990-PF

Return of Private Foundation

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

OMB No. 1545-0052

Do not enter social security numbers on this form as it may be made public. Department of the Treasury ► Go to www.irs.gov/Form990PF for instructions and the latest information. Open to Public Inspection Internal Revenue Service $\overline{11/01}$, 2018, and ending 10/31, 2019 For calendar year 2018 or tax year beginning A Employer identification number Name of foundation 20-3771709 SOMERLED CHARITABLE FOUNDATION Number and street (or P.O. box number if mail is not delivered to street address) Room/suite B Telephone number (see instructions) 233 MARSHALL STREET (781) 934-1330City or town, state or province, country, and ZIP or foreign postal code C If exemption application is pending, check here DUXBURY, MA 02332 G Check all that apply: Initial return Initial return of a former public charity D 1. Foreign organizations, check here Final return Amended return 2. Foreign organizations meeting the 85% test, check here and attach Address change Name change computation **H** Check type of organization: | X | Section 501(c)(3) exempt private foundation E If private foundation status was terminated Section 4947(a)(1) nonexempt charitable trust Other taxable private foundation under section 507(b)(1)(A), check here J Accounting method: X Cash I Fair market value of all assets at If the foundation is in a 60-month termination end of year (from Part II, col. (c), line Other (specify) under section 507(b)(1)(B), check here 794,946. (Part I, column (d) must be on cash basis.) **16**) **▶** \$ (d) Disbursements Part I Analysis of Revenue and Expenses (The (a) Revenue and total of amounts in columns (b), (c), and (d) (b) Net investment (c) Adjusted net for charitable expenses per purposes may not necessarily equal the amounts in income income books (cash basis only) column (a) (see instructions).) 110,803. Contributions, gifts, grants, etc., received (attach schedule) if the foundation is not required to 2 Check > attach Sch. B 3 Interest on savings and temporary cash investments. 5,229 5,229 Dividends and interest from securities 5a Gross rents Net rental income or (loss) 168,426 Net gain or (loss) from sale of assets not on line 10 Gross sales price for all assets on line 6a 169,750. 168,426. Capital gain net income (from Part IV, line 2) Net short-term capital gain Income modifications 10 a Gross sales less returns and allowances b Less: Cost of goods sold ... 208 208 Gross profit or (loss) (attach schedule) Other income (attach schedule) 11 284,666. 173,655. 208. 12 Total. Add lines 1 through 11 0 13 Compensation of officers, directors, trustees, etc. Expenses 52,174. 52,174. 14 Other employee salaries and wages 2,751. 2,751. 15 Pension plans, employee benefits 1,050. 1,050. 16a Legal fees (attach schedule) ATCH 1 7,671. 7,671. Accounting fees (attach schedule)ATCH 2 Administrative Other professional fees (attach schedule) . . . 17 13,683. 13,283. 18 Taxes (attach schedule) (see instructions)[3]. 19 Depreciation (attach schedule) and depletion. 20 7,148. $\overline{7,148}$. 21 and Travel, conferences, and meetings 22 Printing and publications 176,393. 52. 176,341. Operating 23 Other expenses (attach schedule) ATCH 4 24 Total operating and administrative expenses.

260,870

260,870.

23,796.

JSA For Paperwork Reduction Act Notice, see instructions.

Subtract line 26 from line 12:

25

26

Contributions, gifts, grants paid

Total expenses and disbursements. Add lines 24 and 25

a Excess of revenue over expenses and disbursements

b Net investment income (if negative, enter -0-)

c Adjusted net income (if negative, enter -0-). .

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0.

208.

52

52.

173,603.

260,418.

260,418.

Part II		Ralanco Shoots	Attached schedules and amounts in the description column should be for end-of-year	Beginning of year	End	of year	
	artii	Dalatice Stieets	amounts only. (See instructions.)	(a) Book Value	(b) Book Value	(c) Fair Market Value	
	1	Cash - non-interest-bear	ing	464,056.	315,960	. 315,960	
	2	Savings and temporary	cash investments				
		Accounts receivable					
		Less: allowance for dou	btful accounts				
		Pledges receivable ▶					
			btful accounts ►				
			officers, directors, trustees, and other				
			tach schedule) (see instructions)				
			receivable (attach schedule)				
S			btful accounts	2,000.	2,000	. 2,000	
ssets			e	2,000.	2,000	2,000	
ASS			eferred charges				
•			e government obligations (attach schedule)				
			e stock (attach schedule)				
	11	Investments - land, buildings and equipment: basis Less: accumulated deprecia	·				
		(attach schedule) Investments - mortgage	loans				
			ach schedule) ATCH 5	372,489.	400,461	400,461	
		Land, buildings, and equipment: basis	>				
		Less: accumulated deprecia (attach schedule)	ation >				
		Other assets (describe	► ATCH 6)		76,525	. 76,525	
			completed by all filers - see the				
		instructions. Also, see p	age 1, item I)		794,946		
	17	Accounts payable and a	accrued expenses	802.	1,074	•	
	18	Grants payable					
ies		Deferred revenue					
١			ors, trustees, and other disqualified persons.				
Liabilities		• •	otes payable (attach schedule)				
_	22	Other liabilities (describe	. .				
	23	Total liabilities (add line	es 17 through 22)	802.	1,074		
_			w SFAS 117, check here	002.	1,0,1	•	
ces			through 26, and lines 30 and 31.				
	24	•					
ala	25						
B							
nuc			ot follow SFAS 117, check here				
F		and complete lines 27					
Net Assets or Fund Balan	27	Capital stock, trust prince	cipal, or current funds	11,132.	11,132		
ets	28	Paid-in or capital surplus, or	r land, bldg., and equipment fund				
SS	29	Retained earnings, accumi	ulated income, endowment, or other funds	826,611.	782,740		
ìt ⊿			balances (see instructions)	837,743.	793,872	•	
ž	31	Total liabilities and	net assets/fund balances (see				
				838,545.	794,946	•	
			nges in Net Assets or Fund Bala				
1			palances at beginning of year - Part			027 742	
_			ed on prior year's return)			837,743	
2 Enter amount from Part I, line 27a						23,796	
						861,539	
			n line 2 (itemize) ► ATCH 7			67,667	
5		reases not included in		ling 5) - Port II column /	5), line 30 6	793,872	
0	1018	ii net assets of fund b	alances at end of year (line 4 minus	iiile 5) - Fait II, COlumn (I), iiile 30 6	793,072	

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2-story bi	scribe the kind(s) of property sold (for or rick warehouse; or common stock, 200	• •	(b) How acquired P - Purchase D - Donation		(d) Date sold (mo., day, yr.)
1 a SEE PART IV SCHEI	OULE				
b					
С					
d					
e					
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale		(h) Gain or (los ((e) plus (f) minu	
a b					
C					
d					
e					
Complete only for assets s	howing gain in column (h) and owned	by the foundation on 12/31/69.	(h)	Gains (Col. (h) ga	ain minus
(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any		(k), but not less the Losses (from collaboration)	han -0-) or
а					
b					
C					
d					
e					
2 Capital gain net income	or (not capital loce)	ain, also enter in Part I, line 7 oss), enter -0- in Part I, line 7	2		168,426.
	ain or (loss) as defined in sections art I, line 8, column (c). See ins				
		. ,	3		0.
Part I, line 8	Jnder Section 4940(e) for Reprivate foundations subject to the	. ,		me.)	0.
Part I, line 8	Jnder Section 4940(e) for Receptivate foundations subject to the leave this part blank.	duced Tax on Net Investment I e section 4940(a) tax on net invest outable amount of any year in the b	ncome ment inco		
Part I, line 8	Jnder Section 4940(e) for Record private foundations subject to the leave this part blank. the section 4942 tax on the distributed the section 4940(e).	duced Tax on Net Investment I e section 4940(a) tax on net invest outable amount of any year in the b Do not complete this part.	ncome ment inco	d?	
Part I, line 8	Jnder Section 4940(e) for Recprivate foundations subject to the leave this part blank. the section 4942 tax on the distributed the section 4940(e). It is mount in each column for each year.	duced Tax on Net Investment I e section 4940(a) tax on net invest outable amount of any year in the b o not complete this part. ar; see the instructions before mak	ncome ment inco	d?] Yes ∑ N
Part I, line 8	Jnder Section 4940(e) for Record private foundations subject to the leave this part blank. the section 4942 tax on the distributed the section 4940(e).	duced Tax on Net Investment I e section 4940(a) tax on net invest outable amount of any year in the b Do not complete this part.	ncome ment inco	d? htries. (d) Distribution ra	Yes X N
Part I, line 8	Jnder Section 4940(e) for Record private foundations subject to the leave this part blank. the section 4942 tax on the distributed the section 4940 tax on the distributed by the section 4940(e). It is mount in each column for each year.	duced Tax on Net Investment I e section 4940(a) tax on net invest outable amount of any year in the b o not complete this part. ar; see the instructions before mak (c)	ncome ment inco	d? tries. (d) Distribution ra (col. (b) divided by	Yes X N
Part I, line 8	Jnder Section 4940(e) for Recommon private foundations subject to the leave this part blank. the section 4942 tax on the distribution to the distribution of the column for each year of the column f	duced Tax on Net Investment I e section 4940(a) tax on net invest outable amount of any year in the b to not complete this part. ar; see the instructions before mak (c) Net value of noncharitable-use assets	ncome ment inco	d? (d) Distribution ra (col. (b) divided by	Yes X N
Part I, line 8	Jnder Section 4940(e) for Recommon private foundations subject to the leave this part blank. the section 4942 tax on the distributed that qualify under section 4940(e). It mount in each column for each year (b) Adjusted qualifying distributions 285,480.	duced Tax on Net Investment I e section 4940(a) tax on net invest butable amount of any year in the b co not complete this part. ar; see the instructions before mak (c) Net value of noncharitable-use assets 77,579.	ncome ment inco	d? (d) Distribution ra (col. (b) divided by	Yes X N tio col. (c)) 3.679862
Part I, line 8	Jnder Section 4940(e) for Record private foundations subject to the leave this part blank. The section 4942 tax on the distributed the section 4940(e). It is the section 4940(e) and the section 4940(e) for Record to th	duced Tax on Net Investment I e section 4940(a) tax on net invest butable amount of any year in the b co not complete this part. ar; see the instructions before mak (c) Net value of noncharitable-use assets 77,579.	ncome ment inco	d? (d) Distribution ra (col. (b) divided by	Yes X N tio col. (c)) 3.679862
Part I, line 8	Jnder Section 4940(e) for Record private foundations subject to the leave this part blank. the section 4942 tax on the distributed that qualify under section 4940(e). In a continuous time ach column for each years (b) Adjusted qualifying distributions 285,480. 341,087. 159,756.	duced Tax on Net Investment I e section 4940(a) tax on net invest butable amount of any year in the b co not complete this part. ar; see the instructions before mak (c) Net value of noncharitable-use assets 77,579.	ncome ment inco	d? (d) Distribution ra (col. (b) divided by	Yes X N tio col. (c)) 3.679862
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Part I, line 8	Jnder Section 4940(e) for Receptivate foundations subject to the leave this part blank. the section 4942 tax on the distributed for the qualify under section 4940(e). It mount in each column for each years (b) Adjusted qualifying distributions 285,480. 341,087. 159,756. 223,829. 80,178.	duced Tax on Net Investment I e section 4940(a) tax on net invest butable amount of any year in the b Do not complete this part. ar; see the instructions before mak (c) Net value of noncharitable-use assets 77,579. 46,036.	ncome ment inco ase perio ing any er	d? (d) Distribution ra (col. (b) divided by	Yes X N tio col. (c)) 3.679862 7.409136
Part I, line 8	Jnder Section 4940(e) for Record private foundations subject to the leave this part blank. the section 4942 tax on the distribution 4940(e). It is mount in each column for each years (b) Adjusted qualifying distributions 285,480. 341,087. 159,756. 223,829. 80,178.	duced Tax on Net Investment I e section 4940(a) tax on net invest butable amount of any year in the b Do not complete this part. ar; see the instructions before mak (c) Net value of noncharitable-use assets 77,579. 46,036.	ncome ment inco ase perio ing any er	d? (d) Distribution ra (col. (b) divided by	Yes X N tio col. (c)) 3.679862 7.409136
Part I, line 8	Jnder Section 4940(e) for Recoprivate foundations subject to the leave this part blank. the section 4942 tax on the distribution 4940(e). It is mount in each column for each year (b) Adjusted qualifying distributions 285,480. 341,087. 159,756. 223,829. 80,178. d) o for the 5-year base period - divice foundation has been in existence	duced Tax on Net Investment I e section 4940(a) tax on net invest butable amount of any year in the boo not complete this part. ar; see the instructions before mak (c) Net value of noncharitable-use assets 77,579. 46,036.	ase perio	d?	tio (co): 3.6798627.409136
Part I, line 8	Jnder Section 4940(e) for Recoprivate foundations subject to the leave this part blank. the section 4942 tax on the distribution 4940(e). It is mount in each column for each year (b) Adjusted qualifying distributions 285,480. 341,087. 159,756. 223,829. 80,178. d) o for the 5-year base period - divice foundation has been in existence	duced Tax on Net Investment I e section 4940(a) tax on net invest butable amount of any year in the b Do not complete this part. ar; see the instructions before mak (c) Net value of noncharitable-use assets 77,579. 46,036. de the total on line 2 by 5.0, or by if less than 5 years from Part X, line 5	ase perio	d? (d) Distribution ra (col. (b) divided by	Yes X N tio col. (c)) 3.679862 7.409136 1.088998 2.217800
Part V Qualification U For optional use by domestic f section 4940(d)(2) applies, Vas the foundation liable for f "Yes," the foundation doesn 1 Enter the appropriate ar (a) Base period years Calendar year (or tax year beginning in) 2017 2016 2015 2014 2013 2 Total of line 1, column (or 3 Average distribution rati the number of years the 4 Enter the net value of no	Jnder Section 4940(e) for Recording private foundations subject to the leave this part blank. the section 4942 tax on the distributed and the section 4940(e). It is mount in each column for each year (b) Adjusted qualifying distributions 285,480. 341,087. 159,756. 223,829. 80,178. d) o for the 5-year base period - divice foundation has been in existence on charitable-use assets for 2018 for the section of the sect	duced Tax on Net Investment I e section 4940(a) tax on net invest butable amount of any year in the b Do not complete this part. ar; see the instructions before mak (c) Net value of noncharitable-use assets 77,579. 46,036. de the total on line 2 by 5.0, or by if less than 5 years from Part X, line 5	ncome ment inco ase perio ing any er	d? (d) Distribution ra (col. (b) divided by	Yes X N tio col. (c)) 3.679862 7.409136 1.088998 2.217800 239,170.
Part I, line 8	Jnder Section 4940(e) for Recording private foundations subject to the leave this part blank. the section 4942 tax on the distributed and the section 4940(e). It is mount in each column for each year (b) Adjusted qualifying distributions 285,480. 341,087. 159,756. 223,829. 80,178. d) of or the 5-year base period - divice foundation has been in existence concharitable-use assets for 2018 for the concha	duced Tax on Net Investment I e section 4940(a) tax on net invest butable amount of any year in the boo not complete this part. ar; see the instructions before mak (c) Net value of noncharitable-use assets 77,579. 46,036. de the total on line 2 by 5.0, or by if less than 5 years from Part X, line 5	ase perio	d?	tio (col. (c)) 3.679862 7.409136 1.088998 2.217800 239,170. 530,431.

Part VI instructions.

-orm	990-PF (2018) SOMERLED CHARTTABLE FOUNDATION 20-377.			age 4
Par	t VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see i	nstru	ction	s)
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		1,7	736.
	here \blacktriangleright X and enter 1% of Part I, line 27b			
С	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of $\mathcal J$			
	Part I, line 12, col. (b).			
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-)			10.6
3	Add lines 1 and 2		⊥,∵	736.
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-)			0.
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-		Ι, Ί	736.
6	Credits/Payments:			
а	2018 estimated tax payments and 2017 overpayment credited to 2018 6a 6,200.			
b	Exempt foreign organizations - tax withheld at source			
С	Tax paid with application for extension of time to file (Form 8868) 6c			
d	Backup withholding erroneously withheld			200
7	Total credits and payments. Add lines 6a through 6d		6,2	200.
8	Enter any penalty for underpayment of estimated tax. Check here if Form 2220 is attached			1.
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed			160
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid		4,4	163.
11	Enter the amount of line 10 to be: Credited to 2019 estimated tax ▶ 4 , 463 . Refunded ▶ 11			
	t VII-A Statements Regarding Activities			I
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it		Yes	No
	participate or intervene in any political campaign?	1a		X
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the			37
	instructions for the definition	1b		X
	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.			3.7
С	Did the foundation file Form 1120-POL for this year?	1c		X
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. ►\$			
е	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed			
	on foundation managers. \$			v
2	Has the foundation engaged in any activities that have not previously been reported to the IRS?	2		X
	If "Yes," attach a detailed description of the activities.			
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles			Х
	of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes	3		X
	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a		21
	If "Yes," has it filed a tax return on Form 990-T for this year?	4b		Х
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year?	5		25
•	If "Yes," attach the statement required by <i>General Instruction T</i> .			
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either:			
	By language in the governing instrument, or By language in t			
	By state legislation that effectively amends the governing instrument so that no mandatory directions that	6	Х	
-	conflict with the state law remain in the governing instrument?	7	X	
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			
ва	Enter the states to which the foundation reports or with which it is registered. See instructions. ► MA,NY,			
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	X	
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 2018 or the tax year beginning in 2018? See the instructions for Part XIV. If "Yes,"			
	complete Part XIV	9	X	
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10	Х	

11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the maning of section 152(b)(13)? If "96," attach schedule. See instructions	Par	t VII-A Statements Regarding Activities (continued)			
meaning of section 512(b)(13)? If Yes, "attach schedule. See instructions				Yes	No
12 Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified preson had adviseory privileges? If "Yes," attach statement. See instructions 13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? 14 The books are incared ■ WRINDY T. MACDONALD Telephone no. ▶ 781-934-1330 Located at ₱-233 MARSHALL STREET DUXBURY, MA Located at ₱-233 MARSHALL STREET DUXBURY, MA Located at ₱-234 MARSHALL STREET DUXBURY, MA Section 4407(a)(1) nonexampt charitable trust filing Form 900-PF in lieu of Form 1041 - check here and enter the amount of tax-exempt interest received or accrued during the year. 15 Section 4407(a)(1) nonexampt charitable trust filing Form 900-PF in lieu of Form 1041 - check here and enter the amount of tax-exempt interest received or accrued during the year. 16 At any time during calendar year 2018, did the foundation have an interest in or a signature or other authority yes Nover a bank, securities, or other financial account in a foreign country? 17 Section 4720 file any item is checked in the "Yes" column, unless an exception applies. 18 Did the foundation cellete directly or indicately: 19 Engage in the sale or exchange, or leasing of property with a disqualified person? Yes X Nover According to the foreign and property with a disqualified person? Yes X Nover According to the foreign and property with a disqualified person? Yes X Nover According to the property to a government official? (Exception, Check No.' If the foundation spread to make a grant to or to employ the official for a period after termination of government service, it termination of government service, it termination of government service, it termination of assets to a disqualified person of make any of either available to termination of government service, or make any of either available to termination of government service, or any or make any of either available to termination of government service, or any or the act	11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the			
12 Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges (1º Yes.) attach statement. See instructions			11		Х
person had advisory privileges? If "Yes," attach statement. See instructions 10 bit the foundation control, with the public inspection requirements for its annual returns and exemption applications? 14 The books are in care of a WRIN SOMERLEDARTS.ORG 14 The books are in care of a WRINDY L. MACDONALD 15 Section 4947(a)(1) nonexempt charitable trusts filing Form 960-PF in lieu of Form 1041 - check here	12				
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? 13			12		Х
Website address	13			Х	
14. The books are in care of ▶ WENDY I. MACDONALD Located at ▶ 2.33 MARSHALL STREET DUXBURY, MA 2/19-4 ▶ 0.233.2 15. Section 4947(a/11) nonexempt charitable trusts filing Form 980-PF in lieu of Form 1041 - check here	. •	LIVIN COMEDIED ADEC ODC			
Located at №3.3 MARCHALL STREET DUXBURY, MA ZIP4 № 02332 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 16 At any time during calendar year 2018, did the foundation have an interest in or a signature or other authority over a bank, securities, or their financial account in a foreign country. See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country № Part VIIS Statements Regarding Activities for Which Form 4720 May Be Required File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. 1a During the year, did the foundation (either directly or indirectly): (1) Engage in the sale or exchange, or leasing of property with a disqualified person? (2) Borrow money from, lean money to, or otherwise extend credit to (or accept it from) a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? (5) Transfer any income or assets to a disqualified person for make any of either available for the benefit or use of a disqualified person? (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 (Exception. Check "No" if the foundation agreed to make a grant to or to employ (Exception. Check "No" if the foundation greed to make a grant to or to employ (Exception. Check "No" if the foundation greed to make a grant or or to employ (Exception. Check "No" if the foundation greed to make a grant or or to employ (Exception. Check "No" if the foundation greed to make a grant or or to employ (Exception. Check "No" if the foundation relying on a current notice regarding dissater assistance? See instructions. 2 Taxes on failure to distribute income (section 442(2) (does not apply	14	The books are in care of ▶ WENDY L. MACDONALD Telephone no. ▶ 781-934	-133)	
15 Section 4947(a)(1) nonexempt charitable trusts filling Form 990-PF in lieu of Form 1041 - check here	•	Located at ▶233 MARSHALL STREET DUXBURY, MA 7/P+4 ▶ 02332			
and enter the amount of tax-exempt interest received or accrued during the year	15			•	
16 At any time during calendar year 2018, did the foundation have an interest in or a signature or other authority See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country ▶ Part VII-3 Statements Regarding Activities for Which Form 4720 May Be Required File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. 1a During the year, did the foundation (either directly or indirectly): (1) Engage in the sale or exchange, or leasing of property with a disqualified person? (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? (5) Transfer any income or assets to a disqualified person? (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.) b) If any answer is "Yes" to 141/-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 33.4941(d)/3 or in a current notice regarding disaster assistance, See instructions. c) Organizations relying on a current notice regarding disaster assistance, See instructions. c) Did the foundation defined in section 4942(a)(3) or 4942(i)(5): a At the end of tax year 2018, did the toundation have any undistributed income? (If applying section 4942(a)(2) to all years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) to all years listed on incorted valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed on incorted valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed in 2a for which th			• • •		
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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 2018.) 4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its	h				
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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 2018.) 4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its					
foundation had excess business holdings in 2018.) 4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its					
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 4a Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its			3h		
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its	42				Х
· · · · · · · · · · · · · · · · · · ·					
	J	charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2018?	4b		Х

Page 6

Га	t VII-B	Statements Regarding Activities	TOT WHICH FORM	4720 May be Key	un eu (conn	nueu)			
5a	During the	e year, did the foundation pay or incur any amo	ount to:					Yes	No
	(1) Carry	on propaganda, or otherwise attempt to influe	ence legislation (section	on 4945(e))?	Yes	X No			
	(2) Influe	nce the outcome of any specific public ele	ection (see section	4955); or to carry or	1,				
	direct	y or indirectly, any voter registration drive?			Yes	X No			
	(3) Provid	le a grant to an individual for travel, study, or o	ther similar purposes	?	Yes	X No			
	(4) Provid	le a grant to an organization other than a	charitable, etc., org	ganization described i	n				
	section	n 4945(d)(4)(A)? See instructions			Yes	X No			
		le for any purpose other than religious, cl							
	purpo	ses, or for the prevention of cruelty to children	or animals?		Yes	X No			
b		swer is "Yes" to 5a(1)-(5), did any of the				cribed in			
	Regulation	ns section 53.4945 or in a current notice regar	ding disaster assistan	ce? See instructions.			5b		
	Organizat	ions relying on a current notice regarding disa	ster assistance, check	here		▶□			
С	If the an	swer is "Yes" to question 5a(4), does the	foundation claim e	exemption from the t	ax				
	because i	t maintained expenditure responsibility for the	grant?		Yes	No			
	If "Yes," a	ttach the statement required by Regulations s	ection 53.4945-5(d).						
6a	Did the f	oundation, during the year, receive any fur	nds, directly or indir	ectly, to pay premiur	ns				
	on a perso	onal benefit contract?			Yes	X No			
b	Did the fo	undation, during the year, pay premiums, dire	ectly or indirectly, on a	a personal benefit contra	act?		6b		X
	If "Yes" to	6b, file Form 8870.							
7a	At any tim	e during the tax year, was the foundation a p	arty to a prohibited ta	x shelter transaction?	Yes	X No			
b	If "Yes," o	lid the foundation receive any proceeds or ha	ve any net income att	ributable to the transacti	on?		7b		
8		ndation subject to the section 4960 tax on page	` '						
		tion or excess parachute payment(s) during the	year?		. Yes	No_			
Pai	t VIII	Information About Officers, Directo and Contractors	rs, Trustees, Fou	undation Managers	s, Highly Pa	id Emplo	yees,		
1	Lict all of	ficers, directors, trustees, and foundat				•			
	LIST all OI	nicers, directors, trustees, and roundat	ion managers and	their compensation	. See instruct	ions.			
	LIST All OI		(b) Title, and average	(c) Compensation	(d) Contribution	ons to	e) Expens	se accou	ınt,
	LIST All OI	(a) Name and address				ons to fit plans (e) Expens other all	se accou owance	ınt, s
			(b) Title, and average hours per week	(c) Compensation (If not paid, enter -0-)	(d) Contribution employee benef	ons to fit plans pensation	e) Expens other all	se accou owance	s
ATCI			(b) Title, and average hours per week	(c) Compensation (If not paid,	(d) Contribution employee benef	ons to fit plans (e) Expens other all	se accou owance	unt, s
			(b) Title, and average hours per week	(c) Compensation (If not paid, enter -0-)	(d) Contribution employee benef	ons to fit plans pensation	e) Expens other all	se accou owance	s
			(b) Title, and average hours per week	(c) Compensation (If not paid, enter -0-)	(d) Contribution employee benef	ons to fit plans pensation	e) Expens other all	se accou	s
			(b) Title, and average hours per week	(c) Compensation (If not paid, enter -0-)	(d) Contribution employee benef	ons to fit plans pensation	e) Expens other all	se accol owance	s
			(b) Title, and average hours per week	(c) Compensation (If not paid, enter -0-)	(d) Contribution employee benef	ons to fit plans pensation	e) Expens other all	se accou	s
			(b) Title, and average hours per week	(c) Compensation (If not paid, enter -0-)	(d) Contribution employee benef	ons to fit plans pensation	e) Expens other all	se accol	s
	H 8	(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contribution employee beneficiand deferred com	ons to (it plans pensation 0.	other all	owance	o.
ATCI	H 8		(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contribution employee beneficiand deferred com	ons to fit plans pensation 0.	other all	owance	o.
2	Compens	(a) Name and address ation of five highest-paid employees	(b) Title, and average hours per week devoted to position (other than those)	(c) Compensation (lf not paid, enter -0-) 0 .	(d) Contribution employee beneficiand deferred com	ons to if the plans on the pensation of the plans on the pensation of the pensation on the pensation of the	other all	one,	o.
2	Compens	(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contribution and deferred com 1 - see ir (d) Contribution employee in the complex of the c	ns to fit plans pensation 0. nstructions ons to enefit ferred (ferred	other all	one, one, one	O.
2	Compens	(a) Name and address ation of five highest-paid employees	(b) Title, and average hours per week devoted to position (other than those b) Title, and average hours per week	(c) Compensation (lf not paid, enter -0-) 0 .	(d) Contribution employee beneficial and deferred com	ns to fit plans pensation 0. nstructions ons to enefit ferred (ferred	s). If no	one, one, one	O.
2 (a)	Compens	(a) Name and address ation of five highest-paid employees	(b) Title, and average hours per week devoted to position (other than those b) Title, and average hours per week	(c) Compensation (lf not paid, enter -0-) 0 .	(d) Contribution and deferred com 1 - see ir (d) Contribution employee in the complex of the c	ns to fit plans pensation 0. nstructions ons to enefit ferred (ferred	s). If no	one, one, one	O.
2 (a)	Compens "NONE."	(a) Name and address ation of five highest-paid employees	(b) Title, and average hours per week devoted to position (other than those b) Title, and average hours per week	(c) Compensation (lf not paid, enter -0-) 0 .	(d) Contribution and deferred com 1 - see ir (d) Contribution employee in the complex of the c	ns to fit plans pensation 0. nstructions ons to enefit ferred (ferred	s). If no	one, one, one	O.
2 (a)	Compens "NONE."	(a) Name and address ation of five highest-paid employees	(b) Title, and average hours per week devoted to position (other than those b) Title, and average hours per week	(c) Compensation (lf not paid, enter -0-) 0 .	(d) Contribution and deferred com 1 - see ir (d) Contribution employee in the complex of the c	ns to fit plans pensation 0. nstructions ons to enefit ferred (ferred	s). If no	one, one, one	O.
2 (a)	Compens "NONE."	(a) Name and address ation of five highest-paid employees	(b) Title, and average hours per week devoted to position (other than those b) Title, and average hours per week	(c) Compensation (lf not paid, enter -0-) 0 .	(d) Contribution and deferred com 1 - see ir (d) Contribution employee in the complex of the c	ns to fit plans pensation 0. nstructions ons to enefit ferred (ferred	s). If no	one, one, one	O.
2 (a)	Compens "NONE."	(a) Name and address ation of five highest-paid employees	(b) Title, and average hours per week devoted to position (other than those b) Title, and average hours per week	(c) Compensation (lf not paid, enter -0-) 0 .	(d) Contribution and deferred com 1 - see ir (d) Contribution employee in the complex of the c	ns to fit plans pensation 0. nstructions ons to enefit ferred (ferred	s). If no	one, one, one	O.
2 (a)	Compens "NONE."	(a) Name and address ation of five highest-paid employees	(b) Title, and average hours per week devoted to position (other than those b) Title, and average hours per week	(c) Compensation (lf not paid, enter -0-) 0 .	(d) Contribution and deferred com 1 - see ir (d) Contribution employee in the complex of the c	ns to fit plans pensation 0. nstructions ons to enefit ferred (ferred	s). If no	one, one, one	O.
2 (a)	Compens "NONE."	(a) Name and address ation of five highest-paid employees	(b) Title, and average hours per week devoted to position (other than those b) Title, and average hours per week	(c) Compensation (lf not paid, enter -0-) 0 .	(d) Contribution and deferred com 1 - see ir (d) Contribution employee in the complex of the c	ns to fit plans pensation 0. nstructions ons to enefit ferred (ferred	s). If no	one, one, one	O.
2 (a)	Compens "NONE."	(a) Name and address ation of five highest-paid employees	(b) Title, and average hours per week devoted to position (other than those b) Title, and average hours per week	(c) Compensation (lf not paid, enter -0-) 0 .	(d) Contribution and deferred com 1 - see ir (d) Contribution employee in the complex of the c	ns to fit plans pensation 0. nstructions ons to enefit ferred (ferred	s). If no	one, one, one	O.
2 (a)	Compens "NONE."	(a) Name and address ation of five highest-paid employees	(b) Title, and average hours per week devoted to position (other than those b) Title, and average hours per week	(c) Compensation (lf not paid, enter -0-) 0 .	(d) Contribution and deferred com 1 - see ir (d) Contribution employee in the complex of the c	ns to fit plans pensation 0. nstructions ons to enefit ferred (ferred	s). If no	one, one, one	O.

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Part VIII	Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Emplo and Contractors (continued)	yees,
3 Five	highest-paid independent contractors for professional services. See instructions. If none, enter "NONI	E. "
	(a) Name and address of each person paid more than \$50,000 (b) Type of service	(c) Compensation
NONE		
	per of others receiving over \$50,000 for professional services	
Part IX-A	<u> </u>	T
	undation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of one and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1 SOME	RLED IS CONTINUING DEVELOPMENT OF A MUSICAL BASED ON THE	
LLYO	D ALEXANDER YOUNG ADULT NOVEL "THE REMARKABLE JOURNEY OF	
PRIN	CE JEN". BOOK & LYRICS BY WADE & MUSIC BY DAVID GREEN	141,941.
2 SOME	RLED COMMISSIONED AND IS DEVELOPING A MUSICAL CALLED	
	MUSEUM OF BROKEN RELATIONSHIPS". BOOK & LYRICS BY	
	D H. BELL, MUSIC & LYRICS BY DANIEL GREEN	27,764.
	RLED'S "INCUBATOR" PROGRAM HELD A TABLE READING AS	
	OWUP TO LAST YEAR'S 29-HOUR READING OF SENZA LUCE, A	
MUSI	CAL BY NEIL BARTRAM (MUSIC & LYRICS)& BRIAN HILL (BOOK)	3,152.
4		
- · · · · ·		
Part IX-B	, , ,	A
	he two largest program-related investments made by the foundation during the tax year on lines 1 and 2.	Amount
1 NONE	·	
-		
2		
All other p	rogram-related investments. See instructions.	
3		
NONE	1	
Total. Add	lines 1 through 3	

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Par	Minimum Investment Return (All domestic foundations must complete this part. Fore see instructions.)	ign foi	undations,
1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
а	Average monthly fair market value of securities	1a	369,523.
	Average of monthly cash balances	1b	449,647.
	Fair market value of all other assets (see instructions).	1c	
d		1d	819,170.
е	Reduction claimed for blockage or other factors reported on lines 1a and		
	1c (attach detailed explanation)		
2	Acquisition indebtedness applicable to line 1 assets	2	
3	Subtract line 2 from line 1d	3	819,170.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see		
	instructions)ATCH 9	4	580,000.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	239,170.
6	Minimum investment return. Enter 5% of line 5	6	11,959.
Par	Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating four and certain foreign organizations, check here ► X and do not complete this part.)	ndation	s
1	Minimum investment return from Part X, line 6	1	
2 a	Tax on investment income for 2018 from Part VI, line 5		
	Income tax for 2018. (This does not include the tax from Part VI.) 2b		
	Add lines 2a and 2b	2c	
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4	5	
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	
Par	t XII Qualifying Distributions (see instructions)		
1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
а	Expenses, contributions, gifts, etc total from Part I, column (d), line 26	1a	260,418.
b	Program-related investments - total from Part IX-B	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc.,		
	purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
а	Suitability test (prior IRS approval required)	3a	
	Cash distribution test (attach the required schedule)	3b	580,000.
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8; and Part XIII, line 4	4	840,418.
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	1,736.
6	Adjusted qualifying distributions. Subtract line 5 from line 4		838,682.
	Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when ca		ng whether the foundation

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qualifies for the section 4940(e) reduction of tax in those years.

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Pa	rt XIII Undistributed Income (see instr	uctions)			
1	Distributable amount for 2018 from Part XI,	(a) Corpus	(b) Years prior to 2017	(c) 2017	(d) 2018
•	•	·	•		0.
_	Undistributed income, if any, as of the end of 2018:				
a	Enter amount for 2017 only				
	Excess distributions carryover, if any, to 2018:				
	From 2013				
	From 2014				
	From 2015				
	11101112010 111111				
	From 2017	343,605.			
	Total of lines 3a through e	343,003.			
4	Qualifying distributions for 2018 from Part XII, line 4: > \$ 840,418.				
	Applied to 2017, but not more than line 2a				
b	Applied to undistributed income of prior years (Election required - see instructions)				
c	Treated as distributions out of corpus (Election required - see instructions)				
d	Applied to 2018 distributable amount				
	Remaining amount distributed out of corpus	840,418.			
5	Excess distributions carryover applied to 2018				
	(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:	1,184,023.			
	Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	1/101/0201			
b	Prior years' undistributed income. Subtract				
_	line 4b from line 2b. Enter the amount of prior years' undistributed				
٠	income for which a notice of deficiency has				
	been issued, or on which the section 4942(a)				
	tax has been previously assessed				
C	Subtract line 6c from line 6b. Taxable				
е	amount - see instructions				
	4a from line 2a. Taxable amount - see				
	instructions				
f	Undistributed income for 2018. Subtract lines				
	4d and 5 from line 1. This amount must be				
	distributed in 2019				
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)				
ð	Excess distributions carryover from 2013 not applied on line 5 or line 7 (see instructions)				
n					
9	Excess distributions carryover to 2019. Subtract lines 7 and 8 from line 6a	1,184,023.			
10	Analysis of line 9:				
	Excess from 2014				
	Excess from 2015				
	Excess from 2016 343,605.				
	Excess from 2017 291,252.				
	Excess from 2018 840,418.				

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

Pa	rt XIV Private Ope	rating Foundations	(see instructions ar	nd Part VII-A, question	on 9)	
1 a	If the foundation has refoundation, and the ruling	•			·	
b	Check box to indicate w	•	· ·)(3) or 4942(j)(5)
2 a	Enter the lesser of the ad-	Tax year		Prior 3 years		(-) T-(-)
	justed net income from Part I or the minimum investment	(a) 2018	(b) 2017	(c) 2016	(d) 2015	(e) Total
	return from Part X for each year listed	208.	228.		403.	839
b	85% of line 2a	177.	194.		343.	714
С	Qualifying distributions from Part XII, line 4 for each year listed	840,418.	291,252.	343,605.	160,461.	1,635,736
d	Amounts included in line 2c not used directly for active conduct of exempt activities					
е 3	Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c Complete 3a, b, or c for the	840,418.	291,252.	343,605.	160,461.	1,635,736
а	alternative test relied upon: "Assets" alternative test - enter: (1) Value of all assets	794,946.	838,545.	140,732.	235,215.	2,009,438
	(2) Value of assets qualifying under section 4942(j)(3)(B)(i)	658,525.	832,000.	140,732.	160,675.	1,791,932
b	"Endowment" alternative test-					

enter 2/3 of minimum investment return shown in Part X. 7,973. 2,586. 1,535. 269 12,362. 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 ...

Supplementary Information (Complete this part only if the foundation had \$5,000 or more in assets at Part XV any time during the year - see instructions.)

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).)

WENDY L. MACDONALD AND ROBERT L. MACDONALD

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.

NONE

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

Check here $\triangleright X$ 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:

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Part XV Supplementary Information (continued)

Supplementary information (continuea)			
3 Grants and Contributions Paid Dur	ing the Year or App	roved for	Future Payment	
Recipient	If recipient is an individual, show any relationship to	Foundation	Purpose of grant or contribution	Amount
3 Grants and Contributions Paid Dur Recipient Name and address (home or business)	any foundation manager or substantial contributor	recipient	contribution	Amount
a Paid during the year				
Total			▶ 3a	
b Approved for future payment				
Total				

JSA 8E1491 1.000

Form 990-PF (2018) Page **12 Analysis of Income-Producing Activities**

Enter gross amounts unless otherwise indicated.		Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt	
1 Progran	n service revenue:	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	function income (See instructions.)	
-						,	
f							
	and contracts from government agencies						
•	rship dues and assessments						
	on savings and temporary cash investments						
	ds and interest from securities			14	5,229.		
	tal income or (loss) from real estate:						
	t-financed property						
	debt-financed property						
	al income or (loss) from personal property						
	nvestment income						
	(loss) from sales of assets other than inventory			18	168,426.		
	· · ·						
	ome or (loss) from special events orofit or (loss) from sales of inventory					208.	
	evenue: a						
e							
	I. Add columns (b), (d), and (e)				173,655.	208.	
	dd line 12, columns (b), (d), and (e)					173,863.	
	heet in line 13 instructions to verify calcu					·	
Part XVI	-B Relationship of Activities	s to the A	ccomplishment of Ex	xempt Pur	poses		
Line No.	Explain below how each activity					uted importantly to the	
	accomplishment of the foundation	-	•	•	*		
•	accomplishment of the foundation	ni a exemp	t purposes (other than i	by providing	j runus for such purpose	s). (See instructions.)	
10	SALES OF VARIOUS CD'S	FOR CUI	TURAL ENRICHMEN	T (\$208)			

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Part XVI-A

Information Regarding Transfers to and Transactions and Relationships With Noncharitable Part XVII **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? a Transfers from the reporting foundation to a noncharitable exempt organization of:									Yes	No		
а		ash	-							4 - (4)		X	
		ther assets								1a(1) 1a(2)		X	
h	` '	transactions:								14(2)			
b		ales of assets to a no	ncharitable exe	empt organiza	ation					1b(1)		Х	
		irchases of assets fro										X	
		ental of facilities, equi			-							X	
		eimbursement arrang										X	
	` '	oans or loan guarantee								-		X	
					p or fundraising solicitations								
С		ng of facilities, equipm										X	
d	If the	answer to any of th	e above is "Ye	es," comple	te the following	schedule.	Column (b) s	hould a	always show	the f	air m	arket	
		of the goods, other											
		in any transaction or	r sharing arran	gement, sho	ow in column (d								
(a) L	ine no.	(b) Amount involved	(c) Name of	noncharitable e	exempt organization		scription of transf	ers, transa	actions, and sha	ring arra	ngeme	nts	
		N/A				N/A							
	descr	foundation directly ibed in section 501(c)	(other than se					_		Ye	es X		
b	If "Yes	s," complete the follo		1									
		(a) Name of organization	n	(b)	Type of organization		(c) Descri	ption of relations	ship			
		er penalties of perjury, I decla						the best	of my knowledg	ge and b	elief, it	is true,	
Sia.		ect, and complete. Declaration of	f preparer (other than	taxpayer) is based	on all information of wh	ich preparer has	any knowledge.					_	
Sigi		WENDY L. MACDO	NALD	09	/11/2020	TRUS	TEE		May the IRS	discuss eparer s			
Her	e Sig	nature of officer or trustee	V0 1	Date		Title			See instruction		Yes	No	
		Wendy	11100001	March									
Paid	1	Print/Type preparer's na			s signature		Date			PTIN			
		KAREN A KOWGI			A KOWGIOS	CPA	09/11/2	2020 se		P0146		2	
	parer	1 IIIII O II GIIII O	THUMSMITH+					Firm's El	N ▶ 22-20	02709	92		
Jse	Only		11 BROADWA		JOOR		.010		010 -	-1 0-	0.0		
		l NE	W YORK, N	1Y		10	018	Phone no					
									Fo	m 990	,-PF	(2018)	

FORM 990-PF - PART IV
CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME

		NS AND LO				P	_	_
Kind of F	Property		Desc	ription		or D	Date acquired	Date sold
Gross sale	Depreciation	Cost or	FMV	Adj. basis	Excess of	۲	Gain	
price less expenses of sale	allowed/	other	as of 12/31/69	as of 12/31/69	FMV over		or (loss)	
expenses of sale	allowable	basis	12/31/69	12/31/69	adj basis	\forall	(loss)	
		000 0110 31	י מרעי מחענים	II DO I III D			04/16/0010	777 D
		900 SHS ALIE				D	04/16/2019	VAR
		PROPERTY TYPE	PE: SECURIT	IES				
169,750.		1,324.					168,426.	
OTAL GAIN(L)SS)						168,426.	
	,						=======================================	
		I				1		

ATTACHMENT	1

FORM 990PF, PART I - LEGAL FEES

SOMERLED CHARITABLE FOUNDATION

DESCRIPTION		REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT _INCOME_	ADJUSTED NET _INCOME_	CHARITABLE PURPOSES
PETER BREGER, ESQ.		1,050.			1,050.
	TOTALS	1,050.			1,050.

2018 FORM 990-PF SOMERLED CHARITABLE FOUNDATION 20-3771709

ATTACHMENT 2

FORM	990PF,	PART	Ι	_	ACCOUNTING	FEES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME	ADJUSTED NET _INCOME_	CHARITABLE PURPOSES
WITHUMSMITH+BROWN, P.C.	7,671.			7,671.
TOTALS	7,671.			7,671.

ATTACHMENT 3

FORM 990)PF',	PART		_	TAXES
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DESCRIPTION		REVENUE AND EXPENSES PER BOOKS	CHARITABLE PURPOSES
FEDERAL INCOME TAX PAYROLL TAXES		9,000. 4,683.	9,000. 4,283.
	TOTALS	13,683.	13,283.

SOMERLED CHARITABLE FOUNDATION 2018 FORM 990-PF 20-3771709

ATTACHMENT 4

FORM 990PF, PART I - OTHER EXPENSES

	REVENUE		
	AND	NET	
	EXPENSES	INVESTMENT	CHARITABLE
DESCRIPTION	PER BOOKS	INCOME	PURPOSES
PRODUCTION EXPENSES	75,997.		75,997.
INVESTMENT FEES	52.	52.	
INSURANCE	9,524.		9,524.
BANK FEES	16.		16.
SUPPLIES	25.		25.
OTHER	353.		353.
DUES AND SUBSCRIPTIONS	12,114.		12,114.
CREATIVES FEES AND PER DIEMS	78,312.		78,312.
TOTALS	176,393.	<u> </u>	176,341.

SOMERLED CHARITABLE FOUNDATION 2018 FORM 990-PF 20-3771709

ATTACHMENT 5	TACHMENT	5
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FORM 990PF, PART II - OTHER INVESTMENTS

	ENDING	ENDING
DESCRIPTION	BOOK VALUE	<u>FMV</u>
ALIBABA GROUP HLDG LTD	400,461.	400,461.
TOTALS	400,461.	400,461.

SOMERLED CHARITABLE FOUNDATION 2018 FORM 990-PF 20-3771709

ATTACHMENT	6	
ATTACIMIENT	U	

FORM 990PF, PART II - OTHER ASSETS	FORM	990PF,	PART	ΙI	OTHER	ASSETS
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DESCRIPTION	ENDING BOOK VALUE	ENDING <u>FMV</u>
REFUNDABLE BOND	76,525.	76,525.
TOTALS	76,525.	76,525.

ATTACHMENT 7

FORM 990PF, PART III - OTHER DECREASES IN NET WORTH OR FUND BALANCES

DESCRIPTION AMOUNT

67,667. FAIR MARKET VALUE VS BOOK VALUE - STOCKS

> 67,667. TOTAL

FORM 990PF, PART VIII - LIST OF OFFICERS, DIRECTORS, AND TRUSTEES

NAME AND ADDRESS	TITLE AND AVERAGE HOURS PER WEEK DEVOTED TO POSITION	COMPENSATION	CONTRIBUTIONS TO EMPLOYEE BENEFIT PLANS	EXPENSE ACCT AND OTHER ALLOWANCES
WENDY L. MACDONALD 233 MARSHALL ST DUXBURY, MA 02332	TRUSTEE 40.00	0.	0.	0.
ROBERT L. MACDONALD 233 MARSHALL ST DUXBURY, MA 02332	TRUSTEE 1.00	0.	0.	0.
SARAH MACDONALD 233 MARSHALL ST DUXBURY, MA 02332	TRUSTEE 1.00	0.	0.	0.
	GRAND TOTALS	0.	0.	0.

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ATTACHMENT 8

ATTACHMENT 9

FORM 990PF, PART X - CASH DEEMED HELD FOR CHARITABLE ACTIVITIES EXPL.

CASH DEEMED HELD FOR CHARITABLE ACTIVITIES OF \$580,000: USED FOR DEVELOPMENT EXPENSES FOR A MUSICAL BASED ON THE LLOYD ALEXANDER YOUNG ADULT NOVEL "THE REMARKABLE JOURNEY OF PRINCE JEN".

SCHEDULE D (Form 1041)

Capital Gains and Losses

► Attach to Form 1041, Form 5227, or Form 990-T.

▶ Use Form 8949 to list your transactions for lines 1b, 2, 3, 8b, 9 and 10. ► Go to www.irs.gov/F1041 for instructions and the latest information.

OMB No. 1545-0092

Department of the Treasury Internal Revenue Service Name of estate or trust

Note: Form 5227 filers need to complete only Parts I and II.

Employer identification number

SOMERLED CHARITABLE FOUNDATION 20-3771709

Part I Short-Term Capital Gains and Losses - Generally Assets Held One Year or Less (see instructions)

the I	instructions for how to figure the amounts to enter on ines below.	(d) Proceeds	(e) Cost	(g) Adjustments to gain or loss t	from	(h) Gain or (loss) Subtract column (e) from column (d) and
	form may be easier to complete if you round off cents hole dollars.	(sales price)	(or other basis)	Form(s) 8949, F line 2, column		combine the result with column (g)
1a	Totals for all short-term transactions reported on Form 1099-B for which basis was reported to the IRS and for which you have no adjustments (see instructions). However, if you choose to report all these transactions on Form 8949, leave this line blank and go to line 1b.					
1b	Totals for all transactions reported on Form(s) 8949 with Box A checked					
2	Totals for all transactions reported on Form(s) 8949 with Box B checked					
3	Totals for all transactions reported on Form(s) 8949 with Box C checked					
4	Short-term capital gain or (loss) from Forms 4684, 62 Net short-term gain or (loss) from partnerships, S corp				<u>4</u> 5	
6	Short-term capital loss carryover. Enter the amour Carryover Worksheet	nt, if any, from line	e 9 of the 2017	Capital Loss	6	()
7	Net short-term capital gain or (loss). Combine line line 17, column (3) on the back	s 1a through 6 in	column (h). Enter	here and on ▶	7	,
	t II Long-Term Capital Gains and Losses - Gen	erally Assets Held	d More Than One	Year (see inst	truction	ons)
the I	instructions for how to figure the amounts to enter on ines below.	(d) Proceeds	(e) Cost	(g) Adjustments to gain or loss	from	(h) Gain or (loss) Subtract column (e) from column (d) and
	form may be easier to complete if you round off cents hole dollars.	(sales price)	(or other basis)	Form(s) 8949, P line 2, column		combine the result with column (g)
8a	Totals for all long-term transactions reported on Form 1099-B for which basis was reported to the IRS and for which you have no adjustments (see instructions). However, if you choose to report all these transactions on Form 8949, leave this line blank and go to line 8b -					
8b	Totals for all transactions reported on Form(s) 8949 with Box D checked.	169,750.	1,324.			168,426.
9	Totals for all transactions reported on Form(s) 8949 with Box E checked					
10	Totals for all transactions reported on Form(s) 8949 with Box F checked					
11	Long-term capital gain or (loss) from Forms 2439, 46	84, 6252, 6781, and	i 8824		11	
12	Net long-term gain or (loss) from partnerships, S corp	orations, and other e	states or trusts		12	
13	Capital gain distributions				13	
14	Gain from Form 4797, Part I				14	
15	Long-term capital loss carryover. Enter the amount Carryover Worksheet	t, if any, from line	14 of the 2017	Capital Loss	15	()
16	Net long-term capital gain or (loss). Combine lines line 18a, column (3) on the back	8a through 15 in	column (h). Enter	here and on	16	168,426.
For I	Paperwork Reduction Act Notice, see the Instructions for For					e D (Form 1041) 2018

Sche	edule D (Form 1041) 2018				Page 2
Pa	rt III Summary of Parts I and II Caution: Read the instructions before completing this part	t.	(1) Beneficiaries' (see instr.)	(2) Estate's or trust's	(3) Total
17	Net short-term gain or (loss)	17			
18	Net long-term gain or (loss):				
а	Total for year	8a			168,426.
b	Unrecaptured section 1250 gain (see line 18 of the worksheet.) 1	8b			
С	28% rate gain	8с			
19	Total net gain or (loss). Combine lines 17 and 18a ▶	19			168,426.
	e: If line 19, column (3), is a net gain, enter the gain on Form 1041, line 4 os, go to Part V, and don't complete Part IV. If line 19, column (3), is a net				

Part IV **Capital Loss Limitation**

		ter here and enter as a (loss) on Form 1041, line 4 (or Form 990-T, Part I, line 4c, if a trust), the smaller of:		,	
а	The	e loss on line 19, column (3) or b \$3,000	20	()
		the loss on line 10, column (2) is more than \$2,000, or if Form 1041, page 1, line 22 (or Form 000-T line 38)		locc	complete the Canita

Note: If the loss on line 19, column (3), is more than \$3,000, **or** if Form 10. **Loss Carryover Worksheet** in the instructions to figure your capital loss carryover.

Tax Computation Using Maximum Capital Gains Rates Part V

Form 1041 filers. Complete this part only if both lines 18a and 19 in column (2) are gains, or an amount is entered in Part I or Part II and there is an entry on Form 1041, line 2b(2), and Form 1041, line 22, is more than zero.

Caution: Skip this part and complete the Schedule D Tax Worksheet in the instructions if:

- Either line 18b, col. (2) or line 18c, col. (2) is more than zero, or
- Both Form 1041, line 2b(1), and Form 4952, line 4g are more than zero.

Form 990-T trusts. Complete this part only if both lines 18a and 19 are gains, or qualified dividends are included in income in Part I of Form 990-T, and Form 990-T, line 38, is more than zero. Skip this part and complete the Schedule D Tax Worksheet in the instructions if either line 18b, col. (2) or line 18c, col. (2) is more than zero.

21	Enter taxable income from Form 1041, line 22 (or Form 990-T, line 38)	21			
22	Enter the smaller of line 18a or 19 in column (2)				
	but not less than zero				
23	Enter the estate's or trust's qualified dividends				
	from Form 1041, line 2b(2) (or enter the qualified				
	dividends included in income in Part I of Form 990-T) 23				
24	Add lines 22 and 23				
25	If the estate or trust is filing Form 4952, enter the				
	amount from line 4g; otherwise, enter -0 ▶ 25				
26	Subtract line 25 from line 24. If zero or less, enter -0-	26			
27	Subtract line 26 from line 21. If zero or less, enter -0	27		1	
28	Enter the smaller of the amount on line 21 or \$2,600	28			
29	Enter the smaller of the amount on line 27 or line 28	29			
30	Subtract line 29 from line 28. If zero or less, enter -0 This amount is taxed at	0%		30	
31	Enter the smaller of line 21 or line 26	31			
32	Subtract line 30 from line 26	32			
33	Enter the smaller of line 21 or \$12,700	33			
34	Add lines 27 and 30	34			
35	Subtract line 34 from line 33. If zero or less, enter -0	35			
36	Enter the smaller of line 32 or line 35	36			
37	Multiply line 36 by 15% (0.15)			37	
38	Enter the amount from line 31	38			
39	Add lines 30 and 36	39			
40	Subtract line 39 from line 38. If zero or less, enter -0	40			
41	Multiply line 40 by 20% (0.20)		>	41	
42	Figure the tax on the amount on line 27. Use the 2018 Tax Rate Schedule for Estates				
	and Trusts (see the Schedule G instructions in the instructions for Form 1041)	42			
43	Add lines 37, 41, and 42	43			
44	Figure the tax on the amount on line 21. Use the 2018 Tax Rate Schedule for Estates				
	and Trusts (see the Schedule G instructions in the instructions for Form 1041)	44			
45	Tax on all taxable income. Enter the smaller of line 43 or line 44 here and	on Fo	rm 1041, Schedule		
	G. line 1a (or Form 990-T. line 40)		>	45	

Schedule D (Form 1041) 2018

Form 8949 (2018) Attachment Sequence No. 12A Page 2

Name(s) shown on return. Name and SSN or taxpayer identification no. not required if shown on other side

SOMERLED CHARITABLE FOUNDATION

Social security number or taxpayer identification number

20-3771709

Before you check Box D, E, or F below, see whether you received any Form(s) 1099-B or substitute statement(s) from your broker. A substitute statement will have the same information as Form 1099-B. Either will show whether your basis (usually your cost) was reported to the IRS by your broker and may even tell you which box to check.

Part II

Long-Term. Transactions involving capital assets you held more than 1 year are generally long-term (see instructions). For short-term transactions, see page 1.

Note: You may aggregate all long-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS and for which no adjustments or codes are required. Enter the totals directly on Schedule D, line 8a; you aren't required to report these transactions on Form 8949 (see instructions).

You *must* check Box D, E, *or* F below. Check only one box. If more than one box applies for your long-term transactions, complete a separate Form 8949, page 2, for each applicable box. If you have more long-term transactions than will fit on this page for one or more of the boxes, complete as many forms with the same box checked as you need.

11011	e of the boxes, complete as many forms with the same box checked as you need.
X	(D) Long-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS (see Note above)
	(E) Long-term transactions reported on Form(s) 1099-B showing basis wasn't reported to the IRS
	(F) Long-term transactions not reported to you on Form 1099-B

	 							
(a) Description of property (Example: 100 sh. XYZ Co.)	(b) Date acquired (Mo., day, yr.)	(c) Date sold or disposed of	(d) Proceeds (sales price)	(e) Cost or other basis. See the Note below and see <i>Column</i> (e)	Adjustment, if any, to gain or loss. If you enter an amount in column (g), enter a code in column (f). See the separate instructions.		(e) If you enter an amount in column (g) or other basis. ne Note below See the separate instructions.	Gain or (loss). Subtract column (e) from column (d) and
(Example: 100 Str. A12 Co.)	(Mo., day, yr.)	(Mo., day, yr.)	(see instructions)	in the separate instructions	(f) Code(s) from instructions	(g) Amount of adjustment	combine the result with column (g)	
900 SHS ALIBABA GROUP								
HLDG LTD	04/16/2019	VAR	169,750.	1,324.			168,426	
0								
2 Totals. Add the amounts in columns negative amounts). Enter each total								
Schedule D, line 8b (if Box D above above is checked), or line 10 (if Box	is checked), line	9 (if Box E	169,750	1,324.			168,426.	
above is checked), or line 10 (if Box	x r above is ch	eckea)	100,700	1 1,541.			100,420.	

Note: If you checked Box D above but the basis reported to the IRS was incorrect, enter in column (e) the basis as reported to the IRS, and enter an adjustment in column (g) to correct the basis. See *Column* (g) in the separate instructions for how to figure the amount of the adjustment.