

Return of Private Foundation
or Section 4947(a)(1) Trust Treated as Private Foundation

29491291006050

OMB No 1545-0047

2019

Open to Public Inspection

For calendar year 2019 or tax year beginning , and ending

Name of foundation

**ABBOT & DOROTHY H. STEVENS
FOUNDATION**

Number and street (or P O box number if mail is not delivered to street address)

P. O. BOX 111

A Employer identification number

04-6107991

City or town, state or province, country, and ZIP or foreign postal code

NORTH ANDOVER MA 01845

B Telephone number (see instructions)

978-688-7211

G Check all that apply

Initial return

Initial return of a former public charity

Final return

Amended return

Address change

Name change

C If exemption application is pending, check here ► D 1 Foreign organizations, check here ► 2 Foreign organizations meeting the 85% test, check here and attach computation ► E If private foundation status was terminated under section 507(b)(1)(A), check here ► F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ►

H Check type of organization Section 501(c)(3) exempt private foundation
 Section 4947(a)(1) nonexempt charitable trust Other taxable private foundation

I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ► **\$ 26,508,846** (Part I, column (d), must be on cash basis)

04

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received (attach schedule)					
2 Check ► <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities		510,173	510,173		
5a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10		738,342			
b Gross sales price for all assets on line 6a	3,047,990				
7 Capital gain net income (from Part IV, line 2)			738,342		
8 Net short-term capital gain				0	
9 Income modifications					
10a Gross sales less returns and allowances					
b Less Cost of goods sold					
c Gross profit or (loss) (attach schedule)					
11 Other income (attach schedule)	STMT 1	707,324	698,410		
12 Total. Add lines 1 through 11		1,955,839	1,946,925	0	
13 Compensation of officers, directors, trustees, etc		0			
14 Other employee salaries and wages					
15 Pension plans, employee benefits					
16a Legal fees (attach schedule)					
b Accounting fees (attach schedule)	STMT 2	5,685		5,685	
c Other professional fees (attach schedule)	STMT 3	112,452	112,452		
17 Interest					
18 Taxes (attach schedule) (see instructions)	STMT 4	24,690	24,190	500	
19 Depreciation (attach schedule) and depletion					
20 Occupancy					
21 Travel, conferences, and meetings					
22 Printing and publications					
23 Other expenses (att sch)	STMT 5	207,072	92,922		114,150
24 Total operating and administrative expenses.		349,899	229,564	0	120,335
Add lines 13 through 23		1,312,871			1,312,871
25 Contributions, gifts, grants paid		1,662,770	229,564	0	1,433,206
26 Total expenses and disbursements. Add lines 24 and 25		293,069	1,717,361	0	
27 Subtract line 26 from line 12					
a Excess of revenue over expenses and disbursements					
b Net investment income (if negative, enter -0-)					
c Adjusted net income (if negative, enter -0-)					

Assets	Part II Balance Sheets	Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)	Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
	1 Cash – non-interest-bearing		6,350	11,144	11,144
	2 Savings and temporary cash investments		1,894,313	1,471,556	1,471,556
	3 Accounts receivable ►				
	Less allowance for doubtful accounts ►				
	4 Pledges receivable ►				
	Less allowance for doubtful accounts ►				
	5 Grants receivable				
	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)				
	7 Other notes and loans receivable (att schedule) ►		0		
	Less allowance for doubtful accounts ►				
	8 Inventories for sale or use				
	9 Prepaid expenses and deferred charges				
	10a Investments – US and state government obligations (attach schedule)				
	b Investments – corporate stock (attach schedule)	SEE STMT 6	12,835,936	12,641,446	17,813,972
	c Investments – corporate bonds (attach schedule)	SEE STMT 7	6,424,169	7,147,240	7,118,674
	11 Investments – land, buildings, and equipment basis ►				
	Less accumulated depreciation (attach sch) ►				
	12 Investments – mortgage loans				
	13 Investments – other (attach schedule)				
	14 Land, buildings, and equipment basis ►				
	Less accumulated depreciation (attach sch) ►				
	15 Other assets (describe ►	SEE STATEMENT 8		93,500	93,500
	16 Total assets (to be completed by all filers – see the instructions Also, see page 1, item I)		21,160,768	21,364,886	26,508,846
Liabilities	17 Accounts payable and accrued expenses				
	18 Grants payable				
	19 Deferred revenue				
	20 Loans from officers, directors, trustees, and other disqualified persons				
	21 Mortgages and other notes payable (attach schedule)				
	22 Other liabilities (describe ►	SEE STATEMENT 9	43,514		
	23 Total liabilities (add lines 17 through 22)		43,514	0	
Net Assets or Fund Balances	Foundations that follow FASB ASC 958, check here ► <input checked="" type="checkbox"/>				
	and complete lines 24, 25, 29, and 30.				
	24 Net assets without donor restrictions		21,117,254	21,364,886	
	25 Net assets with donor restrictions				
	Foundations that do not follow FASB ASC 958, check here ► <input type="checkbox"/>				
	and complete lines 26 through 30.				
	26 Capital stock, trust principal, or current funds				
	27 Paid-in or capital surplus, or land, bldg , and equipment fund				
	28 Retained earnings, accumulated income, endowment, or other funds				
	29 Total net assets or fund balances (see instructions)		21,117,254	21,364,886	
	30 Total liabilities and net assets/fund balances (see instructions)		21,160,768	21,364,886	

Part III Analysis of Changes in Net Assets or Fund Balances

1 Total net assets or fund balances at beginning of year – Part II, column (a), line 29 (must agree with end-of-year figure reported on prior year's return)	1	21,117,254
2 Enter amount from Part I, line 27a	2	293,069
3 Other increases not included in line 2 (itemize) ►	3	
4 Add lines 1, 2, and 3	4	21,410,323
5 Decreases not included in line 2 (itemize) ► SEE STATEMENT 10	5	45,437
6 Total net assets or fund balances at end of year (line 4 minus line 5) – Part II, column (b), line 29	6	21,364,886

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (for example, real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)		(b) How acquired P – Purchase D – Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
1a PUBLICLY TRADED SECURITIES		P	VARIOUS	VARIOUS
b PUBLICLY TRADED SECURITIES		P	VARIOUS	VARIOUS
c BBH FORM 1099-DIV				
d UNRECAPTURED SECTION 1250				
e				
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g))	
a 395,382		314,426	80,956	
b 2,589,894		1,995,222	594,672	
c 62,714			62,714	
d				
e				
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69				(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any		
a				80,956
b				594,672
c				62,714
d				
e				
2 Capital gain net income or (net capital loss)	If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7		2	738,342
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6)	If gain, also enter in Part I, line 8, column (c) See instructions If (loss), enter -0- in Part I, line 8		3	80,956

Part V Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income)

If section 4940(d)(2) applies, leave this part blank

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?

 Yes No

If "Yes," the foundation doesn't qualify under section 4940(e) Do not complete this part

1 Enter the appropriate amount in each column for each year, see the instructions before making any entries

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2018	1,849,747	24,784,574	0.074633
2017	1,860,706	23,529,873	0.079078
2016	1,886,772	30,002,079	0.062888
2015	1,432,109	24,595,483	0.058227
2014	1,210,850	25,315,994	0.047829
2 Total of line 1, column (d)		2	0.322655
3 Average distribution ratio for the 5-year base period – divide the total on line 2 by 5 0, or by the number of years the foundation has been in existence if less than 5 years		3	0.064531
4 Enter the net value of noncharitable-use assets for 2019 from Part X, line 5		4	25,171,631
5 Multiply line 4 by line 3		5	1,624,351
6 Enter 1% of net investment income (1% of Part I, line 27b)		6	17,174
7 Add lines 5 and 6		7	1,641,525
8 Enter qualifying distributions from Part XII, line 4		8	2,033,727

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate See the Part VI instructions

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 – see instructions)

1a	Exempt operating foundations described in section 4940(d)(2), check here ► <input type="checkbox"/> and enter "N/A" on line 1 Date of ruling or determination letter (attach copy of letter if necessary—see instructions)	1 17,174 2 0 3 17,174 4 0 5 17,174
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ► <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b	
c	All other domestic foundations enter 2% of line 27b Exempt foreign organizations, enter 4% of Part I, line 12, col (b)	
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only, others, enter -0-)	
3	Add lines 1 and 2	
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only, others, enter -0-)	
5	Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0-	
6	Credits/Payments	6a 34,253 6b 6c 6d 7 34,253 8 9 10 17,079 11
a	2019 estimated tax payments and 2018 overpayment credited to 2019	
b	Exempt foreign organizations – tax withheld at source	
c	Tax paid with application for extension of time to file (Form 8868)	
d	Backup withholding erroneously withheld	
7	Total credits and payments Add lines 6a through 6d	
8	Enter any penalty for underpayment of estimated tax Check here <input type="checkbox"/> if Form 2220 is attached	
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	
11	Enter the amount of line 10 to be Credited to 2020 estimated tax ► 17,079 Refunded ►	

Part VII-A Statements Regarding Activities

1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	Yes 1a X 1b X 1c X 2 X 3 X 4a X 4b 5 X N/A 6 X 7 X 8b X 9 X 10 X
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities	
c	Did the foundation file Form 1120-POL for this year?	
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation ► \$ _____ (2) On foundation managers ► \$ _____	
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ► \$ _____	
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities	
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes	
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	
b	If "Yes," has it filed a tax return on Form 990-T for this year?	
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by <i>General Instruction T</i>	
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	
7	Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), and Part XV	
8a	Enter the states to which the foundation reports or with which it is registered See instructions ► MA	
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by <i>General Instruction G</i> ? If "No," attach explanation	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2019 or the tax year beginning in 2019? See instructions for Part XIV If "Yes," complete Part XIV	
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	

Part VII-A Statements Regarding Activities (continued)

11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule. See instructions
 11 X

12 Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement. See instructions
 12 X

13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► **N/A**
 13 X

14 The books are in care of ► **JOSHUA L. MINER**
P. O. BOX 111

Telephone no ► **978-688-7211**Located at ► **NORTH ANDOVER****MA****ZIP+4 ► 01845**

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 – check here and enter the amount of tax-exempt interest received or accrued during the year
 15

16 At any time during calendar year 2019, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?
 See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country ►

	Yes	No
16	<input checked="" type="checkbox"/>	X

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.

1a During the year, did the foundation (either directly or indirectly)

(1) Engage in the sale or exchange, or leasing of property with a disqualified person? Yes No

(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? Yes No

(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? Yes No

(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? Yes No

(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? Yes No

(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days) Yes No

b If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions
 Organizations relying on a current notice regarding disaster assistance, check here
 1b

c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2019? 1c X

2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))

a At the end of tax year 2019, did the foundation have any undistributed income (Part XIII, lines 6d and 6e) for tax year(s) beginning before 2019? Yes No

If "Yes," list the years ► 20 , 20 , 20 , 20

b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement – see instructions) 2b

c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here
 ► 20 , 20 , 20 , 20

3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? Yes No

b If "Yes," did it have excess business holdings in 2019 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Form 4720, Schedule C, to determine if the foundation had excess business holdings in 2019) 3b

4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 4a X

b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2019? 4b X

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required (continued)

5a	During the year did the foundation pay or incur any amount to	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			Yes	No
	(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No				
	(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No				
	(3) Provide a grant to an individual for travel, study, or other similar purposes?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No				
	(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No				
	(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No				
b	If any answer is "Yes" to 5a(1)–(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance? See instructions Organizations relying on a current notice regarding disaster assistance, check here	N/A ► <input type="checkbox"/>		5b		
c	If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? If "Yes," attach the statement required by Regulations section 53.4945–5(d)	N/A <input type="checkbox"/> Yes <input type="checkbox"/> No				
6a	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			6b	X
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? If "Yes," file Form 8870	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No				
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			7b	N/A
b	If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No				
8	Is the foundation subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment(s) during the year?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No				

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors

1 List all officers, directors, trustees, and foundation managers and their compensation. See instructions.

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
JOSHUA L. MINER 356 MAIN STREET	BOXFORD MA 01921	TRUSTEE 0.00	0	0
DEBORAH D. PUTNAM 32 ARBOROUGH ROAD	ROSLINDALE MA 02131	TRUSTEE 0.00	0	0
CHRISTOPHER W. ROGERS 46 OCEAN STREET	NAHANT MA 01908	TRUSTEE 0.00	0	0

2 Compensation of five highest-paid employees (other than those included on line 1 – see instructions). If none, enter "NONE."

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				

Total number of other employees paid over \$50,000

► 0

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Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)**3 Five highest-paid independent contractors for professional services. See instructions. If none, enter "NONE."**

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
BROWN BROTHERS HARRIMAN 40 WATER STREET	BOSTON MA 02110	INVESTMENT ADVI
		112,452

Total number of others receiving over \$50,000 for professional services ► 0

Part IX-A Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc

Expenses

1 N/A

2

3

4

Part IX-B Summary of Program-Related Investments (see instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2

Amount

1 N/A

2

All other program-related investments. See instructions

3

Total. Add lines 1 through 3 ►

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Part X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see instructions)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
a	Average monthly fair market value of securities	1a	24,843,850
b	Average of monthly cash balances	1b	711,105
c	Fair market value of all other assets (see instructions)	1c	0
d	Total (add lines 1a, b, and c)	1d	25,554,955
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0
2	Acquisition indebtedness applicable to line 1 assets	2	0
3	Subtract line 2 from line 1d	3	25,554,955
4	Cash deemed held for charitable activities Enter 1½% of line 3 (for greater amount, see instructions)	4	383,324
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	25,171,631
6	Minimum investment return. Enter 5% of line 5	6	1,258,582

Part XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations, check here ► and do not complete this part.)

1	Minimum investment return from Part X, line 6	1	1,258,582
2a	Tax on investment income for 2019 from Part VI, line 5	2a	17,174
b	Income tax for 2019 (This does not include the tax from Part VI)	2b	
c	Add lines 2a and 2b	2c	17,174
3	Distributable amount before adjustments Subtract line 2c from line 1	3	1,241,408
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	1,241,408
6	Deduction from distributable amount (see instructions)	6	
7	Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1	7	1,241,408

Part XII Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes	1a	1,433,206
a	Expenses, contributions, gifts, etc – total from Part I, column (d), line 26	1b	
b	Program-related investments – total from Part IX-B	2	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	3a	
3	Amounts set aside for specific charitable projects that satisfy the	3b	600,521
a	Suitability test (prior IRS approval required)	4	2,033,727
b	Cash distribution test (attach the required schedule)	5	17,174
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	6	2,016,553
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b See instructions		
6	Adjusted qualifying distributions. Subtract line 5 from line 4		

Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2018	(c) 2018	(d) 2019
1 Distributable amount for 2019 from Part XI, line 7				1,241,408
2 Undistributed income, if any, as of the end of 2019				
a Enter amount for 2018 only				
b Total for prior years 20_____, 20_____, 20_____				
3 Excess distributions carryover, if any, to 2019				
a From 2014				
b From 2015	248,367			
c From 2016	403,124			
d From 2017	710,108			
e From 2018	641,012			
f Total of lines 3a through e	2,002,611			
4 Qualifying distributions for 2019 from Part XII, line 4 ► \$ 2,033,727				
a Applied to 2018, but not more than line 2a				
b Applied to undistributed income of prior years (Election required – see instructions)				
c Treated as distributions out of corpus (Election required – see instructions)				
d Applied to 2019 distributable amount				1,241,408
e Remaining amount distributed out of corpus	792,319			
5 Excess distributions carryover applied to 2019 (If an amount appears in column (d), the same amount must be shown in column (a))				
6 Enter the net total of each column as indicated below:	2,794,930			
a Corpus Add lines 3f, 4c, and 4e Subtract line 5				
b Prior years' undistributed income Subtract line 4b from line 2b				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed				
d Subtract line 6c from line 6b Taxable amount – see instructions				
e Undistributed income for 2018 Subtract line 4a from line 2a Taxable amount – see instructions				
f Undistributed income for 2019 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2020				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required—see instructions)				
8 Excess distributions carryover from 2014 not applied on line 5 or line 7 (see instructions)				
9 Excess distributions carryover to 2020. Subtract lines 7 and 8 from line 6a	2,794,930			
10 Analysis of line 9				
a Excess from 2015	248,367			
b Excess from 2016	403,124			
c Excess from 2017	710,108			
d Excess from 2018	641,012			
e Excess from 2019	792,319			

Part XIV Private Operating Foundations (see instructions and Part VII-A, question 9)

1a	If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2019, enter the date of the ruling				►			
b	Check box to indicate whether the foundation is a private operating foundation described in section				<input type="checkbox"/>	4942(j)(3) or	<input type="checkbox"/>	4942(j)(5)
2a	Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed							
b	85% of line 2a							
c	Qualifying distributions from Part XII, line 4, for each year listed							
d	Amounts included in line 2c not used directly for active conduct of exempt activities							
e	Qualifying distributions made directly for active conduct of exempt activities							
	Subtract line 2d from line 2c							
3	Complete 3a, b, or c for the alternative test relied upon							
a	"Assets" alternative test – enter							
(1)	Value of all assets							
(2)	Value of assets qualifying under section 4942(j)(3)(B)(i)							
b	"Endowment" alternative test – enter 2/3 of minimum investment return shown in Part X, line 6, for each year listed							
c	"Support" alternative test – enter							
(1)	Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)							
(2)	Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)							
(3)	Largest amount of support from an exempt organization							
(4)	Gross investment income							

Part XV Supplementary Information (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year – see instructions.)1 **Information Regarding Foundation Managers:**

a List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000) (See section 507(d)(2))
N/A

b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest
N/A

2 **Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:**

Check here ► if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds If the foundation makes gifts, grants, etc., to individuals or organizations under other conditions, complete items 2a, b, c, and d See instructions

a The name, address, and telephone number or email address of the person to whom applications should be addressed
JOSHUA L. MINER 978-688-7211
P.O. BOX 111 NORTH ANDOVER MA 01845

b The form in which applications should be submitted and information and materials they should include
SEE ATTACHED STATEMENT

c Any submission deadlines
SEE ATTACHED STATEMENT

d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors
SEE ATTACHED STATEMENT

Part XV Supplementary Information (continued)**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<i>a Paid during the year</i> SEE ATTACHED SCHEDULE	UNRELATED	501(C) (3) CHARITABLE PURPOSE		1,312,871
Total			► 3a	1,312,871
<i>b Approved for future payment</i> SEE ATTACHED SCHEDULE	UNRELATED	501(C) (3) CHARITABLE PURPOSE		445,000
Total			► 3b	445,000

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated

Enter gross amounts unless otherwise indicated		Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions)
		(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue						
a						
b						
c						
d						
e						
f						
g Fees and contracts from government agencies						
2 Membership dues and assessments						
3 Interest on savings and temporary cash investments						
4 Dividends and interest from securities						
5 Net rental income or (loss) from real estate						
a Debt-financed property						
b Not debt-financed property						
6 Net rental income or (loss) from personal property						
7 Other investment income						
8 Gain or (loss) from sales of assets other than inventory						
9 Net income or (loss) from special events						
10 Gross profit or (loss) from sales of inventory						
11 Other revenue a						
b CLASS ACTION PROCEEDS					1	
c BBH WEALTH STRATEGIES K-1S					1	8,914
d						
e						
12 Subtotal Add columns (b), (d), and (e)			0		1,280,211	675,628
13 Total Add line 12, columns (b), (d), and (e)					13	1,955,839

(See worksheet in line 13 instructions to verify calculations)

Part XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes

Federal Statements

Statement 1 - Form 990-PF, Part I, Line 11 - Other Income

Description	Revenue per Books	Net Investment Income	Adjusted Net Income
BBH K-1 ST CAPITAL GAIN	\$ 153,465	\$ 153,465	\$
BBH K-1 LT CAPITAL GAIN	544,945	544,945	
BBH WEALTH STRATEGIES K-1S	8,914		
TOTAL	\$ 707,324	\$ 698,410	\$ 0

Statement 2 - Form 990-PF, Part I, Line 16b - Accounting Fees

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
ACCOUNTING FEES	\$ 5,685	\$ 0	\$ 0	\$ 5,685
TOTAL	\$ 5,685	\$ 0	\$ 0	\$ 5,685

Statement 3 - Form 990-PF, Part I, Line 16c - Other Professional Fees

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
INVESTMENT EXPENSES	\$ 112,452	\$ 112,452	\$ 0	\$
TOTAL	\$ 112,452	\$ 112,452	\$ 0	\$ 0

Statement 4 - Form 990-PF, Part I, Line 18 - Taxes

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
STATE FILING FEE	\$ 500	\$ 500	\$	\$ 500
FOREIGN TAX	6,588	6,588		
BBH K-1S FOREIGN TAX	17,602	17,602		
TOTAL	\$ 24,690	\$ 24,690	\$ 0	\$ 500

Federal Statements**Statement 5 - Form 990-PF, Part I, Line 23 - Other Expenses**

<u>Description</u>	<u>Total</u>	<u>Net Investment</u>	<u>Adjusted Net</u>	<u>Charitable Purpose</u>
EXPENSES				\$
OFFICE EXPENSE	108,000			108,000
BBH K-1S 2% FLOOR DEDUCTIONS	92,922			
DUES & SUBSCRIPTIONS	6,150			6,150
TOTAL	\$ 207,072	\$ 92,922	\$ 0	\$ 114,150

Statement 6 - Form 990-PF, Part II, Line 10b - Corporate Stock Investments

<u>Description</u>	<u>Beginning of Year</u>	<u>End of Year</u>	<u>Basis of Valuation</u>	<u>Fair Market Value</u>
CORPORATE EQUITIES	\$ 12,835,936	\$ 12,641,446	COST	\$ 17,813,972
TOTAL	\$ 12,835,936	\$ 12,641,446		\$ 17,813,972

Statement 7 - Form 990-PF, Part II, Line 10c - Corporate Bond Investments

<u>Description</u>	<u>Beginning of Year</u>	<u>End of Year</u>	<u>Basis of Valuation</u>	<u>Fair Market Value</u>
CORPORATE BONDS	\$ 6,424,169	\$ 7,147,240	COST	\$ 7,118,674
TOTAL	\$ 6,424,169	\$ 7,147,240		\$ 7,118,674

Federal Statements**Statement 8 - Form 990-PF, Part II, Line 15 - Other Assets**

Description	Beginning of Year	End of Year	Fair Market Value
BOND COST BASIS ADJUSTMENT	\$ 93,500	\$ 93,500	\$ 93,500
TOTAL	\$ 0	\$ 93,500	\$ 93,500

Statement 9 - Form 990-PF, Part II, Line 22 - Other Liabilities

Description	Beginning of Year	End of Year
BOND COST BASIS ADJUSTMENT	\$ 43,514	\$
TOTAL	\$ 43,514	\$ 0

Statement 10 - Form 990-PF, Part III, Line 5 - Other Decreases

Description	Amount
NONDEDUCTIBLE EXPENSE	\$ 587
FEDERAL TAXES	\$ 44,850
TOTAL	\$ 45,437

Form 990-PF, Part XV, Line 2b - Application Format and Required Contents

Description
SEE ATTACHED STATEMENT

Form 990-PF, Part XV, Line 2c - Submission Deadlines

Description
SEE ATTACHED STATEMENT

Form 990-PF, Part XV, Line 2d - Award Restrictions or Limitations

Description
SEE ATTACHED STATEMENT

For calendar year 2019, or tax year beginning _____, ending _____

Name

ABBOT & DOROTHY H. STEVENS
FOUNDATIONEmployer Identification Number
04-6107991

Undistributed Income Carryovers

Form 990-PF, Part XIII

Tax Year	Prior Undistributed Income			Current Year Decreases	Next Year Carryover	
	Nontaxable or Previously Taxed	Taxable in 2019	Total per Year		Nontaxable or, Previously Taxed	Taxable in 2020
Years prior						
20 15						
20 16						
20 17						
2018						
2019			1,241,408	1,241,408		
Total Carryover to Next Year						0

*Carryover amount includes 4942(a) amounts

Excess Distribution Carryovers

Form 990-PF, Part XIII

Preceding Tax Year Excess Distributions	Decreases	Current Year	Next Year
			Carryover
2014			
2015 248,367			248,367
2016 403,124			403,124
2017 710,108			710,108
2018 641,012			641,012
Current Year Excess Distribution Generated (2019)			792,319
Total Carryover to Next Year			2,794,930

EIN#: 04-6107991

TAX YEAR: 2019

STATEMENT 9 – FORM 990-PF PART XII, LINE 3b AMOUNT SET ASIDE FOR SPECIFIC CHARITABLE PROJECTS THAT SATISFY THE CASH DISTRIBUTION TEST**PROJECT #1 – LAWRENCE HIGH SCHOOL 10TH GRADE ACADEMY**

1. THE NATURE AND PURPOSES OF THE PROJECT FOR WHICH THE AMOUNTS ARE BEING SET ASIDE:

<u>NAME</u>	<u>AMOUNT</u>	<u>PURPOSE OF THE PROJECT</u>
LAWRENCE HIGH SCHOOL 10 TH GRADE ACADEMY	\$521	SCHOOL PROGRAM AT EDGEWOOD FARM IN NORTH ANDOVER
70-71 NORTH PARISH RD		
LAWRENCE, MA 01843		

2. THE ABOVE AMOUNTS WILL ACTUALLY BE PAID DURING 2020 WHICH IS A PERIOD THAT ENDS NO MORE THAN 60 MONTHS AFTER THE DATE OF THE SET-ASIDE.
3. THE PROJECT WILL NOT BE COMPLETED BEFORE THE END OF THE ABOVE-REFERENCED TAX YEAR (THE YEAR IN WHICH THE SET-ASIDE WAS MADE).
4. A STATEMENT SHOWING THE DISTRIBUTABLE AMOUNTS DETERMINED UNDER IRC SEC.4942(d) FOR ALL PAST TAX YEARS IN THE TAXPAYER'S START-UP AND FULL PAYMENT PERIODS. NOT APPLICABLE.
5. A STATEMENT SHOWING THE ACTUAL PAYMENTS MADE IN CASH FOR EXEMPT PURPOSES DURING EACH TAX YEAR IN THE TAXPAYER'S START-UP AND FULL PAYMENT PERIODS.

	<u>YEAR</u>	<u>AMOUNT</u>
LAWRENCE HIGH SCHOOL 10 TH GRADE ACADEMY	2018	\$1,041
	2019	521
	2020	521
	TOTAL	\$2,083

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TAX YEAR: 2019

STATEMENT 9 – FORM 990-PF PART XII, LINE 3b AMOUNT SET ASIDE FOR SPECIFIC CHARITABLE PROJECTS THAT SATISFY THE CASH DISTRIBUTION TEST**PROJECT #2 – MERRIMACK RIVER WATERSHED COUNCIL**

1. THE NATURE AND PURPOSES OF THE PROJECT FOR WHICH THE AMOUNTS ARE BEING SET ASIDE:

<u>NAME</u>	<u>AMOUNT</u>	<u>PURPOSE OF THE PROJECT</u>
MERRIMACK RIVER WATERSHED COUNCIL	\$40,000	ASSIST MRWC IN HIRING AN EXECUTIVE DIRECTOR
60 ISLAND STREET, SUITE 211-E		
LAWRENCE, MA 01840		

2. THE ABOVE AMOUNTS WILL ACTUALLY BE PAID DURING 2020 AND 2021 WHICH ARE PERIODS THAT END NO MORE THAN 60 MONTHS AFTER THE DATE OF THE SET-ASIDE.
3. THE PROJECT WILL NOT BE COMPLETED BEFORE THE END OF THE ABOVE-REFERENCED TAX YEAR (THE YEAR IN WHICH THE SET-ASIDE WAS MADE).
4. A STATEMENT SHOWING THE DISTRIBUTABLE AMOUNTS DETERMINED UNDER IRC SEC.4942(d) FOR ALL PAST TAX YEARS IN THE TAXPAYER'S START-UP AND FULL PAYMENT PERIODS. NOT APPLICABLE.
5. A STATEMENT SHOWING THE ACTUAL PAYMENTS MADE IN CASH FOR EXEMPT PURPOSES DURING EACH TAX YEAR IN THE TAXPAYER'S START-UP AND FULL PAYMENT PERIODS.

<u>NAME</u>	<u>YEAR</u>	<u>AMOUNT</u>
MERRIMACK RIVER WATERSHED COUNCIL	2019	\$20,000
	2020	20,000
	2021	20,000
	TOTAL	\$60,000

ABBOT & DOROTHY H. STEVENS FOUNDATION

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TAX YEAR: 2019

**STATEMENT 9 – FORM 990-PF PART XII, LINE 3b AMOUNT SET ASIDE FOR SPECIFIC CHARITABLE
PROJECTS THAT SATISFY THE CASH DISTRIBUTION TEST**

PROJECT #3 – PINGREE SCHOOL FOR PREP@PINGREE

6. THE NATURE AND PURPOSES OF THE PROJECT FOR WHICH THE AMOUNTS ARE BEING SET ASIDE:

NAME	AMOUNT	PURPOSE OF THE PROJECT
PINGREE SCHOOL FOR PREP@PINGREE	\$30,000	FOR LAWRENCE STUDENTS
537 HIGHLAND STREET		
SOUTH HAMILTON, MA 01982		

7. THE ABOVE AMOUNTS WILL ACTUALLY BE PAID DURING 2020 AND 2021 WHICH IS A PERIOD THAT ENDS NO MORE THAN 60 MONTHS AFTER THE DATE OF THE SET-ASIDE.

8. THE PROJECT WILL NOT BE COMPLETED BEFORE THE END OF THE ABOVE-REFERENCED TAX YEAR (THE YEAR IN WHICH THE SET-ASIDE WAS MADE).

9. A STATEMENT SHOWING THE DISTRIBUTABLE AMOUNTS DETERMINED UNDER IRC SEC.4942(d) FOR ALL PAST TAX YEARS IN THE TAXPAYER'S START-UP AND FULL PAYMENT PERIODS. NOT APPLICABLE.

10. A STATEMENT SHOWING THE ACTUAL PAYMENTS MADE IN CASH FOR EXEMPT PURPOSES DURING EACH TAX YEAR IN THE TAXPAYER'S START-UP AND FULL PAYMENT PERIODS.

NAME	YEAR	AMOUNT
PINGREE SCHOOL FOR PREP@PINGREE	2019	\$15,000
	2020	15,000
	2021	15,000
	TOTAL	\$45,000

ABBOT & DOROTHY H. STEVENS FOUNDATION

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TAX YEAR: 2019

**STATEMENT 9 – FORM 990-PF PART XII, LINE 3b AMOUNT SET ASIDE FOR SPECIFIC CHARTIBABLE
PROJECTS THAT SATISFY THE CASH DISTRIBUTION TEST**

PROJECT #4 – LAWRENCE GENERAL HOSPITAL

1. THE NATURE AND PURPOSES OF THE PROJECT FOR WHICH THE AMOUNTS ARE BEING SET ASIDE:

NAME	AMOUNT	PURPOSE OF THE PROJECT
LAWRENCE GENERAL HOSPITAL	\$50,000	NEW SURGICAL CENTER & RENOVATIONS
PO BOX 189		
LAWRENCE, MA 01842		

2. THE ABOVE AMOUNTS WILL ACTUALLY BE PAID DURING 2020 WHICH IS A PERIOD THAT ENDS NO MORE THAN 60 MONTHS AFTER THE DATE OF THE SET-ASIDE.
3. THE PROJECT WILL NOT BE COMPLETED BEFORE THE END OF THE ABOVE-REFERENCED TAX YEAR (THE YEAR IN WHICH THE SET-ASIDE WAS MADE).
4. A STATEMENT SHOWING THE DISTRIBUTABLE AMOUNTS DETERMINED UNDER IRC SEC.4942(d) FOR ALL PAST TAX YEARS IN THE TAXPAYER'S START-UP AND FULL PAYMENT PERIODS. NOT APPLICABLE.
5. A STATEMENT SHOWING THE ACTUAL PAYMENTS MADE IN CASH FOR EXEMPT PURPOSES DURING EACH TAX YEAR IN THE TAXPAYER'S START-UP AND FULL PAYMENT PERIODS.

NAME	YEAR	AMOUNT
LAWRENCE GENERAL HOSPITAL	2016	\$50,000
	2017	50,000
	2018	50,000
	2019	50,000
	2020	50,000
	TOTAL	\$250,000

ABBOT & DOROTHY H. STEVENS FOUNDATION

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**STATEMENT 9 – FORM 990-PF PART XII, LINE 3b AMOUNT SET ASIDE FOR SPECIFIC CHARITABLE
PROJECTS THAT SATISFY THE CASH DISTRIBUTION TEST**

PROJECT #5 – APPALACHIAN MOUNTAIN CLUB

6. THE NATURE AND PURPOSES OF THE PROJECT FOR WHICH THE AMOUNTS ARE BEING SET ASIDE:

NAME	AMOUNT	PURPOSE OF THE PROJECT
APPALACHIAN MOUNTAIN CLUB	\$30,000	YOUTH OPPORTUNITIES PROGRAM – LAWRENCE & LOWELL
5 JOY STREET		
BOSTON, MA 02108		

7. THE ABOVE AMOUNTS WILL ACTUALLY BE PAID DURING 2020 WHICH IS A PERIOD THAT ENDS NO MORE THAN 60 MONTHS AFTER THE DATE OF THE SET-ASIDE.

8. THE PROJECT WILL NOT BE COMPLETED BEFORE THE END OF THE ABOVE-REFERENCED TAX YEAR (THE YEAR IN WHICH THE SET-ASIDE WAS MADE).

9. A STATEMENT SHOWING THE DISTRIBUTABLE AMOUNTS DETERMINED UNDER IRC SEC.4942(d) FOR ALL PAST TAX YEARS IN THE TAXPAYER'S START-UP AND FULL PAYMENT PERIODS. NOT APPLICABLE.

10. A STATEMENT SHOWING THE ACTUAL PAYMENTS MADE IN CASH FOR EXEMPT PURPOSES DURING EACH TAX YEAR IN THE TAXPAYER'S START-UP AND FULL PAYMENT PERIODS.

NAME	YEAR	AMOUNT
APPALACHIAN MOUNTAIN CLUB	2018	\$40,000
	2019	30,000
	2020	30,000
	TOTAL	\$100,000

ABBOT & DOROTHY H. STEVENS FOUNDATION

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TAX YEAR: 2019

**STATEMENT 9 – FORM 990-PF PART XII, LINE 3b AMOUNT SET ASIDE FOR SPECIFIC CHARITABLE
PROJECTS THAT SATISFY THE CASH DISTRIBUTION TEST**

PROJECT #6 – NORTHERN ESSEX COMMUNITY COLLEGE

11. THE NATURE AND PURPOSES OF THE PROJECT FOR WHICH THE AMOUNTS ARE BEING SET ASIDE:

<u>NAME</u>	<u>AMOUNT</u>	<u>PURPOSE OF THE PROJECT</u>
NORTHERN ESSEX COMMUNITY COLLEGE	\$200,000	CAPITAL SUPPORT
100 ELLIOTT STREET		
HAVERHILL, MA 01830		

12. THE ABOVE AMOUNTS WILL ACTUALLY BE PAID DURING 2020, 2021, 2022 AND 2023 WHICH IS A PERIOD THAT ENDS NO MORE THAN 60 MONTHS AFTER THE DATE OF THE SET-ASIDE.

13. THE PROJECT WILL NOT BE COMPLETED BEFORE THE END OF THE ABOVE-REFERENCED TAX YEAR (THE YEAR IN WHICH THE SET-ASIDE WAS MADE).

14. A STATEMENT SHOWING THE DISTRIBUTABLE AMOUNTS DETERMINED UNDER IRC SEC.4942(d) FOR ALL PAST TAX YEARS IN THE TAXPAYER'S START-UP AND FULL PAYMENT PERIODS. NOT APPLICABLE.

15. A STATEMENT SHOWING THE ACTUAL PAYMENTS MADE IN CASH FOR EXEMPT PURPOSES DURING EACH TAX YEAR IN THE TAXPAYER'S START-UP AND FULL PAYMENT PERIODS.

<u>NAME</u>	<u>YEAR</u>	<u>AMOUNT</u>
NORTHERN ESSEX COMMUNITY COLLEGE	2019	\$50,000
	2020	50,000
	2021	50,000
	2022	50,000
	2023	50,000
	TOTAL	\$250,000

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TAX YEAR: 2019

**STATEMENT 9 – FORM 990-PF PART XII, LINE 3b AMOUNT SET ASIDE FOR SPECIFIC CHARITABLE
PROJECTS THAT SATISFY THE CASH DISTRIBUTION TEST**

PROJECT #7 – MERRIMACK VALLEY YMCA – ANDOVER NORTH ANDOVER BRANCH

16. THE NATURE AND PURPOSES OF THE PROJECT FOR WHICH THE AMOUNTS ARE BEING SET ASIDE:

NAME	AMOUNT	PURPOSE OF THE PROJECT
MERRIMACK VALLEY YMCA	\$75,000	ANDOVER NORTH ANDOVER BRANCH CAPITAL SUPPORT
101 AMESBURY STREET 4 TH FLOOR		
LAWRENCE, MA 01840		

17. THE ABOVE AMOUNTS WILL ACTUALLY BE PAID DURING 2020 WHICH IS A PERIOD THAT ENDS NO MORE THAN 60 MONTHS AFTER THE DATE OF THE SET-ASIDE.

18. THE PROJECT WILL NOT BE COMPLETED BEFORE THE END OF THE ABOVE-REFERENCED TAX YEAR (THE YEAR IN WHICH THE SET-ASIDE WAS MADE).

19. A STATEMENT SHOWING THE DISTRIBUTABLE AMOUNTS DETERMINED UNDER IRC SEC.4942(d) FOR ALL PAST TAX YEARS IN THE TAXPAYER'S START-UP AND FULL PAYMENT PERIODS. NOT APPLICABLE.

20. A STATEMENT SHOWING THE ACTUAL PAYMENTS MADE IN CASH FOR EXEMPT PURPOSES DURING EACH TAX YEAR IN THE TAXPAYER'S START-UP AND FULL PAYMENT PERIODS.

NAME	YEAR	AMOUNT
MERRIMACK VALLEY YMCA	2020	\$75,000
	TOTAL	\$75,000

EIN#: 04-6107991

TAX YEAR: 2019

STATEMENT 9 – FORM 990-PF PART XII, LINE 3b AMOUNT SET ASIDE FOR SPECIFIC CHARITABLE PROJECTS THAT SATISFY THE CASH DISTRIBUTION TEST

PROJECT #8 – ELEVATED THOUGHT FOUNDATION

21. THE NATURE AND PURPOSES OF THE PROJECT FOR WHICH THE AMOUNTS ARE BEING SET ASIDE:

NAME	AMOUNT	PURPOSE OF THE PROJECT
ELEVATED THOUGHT FOUNDATION	\$40,000	CAPACITY BUILDING
22 HEATHER DRIVE		
METHUEN, MA 01844		

22. THE ABOVE AMOUNTS WILL ACTUALLY BE PAID DURING 2020 AND 2021 WHICH IS A PERIOD THAT ENDS NO MORE THAN 60 MONTHS AFTER THE DATE OF THE SET-ASIDE.

23. THE PROJECT WILL NOT BE COMPLETED BEFORE THE END OF THE ABOVE-REFERENCED TAX YEAR (THE YEAR IN WHICH THE SET-ASIDE WAS MADE).

24. A STATEMENT SHOWING THE DISTRIBUTABLE AMOUNTS DETERMINED UNDER IRC SEC.4942(d) FOR ALL PAST TAX YEARS IN THE TAXPAYER'S START-UP AND FULL PAYMENT PERIODS. NOT APPLICABLE.

25. A STATEMENT SHOWING THE ACTUAL PAYMENTS MADE IN CASH FOR EXEMPT PURPOSES DURING EACH TAX YEAR IN THE TAXPAYER'S START-UP AND FULL PAYMENT PERIODS.

NAME	YEAR	AMOUNT
ELEVATED THOUGHT FOUNDATION	2019	\$50,000
	2020	25,000
	2021	15,000
	TOTAL	\$90,000

ABBOT & DOROTHY H. STEVENS FOUNDATION

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TAX YEAR: 2019

**STATEMENT 9 – FORM 990-PF PART XII, LINE 3b AMOUNT SET ASIDE FOR SPECIFIC CHARTABLE
PROJECTS THAT SATISFY THE CASH DISTRIBUTION TEST**

PROJECT #9 – INSTITUTE FOR NON-PROFIT MANAGEMENT

26. THE NATURE AND PURPOSES OF THE PROJECT FOR WHICH THE AMOUNTS ARE BEING SET ASIDE:

<u>NAME</u>	<u>AMOUNT</u>	<u>PURPOSE OF THE PROJECT</u>
INSTITUTE FOR NON-PROFIT MANAGEMENT	\$70,000	ALUMNI PROGRAMMING AND FELLOWSHIPS
51 SLEEPER STREET		
BOSTON, MA 02210		

27. THE ABOVE AMOUNTS WILL ACTUALLY BE PAID DURING 2020 AND 2021 WHICH IS A PERIOD THAT ENDS NO MORE THAN 60 MONTHS AFTER THE DATE OF THE SET-ASIDE.

28. THE PROJECT WILL NOT BE COMPLETED BEFORE THE END OF THE ABOVE-REFERENCED TAX YEAR (THE YEAR IN WHICH THE SET-ASIDE WAS MADE).

29. A STATEMENT SHOWING THE DISTRIBUTABLE AMOUNTS DETERMINED UNDER IRC SEC.4942(d) FOR ALL PAST TAX YEARS IN THE TAXPAYER'S START-UP AND FULL PAYMENT PERIODS. NOT APPLICABLE.

30. A STATEMENT SHOWING THE ACTUAL PAYMENTS MADE IN CASH FOR EXEMPT PURPOSES DURING EACH TAX YEAR IN THE TAXPAYER'S START-UP AND FULL PAYMENT PERIODS.

<u>NAME</u>	<u>YEAR</u>	<u>AMOUNT</u>
INSTITUTE FOR NON-PROFIT MANAGEMENT	2019	\$35,000
	2020	35,000
	2021	35,000
	TOTAL	\$105,000

ABBOT & DOROTHY H. STEVENS FOUNDATION

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TAX YEAR: 2019

**STATEMENT 9 – FORM 990-PF PART XII, LINE 3b AMOUNT SET ASIDE FOR SPECIFIC CHARITABLE
PROJECTS THAT SATISFY THE CASH DISTRIBUTION TEST**

PROJECT #10 – LAWRENCE COMMUNITY WORKS

31. THE NATURE AND PURPOSES OF THE PROJECT FOR WHICH THE AMOUNTS ARE BEING SET ASIDE:

NAME	AMOUNT	PURPOSE OF THE PROJECT
LAWRENCE COMMUNITY WORKS	\$65,000	GENERAL OPERATING SUPPORT
168 NEWBURY STREET		
LAWRENCE, MA 01841		

32. THE ABOVE AMOUNTS WILL ACTUALLY BE PAID DURING 2020 WHICH IS A PERIOD THAT ENDS NO MORE THAN 60 MONTHS AFTER THE DATE OF THE SET-ASIDE.

33. THE PROJECT WILL NOT BE COMPLETED BEFORE THE END OF THE ABOVE-REFERENCED TAX YEAR (THE YEAR IN WHICH THE SET-ASIDE WAS MADE).

34. A STATEMENT SHOWING THE DISTRIBUTABLE AMOUNTS DETERMINED UNDER IRC SEC.4942(d) FOR ALL PAST TAX YEARS IN THE TAXPAYER'S START-UP AND FULL PAYMENT PERIODS. NOT APPLICABLE.

35. A STATEMENT SHOWING THE ACTUAL PAYMENTS MADE IN CASH FOR EXEMPT PURPOSES DURING EACH TAX YEAR IN THE TAXPAYER'S START-UP AND FULL PAYMENT PERIODS.

NAME	YEAR	AMOUNT
LAWRENCE COMMUNITY WORKS	2019	\$65,000
	2020	65,000
	TOTAL	\$130,000

ABBOT & DOROTHY H. STEVENS FOUNDATION
 EIN: 04-6107991
 TAX YEAR: 2019
 FORM 990PF
 PART XV 3a GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

RECIPIENT NAME AND ADDRESS	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
Alzheimers Association 480 Pleasant Street Watertown, MA 02472	501(C)(3) Charitable Organization	general operating support	250 00
Boston Children's Museum Carole Charnow, Pres 308 Congress Street Boston, MA 02210	501(C)(3) Charitable Organization	sponsored visits Lawrence & Lowell	8,000 00
Boys & Girls Club of Lawrence Markus Fischer, Exec. Director 136 Water Street Lawrence, MA 01841	501(C)(3) Charitable Organization	operating support	1,500 00
Bread and Roses Housing Yesinia Gil, Exec. Dir. PO Box 7 Lawrence, MA 01840	501(C)(3) Charitable Organization	Affordable Homeownership program	25 000 00
Catholic Schools Foundation Michael Reardon, Exec. Dir. 260 Franklin Street, Ste 630 Boston, MA 02110	501(C)(3) Charitable Organization	Inner-city Scholarship Fund Lawrence	18 000 00
ECCF Lawrence Emergency Fund 175 Andover Street - Suite 101 Danvers, MA 01923	501(C)(3) Charitable Organization	general operating support	1,000 00
ECCF Summer in Greater Lawrence Carol Schuster, Admin 175 Andover Street - Suite 101 Danvers, MA 01923	501(C)(3) Charitable Organization	summer 2019 support	50,000 00
Elevated Thought Foundation 22 Heather Drive Attn Lester Sydney, Co-Founder Methuen, MA 01844	501(C)(3) Charitable Organization	capacity building & operating support	50,000 00
Family Service, Inc Liz Sweeney, Exec. Dir. 430 No Canal Street Lawrence, MA 01840	501(C)(3) Charitable Organization	Samaritans & Youth Mentoring programs support	40 000 00
Friends of Pleasant Bay PO Box 1243 Hanover, MA 02345	501(C)(3) Charitable Organization	general operating support	200 00
Gifts, Inc Cathleen Gabis, Devil Manager 220 Worthem Street Lowell, MA 01852	501(C)(3) Charitable Organization	Early Literacy program	5,000 00
Handel & Haydn Society Louisa Trackman, Admin. Dir. Institut Civ. 300 Massachusetts Ave Boston, MA 02115	501(C)(3) Charitable Organization	outreach to Lawrence	6,000 00
Home Health VNA John Albert, Pres/CEO 360 Merrimack St., Bldg 9 Lawrence, MA 01843	501(C)(3) Charitable Organization	Falls Prevention	10,000 00
Hurricane Island Outward Bound School 41 Mechanic Street - Suite 313 Camden, ME 04843	501(C)(3) Charitable Organization	Partnership with Aaron's Presents Scholarships	25 000 00

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RECIPIENT NAME AND ADDRESS	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
Institute for Non-Profit Management Audrey Gillis, Devel Director 51 Sleeper Street Boston, MA 02210	501(C)(3) Charitable Organization	operating & Lawrence Fellowships	35,000.00
International Institute of New England Jeffrey Thieiman, President/CEO 15-17 Warren St, 2nd Floor Lowell, MA 01852	501(C)(3) Charitable Organization	Refugee Employment Services Lowell	4,000.00
Lawrence Community Works Jessica Andors 168 Newbury Street Lawrence, MA 01841	501(C)(3) Charitable Organization	operating support	65,000.00
Lawrence Family Devel & Education Fund Ralph Carriero, Exec. Dir 3 West Street Lawrence, MA 01841	501(C)(3) Charitable Organization	Quintana Citizenship Center Support	25,000.00
Lawrence High School 10th Grade Academy 70-71 North Parish Road Lawrence, MA	501(C)(3) Charitable Organization	Edgewood program	521.00
Lawrence History Center Susan Grabski, Ex. Dir 6 Essex Street Lawrence, MA 01840	501(C)(3) Charitable Organization	general operating support	40,000.00
Lazarus House Bridge Shahnen, Ex. Dir PO Box 408 Lawrence, MA 01842	501(C)(3) Charitable Organization	IT critical needs	10,000.00
Lowell Community Health Center Susan West Levine, CEO 161 Jackson Street Lowell, MA 01852	501(C)(3) Charitable Organization	WrapAround Fund support	10,000.00
LCW Mill Cities Leadership Inst Todd Fry, MCLI Director c/o Lawrence Community Works 168 Newbury Street Lawrence, MA 01841	501(C)(3) Charitable Organization	Class of 2020 Institute	12,000.00
Memimack River Watershed Council Christine Eickenl, Exec. Dir 60 Island St, Suite 211-E Lawrence, MA 01840	501(C)(3) Charitable Organization	Advocacy programming, educational & science programming, recreational initiatives	15,000.00
Memimack Valley Immigrant Education Ctr Karen Shendan, Program Director 20 Ballard Road Lawrence, MA 01843	501(C)(3) Charitable Organization	operating & programming support	12,000.00
Memimack River Watershed Council Christine Eickenl, Exec. Dir 60 Island St, Suite 211-E Lawrence, MA 01840	501(C)(3) Charitable Organization	Hire new Executive Director	20,000.00
Museum of Science Amy O'Doherty, Adv. Officer Science Park Boston, MA 02114	501(C)(3) Charitable Organization	Lawrence visitors	7,500.00
Nahant Preservation Trust PO Box 30 Nahant, MA 01908	501(C)(3) Charitable Organization	general operating support	2,500.00

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RECIPIENT NAME AND ADDRESS	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
Nahant Village Church PO Box 77 Nahant, MA 01908	501(C)(3) Charitable Organization	Capital Campaign-Accesability	10,000.00
Nahant Village Church PO Box 77 Nahant, MA 01908	501(C)(3) Charitable Organization	general operating support	2,500.00
Newton's Family of Services Joyce Shannon CEO 10-12 Ingalls Court Methuen, MA 01844	501(C)(3) Charitable Organization	purchase of orthopedic chairs & wheelchair height tables	15,000.00
New England Aquarium Benjamin Wnd. Instn Giving Officer Central Wharf Boston MA 02110	501(C)(3) Charitable Organization	Lawrence Free to Learn program	10,000.00
New Profit - Playworks, Education Mark Foppa, Executive Director 29 Germania Street Boston MA 02130	501(C)(3) Charitable Organization	Lawrence programming & expansion in Lawrence	60,000.00
New Profit Inc - Teach for America Josh Bibet, Ex. Dir 60 Canal Street 3rd Fl Boston, MA 02114	501(C)(3) Charitable Organization	Teach for America Lawrence work	45,000.00
Notre Dame Cristo Rey High School Sister Maryayne Giffather, President 303 Havemill Street Lawrence, MA 01840	501(C)(3) Charitable Organization	Corporate Work Study program in Lawrence non-profits	50,000.00
Northam Essex Community College 100 Elliott Street Haverhill, MA 01830	501(C)(3) Charitable Organization	scholarships & endowment AS only	50,000.00
Greater Lawrence Community Boating PO Box 955 Lawrence, MA 01842	501(C)(3) Charitable Organization	operating support	15,000.00
Appalachian Mountain Club Margaret McNamee, Dir. of Corp/Found 5 Joy Street Boston, MA 02108	501(C)(3) Charitable Organization	YOP Lawrence Lowell Summit site	30,000.00
Greater Lawrence Technical School 57 River Road, John Lavoie Andover, MA 01810	501(C)(3) Charitable Organization	capital for athletic facility renovations	75,000.00
Notre Dame Education Center Cynthia Falkner, Executive Director 354 Merrimack Street Suite 210 Lawrence MA 01843	501(C)(3) Charitable Organization	ESOL programming	10,000.00
Phillips Academy - ABS Sharon Bahn, 180 Main Street Andover, MA 01810	501(C)(3) Charitable Organization	Andover Breadball Wm's program support	25,000.00

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RECIPIENT NAME AND ADDRESS	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
Plummer Youth Promise 290 Merrimack Street, Suite 206 Attn: Nicole McLaughlin, Acting ED Lawrence, MA 01843	501(C)(3) Charitable Organization	Operating - Lawrence & Merrimack Valley Services	10,000.00
Phoenix Charter Academy Beth Anderson, CEO 60 Canal Street, 4th Floor Boston, MA 02114	501(C)(3) Charitable Organization	Phoenix Academy Lawrence college & career pathways program support	10,000.00
Pike School 34 Sunset Rock Road Andover, MA 01810	501(C)(3) Charitable Organization	General operating support	200.00
Boston Symphony Orchestra Symphony Hall Attn: Ryan Losey Boston, MA 02115	501(C)(3) Charitable Organization	Day in the Arts scholarship Lawrence youth	8,000.00
Philanthropy MA 135 Federal Street, #302 Boston, MA 02110	501(C)(3) Charitable Organization	Future of Philanthropy campaign	5,000.00
Pingree School Prep @ Pingree Steve Filoss, Direct, P@P 537 Highland Street South Hamilton, MA 01982	501(C)(3) Charitable Organization	Prep @ Pingree Lawrence	15,000.00
Jeanne Greger Crisis Center Suzanne Dubus, CEO 2 Harris Street Newburyport, MA 01950	501(C)(3) Charitable Organization	Children's Safety Program Lawrence	5,000.00
Merrimack Valley YMCA Frank Kennesly, COO 360 Merrimack Street, Building 9 Suite 270 Lawrence, MA 01840	501(C)(3) Charitable Organization	Lawrence capital project	65,000.00
Plimoth Plantation Jill Tompkins, Inst. Giving Manager PO Box 1620 Plymouth, MA 02362	501(C)(3) Charitable Organization	outreach to Lawrence	5,000.00
Project Hope 550 Dudley Street Boston, MA 02119	501(C)(3) Charitable Organization	memory of Bernadine Murphy	1,500.00
Psychological Center 11 Union Street Attn: Kelly Townsend Lawrence, MA 01840	501(C)(3) Charitable Organization	programming support - Women's View Daybreak Shelter & Pegasus House	8,000.00
Lawrence General Hospital William Parkinson, Dir of Devel PO Box 189 Lawrence, MA 01842	501(C)(3) Charitable Organization	capital - surgical building, renovation of in patient & mammogram ctr	50,000.00
Old Sturbridge Village James Donahue, Pres/CEO 1 Sturbridge Village Road Sturbridge, MA 01566	501(C)(3) Charitable Organization	outreach to Lawrence	4,000.00
Reach Out and Read 89 South Street, Suite 201 Boston, MA 02111	501(C)(3) Charitable Organization	Lawrence programming	10,000.00

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RECIPIENT NAME AND ADDRESS	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
Regis College Antoinette Hays, President 235 Wellesley Street Weston, MA 02493	501(C)(3) Charitable Organization	nursing at Lawrence Catholic Academy	5,000.00
Boys & Girls Club of Gr Lowell Joseph Hurliger, Exec. Director 657 Middlesex Street Lowell, MA 01851	501(C)(3) Charitable Organization	Teen programming	15,000.00
Boys & Girls Club of Lawrence Markus Fischer, Exec. Director 136 Water Street Lawrence, MA 01841	501(C)(3) Charitable Organization	operating and program support	25,000.00
Self Esteem Boston Marion Davis, President PO Box 301155 Jamaica Plain, MA 02130	501(C)(3) Charitable Organization	services in Lawrence	7,500.00
Seven & Eight Park Street Foundation 8 Park Street Boston, MA 02108	501(C)(3) Charitable Organization	general operating support	1,000.00
Si Se Puede Lone Mendoza, Director PO Box 53 North Andover, MA 01845	501(C)(3) Charitable Organization	general operating support	5,000.00
Squashbusters Greg Zaffi, Founder & Ex Dir 60 Island Street Lawrence, MA 01840	501(C)(3) Charitable Organization	Lawrence programming	10,000.00
Tabor Academy 66 Spring Street Marion, MA 02738	501(C)(3) Charitable Organization	general operating support	1,000.00
Jumpstart 308 Congress St, Attn: Katie Dick, Senior Dir of Donor Boston, MA 02210	501(C)(3) Charitable Organization	Lawrence programming	7,500.00
Junior Achievement of N NE Rad Nova President/CEO 400 Fifth Avenue Suite 300 Waltham, MA 02451	501(C)(3) Charitable Organization	Lawrence programming	13,500.00
Thompson Island Outward Bound Arthur Pearson, President PO Box 127 Boston, MA 02127	501(C)(3) Charitable Organization	Connections program Boston	5,000.00
Trinity Church 206 Clarendon Street Boston, MA 02116	501(C)(3) Charitable Organization	general operating support	100.00
Boston Children's Museum Carole Charnow, Pres 309 Congress Street Boston, MA 02210	501(C)(3) Charitable Organization	operating support	5,000.00
Boston Children's Museum Carole Charnow, Pres 309 Congress Street Boston, MA 02210	501(C)(3) Charitable Organization	general operating support	1,000.00

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RECIPIENT NAME AND ADDRESS	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
U Aspire Gabrielle King Morse Ex. Dir 31 St James St Suite 520 Boston, MA 02116	501(C)(3) Charitable Organization	Services at Greater Lawrence Technical School Students	6,000.00
Youth Development Organization Mark Kampert, Ex. Dir 15 Union Street #563 Lawrence, MA 01840	501(C)(3) Charitable Organization	General operating & program support	55,000.00
Boston Baroque Miguel Rodriguez, Executive Director 10 Guest Street - Suite 290 Boston, MA 02135	501(C)(3) Charitable Organization	Concerts at Essex Art Center in February 2020	7,000.00
After School Partners Cindy Weiner, Exec. Dir . 342 A Boylston Street Newton, MA 02459	501(C)(3) Charitable Organization	Lawrence programming @ Esperanza Academy	10,000.00
Essex Art Center John Bludzyna, Ex. Dir 56 Island Street Lawrence, MA 01840	501(C)(3) Charitable Organization	operating support	2,500.00
Mass Audubon Boston Nature Center 500 Walk Hill Street Mattapan, MA 02126	501(C)(3) Charitable Organization	general operating support	5,000.00
Gay Lesbian Advocates & Defenders 30 Winter St -Suite 800 Boston, MA 02108	501(C)(3) Charitable Organization	general operating support	5,000.00
Boston Latin Academy, Friends of 205 Townsend Street Boston MA 02125	501(C)(3) Charitable Organization	Boys Soccer team support	5,000.00
All Five 5 Reyna Place Menlo Park, CA 94005	501(C)(3) Charitable Organization	general operating support	500.00
Lake Sunapee Protective Association Post Office 653 Sunapee, NH 03762	501(C)(3) Charitable Organization	general operating support	500.00
Latino STEM Alliance 20 Moraine Street Attn Karen Chacon, Executive Director Boston, MA 02130	501(C)(3) Charitable Organization	programming Lawrence and Memphack Valley	15,000.00
Bowdoin College 4100 College Station Brunswick, ME 04011-3432	501(C)(3) Charitable Organization	general operating support	1,500.00
My Life My Choice 969 Commonwealth Avenue Attn Lisa Grace, Exec. Dir Boston MA 02215	501(C)(3) Charitable Organization	general operating support	1,500.00
British School & University-Quandie 575 Madison Ave , Suite 1006 New York, NY 10022-2511	501(C)(3) Charitable Organization	general operating support	1,000.00

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RECIPIENT NAME AND ADDRESS	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
American Cancer Society 30 Spen Street Framingham, MA 01701	501(C)(3) Charitable Organization	general operating support	250 00
Chatham Conservation Foundation 104 Cowell Road Chatham MA 02633	501(C)(3) Charitable Organization	general operating support	250 00
English Speaking Union 144 East 38th St New York, NY 10016	501(C)(3) Charitable Organization	general operating support	100 00
TOTAL			<u>1,312,871.00</u>

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PART XV 3b GRANTS AND CONTRIBUTIONS APPROVED FOR FUTURE PAYMENT

RECIPIENT	NAME AND ADDRESS	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
NORTHERN ESSEX COMMUNITY COLLEGE 100 ELLIOTT STREET HAVERHILL, MA 01830		501(C)(3) CHARITABLE ORGANIZATION	CAPITAL SUPPORT	200,000.00
PINGREE SCHOOL FOR PREP@PINGREE 537 HIGHLAND STREET SOUTH HAMILTON, MA 01982		501(C)(3) CHARITABLE ORGANIZATION	FOR LAWRENCE STUDENTS	30,000.00
ELEVATED THOUGHT FOUNDATION 22 HEATHER DRIVE METHUEN, MA 01844		501(C)(3) CHARITABLE ORGANIZATION	CAPACITY BUILDING	40,000.00
INSTITUTE FOR NON-PROFIT MANAGEMENT 51 SLEEPER STREET BOSTON, MA 02210		501(C)(3) CHARITABLE ORGANIZATION	ALUMNI PROGRAMMING AND FELLOWSHIPS	70,000.00
LAWRENCE COMMUNITY WORKS 168 NEWBURY STREET LAWRENCE, MA 01841		501(C)(3) CHARITABLE ORGANIZATION	GENERAL OPERATING SUPPORT	65,000.00
MERRIMACK RIVER WATERSHED COUNCIL 60 ISLAND STREET SUITE 211-E LAWRENCE, MA 01840		501(C)(3) CHARITABLE ORGANIZATION	ASSIST MRWC IN HIRING AN EXECUTIVE DIRECTOR	40,000.00
TOTAL				<u><u>445,000.00</u></u>