Form **990-PF**

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

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

▶ Do not enter social security numbers on this form as it may be made public.
▶ Go to *www.irs.gov/Form990PF* for instructions and the latest information.

OMB No. 1545-0052

2019

Open to Public Inspection

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

Name of foundation
THE AMG CHARITABLE FOUNDATION

% LAURA THOMPSON

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

Room/suite

City or town, state or province, country, and ZIP or foreign postal code
PRIDES CROSSING, MA 01965

A Employer identification number
36-4703120

B Telephone number (see instructions)
(617) 747-3300

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 .... ▶ ☐

G Check all that apply: ☐ Initial return ☐ Initial return of a former public charity ☐ Final return ☐ Amended return ☐ Address change ☐ Name change

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)* ▶$ 1,487,904

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)	500,000			
	2	Check ▶ ☐ if the foundation is **not** required to attach Sch. B				
	3	Interest on savings and temporary cash investments	28,767	28,767		
	4	Dividends and interest from securities	11,802	11,802		
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10				
	b	Gross sales price for all assets on line 6a				
	7	Capital gain net income (from Part IV, line 2)				
	8	Net short-term capital gain				
	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)				
	12	**Total.** Add lines 1 through 11	540,569	40,569		
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc.	0			
	14	Other employee salaries and wages				
	15	Pension plans, employee benefits				
	16a	Legal fees (attach schedule)	22,293	0	0	0
	b	Accounting fees (attach schedule)	10,000	0	0	0
	c	Other professional fees (attach schedule)				
	17	Interest				
	18	Taxes (attach schedule) (see instructions)	1,600	0	0	0
	19	Depreciation (attach schedule) and depletion				
	20	Occupancy	1,414			
	21	Travel, conferences, and meetings				
	22	Printing and publications				
	23	Other expenses (attach schedule)	947	0	0	0
	24	**Total operating and administrative expenses.** Add lines 13 through 23	36,254	0	0	0
	25	Contributions, gifts, grants paid	10,141,900			10,141,900
	26	**Total expenses and disbursements.** Add lines 24 and 25	10,178,154	0	0	10,141,900
	27	Subtract line 26 from line 12:				
	a	**Excess of revenue over expenses and disbursements**	-9,637,585			
	b	**Net investment income** (if negative, enter -0-)		40,569		
	c	**Adjusted net income** (if negative, enter -0-)				

Part II **Balance Sheets** Attached schedules and amounts in the description column should be for end-of-year amounts only. (See instructions.)

	Line	Description	Beginning of year (a) Book Value	End of year (b) Book Value	End of year (c) Fair Market Value
Assets	1	Cash—non-interest-bearing			
	2	Savings and temporary cash investments	10,643,704	482,345	482,345
	3	Accounts receivable ▶			
		Less: allowance for doubtful accounts ▶			
	4	Pledges receivable ▶			
		Less: allowance for doubtful accounts ▶			
	5	Grants receivable	0	500,000	500,000
	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			
	10a	Investments—U.S. and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)	581,327	505,559	505,559
	c	Investments—corporate bonds (attach schedule)			
	11	Investments—land, buildings, and equipment: basis ▶			
		Less: accumulated depreciation (attach schedule) ▶			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)			
	14	Land, buildings, and equipment: basis ▶			
		Less: accumulated depreciation (attach schedule) ▶			
	15	Other assets (describe ▶)			
	16	**Total assets** (to be completed by all filers—see the instructions. Also, see page 1, item I)	11,225,031	1,487,904	1,487,904
Liabilities	17	Accounts payable and accrued expenses	23,775	0	
	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 ▶)			
	23	**Total liabilities**(add lines 17 through 22)	23,775	0	
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	11,201,256	1,487,904	
	25	Net assets with donor restrictions			
		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)	11,201,256	1,487,904	
	30	**Total liabilities and net assets/fund balances** (see instructions)	11,225,031	1,487,904	

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	11,201,256
2	Enter amount from Part I, line 27a	2	-9,637,585
3	Other increases not included in line 2 (itemize) ▶	3	
4	Add lines 1, 2, and 3	4	1,563,671
5	Decreases not included in line 2 (itemize) ▶	5	75,767
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 29	6	1,487,904

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.)
1a			

	(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				
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				
b				
c				
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**

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**

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	271,980	10,989,371	0.024749
2017	346,306	11,442,885	0.030264
2016	315,744	11,596,799	0.027227
2015	711,858	11,588,422	0.061428
2014	436,994	3,345,525	0.13062

2 **Total** of line 1, column (d)	2	0.274288
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	0.054858
4 Enter the net value of noncharitable-use assets for 2019 from Part X, line 5	4	3,135,911
5 Multiply line 4 by line 3	5	172,030
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	406
7 Add lines 5 and 6	7	172,436
8 Enter qualifying distributions from Part XII, line 4 , ...	8	10,141,900

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	406
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	
3	Add lines 1 and 2			3	406
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)			4	
5	**Tax based on investment income.** Subtract line 4 from line 3. If zero or less, enter -0-			5	406
6	Credits/Payments:				
a	2019 estimated tax payments and 2018 overpayment credited to 2019	6a	67		
b	Exempt foreign organizations—tax withheld at source	6b			
c	Tax paid with application for extension of time to file (Form 8868)	6c	1,000		
d	Backup withholding erroneously withheld	6d			
7	Total credits and payments. Add lines 6a through 6d			7	1,067
8	Enter any **penalty** for underpayment of estimated tax. Check here ☐ if Form 2220 is attached			8	
9	**Tax due.** If the total of lines 5 and 8 is more than line 7, enter **amount owed** ▶			9	
10	**Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶			10	661
11	Enter the amount of line 10 to be: **Credited to 2020 estimated tax** ▶ 661	**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?	1a		No
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes? (see Instructions for definition)	1b		No
	*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?	1c		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? *If "Yes," attach a detailed description of the activities.*	2		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? *If "Yes," attach a conformed copy of the changes*	3		No
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		No
b	If "Yes," has it filed a tax return on **Form 990-T** for this year?	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? *If "Yes," attach the statement required by General Instruction T.*	5	Yes	
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?	6	Yes	
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.*	7	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? *If "No," attach explanation*	8b	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. If "Yes," complete Part XIV	9		No
10	Did any persons become substantial contributors during the tax year? *If "Yes," attach a schedule listing their names and addresses.*	10		No

Part VII-A Statements Regarding Activities (continued)

			Yes	No
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?	13	Yes	

Website address ▶WWW.AMG.COM

14 The books are in care of ▶LAURA THOMPSON Telephone no. ▶(617) 747-3300

Located at ▶600 HALE STREET PRIDES CROSSING MA ZIP+4 ▶01965

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

			Yes	No
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?	16		No
	See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes", enter the name of the foreign country ▶			

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

			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	1b		No
	Organizations relying on a current notice regarding disaster assistance check here. ▶ ☐			
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____

			Yes	No
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		No

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

			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)*

			Yes	No
5a	During the year did the foundation pay or incur any amount to:			
	(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? ☐ Yes ☐ No			
	If "Yes," attach the statement required by Regulations section 53.4945–5(d).			
6a	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? ☐ Yes ☑ No			
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?	6b		No
	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			
b	If "Yes", did the foundation receive any proceeds or have any net income attributable to the transaction?	7b		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 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

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

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
Total number of others receiving over $50,000 for professional services. . . . . ▶		

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	549,026
b	Average of monthly cash balances.	1b	2,634,640
c	Fair market value of all other assets (see instructions).	1c	0
d	**Total** (add lines 1a, b, and c).	1d	3,183,666
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation). 1e		
2	Acquisition indebtedness applicable to line 1 assets.	2	0
3	Subtract line 2 from line 1d.	3	3,183,666
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	47,755
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3. Enter here and on Part V, line 4	5	3,135,911
6	**Minimum investment return.** Enter 5% of line 5.	6	156,796

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	156,796
2a	Tax on investment income for 2019 from Part VI, line 5.	2a	406		
b	Income tax for 2019. (This does not include the tax from Part VI.).	2b			
c	Add lines 2a and 2b.			2c	406
3	Distributable amount before adjustments. Subtract line 2c from line 1.			3	156,390
4	Recoveries of amounts treated as qualifying distributions.			4	
5	Add lines 3 and 4.			5	156,390
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	156,390

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	10,141,900
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	0
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required).	3a	0
b	Cash distribution test (attach the required schedule).	3b	0
4	**Qualifying distributions.** Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	10,141,900
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	406
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4.	6	10,141,494

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					156,390
2 Undistributed income, if any, as of the end of 2019:					
a Enter amount for 2018 only.				0	
b Total for prior years: 2017 , 2016 , 2015			0		
3 Excess distributions carryover, if any, to 2019:					
a From 2014.	269,718				
b From 2015.	132,437				
c From 2016.					
d From 2017.					
e From 2018.					
f **Total** of lines 3a through e.		402,155			
4 Qualifying distributions for 2019 from Part XII, line 4: ▶ $ 10,141,900					
a Applied to 2018, but not more than line 2a				0	
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.					156,390
e Remaining amount distributed out of corpus		9,985,510			
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:**					
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5		10,387,665			
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.					
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)					
8 Excess distributions carryover from 2014 not applied on line 5 or line 7 (see instructions) . . .		269,718			
9 **Excess distributions carryover to 2020.** Subtract lines 7 and 8 from line 6a		10,117,947			
10 Analysis of line 9:					
a Excess from 2015. . . .	132,437				
b Excess from 2016. . . .					
c Excess from 2017. . . .					
d Excess from 2018. . . .					
e Excess from 2019. . . .	9,985,510				

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)

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

NA

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.

NA

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:

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

c Any submission deadlines:

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

Part XV **Supplementary Information** (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business)	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
a *Paid during the year* See Additional Data Table				
Total . . . . ▶ **3a**				10,141,900
b *Approved for future payment*				
Total . . . . ▶ **3b**				

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.	Unrelated business income (a) Business code	(b) Amount	Excluded by section 512, 513, or 514 (c) Exclusion code	(d) Amount	(e) Related or exempt function income (See instructions.)
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			14	28,767	
4 Dividends and interest from securities. . . .			18	11,802	
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					
c					
d					
e					
12 Subtotal. Add columns (b), (d), and (e). .				40,569	

13 **Total.** Add line 12, columns (b), (d), and (e). **13** 40,569

(See worksheet in line 13 instructions to verify calculations.)

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

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes). (See instructions.)

Part XVII Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

			Yes	No
1	Did the organization directly or indirectly engage in any of the following with any other organization described in section 501 (c) (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?			
a	Transfers from the reporting foundation to a noncharitable exempt organization of:			
	(1) Cash.	**1a(1)**		**No**
	(2) Other assets.	**1a(2)**		**No**
b	Other transactions:			
	(1) Sales of assets to a noncharitable exempt organization.	**1b(1)**		**No**
	(2) Purchases of assets from a noncharitable exempt organization.	**1b(2)**		**No**
	(3) Rental of facilities, equipment, or other assets.	**1b(3)**		**No**
	(4) Reimbursement arrangements.	**1b(4)**		**No**
	(5) Loans or loan guarantees.	**1b(5)**		**No**
	(6) Performance of services or membership or fundraising solicitations.	**1b(6)**		**No**
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees.	**1c**		**No**

d If the answer to any of the above is "Yes," complete the following schedule. Column **(b)** should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column **(d)** the value of the goods, other assets, or services received.

(a) Line No.	**(b)** Amount involved	**(c)** Name of noncharitable exempt organization	**(d)** Description of transfers, transactions, and sharing arrangements

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

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

Signature of officer or trustee	Date	Title
	2020-11-14	

May the IRS discuss this return with the preparer shown below (see instr.) ☑ **Yes** ☐ **No**

Paid Preparer Use Only

Print/Type preparer's name	Preparer's Signature	Date	Check if self-employed ▶ ☐	PTIN
LAURA MCNEIL				P01427424

Firm's name ▶ PRICEWATERHOUSECOOPERS LLP

Firm's EIN ▶

Firm's address ▶ 101 SEAPORT BLVD SUITE 500

BOSTON, MA 02210

Phone no. (617) 530-5000

Form 990PF Part VIII Line 1 - List all officers, directors, trustees, foundation managers and their compensation

(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
DAVID M BILLINGS 600 HALE STREET PRIDES CROSSING, MA 01965	EVP & SECRETARY/DIRECTOR 3.0	0	0	0
JENNIFER BENSON KELLY 600 HALE STREET PRIDES CROSSING, MA 01965	EXECUTIVE DIRECTOR/DIRECTOR 8.0	0	0	0
SEAN M HEALEY 777 SOUTH FLAGLER DRIVE WEST PALM BEACH, FL 33401	DIRECTOR 3.0	0	0	0
ALEXANDRA LYNN 600 HALE STREET PRIDES CROSSING, MA 01965	PRESIDENT & TREASURER/DIRECTOR 3.0	0	0	0
SELENE OH 600 HALE STREET PRIDES CROSSING, MA 01965	EXEC DIR/DIR (THROUGH 11/19) 3.0	0	0	0
JAY HORGEN 600 HALE STREET PRIDES CROSSING, MA 01965	VICE PRESIDENT 3.0	0	0	0
HUGH CUTLER 600 HALE STREET PRIDES CROSSING, MA 01965	VICE PRESIDENT 3.0	0	0	0
CHRISTINE CARSMAN 600 HALE STREET PRIDES CROSSING, MA 01965	VICE PRESIDENT 3.0	0	0	0
JOHN ERICKSON 600 HALE STREET PRIDES CROSSING, MA 01965	VICE PRESIDENT 3.0	0	0	0
RIZWAN JAMAL 600 HALE STREET PRIDES CROSSING, MA 01965	VICE PRESIDENT 3.0	0	0	0
AARON GALIS 600 HALE STREET PRIDES CROSSING, MA 01965	VICE PRESIDENT 3.0	0	0	0
BENJAMIN LANGILLE 600 HALE STREET PRIDES CROSSING, MA 01965	VICE PRESIDENT 3.0	0	0	0
DEAN MAINES 600 HALE STREET PRIDES CROSSING, MA 01965	VICE PRESIDENT 3.0	0	0	0
LAURA THOMPSON 600 HALE STREET PRIDES CROSSING, MA 01965	VICE PRESIDENT 3.0	0	0	0
GARRET WESTON 600 HALE STREET PRIDES CROSSING, MA 01965	VICE PRESIDENT 3.0	0	0	0

Form 990PF Part VIII Line 1 - List all officers, directors, trustees, foundation managers and their compensation

(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
LOUIS SOMMA 600 HALE STREET PRIDES CROSSING, MA 01965	VICE PRESIDENT 3.0	0	0	0
CAITLIN NUNAN 600 HALE STREET PRIDES CROSSING, MA 01965	EXECUTIVE DIRECTOR/VP/DIRECTOR 3.0	0	0	0
ELIZABETH GOLDSTEIN 600 HALE STREET PRIDES CROSSING, MA 01965	VICE PRESIDENT 3.0	0	0	0
NATHANIEL DALTON 600 HALE STREET PRIDES CROSSING, MA 01965	VICE PRESIDENT 3.0	0	0	0

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business)	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
a *Paid during the year*				
Massachusetts General Hospital 125 Nashua Street Suite 540 Boston, MA 02114		PC	OPERATING SUPPORT	10,000,000
Benjamin School 11000 Ellison Wilson Road North Palm Beach, FL 33408		PC	OPERATING SUPPORT	1,400
Juvenile Diabetes Research Foundation 60 Walnut Street Wellesley Hills, MA 02481		PC	OPERATING SUPPORT	50,000
Total . . . . ▶ **3a**				10,141,900

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business)	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
a *Paid during the year*				
Discovering Justice One Courthouse Way Suite 3120 Boston, MA 02210		PC	OPERATING SUPPORT	5,000
Wellspring House302 Essex Ave Gloucester, MA 01930		PC	OPERATING SUPPORT	5,000
St Clare Catholic School 821 Prosperity Farms Road North Palm Beach, FL 33408		PC	OPERATING SUPPORT	3,000
Total . . . . ▶ **3a**				10,141,900

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business)	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
a *Paid during the year*				
The Red Sox Foundation4 Jersey Street Boston, MA 02215		PC	OPERATING SUPPORT	50,000
Cradles To Crayons Inc 4700 Wisssahickon Ave Suite 142 Philadelphia, PA 19144		PC	OPERATING SUPPORT	2,000
Cradles To Crayons Inc 155 North Beacon Street Brighton, MA 02135		PC	OPERATING SUPPORT	5,000
Total . . . . ▶ **3a**				10,141,900

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business)	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
a *Paid during the year*				
Palm Beach County Food Bank 525 Gator Drive Lantana, FL 33462		PC	OPERATING SUPPORT	2,000
The Food Bank Of Lower Fairfield County 461 Glenbrook Road Stamford, CT 06906		PC	OPERATING SUPPORT	2,000
The Food Project10 Lewis Street Lincoln, MA 01773		PC	OPERATING SUPPORT	4,000
Total . . . . ▶ **3a**				10,141,900

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business)	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
a *Paid during the year*				
Essex Historical Society & Ship Building 66 Main Street Essex, MA 01929		PC	OPERATING SUPPORT	2,500
Imagine ScholarPO Box 80175 Portland, OR 97280		PC	OPERATING SUPPORT	1,000
The American Rhino Foundation 4 South Market Street First Floor Boston, MA 02129		PC	OPERATING SUPPORT	500
Total . . . . ▶ **3a**				10,141,900

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business)	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
a *Paid during the year*				
Friends Of Beverly Recreation 3 Landers Drive Beverly, MA 01915		PC	OPERATING SUPPORT	2,500
Happiness Is Camping Inc 62 sunset Lake Road Hardwick, NJ 07825		PC	OPERATING SUPPORT	1,000
Hedge Funds Care Inc 106 W 32nd Street 2nd Floor New York, NY 10001		PC	OPERATING SUPPORT	1,000
Total . . . . ▶ **3a**				10,141,900

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business)	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
a *Paid during the year*				
New York City Ballet Inc Office of NYCB Admin David H Koch 20 Lincoln Center New York, NY 10023		PC	OPERATING SUPPORT	1,000
St John's Episcopal Church 705 Hale Street Beverly, MA 01915		PC	OPERATING SUPPORT	1,500
Team KJPO Box 1222 Pear River, NY 10965		PC	OPERATING SUPPORT	1,000
Total . . . . ▶ **3a**				10,141,900

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business)	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
a *Paid during the year*				
The Food Project10 Lewis Street Lincoln, MA 01773		PC	OPERATING SUPPORT	500
Total . . . . ▶ **3a**				10,141,900

TY 2019 Accounting Fees Schedule

Name: THE AMG CHARITABLE FOUNDATION

EIN: 36-4703120

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
TAX RETURN PREPARATION SVRCS	10,000	0	0	0

Note: To capture the full content of this document, please select landscape mode (11" x 8.5") when printing.

TY 2019 Depreciation Schedule

Name: THE AMG CHARITABLE FOUNDATION

EIN: 36-4703120

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Note: To capture the full content of this document, please select landscape mode (11" x 8.5") when printing.

TY 2019 Expenditure Responsibility Statement

Name: THE AMG CHARITABLE FOUNDATION

EIN: 36-4703120

Grantee's Name	Grantee's Address	Grant Date	Grant Amount	Grant Purpose	Amount Expended By Grantee	Any Diversion By Grantee?	Dates of Reports By Grantee	Date of Verification	Results of Verification
COALITION FOR INCLUSIVE CAPITALISM	435 EAST 52ND STREET APT 18C NEW YORK, NY 10022	2016-08-29	100,000	OPERATING SUPPORT		NO	PENDING		THE FOUNDATION HAS MADE GOOD-FAITH ATTEMPTS TO CONTACT THE GRANTEE REGARDING THE DELIVERY OF THE REQUIRED EXPENDITURE RESPONSIBILITY REPORTS, INCLUDING RECENT FOLLOW-UP REQUESTS. AS OF THE DATE OF THIS FILING, THE FOUNDATION STILL IS AWAITING RECEIPT OF THE REPORTS.
IMPETUS FOUNDATION	183 EVERSHOLT STREET LONDON NW1 1BU UK	2016-10-12	12,544	OPERATING SUPPORT		NO	PENDING		THE FOUNDATION HAS MADE GOOD-FAITH ATTEMPTS TO CONTACT THE GRANTEE REGARDING THE DELIVERY OF THE REQUIRED EXPENDITURE RESPONSIBILITY REPORTS, INCLUDING RECENT FOLLOW-UP REQUESTS. AS OF THE DATE OF THIS FILING, THE FOUNDATION STILL IS AWAITING RECEIPT OF THE REPORTS.
CHRISTIANS AGAINST POVERTY	30 NORTH ST BRADFORD BD1 4EW UK	2017-05-25	1,000	OPERATING SUPPORT		NO	PENDING		THE FOUNDATION HAS MADE GOOD-FAITH ATTEMPTS TO CONTACT THE GRANTEE REGARDING THE DELIVERY OF THE REQUIRED EXPENDITURE RESPONSIBILITY REPORTS, INCLUDING RECENT FOLLOW-UP REQUESTS. AS OF THE DATE OF THIS FILING, THE FOUNDATION STILL IS AWAITING RECEIPT OF THE REPORTS.
ROYAL ACADEMY OF ART LONDON	BURLINGTON HOUSE PICADILLY, MAYFAIR W1J OBD UK	2017-07-13	13,371	OPERATING SUPPORT		NO	PENDING		THE FOUNDATION HAS MADE GOOD-FAITH ATTEMPTS TO CONTACT THE GRANTEE REGARDING THE DELIVERY OF THE REQUIRED EXPENDITURE RESPONSIBILITY REPORTS, INCLUDING RECENT FOLLOW-UP REQUESTS. AS OF THE DATE OF THIS FILING, THE FOUNDATION STILL IS AWAITING RECEIPT OF THE REPORTS.
SERPENTINE GALLERIES	KENSINGTON GARDENS LONDON W2 3XA UK	2017-07-13	1,310	OPERATING SUPPORT		NO	PENDING		THE FOUNDATION HAS MADE GOOD-FAITH ATTEMPTS TO CONTACT THE GRANTEE REGARDING THE DELIVERY OF THE REQUIRED EXPENDITURE RESPONSIBILITY REPORTS, INCLUDING RECENT FOLLOW-UP REQUESTS. AS OF THE DATE OF THIS FILING, THE FOUNDATION STILL IS AWAITING RECEIPT OF THE REPORTS.
NEW WAYS	47 CUMBERLAND STREET LONDON SW1V 4LY UK	2017-10-21	2,174	OPERATING SUPPORT		NO	PENDING		THE FOUNDATION HAS MADE GOOD-FAITH ATTEMPTS TO CONTACT THE GRANTEE REGARDING THE DELIVERY OF THE REQUIRED EXPENDITURE RESPONSIBILITY REPORTS, INCLUDING RECENT FOLLOW-UP REQUESTS. AS OF THE DATE OF THIS FILING, THE FOUNDATION STILL IS AWAITING RECEIPT OF THE REPORTS.
BEUTEL GOODMAN CHARITABLE FOUNDATION	20 EGLINTON AVENUE WEST SUITE 2000 TORONTO, ONTARIO M4R1K8 CA	2018-04-10	5,000	OPERATING SUPPORT	5,000	NO	1/9/2019		
SERPENTINE GALLERIES	KENSINGTON GARDENS LONDON W2 3XA UK	2018-04-26	23,073	OPERATING SUPPORT		NO	PENDING		THE FOUNDATION HAS MADE GOOD-FAITH ATTEMPTS TO CONTACT THE GRANTEE REGARDING THE DELIVERY OF THE REQUIRED EXPENDITURE RESPONSIBILITY REPORTS, INCLUDING RECENT FOLLOW-UP REQUESTS. AS OF THE DATE OF THIS FILING, THE FOUNDATION STILL IS AWAITING RECEIPT OF THE REPORTS.
BREST FRIENDS AL JALILA FOUNDATION	FIRST FLOOR BLDG 12PO BOX 300100 DUBAI HEALTHCARE CITY , DUBAI AE	2018-05-30	500	OPERATING SUPPORT	500	NO	5/30/2018		
SERPENTINE GALLERIES	KENSINGTON GARDENS LONDON W2 3XA UK	2018-07-18	1,379	OPERATING SUPPORT		NO	PENDING		THE FOUNDATION HAS MADE GOOD-FAITH ATTEMPTS TO CONTACT THE GRANTEE REGARDING THE DELIVERY OF THE REQUIRED EXPENDITURE RESPONSIBILITY REPORTS, INCLUDING RECENT FOLLOW-UP REQUESTS. AS OF THE DATE OF THIS FILING, THE FOUNDATION STILL IS AWAITING RECEIPT OF THE REPORTS.

Grantee's Name	Grantee's Address	Grant Date	Grant Amount	Grant Purpose	Amount Expended By Grantee	Any Diversion By Grantee?	Dates of Reports By Grantee	Date of Verification	Results of Verification
ROYAL CHILDREN'S HOSPITAL FOUNDATION	LEVEL 2 48 FLEMINGTON ROAD PARKVILLE VIC 3052 AS	2018-09-20	745	OPERATING SUPPORT	745	NO	11/6/2019		

TY 2019 General Explanation Attachment

Name: THE AMG CHARITABLE FOUNDATION

EIN: 36-4703120

General Explanation Attachment

Identifier	Return Reference	Explanation	
1	FORM 990-PF, PART VII-A, LINE 5	FORM 990-PF, PART VII-A, LINE 5	DURING THE YEAR, THE AMG CHARITABLE FOUNDATION RECEIVED GIFTS AND CONTRIBUTIONS VALUED AT $500,000 AND MADE GRANTS TOTALING $10,141,900. THE AMG CHARITABLE FOUNDATION DOES NOT CONSIDER THESE GRANTS TO HAVE GIVEN RISE TO A SUBSTANTIAL CONTRACTION WITHIN THE MEANING OF THE FORM 990-PF INSTRUCTIONS OR TREASURY REGULATION SECTION 1.6043-3. THE AMG CHARITABLE FOUNDATION FULLY INTENDS TO CONTINUE OPERATING IN FURTHERANCE OF ITS EXEMPT PURPOSES IN FUTURE YEARS.

General Explanation Attachment

Identifier	Return Reference	Explanation	
2	FORM 990-PF, PART VII-B, LINE 5C	FORM 990-PF, PART VII-B, LINE 5C	THE FOUNDATION HAS BEEN UNABLE TO OBTAIN ADDITIONAL REPORTS FROM SEVERAL OF THE GRANTEES IDENTIFIED ON ATTACHMENT 7. AFTER PERSISTENT AND PROLONGED EFFORTS TO CONTACT THE GRANTEES, THE FOUNDATION HAS DISCONTINUED ITS EFFORTS TO OBTAIN THE GRANTEE REPORTS REQUIRED UNDER SECTION 53.4945-5(C) OF THE TREASURY REGULATIONS. THE FOUNDATION IS TREATING THESE GRANTS AS OTHER THAN TAXABLE EXPENDITURES UNDER SECTION 53.4945-5(D)(2) OF THE TREASURY REGULATIONS BECAUSE: (I) THE GRANTS WERE MADE IN ACCORDANCE WITH SECTION 53.4945-5(B) OF TREASURY REGULATIONS; (II) THE FOUNDATION HAS COMPLIED WITH THE REPORTING REQUIREMENTS CONTANED IN SECTION 53.4945-5(D) OF THE TREASURY REGULATIONS; (III) THE FOUNDATION MADE REASONABLE EFFORTS TO OBTAIN THE REQUIRED REPORTS; AND (IV) THE FOUNDATION HAS CEASED MAKING ANY NEW GRANTS TO THE ORGANIZATIONS.

TY 2019 Investments Corporate Stock Schedule

Name: THE AMG CHARITABLE FOUNDATION

EIN: 36-4703120

Investments Corporation Stock Schedule

Name of Stock	End of Year Book Value	End of Year Fair Market Value
AFFILIATED MANAGERS GROUP, INC	505,559	505,559

TY 2019 Legal Fees Schedule

Name: THE AMG CHARITABLE FOUNDATION

EIN: 36-4703120

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LEGAL COMPLIANCE SERVICES	22,293	0	0	0

TY 2019 Other Decreases Schedule

Name: THE AMG CHARITABLE FOUNDATION

EIN: 36-4703120

Description	Amount
UNREALIZED INVESTMENT LOSSES	75,767

TY 2019 Other Expenses Schedule

Name: THE AMG CHARITABLE FOUNDATION

EIN: 36-4703120

Other Expenses Schedule

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
BILLING CHARGES	470			
DELUXE BUSINESS CHECKS	332	0	0	0
AMERICAN EXPRESS	60			
BANK FEES	50			
MA OFF OF THE ATTORNY GENERAL	35			

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TY 2019 Taxes Schedule

Name: THE AMG CHARITABLE FOUNDATION

EIN: 36-4703120

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
EXCISE TAX PAYMENTS	1,600	0	0	0

Schedule B
(Form 990, 990-EZ, or 990-PF)
Department of the Treasury
Internal Revenue Service

Schedule of Contributors

▶ **Attach to Form 990, 990-EZ, or 990-PF.**
▶ **Go to *www.irs.gov/Form990* for the latest information.**

OMB No. 1545-0047

2019

Name of the organization
THE AMG CHARITABLE FOUNDATION

Employer identification number
36-4703120

Organization type (check one):

Filers of:	**Section:**
Form 990 or 990-EZ	☐ 501(c)( ) (enter number) organization
	☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation
	☐ 527 political organization
Form 990-PF	☑ 501(c)(3) exempt private foundation
	☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation
	☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule.**
Note: Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

General Rule

☑ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling $5,000 or more (in money or other property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions.

Special Rules

☐ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of **(1)** $5,000 or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.

☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than $1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I, II, and III.

☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than $1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Don't complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling $5,000 or more during the year . . . . ▶ $ ____________

Caution: An organization that isn't covered by the General Rule and/or the Special Rules doesn't file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2, of its Form 990; or check the box on line H of its Form 990-EZ or on its Form 990PF, Part I, line 2, to certify that it doesn't meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

Name of organization
THE AMG CHARITABLE FOUNDATION

Employer identification number
36-4703120

Part I **Contributors**

Contributors (see instructions). Use duplicate copies of Part I if additional space is needed.

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	AFFILIATED MANAGERS GROUP INC 600 HALE STREET PRIDES CROSSING, MA 01965	$ 500,000	☑ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
-		$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
-		$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
-		$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
-		$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
-		$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)

Name of organization
THE AMG CHARITABLE FOUNDATION

Employer identification number

36-4703120

Part II **Noncash Property**

(see instructions). Use duplicate copies of Part II if additional space is needed.

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
-		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
-		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
-		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
-		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
-		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
-		$	

Name of organization	Employer identification number
THE AMG CHARITABLE FOUNDATION	36-4703120

Part III *Exclusively* religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than $1,000 for the year from any one contributor. Complete columns **(a)** through **(e) and** the following line entry. For organizations completing Part III, enter the total of *exclusively* religious, charitable, etc., contributions of **$1,000 or less** for the year. (Enter this information once. See instructions.) ▶ $ ____________

Use duplicate copies of Part III if additional space is needed.

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP 4	Relationship of transferor to transferee
-	

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP 4	Relationship of transferor to transferee
-	

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP 4	Relationship of transferor to transferee
-	

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP 4	Relationship of transferor to transferee
-	