

For calendar year 2020, or tax year beginning 01-01-2020, and ending 12-31-2020

Name of foundation The Offensend Family Foundation		A Employer identification number 13-4011882	
% JANET OFFENSEND			
Number and street (or P.O. box number if mail is not delivered to street address) 1 Franklin Street Apt 4204	Room/suite	B Telephone number (see instructions) (917) 797-0305	
City or town, state or province, country, and ZIP or foreign postal code Boston, MA 02110		C If exemption application is pending, check here ☐	
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) ▶ \$ 707,624	J Accounting method: ☐ Cash ☒ Accrual ☐ Other (specify) _____ (Part I, column (d) must be on cash basis.)	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐	

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)	81,370			
	2 Check ☐ if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments	101	101		
	4 Dividends and interest from securities	0	0		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	532,920			
	b Gross sales price for all assets on line 6a _____ 603,790				
	7 Capital gain net income (from Part IV, line 2)		532,920		
	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)				
	12 Total. Add lines 1 through 11	614,391	533,021		
	13 Compensation of officers, directors, trustees, etc.	0			
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)	10,500	2,625	0	10,500
	c Other professional fees (attach schedule)				
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	19,000			
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	460			460
	24 Total operating and administrative expenses. Add lines 13 through 23	29,960	2,625	0	10,960
	25 Contributions, gifts, grants paid	483,498			483,498
	26 Total expenses and disbursements. Add lines 24 and 25	513,458	2,625	0	494,458
	27 Subtract line 26 from line 12:				
	a Excess of revenue over expenses and disbursements	100,933			
	b Net investment income (if negative, enter -0-)		530,396		
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.)		
		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	606,691	707,624	707,624
	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			
	10a Investments—U.S. and state government obligations (attach schedule)			
	b Investments—corporate stock (attach schedule)			
	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)	606,691	707,624	707,624	
Liabilities	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable (attach schedule)			
	22 Other liabilities (describe ▶ _____)			
	23 Total liabilities (add lines 17 through 22)	0	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			
	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	606,691	707,624	
	29 Total net assets or fund balances (see instructions)	606,691	707,624	
	30 Total liabilities and net assets/fund balances (see instructions) .	606,691	707,624	

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	606,691
2 Enter amount from Part I, line 27a	2	100,933
3 Other increases not included in line 2 (itemize) ▶ _____	3	
4 Add lines 1, 2, and 3	4	707,624
5 Decreases not included in line 2 (itemize) ▶ _____	5	
6 Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 29 .	6	707,624

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 12000 SHS CABOT OIL AND GAS CORP		D	2004-03-17	2020-12-29
b 450 SHS MICROSOFT CORP		D	2011-08-17	2020-12-29
c 700 SHS PELOTON INTERACTIVE INC		D	2019-09-26	2020-12-29
d 3000 SHS WEYERHAEUSER		D	2016-02-22	2020-12-29
e 462 SHS BERK HATH B		D	2010-01-21	2020-12-29
(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 193,557		30,516	163,041	
b 101,274		11,289	89,985	
c 104,009		18,766	85,243	
d 101,824		8,160	93,664	
e 103,126		2,139	100,987	

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			163,041
b			89,985
c			85,243
d			93,664
e			100,987

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	532,920
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**SECTION 4940(e) REPEALED ON DECEMBER 20, 2019 - DO NOT COMPLETE**

1 Reserved				
(a) Reserved	(b) Reserved	(c) Reserved	(d) Reserved	
2 Reserved			2	
3 Reserved.			3	
4 Reserved			4	
5 Reserved			5	
6 Reserved			6	
7 Reserved			7	
8 Reserved ,			8	

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	Reserved.	1	7,373
c	All other domestic foundations enter 1.39% 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	7,373
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	7,373
6	Credits/Payments:		
a	2020 estimated tax payments and 2019 overpayment credited to 2020	6a	19,608
b	Exempt foreign organizations—tax withheld at source	6b	0
c	Tax paid with application for extension of time to file (Form 8868)	6c	
d	Backup withholding erroneously withheld	6d	
7	Total credits and payments. Add lines 6a through 6d.	7	19,608
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	12,235
11	Enter the amount of line 10 to be: Credited to 2021 estimated tax 12,235 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. (2) On foundation managers.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? <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 2020 or the taxable year beginning in 2020? 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 ▶ <u>N/A</u>	13	Yes	
14	The books are in care of ▶ <u>JANET OFFENSEND</u> Telephone no. ▶ <u>(917) 797-0305</u>			

Located at ▶ 1 FRANKLIN STREET 4204 BOSTON MA ZIP+4 ▶ 02110

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 2020, 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	Yes 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		
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	
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 2020?	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 2020, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2020? ☐ 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 2020 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 2020.)	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 2020?	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			
Organizations relying on a current notice regarding disaster assistance check here. ▶ ☐	5b		
c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?	☐ 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?			
If "Yes" to 6b, file Form 8870.	6b		No
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			
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
DAVID G OFFENSEND 1 Franklin Street Apt 4204 APT 4204 Boston, MA 02110	TRUSTEE 1.0	0	0	0
JANET M OFFENSEND 1 Franklin Street Apt 4204 APT 4204 Boston, MA 02110	TRUSTEE 1.0	0	0	0

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

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances

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 NONE	
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	0
b	Average of monthly cash balances.	1b	426,796
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	426,796
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	426,796
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	6,402
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	420,394
6	Minimum investment return. Enter 5% of line 5.	6	21,020

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	21,020
2a	Tax on investment income for 2020 from Part VI, line 5.	2a	7,373
b	Income tax for 2020. (This does not include the tax from Part VI.).	2b	
c	Add lines 2a and 2b.	2c	7,373
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	13,647
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	13,647
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	13,647

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	494,458
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	494,458
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	494,458

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 2019	(c) 2019	(d) 2020
1 Distributable amount for 2020 from Part XI, line 7				13,647
2 Undistributed income, if any, as of the end of 2020:				
a Enter amount for 2019 only.			0	
b Total for prior years: 2018, 2017, 2016		0		
3 Excess distributions carryover, if any, to 2020:				
a From 2015.	388,743			
b From 2016.	272,545			
c From 2017.	353,219			
d From 2018.	336,165			
e From 2019.	425,954			
f Total of lines 3a through e.	1,776,626			
4 Qualifying distributions for 2020 from Part XII, line 4: ► \$ <u>494,458</u>				
a Applied to 2019, 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 2020 distributable amount.				13,647
e Remaining amount distributed out of corpus	480,811			
5 Excess distributions carryover applied to 2020. (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	2,257,437			
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 2019. Subtract line 4a from line 2a. Taxable amount—see instructions.			0	
f Undistributed income for 2021. 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 2015 not applied on line 5 or line 7 (see instructions).	388,743			
9 Excess distributions carryover to 2021. Subtract lines 7 and 8 from line 6a.	1,868,694			
10 Analysis of line 9:				
a Excess from 2016.	272,545			
b Excess from 2017.	353,219			
c Excess from 2018.	336,165			
d Excess from 2019.	425,954			
e Excess from 2020.	480,811			

b Check box to indicate whether the organization is a private operating foundation described in section ☐ 4942(j)(3) or ☐ 4942(j)(5)

		Prior 3 years				(e) Total
		(a) 2020	(b) 2019	(c) 2018	(d) 2017	
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					

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).)
DAVID G OFFENSED

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 <i>Paid during the year</i> See Attachment 5 N/A NA, MA 02116	CHARITY		SEE ATTACHED	483,498
Total ► 3a				483,498
b <i>Approved for future payment</i>				
Total ► 3b				

Enter gross amounts unless otherwise indicated.

Enter gross amounts unless otherwise indicated.	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions.)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue:					
a _____					
b _____					
c _____					
d _____					
e _____					
f _____					
g Fees and contracts from government agencies					
2 Membership dues and assessments.					
3 Interest on savings and temporary cash investments			14	101	
4 Dividends and interest from securities.					
5 Net rental income or (loss) from real estate:					
a Debt-financed property.					
b Not debt-financed property.					
6 Net rental income or (loss) from personal property					
7 Other investment income.					
8 Gain or (loss) from sales of assets other than inventory			18	532,920	
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).				533,021	
13 Total. Add line 12, columns (b), (d), and (e). (See worksheet in line 13 instructions to verify calculations.)			13		533,021

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

[illegible]

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

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?			Yes	No
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.				

[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

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.

Sign Here ▶ Signature of officer or trustee	2021-05-15 Date	▶ Title
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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
	Mike Sales		2021-05-15		P01770943
	Firm's name ▶ ERNST & YOUNG US LLP				Firm's EIN ▶
	Firm's address ▶ 99 WOOD AVEUE SOUTH ISELIN, NJ 08830				Phone no. (732) 516-4200

TY 2020 Accounting Fees Schedule**Name:** The Offensend Family Foundation**EIN:** 13-4011882

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ERNST AND YOUNG, LLP	10,500	2,625		10,500

TY 2020 All Other Program Related Investments Schedule

Name: The Offensend Family Foundation
EIN: 13-4011882

Category	Amount
NONE	

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

TY 2020 Depreciation Schedule

Name: The Offensend Family Foundation

EIN: 13-4011882

TY 2020 Other Expenses Schedule**Name:** The Offensend Family Foundation**EIN:** 13-4011882**Other Expenses Schedule**

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
STATE FILING FEES	310			310
BANK FEES	150			150

TY 2020 Other Income Schedule

Name: The Offensend Family Foundation

EIN: 13-4011882

Other Income Schedule

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
TAX REFUND			

TY 2020 Taxes Schedule

Name: The Offensend Family Foundation
EIN: 13-4011882

Taxes Schedule

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FEDERAL TAX	19,000			

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 <u>www.irs.gov/Form990</u> for the latest information.	OMB No. 1545-0047 2020
	Name of the organization The Offensend Family Foundation	Employer identification number 13-4011882

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 33¹/₃% 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 Offensend Family Foundation	Employer identification number 13-4011882
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Part I**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	David and Janet Offensend 1 FRANKLIN STREET 4204 BOSTON, MA 02110	\$ 81,370	☒ Person ☐ Payroll ☒ Noncash (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)

Name of organization The Offensend Family Foundation	Employer identification number 13-4011882
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Part II Noncash Property			
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
<u>1</u>	12000 SHS CABOT OIL & GAS CORP	\$ 193,557	2020-12-22
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
<u>1</u>	450 SHS MICROSOFT CORP	\$ 101,274	2020-12-22
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
<u>1</u>	700 SHS PELOTON INTERACTIVE INC	\$ 104,009	2020-12-22
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
<u>1</u>	3000 SHS WEYERHAEUSER CO	\$ 101,824	2020-12-23
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
<u>1</u>	462 SHS BERKSHIRE HATHAWAY INC CLASS B	\$ 103,126	2020-12-23
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
.		\$	

Name of organization The Offensend Family Foundation	Employer identification number 13-4011882
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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

ATTACHMENT 5

The Offensend Family Foundation
EIN: 13-4011882
YE: 12/31/2020

ORGANIZATION	AMOUNT	FOUNDATION STATUS	PURPOSE
The Wassaic Project 37 Furnace Bank Road Wassaic, NY 12592	\$3,500	PC	To support TWP's work enlivening the region by working with emerging artists and the community.
Boston Lyric Opera P.O. Box 847897 Boston, MA 02284	\$1,000	PC	To support the opera's productions in 2020.
The Trustees of Reservations 200 High Street, Fourth Floor Boston, MA 02110	\$10,000	PC	To support the Art & the Landscape program. Payment 2 of 3
Memorial Sloan Kettering Cancer Center 1275 York Avenue New York, NY 10065	\$2,000	PC	Cycle for Survival to support research against rare cancers
The Wassaic Project 37 Furnace Bank Road Wassaic, NY 12592	\$17,500	PC	to support TwP's work enlivening the region by working with emerging artists and the community.
Brooklyn Children's Museum 145 Brooklyn Avenue Brooklyn, NY 11213	\$15,000	PC	To support BCM's educational programs
Boston Children's Chorus 20 Old Colony Avenue, #2 Boston, MA 02127	\$15,000	PC	to support BCC's music training and social justice work with young people in Boston
Dutchess Land Conservancy P.O. Box 138 Millbrook, NY 12545	\$1,000	PC	To support DLC's land conservancy work
Planned Parenthood Federation of America P.O. Box 97166 Washington, DC 20090	\$1,000	PC	To support PPFA's work on reproductive health
Planned Parenthood of Southern New England P.O. Box 4138 Woburn, MA 01888	\$1,000	PC	To support PPSNE's work providing reproductive health in CT, MA and RI
The Sharon Audubon Center 325 Cornwall Bridge Road Sharon, CT 06069	\$1,000	PC	To support Audubon's work protecting open space in Sharon, CT
Huntington Theatre Company 264 Huntington Avenue Boston, MA 02115	\$1,000	PC	To support Huntington Theatre Company's theater productions and educational work
Handel + Haydn Society 9 Harcourt Street Boston, MA 02116	\$1,000	PC	To support the H+H musical program
The Glimmerglass Festival P.O. Box 191 Cooperstown, NY 13326	\$2,500	PC	To support the opera's productions in 2020.
Prep for Prep 215 Park Avenue South, # 2014 New York, NY 10003	\$1,000	PC	To support Prep for Prep's work preparing low-income high-achieving NYC youngsters for high school and college
Greater Yellowstone Coalition 215 South Wallace Ave Bozeman, MT 59715	\$15,000	PC	To support the Caroline Byrd Legacy Fund enabling GYC to continue conservation work in the GYE.
Brooklyn Botanical Garden 1000 Washington Avenue Brooklyn, NY 11225	\$1,000	PC	To support BBG's education programs
Brooklyn Historical Society 128 Pierrepont Street Brooklyn, NY 11201	\$3,000	PC	To support the library at BHS
Pine Street Inn P.O. Box 55945 Boston, MA 02205	\$2,000	PC	To support Pine Street Inn's programs for homeless Bostonians

ATTACHMENT 5

**The Offensend Family Foundation
EIN: 13-4011882
YE: 12/31/2020**

Fund for the Boston Public Library 700 Boylston Street Boston, MA 02116	\$5,000	PC	To support the Library's programs
Center for Family Representation 40 Worth Street, Suite 605 New York, NY 10013	\$2,500	PC	To support CFR's work with families in crisis
The Corner Food Pantry P.O. Box 705 Lakeville, CT 06039	\$500	PC	To support the Pantry's food distribution network
Visionary Initiatives in Art Fund 83 Newbury Street, 4th Floor Boston, MA 02116	\$2,000	PC	To support the COVID Artists Relief Fund
Berkshire Taconic Community Foundation 800 North Main Street Sheffield, MA 01257	\$5,000	PC	To support the Northeast Dutchess Fund Covid Relief efforts
St. Francis House 39 Boylston Street Boston, MA 02116	\$2,000	PC	To support this day shelter for Boston's homeless
Play for PINK/Millbrook P.O. Box 890 Millbrook, NY 12545	\$1,500	PC	Breast Cancer research
Brooklyn Youth Chorus 179 Pacific Street Brooklyn, NY 11201	\$1,000	PC	Support for youth music group
The Wassaic Project 37 Furnace Bank Road Wassaic, NY 12592	\$2,500	PC	To support TWP's work enlivening the region by working with emerging artists and the community.
Education Matters Africa Foundation P.O. Box 966 North Haven, CT 06437	\$5,000	PC	To support USAP Community School in Harere, Zimbabwe, a school for low-income high-achieving students.
ArtsEmerson 120 Boylston Street Boston, MA 02116	\$25,000	PC	To support the Gaining Ground Fund for the presentation of works of the African diaspora and to support the 2020 season. (2/3)
ArtsEmerson 120 Boylston Street Boston, MA 02116	\$1,000	PC	To support the 2020 season of performing arts
Brooklyn Public Library 10 Grand Army Plaza Brooklyn, NY 11238	\$15,000	PC	To support the Library's operations and programs in 2020
National Park Foundation P.O. Box 17394 Baltimore, MD 21297-1394	\$1,000	PC	To support programs in the national parks
Accion 10 Fawcett Street, Suite 204 Cambridge, MA 02138	\$1,000	PC	To support fintech and microfinance operations in unbanked communities worldwide
Sharon Hospital 50 Hospital Hill Road Sharon, CT 06069	\$5,000	PC	To help meet a challenge grant relating to the hospital's work during the COVID pandemic
Packer Collegiate Institute 170 Joralemon Street Brooklyn, NY 11201	\$1,000	PC	To support financial aid at this independent school in Brooklyn
Boston Medical Center 1 Boston Medical Center Place Boston, MA 02118	\$5,000	PC	To support COVID-19 services during the pandemic
Princeton University Princeton, NJ 08540	\$100,000	PC	To support the academic programs at the University
Northeast Community Center 51 Center Street Millerton, NY 12546	\$2,000	PC	To support NECC's work supporting low-income people and youth in northeastern Dutchess County

ATTACHMENT 5

**The Offensend Family Foundation
EIN: 13-4011882
YE: 12/31/2020**

Norman Rockwell Museum P.O. Box 308 Stockbridge, MA 01262	\$1,000	PC	To support the museum's exhibition of American illustration
Pilobolus P.O. Box 388 Washington Depot, CT 06794	\$5,000	PC	To support Pilobolus' dancers and performance
Environmental Defense Fund P.O. Box 98051 Washington, DC 20077	\$2,000	PC	To support EDF's work on climate change
Shaker Museum Mt. Lebanon P.O. Box 630 New Lebanon, NY 12125	\$1,000	PC	To support the Shaker Museum's work preserving Shaker communities, artifacts and culture.
Community Roots Charter School 51 St. Edwards Place Brooklyn, NY 11205	\$510	PC	To support the re-opening of this charter school in the COVID pandemic
Community Foundation of Jackson Hole 245 East Simpson Avenue Jackson, WY 83001	\$12,000	PC	For Old Bill's community funding event, supporting: Greater Yellowstone Coalition (\$5,000); JH Family Planning (\$1,000); JH Community Counseling Center (\$1,000); Stripping for a Cure (\$500); JH Reuse (\$250); One22 Resource Center (\$2,000); JH Conservation Alliance (\$250); JH Land Trust (\$2,000).
United Neighborhood Houses 45 Broadway, 22nd floor New York, NY 10006	\$6,500	PC	To support UNH's work with 43 settlement houses in low income communities throughout New York City.
ArtsEmerson 120 Boylston Street Boston, MA 02116	\$1,000	PC	To support the Gaining Ground Fund for the presentation of works of the African diaspora
Esplanade Association 575 Boylston Street, Suite 4R Boston, MA 02116	\$1,000	PC	To support upkeep of the Charles River Esplanade
Innisfree Foundation Box 970 Millbrook, NY 12545	\$250	PC	To support upkeep of this important American garden.
Greater Yellowstone Coalition 215 South Wallace Ave Bozeman, MT 59715	\$10,000	PC	To promote online giving at GYC through a match of other gifts
The Wassaic Project 37 Furnace Bank Road Wassaic, NY 12592	\$25,000	PC	To support TWP's work enlivening the region by working with emerging artists and the community.
The Trustees of Reservations 200 High Street, Fourth Floor Boston, MA 02110	\$1,000	PC	To support the deCordova Sculpture Park and the Trustees activities there
The Equus Effect 37 Drumm Road Sharon, CT 06069	\$5,000	PC	To support construction of a new indoor ring to extend the program season.
Ceres 99 Chauncy Street, 6th Floor Boston, MA 02111	\$2,000	PC	To support Ceres work on encouraging climate change through investor actions, and to support their DEI work internally
EarthJustice 50 California St., Ste. 500 San Francisco, CA 94111	\$1,000	PC	To support EJ's environmental litigation work in the Northern Rockies
Brooklyn Bridge Park Conservancy 334 Furman Street, Suite 1 Brooklyn, NY 11201	\$15,000	PC	To support BBPC's programming work in Brooklyn Bridge Park.
Dutchess Land Conservancy P.O. Box 138 Millbrook, NY 12545	\$1,000	PC	To support DLC's land conservancy work

ATTACHMENT 5

**The Offensend Family Foundation
EIN: 13-4011882
YE: 12/31/2020**

Wassaic Fire Company P.O. Box 287 Wassaic, NY 12592	\$1,000	PC	To support the fire companies public safety work in Wassaic
Princeton University, Class of 1978 Princeton, NJ 08540	\$1,200	PC	To support the classes alumni activities and the Class of 1978 Foundation, which supports student community service work
The Chore Service P.O. Box 522 Lakeville, CT 06039	\$750	PC	To support Chore's work with seniors and other in need of assistance in our community
Planned Parenthood League of MA 1055 Commonwealth Avenue Boston, MA 02215-1001	\$2,000	PC	To support PPLM's work support women's health and reproductive rights
Harlem Academy 1330 Fifth Avenue New York, NY 10026	\$2,500	PC	To support this independent school in Harlem serving mostly low-income students
The HOPE Program 1 Smith Street, 4th Floor Brooklyn, NY 11201	\$1,030	PC	To support HOPE's work readiness programming
St. Francis House 39 Boylston Street Boston, MA 02116	\$308	PC	To support St. Francis House's work with homeless people in downtown Boston
Brooklyn Kindergarten Society 25 Chapel Street Brooklyn, NY 11201	\$5,250	PC	To support early childhood education programs in Central Brooklyn
Bedford-Stuyvesant Restoration Corporation 1368 Fulton Street Brooklyn, NY 11216	\$25,000	PC	To support BSRC's community work in central Brooklyn
Boston Children's Chorus 20 Old Colony Avenue, #2 Boston, MA 02127	\$1,050	PC	to support BCC's music training and social justice work with young people in Boston
Colorado Plateau Foundation 113 East Birch Avenue Flagstaff, AZ 86001	\$1,030	PC	To support the Foundation's work with Native American communities in the Southwest.
The Corner Food Pantry P.O. Box 705 Lakeville, CT 06039	\$500	PC	To support the Pantry's food distribution network
HBS Fund Harvard Business School Boston, MA 02241	\$1,000	PC	To support the Business School's education of business students
Fund for the Boston Public Library 700 Boylston Street Boston, MA 02116	\$5,000	PC	To support the Library's operations and programs in 2020
National Multiple Sclerosis Foundation 733 Third Avenue New York, NY 10017	\$1,060	PC	To support research into treatment
Environmental Voter Project 55 Court Street Boston, MA 02108	\$500	PC	To support work registering and expanding environmental voter base
NOW Ensemble 1124 W Prospect Ave. Appleton, WI 54914	\$5,000	PC	To support development of the opera "A Marvelous Order"
Kent Singers Box 774 Kent, CT 06757	\$250	PC	To support their 20-21 season of choral music.
Prospect Foundation c/o Quadrangle Club 33 Prospect Avenue Princeton, NJ 08540	\$5,000	PC	Krishna Singho memorial toward the diversification efforts at Quadrangle Club

ATTACHMENT 5**The Offensend Family Foundation****EIN: 13-4011882****YE: 12/31/2020**

Brooke Charter School 200 American Legion Blvd. Boston, MA 02124	\$2,060	PC	To help support Brooke's families during the challenges of COVID
Harbor Voices PO Box 609 Hamilton MA 01936	\$1,000	PC	To support Harbor Voices work creating art with immigrant communities
Professional Children's School 132 W. 60th Street New York, NY 10023	\$250	PC	To support the educational program of PCS
Friends of the Public Garden 69 Beacon Street Boston, MA 02108	\$1,000	PC	To support the programming in the Public Garden
National Wildlife Federation 303 East 17th Ave, #230 Denver, CO 80203	\$2,000	PC	To support NEF's work with tribal nations on the restoration of bison to native lands
Heights and Hills 81 Willoughby Street, #302 Brooklyn, NY 11201	\$2,500	PC	To support Heights and Hills in their work with seniors in Brownstone Brooklyn
Hancock Shaker Village P.O. Box 927 Pittsfield, MA 01202	\$1,000	PC	To support HSV's programs at this restored Shaker village
MGH Fund for Mass General Hospital 125 Nashua Street, Suite 540 Boston, MA 02114-2792	\$1,000	PC	To support the hospital during the time of COVID