

For calendar year 2019, or tax year beginning 01-01-2019, and ending 12-31-2019

Name of foundation THE BEVERIDGE FAMILY FOUNDATION		A Employer identification number 31-1698286	
Number and street (or P.O. box number if mail is not delivered to street address) 3 UPLAND LANE		Room/suite	
City or town, state or province, country, and ZIP or foreign postal code WEST NEWBURY, MA 01985		B Telephone number (see instructions) (800) 229-9667	
G Check all that apply: ☐ Initial return ☐ Initial return of a former public charity ☐ Final return ☐ Amended return ☐ Address change ☐ Name change		D 1. Foreign organizations, check here..... 2. Foreign organizations meeting the 85% test, check here and attach computation ...	
H Check type of organization: ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here	
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ▶ \$ 61,915,543		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here	
J Accounting method: ☐ Cash ☒ Accrual ☐ Other (specify) _____ (Part I, column (d) must be on cash basis.)			

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)
Revenue	1 Contributions, gifts, grants, etc., received (attach schedule)				
	2 Check ☒ if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities . . .	1,544,937	1,544,937		
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	1,863,535			
	b Gross sales price for all assets on line 6a 15,535,681				
	7 Capital gain net income (from Part IV, line 2) . . .		1,863,535		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
Operating and Administrative Expenses	b Less: Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)	32,055	32,055	0	
	12 Total. Add lines 1 through 11	3,440,527	3,440,527	0	
	13 Compensation of officers, directors, trustees, etc.	187,000	37,400	0	149,600
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits	46,793	9,358	0	37,435
	16a Legal fees (attach schedule)	14,382	7,191	0	7,191
	b Accounting fees (attach schedule)	76,929	38,465	0	38,464
	c Other professional fees (attach schedule)	415,618	358,978	0	56,640
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	82,942	23,375	0	0
	19 Depreciation (attach schedule) and depletion	7,985	0	0	
	20 Occupancy	16,800	3,360	0	13,440
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	87,435	17,469	0	69,876
	24 Total operating and administrative expenses. Add lines 13 through 23	935,884	495,596	0	372,646
	25 Contributions, gifts, grants paid	2,339,490			2,339,490
	26 Total expenses and disbursements. Add lines 24 and 25	3,275,374	495,596	0	2,712,136
	27 Subtract line 26 from line 12:				
	a Excess of revenue over expenses and disbursements	165,153			
	b Net investment income (if negative, enter -0-)		2,944,931		
				0	

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
Assets	1 Cash—non-interest-bearing			
	2 Savings and temporary cash investments	1,482,153	1,858,048	1,858,048
	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 (attach schedule) ▶ _____ Less: allowance for doubtful accounts ▶ _____			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges	8,966	3,164	3,164
	10a Investments—U.S. and state government obligations (attach schedule)	4,298,481	5,306,991	5,306,991
	b Investments—corporate stock (attach schedule)	27,797,816	33,720,569	33,720,569
	c Investments—corporate bonds (attach schedule)	8,178,697	7,772,874	7,772,874
	11 Investments—land, buildings, and equipment: basis ▶ _____ Less: accumulated depreciation (attach schedule) ▶ _____			
	12 Investments—mortgage loans			
	13 Investments—other (attach schedule)	11,057,663	13,110,538	13,110,538
	14 Land, buildings, and equipment: basis ▶ _____ 37,166 Less: accumulated depreciation (attach schedule) ▶ 16,791	5,296	20,375	20,375
15 Other assets (describe ▶ _____)	157,506	122,984	122,984	
16 Total assets (to be completed by all filers—see the instructions. Also, see page 1, item I)	52,986,578	61,915,543	61,915,543	
Liabilities	17 Accounts payable and accrued expenses	42,478	38,682	
	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 ▶ _____)	29,600	218,167	
	23 Total liabilities (add lines 17 through 22)	72,078	256,849	
Net Assets or Fund Balances	Foundations that follow FASB ASC 958, check here ☒ and complete lines 24, 25, 29 and 30.			
	24 Net assets without donor restrictions	39,281,476	45,707,833	
	25 Net assets with donor restrictions	13,633,024	15,950,861	
	Foundations that do not follow FASB ASC 958, check here ☐ 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)	52,914,500	61,658,694	
30 Total liabilities and net assets/fund balances (see instructions) .	52,986,578	61,915,543		

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	52,914,500
2 Enter amount from Part I, line 27a	2	165,153
3 Other increases not included in line 2 (itemize) ▶ _____	3	8,754,041
4 Add lines 1, 2, and 3	4	61,833,694
5 Decreases not included in line 2 (itemize) ▶ _____	5	175,000
6 Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 29 .	6	61,658,694

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., 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.)
1 a REALIZED GAINS	P		
b			
c			
d			
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 15,535,681		13,672,146	1,863,535
b			
c			
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) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a			1,863,535
b			
c			
d			
e			

2 Capital gain net income or (net capital loss)	2	1,863,535
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	1,863,535

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 does not qualify under section 4940(e). Do not complete this part.

1 Enter the appropriate amount in each column for each year; see 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	2,672,034	56,809,089	0.047035
2017	2,659,247	55,289,527	0.048097
2016	2,433,423	52,108,978	0.046699
2015	3,233,724	55,399,271	0.058371
2014	2,788,698	57,245,843	0.048714

2 Total of line 1, column (d)	2	0.248916
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	0.049783
4 Enter the net value of noncharitable-use assets for 2019 from Part X, line 5	4	58,068,803
5 Multiply line 4 by line 3	5	2,890,839
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	29,449
7 Add lines 5 and 6	7	2,920,288
8 Enter qualifying distributions from Part XII, line 4	8	2,722,700

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 ☐ and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary—see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☐ and enter 1% of Part I, line 27b	1	58,899
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-)	2	0
3	Add lines 1 and 2.	3	58,899
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	0
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5	58,899
6	Credits/Payments:		
a	2019 estimated tax payments and 2018 overpayment credited to 2019	6a	41,500
b	Exempt foreign organizations—tax withheld at source	6b	
c	Tax paid with application for extension of time to file (Form 8868)	6c	0
d	Backup withholding erroneously withheld	6d	0
7	Total credits and payments. Add lines 6a through 6d.	7	41,500
8	Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached.	8	768
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	18,167
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	
11	Enter the amount of line 10 to be: Credited to 2020 estimated tax ☐ Refunded ☐	11	

Part VII-A Statements Regarding Activities

	Yes	No
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?		No
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? (see Instructions for definition). <i>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.</i>		No
c Did the foundation file Form 1120-POL for this year?		No
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. ☐ \$ 0 (2) On foundation managers. ☐ \$ 0		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ☐ \$ 0		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If "Yes," attach a detailed description of the activities.</i>		No
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? <i>If "Yes," attach a conformed copy of the changes</i>		No
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		No
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? <i>If "Yes," attach the statement required by General Instruction T.</i>		No
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?	Yes	
7 Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col. (c), and Part XV.</i>	Yes	
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 General Instruction G? <i>If "No," attach explanation.</i>	Yes	
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 taxable year beginning in 2019? See the instructions for Part XIV. <i>If "Yes," complete Part XIV</i>		No
10 Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses.</i>		No

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		No
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		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address WWW.BEVERIDGE.ORG	13	Yes	
14	The books are in care of GMA FOUNDATIONS Telephone no. (617) 426-7080			

Located at **2 LIBERTY SQUARE STE 500 BOSTON MA**ZIP+4 **02109**

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 ▶	16	Yes	No

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.**

		Yes	No
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	No
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	No
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 (lines 6d and 6e, Part XIII) 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 Schedule C, Form 4720, 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	No
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	No

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:		Yes	No
(1)	Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	☐ Yes ☒ No		
(2)	Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?	☐ Yes ☒ No		
(3)	Provide a grant to an individual for travel, study, or other similar purposes?	☐ Yes ☒ No		
(4)	Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions.	☐ Yes ☒ 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?	☐ Yes ☒ 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		5b	
	Organizations relying on a current notice regarding disaster assistance check here. 	☐		
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).	☐ Yes ☐ No		
6a	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	☐ Yes ☒ No	6b	No
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? If "Yes" to 6b, file Form 8870.			
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	☐ Yes ☒ No	7b	
b	If "Yes", did the foundation receive any proceeds or have any net income attributable to the transaction?			
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 during the year?	☐ Yes ☒ No		

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

1 List all officers, directors, trustees, 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
See Additional Data Table				
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

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
BRANDES INVESTMENT PARTNERS 11988 EL CAMINO REAL 600 SAN DIEGO, CA 92130	INVESTMENT MANAGEMENT	86,416
GMA FOUNDATIONS INC 2 LIBERTY SQUARE SUITE 500 BOSTON, MA 02109	ACCOUNTING	50,820
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	
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	
2	
All other program-related investments. See instructions.	
3	
Total. Add lines 1 through 3 ▶	

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	58,883,904
b	Average of monthly cash balances.	1b	69,195
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	58,953,099
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	58,953,099
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	884,296
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	58,068,803
6	Minimum investment return. Enter 5% of line 5.	6	2,903,440

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	2,903,440
2a	Tax on investment income for 2019 from Part VI, line 5.	2a	58,899
b	Income tax for 2019. (This does not include the tax from Part VI.).	2b	
c	Add lines 2a and 2b.	2c	58,899
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	2,844,541
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	2,844,541
6	Deduction from distributable amount (see instructions).	6	0
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1.	7	2,844,541

Part XII Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
a	Expenses, contributions, gifts, etc.—total from Part I, column (d), line 26.	1a	2,712,136
b	Program-related investments—total from Part IX-B.	1b	0
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes.	2	10,564
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required).	3a	
b	Cash distribution test (attach the required schedule).	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	2,722,700
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.	5	0
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	2,722,700

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				2,844,541
2 Undistributed income, if any, as of the end of 2019:				
a Enter amount for 2018 only.			0	
b Total for prior years: 20____, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2019:				
a From 2014.				
b From 2015.	223,105			
c From 2016.				
d From 2017.				
e From 2018.				
f Total of lines 3a through e.	223,105			
4 Qualifying distributions for 2019 from Part XII, line 4: ► \$ <u>2,722,700</u>				
a Applied to 2018, but not more than line 2a			0	
b Applied to undistributed income of prior years (Election required—see instructions).		0		
c Treated as distributions out of corpus (Election required—see instructions).	0			
d Applied to 2019 distributable amount.				2,722,700
e Remaining amount distributed out of corpus	0			
5 Excess distributions carryover applied to 2019. (If an amount appears in column (d), the same amount must be shown in column (a).)	121,841			121,841
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	101,264			
b Prior years' undistributed income. Subtract line 4b from line 2b.		0		
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.		0		
d Subtract line 6c from line 6b. Taxable amount—see instructions.		0		
e Undistributed income for 2018. Subtract line 4a from line 2a. Taxable amount—see instructions.			0	
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).	0			
8 Excess distributions carryover from 2014 not applied on line 5 or line 7 (see instructions).	0			
9 Excess distributions carryover to 2020. Subtract lines 7 and 8 from line 6a.	101,264			
10 Analysis of line 9:				
a Excess from 2015.	101,264			
b Excess from 2016.				
c Excess from 2017.				
d Excess from 2018.				
e Excess from 2019.				

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 organization is a private operating foundation described in section ☐ 4942(j)(3) or ☐ 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

	Tax year	Prior 3 years			(e) Total
	(a) 2019	(b) 2018	(c) 2017	(d) 2016	
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).)

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.

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 e-mail address of the person to whom applications should be addressed:

WARD CASWELL
3 UPLAND LANE
WEST NEWBURY, MA 01985
(800) 229-9667
WARD@CASWELL.ORG

b The form in which applications should be submitted and information and materials they should include:

APPLICANTS SHOULD SUBMIT THE PROPOSAL ABSTRACT PROVIDED BY THE FOUNDATION ALONG WITH THE FOLLOWING REQUIRED DOCUMENTS 1)COPY OF IRS LETTER CLASSIFYING THE APPLICANT AS EXEMPT UNDER CODE SECTIONS 509(A) & 501(C)(3), 2)COPY OF 990 FOR THE MOST RECENT TOW YEARS, 3)THREE CONSTRUCTION BIDS, IF CONSTRUCTION PROJECT, 4)NAMES AND AFFILIATIONS OF THE BOARD MEMBERS, 5)IF HOSPITAL OR OTHER HEALHT-RELATED FACILITY, A COPY OF THE DETERMINATION OF NEED (DON) OR A CERTIFICATE OF NEED (CON), 6)MOST RECENT AUDITED FIANCIAL STATEMENTS, IF APPLICABLE, 7)NAME AND QULAIFCATIONS OF THE PERSON RESPONSIBLE OFR ADMINSTERING THE GRANT, 8)DETAILED BUDGET OF TEH PROJECT, 9)LIST OF OTHER SOURCES OF FUNDIGN FOR THIS PROJECT, 10)A STATEMENT THAT THE GRANT REQUEST IS EXECUTED BY A PERSON AUTHORIZED TO SUBMIT ON HEALF OF THE REQUESTING ORGANIZATION, 11)TABLE OF ORGANIZATION, 12)IF A UNIT OF GOVERNMENT, EVIDENCE OF THE RELATIONSHIP

c Any submission deadlines:

DUE DATE FOR RECEIPT OF COMPLETE PROPOSALS IS 5:00 PM ON FEBRUARY 1 AND AUGSUT 1 OF EACH YEAR

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

REJECTED PROGRAM ACTIVILES, INTERNATIONAL AFFAIRS, MEMBER BENEFIT, REJECTED TYPES OF SUPPORT AWARDS/PRIZE/COMPETITOINS, COLLECTIONS MGMT, COMMISSIONING NEW WORKS, CONFERENCES/SEMINARS, CURRICULUM DEVELOPMENT, DEBT REDUCTION, EMPLOYEE MATCHING GIFTS, EMLOYEE-BASED SCHOLARSHIPS, ENDOWMENT FUNDS, FACULTY/STAFF DEVELOPMENT, FELLOWSHIPS, FIL/VIDEO/RADIO PRODUCTION, FOUNDATION ADMINSTERED PRGRAMS, GENERAL/OPERATING SUPPORT, GRANTS/SCHOLARSHIPS TO INDIVIDUALS, INCOME DEVELOPMENT, INTERNSHIP FUNDS, MANAGEMENT DEVELOPMENT, PERFORMANCE/PRODUCTION COSTS, PROFESSORSHIPS, PROGRAM-RELATED INVESTMENT/LOANS, STUDENT AID MAXIUM GRANT AMOUNT REQUESTED SHOULD NOT EXCEED 25% OF THE TOTAL CONTRIBUTIONS FOR THE MOST RECENTLY ENDED FISCAL YEAR, OR 20% OF THE PROJECT BUDGET APPROVED AREAS OF GIVING INCLUDE HAMPEN & HAMPSHIRE COUNTIES, MA

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)				
a <i>Paid during the year</i> See Additional Data Table				
Total			3a	2,339,490
b <i>Approved for future payment</i>				
Total			3b	0

Enter gross amounts unless otherwise indicated.

[illegible]

Part XVII

	Yes	No
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1a(1)	No
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1a(2)	No
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1b(1)	No
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1b(2)		No
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1b(3)		No
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1b(4)		No
--------------	--	-----------

1b(5)		No
--------------	--	-----------

1b(6)		No
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1c		No
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value
ue

[illegible]

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations

described in section 501(c) (other than section 501(c)(3)) or in section 527? ☐ Yes ☒ No

b If "Yes," complete the following schedule.

(a) Name of organization	(b) Type of organization	(c) Description of relationship

Sign Here 	*****	2020-05-04	*****	May the IRS discuss this return with the preparer shown below (see instr.) ☒ Yes ☐ No
	_____ Signature of officer or trustee	_____ Date	_____ Title	

Paid Preparer Use Only	TOM F MULDOON		2020-05-04		
	Firm's name ► AAFCPAS INC				Firm's EIN ► 04-2571780
	Firm's address ► 50 WASHINGTON STREET WESTBOROUGH, MA 01581				Phone no. (508) 366-9100

May the IRS discuss this return with the preparer shown below

(see instr.) ☒ **Yes** ☐ **No**

Form 990PF Part VIII Line 1 - List all officers, directors, trustees, foundation managers and their compensation				
(a) Name and address	Title, and average hours per week (b) devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances
WARD S CASWELL	PRESIDENT/DIRECTOR 40.00	187,000	35,512	0
3 UPLAND LANE WEST NEWBURY, MA 01985				
PHILIP CASWELL	EMERITUS 0.50	0	0	0
44 MERRIMAC ST NEWBURYPORT, MA 01950				
RUTH S DUPONT	DIRECTOR 0.50	0	0	0
44 MERRIMAC ST NEWBURYPORT, MA 01950				
LEAH BEVERIDGE RICHARDSON	CLERK 0.50	0	0	0
44 MERRIMAC ST NEWBURYPORT, MA 01950				
CHRISTA PALMER BIGUE	DIRECTOR 0.50	0	0	0
44 MERRIMAC ST NEWBURYPORT, MA 01950				
PETER WESTON	DIRECTOR 0.50	0	0	0
44 MERRIMAC ST NEWBURYPORT, MA 01950				
JABEZ PALMER	DIRECTOR 0.50	0	0	0
44 MERRIMAC ST NEWBURYPORT, MA 01950				
ELIZABETH L KIRKPATRICK	SECOND VICE PRESIDENT 0.50	0	0	0
44 MERRIMAC ST NEWBURYPORT, MA 01950				
FREDERICK WILLIAM STECHER	TREASURER 0.50	0	0	0
44 MERRIMAC ST NEWBURYPORT, MA 01950				
JONATHAN CASWELL	FIRST VICE PRESIDENT 0.50	0	0	0
44 MERRIMAC ST NEWBURYPORT, MA 01950				
ALEXANDER CASWELL	ASSISTANT CLERK 0.50	0	0	0
44 MERRIMAC ST NEWBURYPORT, MA 01950				
ALEXANDRA B RUSSELL	DIRECTOR 0.50	0	0	0
44 MERRIMAC ST NEWBURYPORT, MA 01950				
PATRICE SWAN	DIRECTOR 0.50	0	0	0
44 MERRIMAC ST NEWBURYPORT, MA 01950				
JOSEPH BEVERIDGE PALMER	EMERITUS 0.50	0	0	0
44 MERRIMAC ST NEWBURYPORT, MA 01950				

Form 990PF Part XV Line 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)				
a <i>Paid during the year</i>				
ALL OUR KIDS INC3 LEBLANCE DR SOUTH HADLEY, MA 01075		PC	PROGRAM SUPPORT	6,000
AMERICAN CULINARY FEDERATION PALM BEACH COUNTY CHAPTER INC 3813 BLUEBELL ST PALM BEACH GARDENS, FL 33410		PC	PROGRAM SUPPORT	1,000
AMHERST BALLET THEATRE COMPANY INC 29 STRONG ST AMHERST, MA 010021836		PC	PROGRAM SUPPORT	2,000
Total ▶ 3a				2,339,490

Form 990PF Part XV Line 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)				
a <i>Paid during the year</i>				
AMHERST BOYS CLUB INC 29A COTTAGE ST AMHERST, MA 01002		PC	PROGRAM SUPPORT	10,000
AMHERST COLLEGE TRUSTEES PO BOX 5000 AMHERST, MA 010025000		PC	PROGRAM SUPPORT	5,000
ARGENZIANO SCHOOL PTA 290 WASHINGTON STREET SOMMERVILLE, MA 02143		PC	PROGRAM SUPPORT	5,000
Total ▶ 3a				2,339,490

Form 990PF Part XV Line 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)				
a <i>Paid during the year</i>				
ARISE INCPO BOX 5423 SPRINGFIELD, MA 011015423		PC	PROGRAM SUPPORT	9,000
ART WITH IMPACT 5214F DIAMOND HEIGHTS BLVD 454 SAN FRANCISCO, CA 941312175		PC	PROGRAM SUPPORT	7,500
BABY BASICS INC47 BEAUFORT AVE NEEDHAM, MA 02492		PC	PROGRAM SUPPORT	5,000
Total ▶ 3a				2,339,490

Form 990PF Part XV Line 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)				
a <i>Paid during the year</i>				
BARTON CENTER FOR DIABETES EDUCATION INC PO BOX 356 NORTH OXFORD, MA 015370356		PC	PROGRAM SUPPORT	10,000
BAY PATH UNIVERSITY 588 LONGMEADOW ST LONGMEADOW, MA 011062292		PC	PROGRAM SUPPORT	15,000
BEHAVIORAL HEALTH NETWORK INC 417 LIBERTY ST STE 1 SPRINGFIELD, MA 011043739		PC	PROGRAM SUPPORT	22,500
Total ▶ 3a				2,339,490

Form 990PF Part XV Line 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)				
a <i>Paid during the year</i>				
BERKSHIRE HILLS MUSIC ACADEMY INC 48 WOODBRIDGE ST SOUTH HADLEY, MA 010751125		PC	PROGRAM SUPPORT	17,500
BLUES TO GREEN INC18 TUCKER ROAD HUNTINGTON, MA 010509728		PC	PROGRAM SUPPORT	5,000
BOY SCOUTS OF AMERICA 1 ARCH ROAD SUITE 5 WESTFIELD, MA 01085		PC	PROGRAM SUPPORT	1,900
Total ▶ 3a				2,339,490

Form 990PF Part XV Line 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)				
a <i>Paid during the year</i>				
BOYS & GIRLS CLUB OF CHICOPEE 580 MEADOW STREET CHICOPEE, MA 010131820		PC	PROGRAM SUPPORT	5,000
BOYS & GIRLS CLUB OF GREATER WESTFIELD INC PO BOX 128 28 W SILVER ST WESTFIELD, MA 010860128		PC	PROGRAM SUPPORT	27,500
BRIDGE ST SCHOOL PTO INC 2 PARSONS ST NORTHAMPTON, MA 01060		PC	PROGRAM SUPPORT	10,000
Total ▶ 3a				2,339,490

Form 990PF Part XV Line 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)				
a <i>Paid during the year</i>				
C-10 RESEARCH & EDUCATION FOUNDATION 11 CHESTNUT ST AMESBURY, MA 01913		PC	PROGRAM SUPPORT	1,000
CANDID32 OLD SLIP 24TH FLOOR NEW YORK, NY 10005		PC	PROGRAM SUPPORT	5,000
CENTER FOR HUMAN DEVELOPMENT INC 70 BOLTWOOD WALK AMHERST, MA 01002		PC	PROGRAM SUPPORT	10,000
Total ▶ 3a				2,339,490

Form 990PF Part XV Line 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)				
a <i>Paid during the year</i>				
CHERRY CREEK TOUCHDOWN CLUB PO BOX 4474 GREENWOOD VILLAGE, CO 80155		PC	PROGRAM SUPPORT	5,000
CHESAPEAKE REGION ACCESSIBLE BOATING INC PO BOX 6564 ANNAPOLIS, MD 21403		PC	PROGRAM SUPPORT	5,000
CHILDRENS INSTITUTE INC 2121 WEST TEMPLE STREET LOS ANGELES, CA 90026		PC	PROGRAM SUPPORT	4,000
Total ▶ 3a				2,339,490

Form 990PF Part XV Line 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)				
a <i>Paid during the year</i>				
CHOATE ROSEMARY HALL FOUNDATION INCORPORATED 333 CHRISTIAN ST WALLINGFORD, CT 06492		PC	PROGRAM SUPPORT	5,000
CITYSPACE INC50 PAYSON AVE EASTHAMPTON, MA 010272255		PC	PROGRAM SUPPORT	9,000
CLINICAL & SUPPORT OPTIONS INC 8 ATWOOD DRIVE NO 301 NORTHAMPTON, MA 010604272		PC	PROGRAM SUPPORT	17,500
Total ▶ 3a				2,339,490

Form 990PF Part XV Line 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)				
a <i>Paid during the year</i>				
COMMON CAPITAL INC120 MAPLE ST SPRINGFIELD, MA 01103		PC	PROGRAM SUPPORT	5,000
COMMUNITY ACTION OF THE PIONEER VALLEY 393 MAIN ST GREENFIELD, MA 013013320		PC	PROGRAM SUPPORT	1,000
COMMUNITY FOUNDATION OF WESTERN MASSACHUSETTS 333 BRIDGE ST SPRINGFIELD, MA 01103		PC	PROGRAM SUPPORT	45,000
Total ▶ 3a				2,339,490

Form 990PF Part XV Line 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)				
a <i>Paid during the year</i>				
COMMUNITY INVOLVED IN SUSTAINING AGRICULTURE INC 1 SUGARLOAF ST 2ND FLR S DEERFIELD, MA 013731119		PC	PROGRAM SUPPORT	17,500
COMMUNITY MUSIC SCHOOL OF SPRINGFIELD INC 127 STATE ST SPRINGFIELD, MA 011031905		PC	PROGRAM SUPPORT	21,000
COOLEY DICKINSON HOSPITAL 30 LOCUST STREET NORTHAMPTON, MA 010602052		PC	PROGRAM SUPPORT	30,000
Total ▶ 3a				2,339,490

Form 990PF Part XV Line 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)				
a <i>Paid during the year</i>				
CRISIS CLINIC 9725 3RD AVE NE SUITE 300 SEATTLE, WA 98115		PC	PROGRAM SUPPORT	2,000
DAKIN PIONEER VALLEY HUMANE SOCIETYINC PO BOX 6307 SPRINGFIELD, MA 011016307		PC	PROGRAM SUPPORT	3,694
DOUBLE EDGE THEATRE PRODUCTIONS INCORPORATED 948 CONWAY RD ASHFIELD, MA 013309772		PC	PROGRAM SUPPORT	5,000
Total ▶ 3a				2,339,490

Form 990PF Part XV Line 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)				
a <i>Paid during the year</i>				
DUNN SCHOOLBOX 98 LOS OLIVOS, CA 934410098		PC	PROGRAM SUPPORT	5,000
EMPTY ARMS BEREAVEMENT SUPPORT INC 140 PINE ST ROOM 2B FLORENCE, MA 01062		PC	PROGRAM SUPPORT	4,000
ENCHANTED CIRCLE INC 4 OPEN SQUARE WAY HOLYOKE, MA 01040		PC	PROGRAM SUPPORT	5,000
Total ▶ 3a				2,339,490

Form 990PF Part XV Line 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)				
a <i>Paid during the year</i>				
EPISCOPAL CHURCH OF THE GOOD SHEPHERD OF TEQUESTA INC 400 SEABROOK RD TEQUESTA, FL 33469		PC	PROGRAM SUPPORT	5,000
ESSEX HISTORICAL SOCIETY & SHIPBUILDING MUSEUM INC PO BOX 277 66 MAIN STREET ESSEX, MA 01929		PC	PROGRAM SUPPORT	5,000
FIDELCO GUIDE DOG FOUNDATION INC 103 VISION WAY BLOOMFIELD, CT 060021424		PC	PROGRAM SUPPORT	5,000
Total			▶ 3a	2,339,490

Form 990PF Part XV Line 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)				
a <i>Paid during the year</i>				
FLORENCE CRITTENTON SERVICES OF COLORADO 96 SOUTH ZUNI STREET DENVER, CO 80223		PC	PROGRAM SUPPORT	5,000
FRANKLIN COUNTY DIAL SELF INC 196 FEDERAL STREET GREENFIELD, MA 013012714		PC	PROGRAM SUPPORT	45,000
FRIENDS OF WASHINGTON MUSIC 2101 S JACKSON ST SEATTLE, WA 98144		PC	PROGRAM SUPPORT	3,000
Total ▶ 3a				2,339,490

Form 990PF Part XV Line 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)				
a <i>Paid during the year</i>				
GETTYSBURG COLLEGE 300 NORTH WASHINGTON STREET BOX 426 GETTYSBURG, PA 17325		PC	PROGRAM SUPPORT	5,000
GIRLS INCORPORATED OF THE VALLEY 6 OPEN SQUARE WAY HOLYOKE, MA 010405882		PC	PROGRAM SUPPORT	40,000
GLOBAL GLIMPSE 2991 SHATTUCK AVE SUITE 304 BERKELEY, CA 94705		PC	PROGRAM SUPPORT	35,000
Total ▶ 3a				2,339,490

Form 990PF Part XV Line 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)				
a <i>Paid during the year</i>				
GORDON SCHOOL45 MAXFIELD AVE E PROVIDENCE, RI 02914		PC	PROGRAM SUPPORT	5,000
GROUNDWORK SOMERVILLE INC 337 SOMERVILLE AVE 2B SOMERVILLE, MA 02143		PC	PROGRAM SUPPORT	5,000
GROW FOOD NORTHAMPTON 221 PINE ST SUITE 349 FLORENCE, MA 01062		PC	PROGRAM SUPPORT	10,000
Total ▶ 3a				2,339,490

Form 990PF Part XV Line 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)				
a <i>Paid during the year</i>				
GUS GIORDANO JAZZ LEGACY FOUNDATION 5230 NORTH CLARK STREET CHICAGO, IL 60640		PC	PROGRAM SUPPORT	5,000
HABITAT FOR HUMANITY INTERNATIONAL INC 268 COLD SPRING AVENUE W SPRINGFIELD, MA 010894004		PC	PROGRAM SUPPORT	40,500
HILLTOWN LAND TRUST INC 332 BULLIT ROAD ASHFIELD, MA 01330		PC	PROGRAM SUPPORT	15,000
Total ▶ 3a				2,339,490

Form 990PF Part XV Line 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)				
a <i>Paid during the year</i>				
HISTORIC NORTHAMPTON INC 46 BRIDGE ST NORTHAMPTON, MA 010602406		PC	PROGRAM SUPPORT	6,000
HOLYOKE COMMUNITY COLLEGE FOUNDATION INC 303 HOMESTEAD AVENUE HOLYOKE, MA 01040		PC	PROGRAM SUPPORT	26,000
HOLYOKE PUBLIC EDUCATION AND GOVERNMENT ACCESS INC 536 DWIGHT STREET HOLYOKE, MA 010405086		PC	PROGRAM SUPPORT	40,000
Total ▶ 3a				2,339,490

Form 990PF Part XV Line 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)				
a <i>Paid during the year</i>				
HOLYOKE YOUNG MENS CHRISTIAN ASSOCIATION INC 171 PINE ST HOLYOKE, MA 010404065		PC	PROGRAM SUPPORT	40,500
HOMEWARD ALLIANCE242 CONIFER ST FORT COLLINS, CO 80524		PC	PROGRAM SUPPORT	2,000
HOMEWORK HOUSE INC 54 N SUMMER ST HOLYOKE, MA 010406208		PC	PROGRAM SUPPORT	12,000
Total ▶ 3a				2,339,490

Form 990PF Part XV Line 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)				
a <i>Paid during the year</i>				
HOPE AND COMFORT INC 659 HIGHLAND AVE NEEDHAM, MA 02494		PC	PROGRAM SUPPORT	2,000
HOPEWELL2 ALLIED DRIVE SUITE 308 DEDHAM, MA 02026		PC	PROGRAM SUPPORT	10,000
HUMAN DEVELOPMENT CORPORATION 664 E CENTRAL AVE EDGEWATER, MD 210373429		PC	PROGRAM SUPPORT	4,000
Total ▶ 3a				2,339,490

Form 990PF Part XV Line 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)				
a <i>Paid during the year</i>				
HUMAN SERVICE FORUM 100 WHITING FARMS RD SUITE 3 HOLYOKE, MA 01040		PC	PROGRAM SUPPORT	17,000
INNER EXPLORER INC 430 FRANKLIN VILLAGE PARKWAY SUITE 325 FRANKLIN, MA 02038		PC	PROGRAM SUPPORT	5,000
INSIGHT PRODUCTIONS INCPO BOX 96 MARLBORO, VT 053440096		PC	PROGRAM SUPPORT	20,000
Total ▶ 3a				2,339,490

Form 990PF Part XV Line 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)				
a <i>Paid during the year</i>				
INTEGRATED FAMILY COMMUNITY SERVICES 3370 S IRVING ST ENGLEWOOD, CO 80111		PC	PROGRAM SUPPORT	2,000
INTERNATIONAL LANGUAGE INSTITUTE OF MA INC 25 NEW SOUTH STREET NORTHAMPTON, MA 010604073		PC	PROGRAM SUPPORT	5,400
JEANNE GEIGER CRISIS CENTER INC 2 HARRIS STREET NEWBURYPORT, MA 01950		PC	PROGRAM SUPPORT	5,000
Total ▶ 3a				2,339,490

Form 990PF Part XV Line 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)				
a <i>Paid during the year</i>				
JONATHANS LANDING CARES INC 16823 CAPTAIN KIRLE DR JUPITER, FL 334771299		PC	PROGRAM SUPPORT	1,000
JUPITER MEDICAL CENTER FOUNDATION INC 1210 S OLD DIXIE HWY JUPITER, FL 334587205		PC	PROGRAM SUPPORT	5,000
LEADERSHIP PIONEER VALLEY 1 FEDERAL STREET BLDG 1 SPRINGFIELD, MA 01105		PC	PROGRAM SUPPORT	5,000
Total ▶ 3a				2,339,490

Form 990PF Part XV Line 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)				
a <i>Paid during the year</i>				
LOWELLS MARITIME FOUNDATION 459 MAIN ST AMESBURY, MA 01913		PC	PROGRAM SUPPORT	10,000
LOXAHATCHEE RIVER HISTORICAL SOCIETY INC 500 CAPTAIN ARMOURS WAY JUPITER, FL 33469		PC	PROGRAM SUPPORT	10,000
MAKE-IT SPRINGFIELD INC 168 WORTHINGTON ST SPRINGFIELD, MA 01103		PC	PROGRAM SUPPORT	20,000
Total ▶ 3a				2,339,490

Form 990PF Part XV Line 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)				
a <i>Paid during the year</i>				
MARGARET FULLER-NEIGHBORHOOD HOUSE INC 71 CHERRY ST CAMBRIDGE, MA 02139		PC	PROGRAM SUPPORT	2,000
MARTIN LUTHER KING JR FAMILY SERVICES INC 106 WILBRAHAM ROAD SPRINGFIELD, MA 01109		PC	PROGRAM SUPPORT	3,000
MASSACHUSETTS 4-H FOUNDATION INC 1671 WORCESTER ROAD SUITE 403 FRAMINGHAM, MA 01701		PC	PROGRAM SUPPORT	9,200
Total ▶ 3a				2,339,490

Form 990PF Part XV Line 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)				
a <i>Paid during the year</i>				
MASSACHUSETTS ADOPTION RESOURCE EXCHANGE INC 19 NEEDHAM STREET SUITE 206 NEWTON, MA 02461		PC	PROGRAM SUPPORT	18,000
MASSACHUSETTS PUBLIC HEALTH ASSOCIATION 50 FEDERAL ST 8TH FLOOR BOSTON, MA 02110		PC	PROGRAM SUPPORT	2,500
MAY INSTITUTE INC 41 PACELLA PARK DR RANDOLPH, MA 023681755		PC	PROGRAM SUPPORT	10,000
Total ▶ 3a				2,339,490

Form 990PF Part XV Line 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)				
a <i>Paid during the year</i>				
MENTAL HEALTH ASSOCIATION OF GREATER SPRINGFIELD 995 WORTHINGTON ST SPRINGFIELD, MA 011094027		PC	PROGRAM SUPPORT	5,000
MIRACLE LEAGUE OF METRO DENVER 8200 S QUEBEC ST SUITE A-3 BOX 273 CENTENNIAL, CO 80112		PC	PROGRAM SUPPORT	2,500
MOUNT WASHINGTON VALLEY CHORAL SOCIETY PO BOX 5002 PMB 207 NORTH CONWAY, NH 038605002		PC	PROGRAM SUPPORT	5,000
Total ▶ 3a				2,339,490

Form 990PF Part XV Line 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)				
a <i>Paid during the year</i>				
MULTICULTURAL COMMUNITY SERVICE OF THE PIONEER VALLEY INC 1000 WILBRAHAM RD SPRINGFIELD, MA 01109		PC	PROGRAM SUPPORT	8,000
NAISMITH MEMORIAL BASKETBALL HALL OF FAME INC 1000 W COLUMBUS AVE SPRINGFIELD, MA 011059930		PC	PROGRAM SUPPORT	40,000
NATIVE PLANT TRUST 180 HEMENWAY RD FRAMINGHAM, MA 017012636		PC	PROGRAM SUPPORT	5,000
Total ▶ 3a				2,339,490

Form 990PF Part XV Line 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)				
a <i>Paid during the year</i>				
NATURE CONSERVANCY INC 99 BEDFORD STREET SUITE 500 BOSTON, MA 02111		PC	PROGRAM SUPPORT	27,500
NEIGHBOR TO NEIGHBOR MASSACHUSETTS 15 COURT SQ SUITE 345 BOSTON, MA 02108		PC	PROGRAM SUPPORT	5,000
NEW NORTH CITIZENS COUNCIL 2455 MAIN ST SPRINGFIELD, MA 011071907		PC	PROGRAM SUPPORT	25,000
Total ▶ 3a				2,339,490

Form 990PF Part XV Line 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)				
a <i>Paid during the year</i>				
NEWBURYPORT PARKS CONSERVANCY PO BOX 1211 NEWBURYPORT, MA 01950		PC	PROGRAM SUPPORT	1,000
NORTHAMPTON COMMUNITY MUSIC CENTER INC 139 SOUTH ST NORTHAMPTON, MA 010604017		PC	PROGRAM SUPPORT	30,000
NORTHAMPTON JAZZ FESTIVAL INC PO BOX 631 NORTHAMPTON, MA 01061		PC	PROGRAM SUPPORT	5,000
Total ▶ 3a				2,339,490

Form 990PF Part XV Line 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)				
a <i>Paid during the year</i>				
NORTHFIELD MOUNT HERMON SCHOOL ONE LAMPLIGHTER WAY MOUNT HERMON, MA 01354		PC	PROGRAM SUPPORT	50,000
NUTSHELL PLAYHOUSE INC 76 BRUNELL AVE LENOX, MA 012402025		PC	PROGRAM SUPPORT	500
PA'LANTE RESTORATIVE JUSTICE 500 BEECH ST HOLYOKE, MA 01040		PC	PROGRAM SUPPORT	25,000
Total ▶ 3a				2,339,490

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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)				
a <i>Paid during the year</i>				
PARTNERS & ADVOCATES FOR REMARKABLE CHILDREN AND ADULTS 800 AIRPORT BLVD SUITE 320 BURLINGAME, CA 94010		PC	PROGRAM SUPPORT	5,000
PIONEER VALLEY BALLET GUILD 116 PLEASANT ST EASTHAMPTON, MA 010272752		PC	PROGRAM SUPPORT	2,000
PIONEER VALLEY RIVERFRONT CLUB INC 121 WEST ST SPRINGFIELD, MA 01104		PC	PROGRAM SUPPORT	5,000
Total ▶ 3a				2,339,490

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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)				
a <i>Paid during the year</i>				
PIONEER VALLEY WORKERS CENTER 20 HAMPTON AVE 200 NORTHAMPTON, MA 01060		PC	PROGRAM SUPPORT	24,000
PITTSBURGH YOUTH LEADERSHIP 1034 FIFTH AVENUE SUITE 400 PITTSBURGH, PA 15219		PC	PROGRAM SUPPORT	2,000
PLAY ON SHAKESPEAREPO BOX 955 ASHLAND, OR 97520		PC	PROGRAM SUPPORT	10,000
Total ▶ 3a				2,339,490

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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)				
a <i>Paid during the year</i>				
PLYMOUTH HOUSING GROUP 2113 THIRDS AVENUE SEATTLE, WA 98121		PC	PROGRAM SUPPORT	4,500
PRATT FINE ARTS CENTER 1902 SOUTH MAIN STREET SEATTLE, WA 98144		PC	PROGRAM SUPPORT	2,500
PROTEUS FUND INC15 RESEARCH DR AMHERST, MA 010022773		PC	PROGRAM SUPPORT	7,500
Total ▶ 3a				2,339,490

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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)				
a <i>Paid during the year</i>				
PUBLIC HEALTH INSTITIUTE OF WESTERN MASSACHUSETTS 280 CHESTNUT STREET 6TH FLOOR SPRINGFIELD, MA 01104		PC	PROGRAM SUPPORT	37,500
REGIONAL EMPLOYMENT BOARD OF HAMPDEN COUNTY INC 1441 MAIN ST SPRINGFIELD, MA 011031406		PC	PROGRAM SUPPORT	1,000
RESPOND INCPO BOX 555 SOMERVILLE, MA 02143		PC	PROGRAM SUPPORT	2,000
Total ▶ 3a				2,339,490

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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)				
a <i>Paid during the year</i>				
RISE ABOVE FOUNDATION PO BOX 174 NORTHBRIDGE, MA 01534		PC	PROGRAM SUPPORT	22,500
RIVERSIDE COMMUNITY CARE INC 270 BRIDGE ST SUITE 301 DEDHAM, MA 02026		PC	PROGRAM SUPPORT	1,000
ROCA INC 101 PARK ST CHELSEA, MA 02150 2771		PC	PROGRAM SUPPORT	20,000
Total ▶ 3a				2,339,490

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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)				
a <i>Paid during the year</i>				
SANDWICH COMMUNITY SCHOOL INC 1164 BUNKER HILL ROAD SOUTH TAMWORTH, NH 038834170		PC	PROGRAM SUPPORT	5,000
SELF ESTEEM BOSTON EDUCATIONAL INSTITUTE INC 8 LAKEVILLE RD APT 3 JAMAICA PLAN, MA 02130		PC	PROGRAM SUPPORT	17,500
SEVENARS CONCERTS INC 80 EAST END AVENUE 3G NEW YORK, NY 10028		PC	PROGRAM SUPPORT	5,000
Total ▶ 3a				2,339,490

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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)				
a <i>Paid during the year</i>				
SHAKA FRANKLIN FOUNDATION FOR YOUTH 8101 E DARTMOUTH AVE 11 DENVER, CO 80231		PC	PROGRAM SUPPORT	2,500
SIBLING CONNECTIONS INC 89 SOUTH STREET SUITE 203 BOSTON, MA 02111		PC	PROGRAM SUPPORT	15,000
SPIRIT OF SPRINGFIELD INC 1350 MAIN STREET SUITE 1005 SPRINGFIELD, MA 011032066		PC	PROGRAM SUPPORT	5,000
Total ▶ 3a				2,339,490

Form 990PF Part XV Line 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)				
a <i>Paid during the year</i>				
SPRINGFIELD DAY NURSERY CORPORATION 1095 MAIN ST SPRINGFIELD, MA 01103		PC	PROGRAM SUPPORT	2,000
SPRINGFIELD LIBRARY FOUNDATION INC 220 STATE ST SPRINGFIELD, MA 011031733		PC	PROGRAM SUPPORT	40,000
SPRINGFIELD SYMPHONY ORCHESTRA 1441 MAIN ST SUITE 120 SPRINGFIELD, MA 01103		PC	PROGRAM SUPPORT	5,000
Total ▶ 3a				2,339,490

Form 990PF Part XV Line 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)				
a <i>Paid during the year</i>				
STANLEY PARK OF WESTFIELD INC 400 WESTERN AVE WESTFIELD, MA 010852521		PC	PROGRAM SUPPORT	715,496
THE SERVICE BOARD 4408 DELRIDGE WAY SW 100 SEATTLE, WA 98106		PC	PROGRAM SUPPORT	5,000
THE STREET DOG COALITION 220 JACKSON AVENUE FORT COLLINS, CO 80521		PC	PROGRAM SUPPORT	5,000
Total ▶ 3a				2,339,490

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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)				
a <i>Paid during the year</i>				
THE TOR PROJECT INC 79 S WASHINGTON ST NO M-101 SEATTLE, WA 98194		PC	PROGRAM SUPPORT	5,000
THIRD SECTOR NEW ENGLAND INC 89 SOUTH ST STE 700 BOSTON, MA 021112679		PC	PROGRAM SUPPORT	5,300
TREEHOUSE FOUNDATION INC 1 TREEHOUSE CIR EASTHAMPTON, MA 010272175		PC	PROGRAM SUPPORT	45,000
Total ▶ 3a				2,339,490

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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)				
a <i>Paid during the year</i>				
TRUSTEES OF TUFTS COLLEGE 200 BOSTON AVE SUITE 1650 MEDFORD, MA 02155		PC	PROGRAM SUPPORT	4,100
TRUSTEES OF WESTMINSTER SCHOOL INC 995 HOPMEADOW ST SIMSBURY, CT 060701812		PC	PROGRAM SUPPORT	10,000
U S S MASS MEMORIAL COMMITTEE INC 5 BATTLESHIP COVE FALL RIVER, MA 027210000		PC	PROGRAM SUPPORT	5,000
Total ▶ 3a				2,339,490

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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)				
a <i>Paid during the year</i>				
UNIVERSITY SCHOOL 2785 SOM CENTER ROAD HUNTING VALLEY, OH 44022		PC	PROGRAM SUPPORT	5,000
VALLEY EYE RADIO 44 HAMPDEN STREET SPRINGFIELD, MA 01103		PC	PROGRAM SUPPORT	5,000
VALLEY VENTURE MENTORS 276 BRIDGE ST 3RD FLOOR SPRINGFIELD, MA 01103		PC	PROGRAM SUPPORT	27,500
Total ▶ 3a				2,339,490

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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)				
a <i>Paid during the year</i>				
WASHINGTON MIDDLE SCHOOL PTA 2101 S JACKSON ST SEATTLE, WA 98144		PC	PROGRAM SUPPORT	2,000
WELLSPRING COOPERATIVE CORPORATION 143 MAIN STREET SPRINGFIELD, MA 01105		PC	PROGRAM SUPPORT	17,000
WESTFIELD ON WEEKENDS INC PO BOX 154 WESTFIELD, MA 010860154		PC	PROGRAM SUPPORT	5,000
Total ▶ 3a				2,339,490

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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)				
a <i>Paid during the year</i>				
WESTFIELD STATE COLLEGE FOUNDATION PO BOX 1630 WESTFIELD, MA 010851630		PC	PROGRAM SUPPORT	32,400
WGBH EDUCATIONAL FOUNDATION 125 WESTERN AVE BOSTON, MA 021341008		PC	PROGRAM SUPPORT	1,000
WILLIE ROSS SCHOOL FOR THE DEAF INC 32 NORWAY AVE LONGMEADOW, MA 011063109		PC	PROGRAM SUPPORT	20,000
Total ▶ 3a				2,339,490

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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)				
a <i>Paid during the year</i>				
WINDRUSH FARM THERAPEUTIC EQUITATION INC 479 LACY ST NORTH ANDOVER, MA 01845		PC	PROGRAM SUPPORT	1,000
WOMENS FUND OF WESTERN MASSACHUSETTS 1350 MAIN ST SUITE 1006 SPRINGFIELD, MA 01103		PC	PROGRAM SUPPORT	9,000
YMCA OF GREATER SPRINGFIELD 1500 MAIN STREET SUITE 200 SPRINGFIELD, MA 01115		PC	PROGRAM SUPPORT	45,000
Total ▶ 3a				2,339,490

TY 2019 Accounting Fees Schedule**Name:** THE BEVERIDGE FAMILY FOUNDATION**EIN:** 31-1698286

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING	76,929	38,465	0	38,464

TY 2019 Investments Corporate Bonds Schedule**Name:** THE BEVERIDGE FAMILY FOUNDATION**EIN:** 31-1698286**Investments Corporate Bonds Schedule**

Name of Bond	End of Year Book Value	End of Year Fair Market Value
FIXED INCOME SECURITIES	7,772,874	7,772,874

TY 2019 Investments Corporate Stock Schedule**Name:** THE BEVERIDGE FAMILY FOUNDATION**EIN:** 31-1698286**Investments Corporation Stock Schedule**

Name of Stock	End of Year Book Value	End of Year Fair Market Value
COMMON STOCK	33,720,569	33,720,569

TY 2019 Investments Government Obligations Schedule**Name:** THE BEVERIDGE FAMILY FOUNDATION**EIN:** 31-1698286**US Government Securities - End
of Year Book Value:**

5,306,991

**US Government Securities - End
of Year Fair Market Value:**

5,306,991

**State & Local Government
Securities - End of Year Book
Value:**

0

**State & Local Government
Securities - End of Year Fair
Market Value:**

0

TY 2019 Investments - Other Schedule

Name: THE BEVERIDGE FAMILY FOUNDATION

EIN: 31-1698286

Investments Other Schedule 2

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
MUTUAL FUNDS	AT COST	13,110,538	13,110,538

TY 2019 Legal Fees Schedule

Name: THE BEVERIDGE FAMILY FOUNDATION

EIN: 31-1698286

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LEGAL	14,382	7,191	0	7,191

TY 2019 Other Assets Schedule**Name:** THE BEVERIDGE FAMILY FOUNDATION**EIN:** 31-1698286**Other Assets Schedule**

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
ACCRUED INCOME/DIVIDEND RECEIVABLE	85,006	84,440	84,440
INTANGIBLE ASSETS, NET	12,500		
PROGRAM-RELATED INVESTMENTS	35,000	38,544	38,544
MASSACHUSETTS COMMUNITY INVESTMENT TAX CREDIT RECEIVABLE	25,000		

TY 2019 Other Decreases Schedule

Name: THE BEVERIDGE FAMILY FOUNDATION
EIN: 31-1698286

Description	Amount
DEFERRED TAX ASSET	175,000

TY 2019 Other Expenses Schedule**Name:** THE BEVERIDGE FAMILY FOUNDATION**EIN:** 31-1698286**Other Expenses Schedule**

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
OFFICE EXPENSES	21,742	5,966	0	15,776
OTHER	65,693	11,503	0	54,100

TY 2019 Other Income Schedule

Name: THE BEVERIDGE FAMILY FOUNDATION

EIN: 31-1698286

Other Income Schedule

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
OTHER REVENUE	32,055	32,055	0

TY 2019 Other Increases Schedule

Name: THE BEVERIDGE FAMILY FOUNDATION
EIN: 31-1698286

Description	Amount
UNREALIZED GAINS	8,754,041

TY 2019 Other Liabilities Schedule**Name:** THE BEVERIDGE FAMILY FOUNDATION**EIN:** 31-1698286

Description	Beginning of Year - Book Value	End of Year - Book Value
DEFERRED FEDERAL EXCISE TAX	25,000	200,000
EXCISE TAX PAYABLE	4,600	18,167

TY 2019 Other Professional Fees Schedule**Name:** THE BEVERIDGE FAMILY FOUNDATION**EIN:** 31-1698286

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
OTHER	415,618	358,978	0	56,640

TY 2019 Taxes Schedule**Name:** THE BEVERIDGE FAMILY FOUNDATION**EIN:** 31-1698286

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FEDERAL EXCISE TAX	59,567	0	0	0
FOREIGN TAXES	23,375	23,375	0	0