

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

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

2017

Open to Public Inspection

For calendar year 2017 or tax year beginning , 2017, and ending

The Klarman Family Foundation
P.O. Box 171627
Boston, MA 02117

A Employer identification number
04-3105768

B Telephone number (see instructions)
617-236-7909

C If exemption application is pending, check here. ▶ ☐

D 1 Foreign organizations, check here. ▶ ☐

2 Foreign organizations meeting the 85% test, check here and attach computation ▶ ☐

E If private foundation status was terminated under section 507(b)(1)(A), check here. ▶ ☐

F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here. ▶ ☐

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

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

I Fair market value of all assets at end of year (from Part II, column (c), line 16) ▶ \$ 805,833,899.

J Accounting method: ☒ Cash ☐ Accrual
☐ Other (specify) _____
(Part I, column (d) must be on cash basis.)

Part I Analysis of Revenue and Expenses

(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions).)

(a) Revenue and expenses per books

(b) Net investment income

(c) Adjusted net income

(d) Disbursements for charitable purposes (cash basis only)

REVENUE

1 Contributions, gifts, grants, etc., received (attach schedule) . . .

90,200,000.

2 Check ☐ if the foundation is not required to attach Sch. B

3 Interest on savings and temporary cash investments.

347,241.

347,241.

4 Dividends and interest from securities

5a Gross rents

b Net rental income or (loss)

6a Net gain or (loss) from sale of assets not on line 10.

7,864,911.

b Gross sales price for all assets on line 6a

7,894,622.

7 Capital gain net income (from Part IV, line 2)

7,894,622.

8 Net short-term capital gain

9 Income modifications

10a Gross sales less returns and allowances

b Less: Cost of goods sold

c Gross profit or (loss) (attach schedule)

11 Other income (attach schedule)

See Statement 1

5,386,560.

4,465,224.

19,975.

12 Total. Add lines 1 through 11.

103,798,712.

12,707,087.

19,975.

ADMINISTRATIVE AND EXPENSES

13 Compensation of officers, directors, trustees, etc.

392,105.

3,780.

388,325.

14 Other employee salaries and wages

1,371,304.

5,300.

4,611.

1,361,393.

15 Pension plans, employee benefits

386,461.

1,657.

1,456.

383,348.

16a Legal fees (attach schedule) See St. 2

169,251.

9,095.

1,686.

158,470.

b Accounting fees (attach sch) See St. 3

106,063.

25,178.

77,788.

c Other professional fees (attach sch) See St. 4

319,437.

319,437.

17 Interest

18 Taxes (attach schedule)(see instrs) See Stmt. 5

5,000.

19 Depreciation (attach schedule) and depletion See Stmt. 6

152,920.

20 Occupancy

645,073.

645,073.

21 Travel, conferences, and meetings

176,607.

176,607.

22 Printing and publications

23 Other expenses (attach schedule)

See Statement 7

9,963,123.

8,329,215.

281,376.

24 Total operating and administrative expenses. Add lines 13 through 23.

13,687,344.

8,370,445.

11,533.

3,791,817.

25 Contributions, gifts, grants paid Part XV

46,414,081.

46,414,081.

26 Total expenses and disbursements. Add lines 24 and 25.

60,101,425.

8,370,445.

11,533.

50,205,898.

27 Subtract line 26 from line 12:

a Excess of revenue over expenses and disbursements

43,697,287.

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

4,336,642.

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

8,442.

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	3,783,534.	3,643,451.	3,643,451.
	2 Savings and temporary cash investments	86,612,469.	109,103,375.	109,103,375.
	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 sch) .. 1,997,543.	Statement 8		
	Less: allowance for doubtful accounts	1,997,543.	1,997,543.	1,997,543.
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges	26,433.	3,477.	3,477.
	10a Investments — U.S. and state government obligations (attach schedule)			
	b Investments — corporate stock (attach schedule) .. Statement 9 ..	6,875,000.	10,000,000.	11,575,113.
	c Investments — corporate bonds (attach schedule)			
	11 Investments — land, buildings, and equipment: basis			
LIABILITIES	Less: accumulated depreciation (attach schedule)			
	12 Investments — mortgage loans			
	13 Investments — other (attach schedule) .. Statement 10 ..	498,972,459.	517,326,963.	678,611,176.
	14 Land, buildings, and equipment: basis .. 1,359,534.			
	Less: accumulated depreciation (attach schedule) .. See Stmt 11 .. 489,132.	1,002,789.	870,402.	870,402.
	15 Other assets (describe .. See Statement 12 ..)	29,404.	29,362.	29,362.
	16 Total assets (to be completed by all filers — see the instructions. Also, see page 1, item I)	599,299,631.	642,974,573.	805,833,899.
	17 Accounts payable and accrued expenses	35,052.	12,707.	
	18 Grants payable			
	19 Deferred revenue			
NET FUND ASSETS OR BALANCES	20 Loans from officers, directors, trustees, & other disqualified persons			
	21 Mortgages and other notes payable (attach schedule)			
	22 Other liabilities (describe ..)			
	23 Total liabilities (add lines 17 through 22)	35,052.	12,707.	
	Foundations that follow SFAS 117, check here .. and complete lines 24 through 26, and lines 30 and 31. <input type="checkbox"/>			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here .. and complete lines 27 through 31. <input checked="" type="checkbox"/>			
	27 Capital stock, trust principal, or current funds			
	28 Paid-in or capital surplus, or land, bldg., and equipment fund			
	29 Retained earnings, accumulated income, endowment, or other funds	599,264,579.	642,961,866.	
	30 Total net assets or fund balances (see instructions)	599,264,579.	642,961,866.	
	31 Total liabilities and net assets/fund balances (see instructions)	599,299,631.	642,974,573.	

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 30 (must agree with end-of-year figure reported on prior year's return)	1	599,264,579.
2 Enter amount from Part I, line 27a	2	43,697,287.
3 Other increases not included in line 2 (itemize)	3	
4 Add lines 1, 2, and 3	4	642,961,866.
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 30	6	642,961,866.

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (for example, real estate, 2-story brick warehouse; or common stock, 200 shares MLC Company)		(b) How acquired P — Purchase D — Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a Passthrough K-1 capital gain				
b Distributions in excess of basis				
c				
d				
e				

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 7,884,226.			7,884,226.
b 10,396.			10,396.
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a			7,884,226.
b			10,396.
c			
d			
e			

2 Capital gain net income or (net capital loss).....	<div style="border: 1px solid black; padding: 2px;"> If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 </div>	2	7,894,622.
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.....	<div style="border: 1px solid black; padding: 2px;"> If gain, also enter in Part I, line 8, column (c). See instructions. If (loss), enter -0- in Part I, line 8..... </div>	3	0.

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

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

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

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

☐ Yes☒ No

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2016	44,786,479.	643,438,736.	0.069605
2015	42,730,059.	606,713,928.	0.070429
2014	38,338,274.	526,133,594.	0.072868
2013	57,843,771.	438,568,794.	0.131892
2012	30,655,898.	272,059,909.	0.112681

2 Total of line 1, column (d).....	2	0.457475
3 Average distribution ratio for the 5-year base period — divide the total on line 2 by 5.0, or by the number of years the foundation has been in existence if less than 5 years.....	3	0.091495
4 Enter the net value of noncharitable-use assets for 2017 from Part X, line 5.....	4	742,469,408.
5 Multiply line 4 by line 3.....	5	67,932,238.
6 Enter 1% of net investment income (1% of Part I, line 27b).....	6	43,366.
7 Add lines 5 and 6.....	7	67,975,604.
8 Enter qualifying distributions from Part XII, line 4.....	8	50,226,432.

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

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

1 a Exempt operating foundations described in section 4940(d)(2), check here. <input type="checkbox"/> and enter 'N/A' on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary — see instructions)			
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here. <input type="checkbox"/> and enter 1% of Part I, line 27b		1	86,733.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)			
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-)		2	0.
3 Add lines 1 and 2		3	86,733.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-)		4	0.
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-		5	86,733.
6 Credits/Payments:			
a 2017 estimated tax pmts and 2016 overpayment credited to 2017	6a	276,687.	
b Exempt foreign organizations — tax withheld at source	6b		
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	276,687.	
8 Enter any penalty for underpayment of estimated tax. Check here <input checked="" type="checkbox"/> 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	0.	
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	189,954.	
11 Enter the amount of line 10 to be: Credited to 2018 estimated tax 189,954. Refunded	11	0.	

Part VII-A Statements Regarding Activities

	Yes	No
1 a 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?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition		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.		
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. <input type="checkbox"/> \$ 0. (2) On foundation managers. <input type="checkbox"/> \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. <input type="checkbox"/> \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If 'Yes,' attach a detailed description of the activities.		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If 'Yes,' attach a conformed copy of the changes	X	
4 a Did the foundation have unrelated business gross income of \$1,000 or more during the year?	X	
b If 'Yes,' has it filed a tax return on Form 990-T for this year?	X	
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If 'Yes,' attach the statement required by General Instruction T.		X
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?	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.	X	
8 a Enter the states to which the foundation reports or with which it is registered. See instructions. <u>MA NY</u>		
b If the answer is 'Yes' to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by <i>General Instruction G</i> ? If 'No,' attach explanation	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 2017 or the tax year beginning in 2017? See the instructions for Part XIV. If 'Yes,' complete Part XIV.		X
10 Did any persons become substantial contributors during the tax year? If 'Yes,' attach a schedule listing their names and addresses.		X

BAA

Form 990-PF (2017)

Part VII-A Statements Regarding Activities (continued)

	Yes	No
11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If 'Yes,' attach schedule. See instructions.	11	X
12 Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If 'Yes,' attach statement. See instructions.	12	X
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address: <u>www.klarmanfoundation.org</u>	13	X
14 The books are in care of <u>Beth Klarman</u> Telephone no. <u>617-236-7909</u> Located at <u>P.O. Box 171627 Boston MA</u> ZIP + 4 <u>02117</u>		
15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 — check here. <u>N/A</u> and enter the amount of tax-exempt interest received or accrued during the year. <u>15</u> <u>N/A</u>		
16 At any time during calendar year 2017, 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	X
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
1 a 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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No		
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> 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)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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.) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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. <u>1 b</u> <u>X</u> Organizations relying on a current notice regarding disaster assistance, check here <input type="checkbox"/>		
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 2017? <u>1 c</u> <u>X</u>		
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 2017, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2017? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If 'Yes,' list the years <u>20</u> <u>20</u> <u>20</u> <u>20</u>		
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.) <u>2 b</u> <u>N/A</u>		
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. <u>20</u> <u>20</u> <u>20</u> <u>20</u>		
3 a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b If 'Yes,' did it have excess business holdings in 2017 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 2017.) <u>3 b</u> <u>N/A</u>		
4 a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? <u>4 a</u> <u>X</u>		
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 2017? <u>4 b</u> <u>X</u>		

BAA

Form 990-PF (2017)

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required (continued)**5 a** 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 instructionsOrganizations relying on a current notice regarding disaster assistance, check here. ☐**c** If the answer is 'Yes' to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? ☒ Yes ☐ No
If 'Yes,' attach the statement required by Regulations section 53.4945–5(d).**6 a** 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? ☐ Yes ☒ No
If 'Yes' to 6b, file Form 8870.**7 a** 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? ☐ Yes ☒ No**Part VIII** Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors**1** List all officers, directors, trustees, and foundation managers and their compensation. See instructions.

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
Seth A. Klarman PO Box 171627 Boston, MA 02117	Trustee 5.00	0.	0.	0.
Beth S. Klarman PO Box 171627 Boston, MA 02117	Pres/Trustee 30.00	0.	0.	0.
Kim McCabe PO Box 171627 Boston, MA 02117	Exec. Dir. 40.00	350,900.	41,205.	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
Laura Sherman PO Box 171627 Boston, MA 02117	Dir MA Grants 40	180,500.	44,269.	0.
Karen Gill PO Box 171627 Boston, MA 02117	Dir Ops & Adm 32	176,000.	43,305.	0.
Lara Bethke PO Box 171627 Boston, MA 02117	Dir Med/Sci 40	170,000.	21,879.	0.
Jonathan Horowitz PO Box 171627 Boston, MA 02117	Sr Prog Ofcr 40	164,000.	23,140.	0.
Erin Peterson PO Box 171627 Boston, MA 02117	Sr Grants Mgr 40	110,000.	30,303.	0.

Total number of other employees paid over \$50,000. ☐ 6

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
CFAR 1700 Market Street, Suite 2140 Philadelphia, PA 19103	Organizational Strgy	82,734.
RAND Corporation 1776 Main Street, PO Box 2138 Santa Monica, CA 90407	Progrm Strategy-Vets	52,500.
Total number of others receiving over \$50,000 for professional services		0

Part IX-A Summary of Direct Charitable Activities

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

	Expenses
1 N/A	
2	
3	
4	

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

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

	Amount
1 N/A	
2	
All other program-related investments. See instructions.	
3	
Total. Add lines 1 through 3	0.

BAA

Form 990-PF (2017)

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.....	1 a	
b	Average of monthly cash balances.....	1 b	63,924,684.
c	Fair market value of all other assets (see instructions).....	1 c	689,851,365.
d	Total (add lines 1a, b, and c).....	1 d	753,776,049.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).....	1 e	0.
2	Acquisition indebtedness applicable to line 1 assets.....	2	0.
3	Subtract line 2 from line 1d.....	3	753,776,049.
4	Cash deemed held for charitable activities. Enter 1-1/2% of line 3 (for greater amount, see instructions).....	4	11,306,641.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4.....	5	742,469,408.
6	Minimum investment return. Enter 5% of line 5.....	6	37,123,470.

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	37,123,470.
2 a	Tax on investment income for 2017 from Part VI, line 5.....	2 a	86,733.
b	Income tax for 2017. (This does not include the tax from Part VI.).....	2 b	
c	Add lines 2a and 2b.....	2 c	86,733.
3	Distributable amount before adjustments. Subtract line 2c from line 1.....	3	37,036,737.
4	Recoveries of amounts treated as qualifying distributions.....	4	5,415.
5	Add lines 3 and 4.....	5	37,042,152.
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	37,042,152.

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.....	1 a	50,205,898.
b	Program-related investments — total from Part IX-B.....	1 b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes.....	2	20,534.
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required).....	3 a	
b	Cash distribution test (attach the required schedule).....	3 b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8; and Part XIII, line 4....	4	50,226,432.
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	
6	Adjusted qualifying distributions. Subtract line 5 from line 4.....	6	50,226,432.

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 2016	(c) 2016	(d) 2017
1 Distributable amount for 2017 from Part XI, line 7				37,042,152.
2 Undistributed income, if any, as of the end of 2017:				
a Enter amount for 2016 only.			0.	
b Total for prior years: 20 __, 20 __, 20 __		0.		
3 Excess distributions carryover, if any, to 2017:				
a From 2012	17,122,971.			
b From 2013	36,577,104.			
c From 2014	12,411,363.			
d From 2015	12,672,685.			
e From 2016	12,825,930.			
f Total of lines 3a through e.	91,610,053.			
4 Qualifying distributions for 2017 from Part XII, line 4: ► \$ 50,226,432.				
a Applied to 2016, but not more than line 2a ..			0.	
b Applied to undistributed income of prior years (Election required — see instructions)		0.		
c Treated as distributions out of corpus (Election required — see instructions)	0.			
d Applied to 2017 distributable amount.				37,042,152.
e Remaining amount distributed out of corpus.	13,184,280.			
5 Excess distributions carryover applied to 2017. (If an amount appears in column (d), the same amount must be shown in column (a).)	0.			0.
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5.	104,794,333.			
b Prior years' undistributed income. Subtract line 4b from line 2b.		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.		0.		
d Subtract line 6c from line 6b. Taxable amount — see instructions.		0.		
e Undistributed income for 2016. Subtract line 4a from line 2a. Taxable amount — see instructions.			0.	
f Undistributed income for 2017. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2018.				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required — see instructions).	0.			
8 Excess distributions carryover from 2012 not applied on line 5 or line 7 (see instructions).	17,122,971.			
9 Excess distributions carryover to 2018. Subtract lines 7 and 8 from line 6a.	87,671,362.			
10 Analysis of line 9:				
a Excess from 2013.	36,577,104.			
b Excess from 2014.	12,411,363.			
c Excess from 2015.	12,672,685.			
d Excess from 2016.	12,825,930.			
e Excess from 2017.	13,184,280.			

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

N/A

1 a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2017, enter the date of the ruling. ▶

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

	Tax year	Prior 3 years			(e) Total
	(a) 2017	(b) 2016	(c) 2015	(d) 2014	
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed.					
b 85% of line 2a.					
c Qualifying distributions from Part XII, line 4 for each year listed.					
d Amounts included in line 2c not used directly for active conduct of exempt activities.					
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c.					
3 Complete 3a, b, or c for the alternative test relied upon:					
a 'Assets' alternative test — enter:					
(1) Value of all assets.					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i).					
b 'Endowment' alternative test — enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed.					
c 'Support' alternative test — enter:					
(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties).					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii).					
(3) Largest amount of support from an exempt organization.					
(4) Gross investment income.					

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

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

See Statement 13

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

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:

See Statement 14

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

See Statement for Line 2a

c Any submission deadlines:

See Statement for Line 2a

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

See Statement for Line 2a

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year See attachment to Pt XV, Ln 3a [State and zip for e-filing purposes] MA 02117	N/A		See attachment to Part XV, Ln 3a	46,414,081.
Total			3a	46,414,081.
b Approved for future payment See attachment to Pt XV, Ln 3b [State and zip for e-filing purposes] MA 02117	N/A		See attachment to Part XV, Ln 3b	77,463,658.
Total			3b	77,463,658.

Schedule B
(Form 990, 990-EZ,
or 990-PF)

Department of the Treasury
Internal Revenue Service

Schedule of Contributors

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

OMB No. 1545-0047

2017

Name of the organization

The Klarman Family Foundation

Employer identification number

04-3105768

Organization type (check one):

Filers of:

Form 990 or 990-EZ

Section:

- ☐ 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 property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions.

Special Rules

- ☐ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33-1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h; or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I, II, and III.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Don't complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling \$5,000 or more during the year ► \$ _____

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

BAA For Paperwork Reduction Act Notice, see the instructions for Form 990, 990-EZ, or 990-PF.

Schedule B (Form 990, 990-EZ, or 990-PF) (2017)

Name of organization

Employer identification number

The Klarman Family Foundation

04-3105768

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

(a) Number	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	Seth A. Klarman PO Box 171627 Boston, MA 02117	\$ 90,200,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II for noncash contributions.)
			Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
			Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
			Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
			Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
			Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
			Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)

Employer identification number	
--------------------------------	--

04-3105768

Part II

[illegible]

Schedule B (Form 990, 990-EZ, or 990-PF) (2017)

The Klarman Family Foundation

04-3105768

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

	(a) Revenue per Books	(b) Net Investment Income	(c) Adjusted Net Income
Interest income from PRI.....	\$ 19,975.	\$ 19,975.	\$ 19,975.
IRC § 965(a) income.....	515,658.	515,658.	
Passthrough K-1 income.....	4,834,442.	3,929,591.	
Returned grant.....	5,415.		
Security deposit refund.....	11,070.		
Total	\$ 5,386,560.	\$ 4,465,224.	\$ 19,975.

Statement 2
Form 990-PF, Part I, Line 16a
Legal Fees

	(a) Expenses Per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Administrative matters & other.....	\$ 41,278.			\$ 41,278.
Grants management.....	61,951.			61,951.
Investments.....	9,095.	\$ 9,095.		
Program-related investment matters	1,686.		\$ 1,686.	
Tax matters.....	55,241.			55,241.
Total	\$ 169,251.	\$ 9,095.	\$ 1,686.	\$ 158,470.

Statement 3
Form 990-PF, Part I, Line 16b
Accounting Fees

	(a) Expenses per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Bookkeeping and fiscal mgmt.....	\$ 57,974.			\$ 57,974.
Investment accounting.....	25,178.	\$ 25,178.		
Tax compliance.....	22,911.			19,814.
Total	\$ 106,063.	\$ 25,178.	\$ 0.	\$ 77,788.

Statement 4
Form 990-PF, Part I, Line 16c
Other Professional Fees

	(a) Expenses per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
403b admin/recordkeeping/general consult	\$ 13,882.			\$ 13,882.
Communications.....	25,979.			25,979.
Grants management system support..	998.			998.

Statement 4 (continued)
Form 990-PF, Part I, Line 16c
Other Professional Fees

	(a) Expenses per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
HR and benefits consulting.....	\$ 1,650.			\$ 1,650.
IT and phone services.....	17,622.			17,622.
Med & sci research program consulting				
	44,500.			44,500.
Organizational strategy.....	82,734.			82,734.
Professional staffing.....	12,000.			12,000.
Program evaluation.....	20,572.			20,572.
Program strategy research & consulting				
	59,500.			59,500.
Scientific committee honoraria.....	40,000.			40,000.
Total	<u>\$ 319,437.</u>	<u>\$ 0.</u>	<u>\$ 0.</u>	<u>\$ 319,437.</u>

Statement 5
Form 990-PF, Part I, Line 18
Taxes

	(a) Expenses per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Excise tax.....	\$ 5,000.			
Total	<u>\$ 5,000.</u>	<u>\$ 0.</u>	<u>\$ 0.</u>	<u>\$ 0.</u>

Statement 6
Form 990-PF, Part I, Line 19
Allocated Depreciation

Date Acquired	Cost Basis	Prior Yr Depr	Method	Rate	Life	Current Yr Depr	Net Invest Income	Adjusted Net Income
Equipment								
Various	96,100	51,774	S/L		3	20,513	0	0
Furniture								
Various	456,233	215,032	S/L		5	54,743	0	0
Leasehold improvements								
Various	768,038	50,776	S/L		10	77,664	0	0

Statement 7
Form 990-PF, Part I, Line 23
Other Expenses

	(a) Expenses per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Dues, memberships & subscriptions.	\$ 181,571.			\$ 181,571.
Insurance.....	12,614.			12,614.
Office supplies.....	47,600.			47,600.
Passthrough K-1 expenses.....	9,681,747.	\$ 8,329,215.		
Repairs and maintenance.....	7,904.			7,904.
State filing fees.....	1,000.			1,000.
Technology expense.....	30,687.			30,687.
Total	\$ 9,963,123.	\$ 8,329,215.	\$ 0.	\$ 281,376.

Statement 8
Form 990-PF, Part II, Line 7
Other Notes and Loans Receivable

Other Notes and Loans	Book Value	Fair Market Value	Doubtful Accounts Allowance
PRI - Home Funders Loan	\$ 1,997,543.	\$ 1,997,543.	\$ 0.
Total	\$ 1,997,543.	\$ 1,997,543.	
Allowance for Doubtful Accounts			\$ 0.
Net Other Notes/Loans Rec. - Book Value			\$ 1,997,543.

Statement 9
Form 990-PF, Part II, Line 10b
Investments - Corporate Stocks

Corporate Stocks	Valuation Method	Book Value	Fair Market Value
Foghorn Therapeutics Inc	Cost	\$ 5,000,000.	\$ 5,000,000.
Gwynnie Bee Inc Series A-4	Cost	118,985.	349,856.
Gwynnie Bee Inc Series A-5	Cost	195,415.	493,472.
Gwynnie Bee Inc Series A-8	Cost	4,685,600.	5,731,785.
Total		\$ 10,000,000.	\$ 11,575,113.

Statement 10
Form 990-PF, Part II, Line 13
Investments - Other

Other Investments	Valuation Method	Book Value	Fair Market Value
See attachment	Cost	\$ 517326963.	\$ 678,611,176.
Total		\$ 517326963.	\$ 678,611,176.

The Klarman Family Foundation

04-3105768

Statement 11
Form 990-PF, Part II, Line 14
Land, Buildings, and Equipment

Category	Basis	Accum. Deprec.	Book Value	Fair Market Value
Furniture and Fixtures	\$ 456,233.	\$ 269,775.	\$ 186,458.	\$ 186,458.
Machinery and Equipment	126,007.	90,917.	35,090.	35,090.
Improvements	777,294.	128,440.	648,854.	648,854.
Total	<u>\$ 1,359,534.</u>	<u>\$ 489,132.</u>	<u>\$ 870,402.</u>	<u>\$ 870,402.</u>

Statement 12
Form 990-PF, Part II, Line 15
Other Assets

	Book Value	Fair Market Value
PRI - Home Funders LLC.....	\$ 29,362.	\$ 29,362.
Total	<u>\$ 29,362.</u>	<u>\$ 29,362.</u>

Statement 13
Form 990-PF, Part XV, Line 1a
Foundation Managers - 2% or More Contributors

Seth A. Klarman
 Beth S. Klarman

Statement 14
Form 990-PF, Part XV, Line 2a-d
Application Submission Information

Name of Grant Program: Instrument Fund
 Name: Laura Sherman
 Care Of: The Klarman Family Foundation
 Street Address: PO Box 171627
 City, State, Zip Code: Boston, MA 02117
 Telephone: 617-236-7909
 E-Mail Address: instrumentfund@klarmanfoundation.org
 Form and Content: The majority of the Klarman Family Foundation's grant making is done on an invitation-only basis. The two exceptions are the Foundation's Instrument Fund and its Grant program in Eating Disorders Research. More detailed information about applying to these programs can be found on the foundation's website: www.klarmanfoundation.org.
 Submission Deadlines: See www.klarmanfoundation.org
 Restrictions on Awards: See www.klarmanfoundation.org

Name of Grant Program: Eating Disorders Research
 Name: Lara Bethke
 Care Of: The Klarman Family Foundation
 Street Address: PO Box 171627
 City, State, Zip Code: Boston, MA 02117
 Telephone: 617-236-7909

The Klarman Family Foundation

04-3105768

Statement 14 (continued)
Form 990-PF, Part XV, Line 2a-d
Application Submission Information

E-Mail Address:	medicalresearch@klarmanfoundation.org
Form and Content:	The majority of the Klarman Family Foundation's grant making is done on an invitation-only basis. The two exceptions are the Foundation's Instrument Fund and its Grant program in Eating Disorders Research. More detailed information about applying to these programs can be found on the foundation's website: www.klarmanfoundation.org .
Submission Deadlines:	See www.klarmanfoundation.org
Restrictions on Awards:	See www.klarmanfoundation.org

Attachment to Part I, Line 6 - Net Capital Gain/Loss

	Proceeds	Cost	Gain/Loss
Amounts reported in Part IV	\$ 7,894,622	-	\$ 7,894,622
Passthrough K-1 short-term capital gain UBTI			(74,836)
Passthrough K-1 long-term capital gain UBTI			962,207
Passthrough K-1 751 gain UBTI			221,940
Passthrough K-1 1231 gain UBTI			(75,828)
Passthrough K-1 1256 gain UBTI			(1,063,194)
Total Gain/Loss per Part I, Line 6			<u>\$ 7,864,911</u>

Part II, Line 13 - Other Investments

	Book Value	Fair Market Value
Abrams Capital Partners I, L.P.	\$ 32,244,584	\$ 34,962,470
Abrams Capital Partners II, L.P.	37,182,978	38,862,092
Al Bawadar	462,358	436,079
Arbiter Partners, L.P.	8,560,639	9,541,757
Attestor Value Fund, LP	47,564,023	56,173,556
Berkshire Fund IX-A LP	589,457	600,760
Berkshire Fund VII (OS), LP	29,228	42,936
Berkshire Fund VII, LP	-	129,850
Berkshire Fund VIII (IND), LP	1,013,145	1,666,646
Boulderado Partners LLC	4,287,150	8,603,096
Brookside Capital Partners Fund	10,824,076	11,845,919
Columbus Hill Partners LP	13,838,898	16,217,169
Covalent Partners	598,433	601,541
Cross Shore Overseas	2,500,000	2,657,047
Cue Ball Capital L.P.	1,575,940	1,727,878
Dynamic Care	200,000	200,000
EcoR1 Capital Fund, LP	9,519,683	12,735,482
FIMI Opportunity 6, LP	839,117	1,067,000
FIMI Opportunity V, LP	3,889,021	8,198,000
Finepoint Capital	9,661,153	10,545,208
Flare Capital Partners I	637,079	848,641
Flybridge Capital Partners III	246,169	496,218
Flybridge Capital Partners IV	452,647	851,156
Flybridge II, LLC	199,568	172,405
Flybridge XFactor	499,482	500,000
GC Entrepreneurs Fund II	3,683	3,193
GC Entrepreneurs Fund IV	15,705	48,654
Greenlight Capital Offshore (Gold), LTD	20,000,000	22,333,232
Greylock Israel II LP	1,340,485	2,192,036
Hawkeye Institutional Cap LP	6,469,349	6,566,445
Hayman Capital	2,287,372	2,179,817
Highfields Capital Ltd.	5,501,824	5,555,957
Imagry, Inc.	2,000,000	2,000,000
JHL Capital Group	15,868,326	16,674,033
Jeereddi I, LP	3,810,893	5,003,844
Kensico Offshore Fund	97,839,000	160,277,472
Magma Venture Capital III Fund	3,229,258	5,999,646
Magma Venture Capital IV Fund	2,261,109	3,402,170
Newtyn TE Partners	13,881,101	13,837,873

Part II, Line 13 - Other Investments

	Book Value	Fair Market Value
Ostra Capital	11,740,136	11,872,971
Perry Partners, LP	848,072	1,141,384
Pitango Growth Fund I L.P.	792,660	945,186
Pitango Venture Capital Fund VI L.P.	1,554,695	2,826,861
Pitango Venture Capital Fund VII L.P.	485,415	949,565
Privatvarde Fund	181,120	6,901
Raffles Associates, LP	11,525,506	10,776,992
Riva Capital Partners LP	304,917	118,575
Route One Fund I, LP	28,148,977	37,277,484
Sessa Capital International Fund	2,000,000	4,474,347
Slate Path Partners LP	37,626,568	39,821,893
Spruce House Capital	28,667,442	69,212,966
Swiftcurrent Offshore (Bridger Capital)	7,500,000	8,959,680
Takwin Labs L.P.	675,642	799,248
The Varde Fund IX, LP	369,931	309,657
The Varde Fund VII, LP	484,685	52,253
The Varde Fund VIII, LP	430,242	160,792
The Varde Fund X, LP	4,909,575	4,750,373
The Varde Fund, LP	242,178	21,585
Three Bays Capital	14,819,822	15,927,653
Varde Investment Partners, LP	2,096,447	2,447,532
Total Part II, Line 13 - Other Investments	\$ 517,326,963	\$ 678,611,176

Part VII-B, Line 5c – Expenditure Responsibility

Pursuant to IRC Regulation 53.4945-5(d)(2), the Foundation provides the following information for one program related investment:

- (i) **PRI Recipient:** Home Funders Collaborative LLC (“Home Funders”)
240 Newbury Street, 2nd Floor, Boston, MA 02116
- (ii) **Date and Amount of PRI:**
- | | |
|------------|---------|
| 6/10/2009 | 375,000 |
| 6/24/2011 | 300,000 |
| 6/22/2012 | 200,000 |
| 8/15/2012 | 100,000 |
| 10/31/2012 | 116,667 |
| 2/8/2013 | 100,000 |
| 6/24/2013 | 289,916 |
| 3/10/2014 | 150,000 |
| 3/12/2015 | 225,000 |
| 12/16/2015 | 143,417 |
- (iii) **Purpose of PRI:** The Home Funders mission is to support the creation of housing for extremely low-income families in a mixed income housing environment. The investment has a 20 year term for an amount up to \$ 2 million, for which the first capital call was paid in 2009. Funds are disbursed to Home Funders as real estate closings occur, which subsequently flow to finance a 20 year permanent loan to an affordable housing project. As of 12/31/15 the Foundation had fully disbursed this commitment.
- (iv) & (vi) **Reports of Amounts Expended:** Home Funders submitted a complete report on the following dates in 2017 of the type ordinarily required by commercial investors under similar circumstances: 1/12/2017, 4/13/17, 7/13/2017, and 10/12/17.
- This investment remained on the Foundation’s books as of 12/31/17.
- (v) **Diversions:** To the knowledge of the grantor, no funds have been diverted to any activity other than the activity for which the investment was originally made.
- (vii) **Verification:** The grantor has no reason to doubt the accuracy or reliability of the reports from the grantee; therefore, no independent verification of the reports was made.

Part VII-B, Line 5c – Expenditure Responsibility

Pursuant to IRC Regulation 53.4945-5(d)(2), the Foundation provides the following information for one program related investment:

- | | | |
|-------------|---------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| (i) | Grantee: | Strategic Grant Partners (“SGP”)
240 Newbury Street, 2 nd Floor, Boston, MA 02116 |
| (ii) | Date and
Amount of
Grant: | 7/1/16 \$1,097,722
12/15/16 \$597,649 |
| (iii) | Purpose of
Grant: | To support SGP in achieving its purpose of providing pro bono consulting services and financial support to organizations with outstanding leadership and game-changing ideas that improve the lives of struggling individuals and families. |
| (iv) & (vi) | Reports of
Amounts
Expended: | SGP submitted a complete report of its expenditure of the grant funds on 11/10/17. |
| (v) | Diversions: | To the knowledge of the grantor, no funds have been diverted to any activity other than the activity for which the investment was originally made. |
| (vii) | Verification: | The grantor has no reason to doubt the accuracy or reliability of the reports from the grantee; therefore, no independent verification of the reports was made. |

Part VII-B, Line 5c – Expenditure Responsibility

Pursuant to IRC Regulation 53.4945-5(d)(2), the Foundation provides the following information for one program related investment:

- | | | |
|----------------|---------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| (i) | Grantee: | Strategic Grant Partners (“SGP”)
240 Newbury Street, 2 nd Floor, Boston, MA 02116 |
| (ii) | Date and
Amount of
Grant: | 7/10/17 \$761,387
12/6/17 \$433,138 |
| (iii) | Purpose of
Grant: | To support SGP in achieving its purpose of providing pro bono consulting services and financial support to organizations with outstanding leadership and game-changing ideas that improve the lives of struggling individuals and families. |
| (iv) &
(vi) | Reports of
Amounts
Expended: | SGP is expected to submit a complete report of its expenditure of the grant funds by 11/15/18. |
| (v) | Diversions: | To the knowledge of the grantor, no funds have been diverted to any activity other than the activity for which the investment was originally made. |
| (vii) | Verification: | The grantor has no reason to doubt the accuracy or reliability of the reports from the grantee; therefore, no independent verification of the reports was made. |

Part XV, Line 3a – Grants and Contributions Paid During the Year

The Klarman Family Foundation seeks to identify areas of unmet need and to advance solutions to addressing them. We believe passionately in the promise and importance of creative thinking, strategic leadership and strong organizations to help bring about change. Our intention as a Foundation is to help make measurable progress in improving the lives of others.

Our work is guided by the following principles and values:

- We approach our work with a seriousness of purpose and evaluative rigor, and with an openness to tackle issues in new ways and the flexibility to make adjustments along the way.
- Because society's problems seem to be compounding rapidly, we approach our work with a sense of urgency and willingness to invest based on the opportunities to make a difference rather than the limits of an annual grant-making budget.
- We believe that the preservation of democratic norms lies at the core of all of our work, and that a healthy democracy is crucial to all we seek to achieve.
- We value acting in partnership with other funders. We view these relationships as opportunities to learn and leverage greater impact. We apply what we learn to improve our philanthropic practices and outcomes.
- We make funding decisions based on careful review of an organization's strategies and effectiveness, leadership and financial position. Our funding is intended to strengthen organizations, often through unrestricted support, so that they can make a measurable difference in pursuing their goals.

The Foundation's grant making spans several areas of interest. The issues we are addressing are complicated, requiring new and creative thinking and persistence over time. As we are committed to learning and assessing our impact, these categories and our specific strategies within them will evolve. Our dedication to applying best practices in philanthropy will remain unchanged.

Current categories of grant making:

Medical and Scientific Research: The Foundation invests in research efforts to advance understanding of the biological basis of health and illness with current interests including anorexia nervosa and sleep research. The Foundation's grant making seeks to advance basic science research, to help create resources that are broadly available for the research community, and to strengthen collaborative efforts in order to accelerate discovery.	\$12,073,773
------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	--------------

Good Philanthropic Citizen and Community Grants: The Foundation works to expand access to the critical services and enrichment opportunities that help make communities stronger, healthier and more vibrant. While the majority of grants in this category focus on Greater Boston as well as on the Jewish community, the Foundation also values the role it can play within some national and global contexts, acting nimbly as opportunities or needs arise. In 2017, this includes	10,710,200
------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	------------

Part XV, Line 3a – Grants and Contributions Paid During the Year

grants made in support of relief and recovery efforts for hurricanes in the U.S. and the Caribbean.

Grants in this category cluster around long-standing philanthropic interests such as bolstering a safety net and ensuring access to opportunities for vulnerable families, promoting democratic ideals, strengthening children's mental health and supporting veterans and military families. Over time, new strategies may emerge from this category.

Healthy Democracy: The Foundation has a long-standing commitment to addressing anti-Semitism and other forms of hatred, bigotry and intolerance which, we know from history, endangers the fabric of civil society and threatens democracy. A healthy democracy is built upon a commitment to treating all people fairly and equally under the law, and on an inclusive society where people know, trust and care about the common good. While continuing its commitment to addressing hate, the Foundation broadened its grant making in 2017 to include objectives focused on other essential components of a healthy democracy. 7,400,000

Funder Collaborations and Bold Bets: The Foundation values working in partnerships as an effective means to increase learning, build capacity and maximize impact. In addition, the Foundation supports a small number of organizations, outside of current areas of interest, led by extraordinary leaders whose bold ideas and comprehensive plans to scale initial outcomes hold significant promise for positive, wide scale impact. 4,194,525

Connections to Israel: The Foundation believes Israel is essential to the Jewish experience, and that Israel's significance extends beyond its importance to the Jewish people. It is a dynamic, diverse and democratic society, with an entrepreneurial spirit that has enabled it to make a positive global impact in many fields, including science, technology and medicine. The Foundation supports engaging educational experiences that build authentic relationships between Americans and their Israeli peers. 2,161,000

Arab Israeli Employment and Education: The Foundation is committed to improving the quality of life and access to opportunities for Israel's Arab citizens, and to ensuring a strong Jewish and democratic state in which all citizens might participate in the country's economic growth. The Foundation's grant making focuses on increasing access to and success in higher education, leadership development and professional employment for Arabs in Israel. 1,925,000

Music Pathways for Youth: The Foundation believes in the power of music education to enrich the lives of individuals. It seeks to create a stronger, more accessible music pathway so that young people in Greater Boston, regardless of their financial means, can pursue training - from beginner to mastery - according 1,762,640

Part XV, Line 3a – Grants and Contributions Paid During the Year

to their highest level of interest and ability. In addition to providing operating support grants to high quality, music education programs, the Foundation addresses other barriers such as lack of access to appropriate instruments and limited professional development opportunities for music educators and teaching artists to strengthen their ability to teach and mentor students along the music pathway.

Other Grants and Contributions: This category includes contributions made through the Foundation's employee matching gifts program, conference sponsorships, grants to organizations that no longer fit with the Foundation's areas of interest, and capital grants that are not associated with a specific Foundation strategy.

6,186,943

Total Part XV, Line 3a – Grants and Contributions Paid During the Year

\$46,414,081

Part XV, Line 3a - Grants and Contributions Paid During the Year

Organization name and address	Status	Purpose of grant or contribution	Amount
<u>Medical and Scientific Research</u>			
Beth Israel Deaconess Medical Center, Inc. 330 Brookline Avenue Boston, MA 02215-5491	PC	Focus on the positive: pathways for biasing responses to mixed-valence food cues	\$ 250,000
Broad Institute, Inc. 415 Main Street Cambridge, MA 02142	PC	To provide flexible, incubative and accelerant funding	1,250,000
Broad Institute, Inc. 415 Main Street Cambridge, MA 02142	PC	To provide flexible, incubative and accelerant funding for the Klarman Cell Observatory to systematically define cellular circuits in mammalian cells	5,000,000
Broad Institute, Inc. 415 Main Street Cambridge, MA 02142	PC	To support genotyping of tissue samples as a part of the Anorexia Nervosa Genetics Initiative (ANGI)	619,272
Israel Science Foundation Albert Einstein Square 43 Jabotinsky Street Jerusalem, Israel 9104001	PC	To develop and support scientific collaborations in cell circuitry between Israeli and Broad Institute scientists	1,000,000
Johns Hopkins University 733 N. Broadway St. Suite 117 Baltimore, MD 21205	PC	Neural Mechanisms of Appetite Dysregulation in Anorexia Nervosa: The Role of AGRP	181,447
Lieber Institute, Inc. 855 N. Wolfe ST Suite 300 Baltimore, MD 21205	PC	Molecular Biology of Anorexia Nervosa	148,441
Pennsylvania State University Department of Psychiatry 500 University Drive, H073 Hershey, PA 17033-0850	PC	Evaluating the Role of the Bed Nucleus of the Stria Terminalis in the Neurocircuitry of Anxiety in Patients with Anorexia Nervosa Restricting Type	149,999
Regents of the University of Minnesota 2450 Riverside Ave Minneapolis, MN 55454	PC	Goal based learning and habit in Anorexia Nervosa	174,642

Part XV, Line 3a - Grants and Contributions Paid During the Year

Organization name and address	Status	Purpose of grant or contribution	Amount
Regents of the University of Minnesota 2450 Riverside Ave Minneapolis, MN 55454	PC	Investigating the Impact of Oxytocin on the Neurobiological Underpinnings of Socioemotional Deficits in Anorexia Nervosa	149,991
Board Of Trustees Of The Leland Stanford Junior University 450 Serra Mall Stanford, CA 94305	PC	To support Stanford Technology Analytics and Genomics in Sleep (STAGES)	1,247,000
The Rockefeller University 1230 York Avenue, Box 305 New York, NY 10065	PC	Dissecting a Septal Circuit Involved in the Crosstalk between Stress, Anxiety and Anorexia	149,999
Trustees Of Columbia University In The City Of New York 615 West 131st Street 6th Floor, Mail Code 8725 New York, NY 10027	PC	Mechanisms of decision-making in Anorexia Nervosa: a computational psychiatry approach	240,829
Trustees Of Columbia University In The City Of New York 615 West 131st Street 6th Floor, Mail Code 8725 New York, NY 10027	PC	Stress and Eating Behavior in Anorexia Nervosa	250,000
University of North Carolina at Chapel Hill 111 Mason Farm Road 7340 MBRB, CB # 7032 Chapel Hill, NC 27599	PC	To support the KFF Anorexia Nervosa Genetics Initiative (ANGI)	1,112,153
University of Texas Southwestern Medical Center 5323 Harry Hines Blvd Dallas, TX 75390-9020	PC	Biological Factors Related to Treatment-Refractory Anorexia Nervosa	150,000
Subtotal Medical and Scientific Research			12,073,773

Good Philanthropic Citizen and Community Grants

Action for Boston Community Development, Inc. 178 Tremont Street Boston, MA 02111	PC	To support the Fuel Assistance Program for fiscal years 2017, 2018, and 2019	25,000
-----------------------------------------------------------------------------------------	----	------------------------------------------------------------------------------	--------

Part XV, Line 3a - Grants and Contributions Paid During the Year

Organization name and address	Status	Purpose of grant or contribution	Amount
Action for Boston Community Development, Inc. 178 Tremont Street Boston, MA 02111	PC	To support the SummerWorks program in summers 2016 and 2017	30,000
Adolescent Consultation Services, Inc. 189 Cambridge Street Cambridge, MA 02134	PC	Unrestricted operating support for fiscal years 2017, 2018 and 2019	35,000
American Jewish Committee 165 East 56 Street New York, NY 10022	PC	Unrestricted operating support for fiscal years 2017 and 2018	150,000
American Jewish Joint Distribution Committee 711 Third Avenue New York, NY 10017	PC	To support the Jewish Coalition for Syrian Refugees	150,000
American Jewish World Service, Inc. 45 West 36th St. New York, NY 10018	PC	Unrestricted operating support for fiscal years 2016, 2017, 2018 and 2019	250,000
Beth Israel Deaconess Medical Center, Inc. 330 Brookline Avenue Boston, MA 02215-5491	PC	Unrestricted operating support	20,000
Boston After School & Beyond, Inc. 89 South Street, Suite 601 Boston, MA 02111	PC	Unrestricted operating support and the Summer Learning Project for fiscal years 2018 and 2019	100,000
Boston Ballet, Inc. 19 Clarendon Street Boston, MA 02116	PC	Unrestricted operating support for fiscal years 2016 and 2017	125,000
Boston Debate League 225 Friend St., Suite 401 Boston, MA 02114	PC	Unrestricted operating support	50,000
Boston Education Skills & Training Corp 33 Harrison Ave Boston, MA 02111	PC	To support technology needs at the Dudley Square training site	49,200
Boston Foundation, Inc. 75 Arlington Street Boston, MA 02116	PC	To support the Civic Leadership Fund for fiscal years 2017, 2018 and 2019	50,000

Part XV, Line 3a - Grants and Contributions Paid During the Year

Organization name and address	Status	Purpose of grant or contribution	Amount
Boston Foundation, Inc. 75 Arlington Street Boston, MA 02116	PC	To support the Massachusetts United for Puerto Rico Fund	100,000
Boston Health Care for the Homeless Program, Inc. 780 Albany Street Boston, MA 02118	PC	Unrestricted operating support for fiscal years 2016, 2017, 2018 and 2019	50,000
Boston Landmarks Orchestra, Inc. 214 Lincoln St #331 Boston, MA 02134	PC	Unrestricted operating support	50,000
Boston Medical Center Corporation One Boston Medical Center Place Boston, Massachusetts 02118	PC	Unrestricted operating support	30,000
Bottom Line 500 Amory St., Suite 3 Jamaica Plain, MA 02130	PC	Unrestricted operating support for fiscal years 2017 and 2018	25,000
Boys and Girls Clubs of Boston, Inc. 200 High Street, 3rd Floor Boston, Massachusetts 02110-3045	PC	Unrestricted operating support for fiscal years 2018, 2019, 2020, and 2021	250,000
Brigham & Women's Hospital 75 Francis Street Boston, MA 02115	PC	Unrestricted operating support	20,000
Brookline Community Mental Health Center, Inc. 41 Garrison Road Brookline, MA 02445	PC	To support the Bridge for Resilient Youth in Transition (BRYT) program for fiscal years 2018, 2019, and 2020	175,000
Center for Disaster Philanthropy 1201 Connecticut Ave. NW, Suite 300 Washington, DC, DC 20036	PC	To support The Center for Disaster Philanthropy's Hurricane Recovery Fund, for relief efforts across Florida and the Caribbean	500,000
Center for Jewish History, Inc. 15 West 16th Street New York, NY 10011	PC	Unrestricted operating support for fiscal years 2016, 2017, and 2018	25,000

Part XV, Line 3a - Grants and Contributions Paid During the Year

Organization name and address	Status	Purpose of grant or contribution	Amount
Children's Hospital Corporation 300 Longwood Avenue Boston, MA 02115	PC	Unrestricted operating support	20,000
Combined Jewish Philanthropies of Greater Boston, Inc. 126 High Street Boston, MA 02110	PC	To support the mission and organizational goals of Combined Jewish Philanthropies, and to support local network agencies	1,250,000
Commonwealth Shakespeare Company, Inc. 231 Forest Street, Sorenson Center Babson Park, MA 02457	PC	To support Shakespeare on the Common for fiscal years 2017, 2018, and 2019	25,000
Community Economic Development Assistance Corporation 18 Tremont Street, Suite 500 Boston, MA 02108	PC	To support the Children's Investment Fund for fiscal years 2017 and 2018	150,000
Crisis Text Line 24 W 25th St, Fl 6 New York, NY 10010	PC	Unrestricted operating support for fiscal years 2018 and 2019	300,000
Dudley Street Neighborhood Initiative 550 Dudley Street Roxbury, MA 02119	PC	To support the GOTCHA Youth Jobs Collaborative in summers 2016 and 2017	20,000
Economic Mobility Pathways, Inc. One Washington Mall, 3rd Floor Boston, MA 02108	PC	Unrestricted operating support for fiscal years 2018 and 2019	50,000
Edvestors, Inc. 140 Clarendon Street Suite 401 Boston, MA 02116	PC	Unrestricted operating support for fiscal years 2017 and 2018, and BPS Arts Expansion for fiscal year 2018	650,000
English for New Bostonians 105 Chauncy St., 4th floor Boston, MA 02111	PC	Unrestricted operating support for fiscal years 2018 and 2019, and strategic planning	145,000
Foundation For Jewish Camp, Inc. 253 West 35th Street, 4th Fl New York, NY 10001	PC	To support the Disabilities Inclusion Initiative for fiscal years 2015, 2016, and 2017	65,000

Part XV, Line 3a - Grants and Contributions Paid During the Year

Organization name and address	Status	Purpose of grant or contribution	Amount
Franciscan Hospital for Children, Inc. 30 Warren Street Brighton, MA 02135	PC	Unrestricted operating support	20,000
Gateways Access to Jewish Education, Inc. 333 Nahanton Street Newton, MA 02459-3213	PC	Unrestricted operating support for fiscal years 2017 and 2018	75,000
Greater Houston Community Foundation 5120 Woodway Drive Suite 6000 Houston, Texas 77056	PC	To support the Hurricane Harvey Relief Fund	500,000
Health Care For All, Inc. One Federal Street, 5th Floor Boston, MA 02110	PC	Unrestricted operating support for fiscal years 2018 and 2019	35,000
Health Law Advocates, Inc. One Federal Street, 5th Floor Boston, MA 02110	PC	Unrestricted operating support for fiscal years 2017, 2018, and 2019	50,000
Health Leads, Inc. 24 School Street, 6th Floor Boston, MA 02108	PC	Unrestricted operating support for fiscal years 2017, 2018 and 2019	40,000
Hebrew Seniorlife, Inc. 1200 Centre Street Boston, MA 02131	PC	Unrestricted operating support	20,000
Homestart, Inc. 105 Chauncy Street, Suite 502 Boston, MA 02111	PC	Unrestricted operating support for fiscal years 2017 and 2018	75,000
Institute for National Security Studies, a Think Tank By Tel Aviv University, Ltd. 40 Haim Levanon POB 39950 Tel Aviv, Israel 6997556	PC	Unrestricted operating support for fiscal years 2017 and 2018	200,000
International Association Yahad-in Unum 30 Rue Garibaldi Saint Ouen, France 93400	PC	To support research missions for fiscal years 2017 and 2018	500,000

Part XV, Line 3a - Grants and Contributions Paid During the Year

Organization name and address	Status	Purpose of grant or contribution	Amount
Jewish Arts Collaborative, Inc. 1320 Centre Street, Suite 201 Newton Center, MA 02459	PC	Unrestricted operating support for fiscal years 2017 and 2018	100,000
Jewish Community Relations Council of San Francisco, the Peninsula, Marin, Sonoma, Alameda and Contra Costa Counties 121 Steuart Street, Suite 301 San Francisco, CA 94105	PC	To support the Institute for Curriculum Services for fiscal years 2018, 2019, and 2020	100,000
Jewish Family & Children's Service 1430 Main Street Waltham, MA 02451	PC	To support Community Services, the Center for Early Relationship Support (CERS), and Services for People with Disabilities for fiscal years 2016 and 2017	300,000
Jewish Funders Network 150 W 30th Street, Suite 900 New York, NY 10001	PC	To support the mission and goals of JFN for fiscal years 2017 and 2018	100,000
Jewish Vocational Service, Inc. 75 Federal Street, 3rd Floor Boston, MA 02110	PC	Unrestricted operating support for fiscal years 2015, 2016, and 2017	200,000
Jewish Women's Archive, Inc. One Harvard Street, Suite 200 Brookline, MA 02445	PC	Unrestricted operating support for fiscal years 2015, 2016, and 2017	50,000
Judge Baker Children's Center 53 Parker Hill Avenue Boston, MA 02120	PC	Unrestricted operating support	20,000
Julie's Family Learning Program, Inc. 133 Dorchester Street South Boston, MA 02127	PC	Unrestricted operating support for fiscal years 2017, 2018, and 2019	30,000
Katahdin Productions, Inc. PO Box 2218 Berkeley, CA 94702	PC	To support outreach and educational distribution for the film "Who Will Write Our History"	25,000
Kolot Inc. (RA) 17 Rachel Immeinu Jerusalem, Israel 91083	PC	Unrestricted operating support	25,000

Part XV, Line 3a - Grants and Contributions Paid During the Year

Organization name and address	Status	Purpose of grant or contribution	Amount
Leading Edge Alliance, Inc. 85 Broad St. 16th Floor New York, NY 10004	PC	Unrestricted operating support for fiscal years 2018, 2019, and 2020	75,000
Leket Israel 11 HaSadna; P.O. Box 2297 Ra'anana, Israel 4365006	PC	Unrestricted operating support for fiscal years 2017 and 2018	75,000
Little Sisters of the Assumption Family Health Services, Inc. dba Project Hope 550 Dudley Street Roxbury, MA 02119	PC	Unrestricted operating support for fiscal years 2017, 2018, and 2019	50,000
Longwood Symphony Orchestra, Inc. 10 Guest Street Suite 295 Boston, MA 02135	PC	Unrestricted operating support for fiscal years 2017, 2018, and 2019	25,000
Massachusetts Advocates for Children, Inc. 25 Kingston St. #2F Boston, MA 02111	PC	Unrestricted operating support for fiscal years 2016, 2017, and 2018	40,000
Massachusetts Society for the Prevention of Cruelty to Children 3815 Washington Street, Suite 2 Boston, MA 02130	PC	Unrestricted operating support for fiscal years 2018 and 2019	25,000
MASScreative, Inc. 15 Channel Center Street, Suite 103 Boston, MA 02210	PC	Unrestricted operating support for fiscal years 2017 and 2018	40,000
Merrimack Valley Food Bank, Inc. P.O. Box 8638 Lowell, MA 01853	PC	Unrestricted operating support for fiscal years 2017, 2018, and 2019	25,000
National Consumer Law Center, Inc. 7 Winthrop Square Boston, MA 02110-1245	PC	To support Project Stay Connected for fiscal years 2017, 2018, and 2019	25,000
One Family, Inc. 800 South Street, Suite 610 Waltham, MA 02453	PC	Unrestricted operating support	25,000

Part XV, Line 3a - Grants and Contributions Paid During the Year

Organization name and address	Status	Purpose of grant or contribution	Amount
Our Military Kids, Inc. 6861 Elm Street, Suite 2A McLean, VA 22101	PC	Unrestricted operating support for fiscal years 2017, 2018, and 2019	50,000
Parent Professional Advocacy League, Inc. 15 Court Square Suite 660 Boston, MA 02108	PC	Unrestricted operating support for fiscal years 2017, 2018, and 2019	25,000
Phillips Brook House Association Incorporated 1 Harvard Yard Cambridge, MA 02138	PC	To support the installation of air conditioning for Y2Y Harvard Square homeless shelter	40,000
Pine Street Inn, Inc. 444 Harrison Avenue Boston, MA 02118	PC	Unrestricted operating support	250,000
Project Bread - The Walk for Hunger, Inc. 145 Border Street East Boston, MA 02128	PC	Unrestricted operating support for fiscal years 2017, 2018, and 2019	25,000
Roca, Inc. 101 Park Street Chelsea, MA 02150	PC	Unrestricted operating support for fiscal years 2016, 2017, and 2018	175,000
Rosie's Place, Inc. 889 Harrison Avenue Boston, MA 02118	PC	Unrestricted operating support for fiscal years 2018 and 2019	25,000
Shelter Music Boston, Inc. 243 Sylvia Street Arlington, MA 02476	PC	To support audio recording and editing equipment and accessories	5,000
Soldier On, Inc. 290 Merrill Road Pittsfield, MA 01201	PC	Unrestricted operating support for fiscal years 2017 and 2018	50,000
South Boston Neighborhood House, Inc. 136 H Street South Boston, MA 02127	PC	To support the purchase of a new van	36,000

Part XV, Line 3a - Grants and Contributions Paid During the Year

Organization name and address	Status	Purpose of grant or contribution	Amount
Spaulding Rehabilitation Hospital Corporation 300 First Avenue Charlestown, MA 02129	PC	Unrestricted operating support	20,000
Springfield Public Schools 1550 Main Street PO Box 1410 Springfield, MA 01103-1410	PC	To support the implementation of the After the Bell Breakfast in the Classroom program	50,000
Summer Search 3840 Washington Street Jamaica Plain, MA 02130	PC	Unrestricted operating support for fiscal years 2017, 2018, and 2019	75,000
Syrian American Medical Society Foundation 1012 14th St. NW, Suite 1500 Washington, DC 20005	PC	Unrestricted operating support	100,000
Team Rubicon 6171 W. Century Blvd. Suite 310 Los Angeles, CA 90045	PC	To support Hurricane Harvey relief efforts in Houston	50,000
The Boston Jewish Film Festival, Inc. 1001 Watertown St West Newton, MA 02465	PC	Unrestricted operating support for fiscal years 2016 and 2017	10,000
The Boston Private Industry Council, Inc. 2 Oliver Street, 3rd Floor Boston, MA 02109	PC	To support the Summer Learning Project in summers 2016 and 2017	45,000
The Food Bank of Western Massachusetts, Inc. 97 North Hatfield Road P.O. Box 160 Hatfield, MA 01038	PC	Unrestricted operating support for fiscal years 2017, 2018 and 2019	25,000
The Greater Boston Food Bank, Inc. 70 South Bay Avenue Boston, MA 02118	PC	Unrestricted operating support for fiscal years 2017, 2018 and 2019	50,000
The Jewish Federations of North America, Inc. 25 Broadway, Suite 1700 New York, NY 10004	PC	To support the Hurricane Harvey Relief Fund	250,000

Part XV, Line 3a - Grants and Contributions Paid During the Year

Organization name and address	Status	Purpose of grant or contribution	Amount
The McLean Hospital Corporation 115 Mill Street; Mail Stop 126 Belmont, MA 02478-1064	PC	Unrestricted operating support	25,000
The Miami Foundation, Inc. 40 NW 3rd Street Suite 305 Miami, FL 33128	PC	To support the Hurricane Relief Fund and the U.S. Caribbean Strong Relief Fund	200,000
The Reut Institute - From Vision to Policy Kalman Magen 3 Tel Aviv, Israel 6107075	PC	Unrestricted operating support for fiscal years 2016 and 2017	125,000
The UMass Memorial Foundation, Inc. 333 South St Shrewsbury, MA 01545	PC	To support the Sibling Support Program: A Family-Centered Mental Health Initiative of the Eunice Kennedy Shriver Center for fiscal years 2017 and 2018	40,000
United Way Of Massachusetts Bay, Inc. 51 Sleeper Street Boston, MA 02210	PC	Unrestricted operating support for fiscal years 2017, 2018 and 2019	200,000
Veteran Homestead, Inc. 3 Victory Lane Gardner, MA 01440	PC	Unrestricted operating support	75,000
Veterans, Inc. 69 Grove Street Worcester, MA 01605	PC	Unrestricted operating support for fiscal years 2017 and 2018	35,000
Veterans Legal Services, Inc. P.O. Box 8457 Boston, MA 02114	PC	Unrestricted operating support for fiscal years 2018, 2019, and 2020	100,000
Washington Institute for Near East Policy 1111 19th Street, NW Suite 500 Washington, DC 20036	PC	Unrestricted operating support for fiscal years 2017 and 2018	125,000
Worcester County Food Bank, Inc. 474 Boston Turnpike Shrewsbury, MA 01545	PC	Unrestricted operating support for fiscal years 2017, 2018, and 2019	25,000

Part XV, Line 3a - Grants and Contributions Paid During the Year

Organization name and address	Status	Purpose of grant or contribution	Amount
Youth Villages, Inc. 3320 Brother Blvd Bartlett, TN 38133	PC	Unrestricted operating support for fiscal years 2018 and 2019	600,000
Subtotal Good Philanthropic Citizen and Community Grants			10,710,200
<u>Healthy Democracy</u>			
Anti-Defamation League 605 Third Avenue New York, NY 10158-0180	PC	To support the mission and goals of ADL nationally, including its work in the New England Region for fiscal years 2018 and 2019	750,000
Bagly, Inc. PO Box 960814 Boston, MA 02196-0814	PC	Unrestricted operating support for fiscal years 2018 and 2019	25,000
Combined Jewish Philanthropies of Greater Boston, Inc. 126 High Street Boston, MA 02110	PC	To support the CJP Legal Aid Fund for Immigrants	50,000
Combined Jewish Philanthropies of Greater Boston, Inc. 126 High Street Boston, MA 02110	PC	To support the mission and goals of the Jewish Community Relations Council of Greater Boston	250,000
Committee To Protect Journalists, Inc. 330 Seventh Avenue 11th Floor New York, NY 10001	PC	To support the U.S. initiatives in fiscal year 2017	250,000
Equal Justice Initiative 122 Commerce Street Montgomery, AL 36104	PC	Unrestricted operating support and support for the capital campaign for fiscal years 2018 and 2019	500,000
Facing History And Ourselves, Inc. 16 Hurd Road Brookline, MA 02445	PC	Unrestricted operating support for fiscal years 2016 and 2017	1,000,000

Part XV, Line 3a - Grants and Contributions Paid During the Year

Organization name and address	Status	Purpose of grant or contribution	Amount
Facing History And Ourselves, Inc. 16 Hurd Road Brookline, MA 02445	PC	Unrestricted operating support for fiscal years 2018, 2019 and 2020	2,000,000
GLBTQ Legal Advocates & Defenders, Inc. 30 Winter St Ste 800 Boston, MA 02108	PC	Unrestricted operating support for fiscal years 2018 and 2019	100,000
Interfaith Youth Core 141 W. Jackson Blvd, Suite 3200 Chicago, Illinois 60604	PC	Unrestricted operating support for fiscal years 2018 and 2019	250,000
Irish International Immigrant Center, Inc. One State Street, Suite 800 Boston, MA 02109	PC	Unrestricted operating support for fiscal years 2018 and 2019	25,000
Keshet, Inc. 284 Amory Street Boston, MA 02130	PC	Unrestricted operating support	100,000
Lambda Legal Defense And Education Fund, Inc. 120 Wall Street, 19th Floor New York, NY 10005-3919	PC	Unrestricted operating support	100,000
Massachusetts Alliance Of Portuguese Speakers, Inc. 1046 Cambridge Street Cambridge, MA 02139	PC	Unrestricted operating support for fiscal years 2018 and 2019	25,000
Massachusetts Immigrant And Refugee Advocacy Coalition, Inc. 105 Chauncy St., Ste 901 Boston, MA 02111	PC	Unrestricted operating support for fiscal years 2018 and 2019	100,000
Massachusetts Legal Assistance Corporation 7 Winthrop Square, 2nd Floor Boston, MA 02110-1245	PC	To support the Greater Boston Immigrant Defense Fund	100,000
Massachusetts Legal Assistance Corporation 7 Winthrop Square, 2nd Floor Boston, MA 02110-1245	PC	To support the mission and goals of MLAC, and for immigration legal services for Massachusetts organizations for fiscal years 2018 and 2019	400,000

Part XV, Line 3a - Grants and Contributions Paid During the Year

Organization name and address	Status	Purpose of grant or contribution	Amount
Mission Asset Fund 3269 Mission Street San Francisco, CA 94110	PC	To support the DACA Renewal Scholarships Fund	250,000
National Center For Transgender Equality 1133 19th St NW Suite 302 Washington, DC 20036	PC	Unrestricted operating support for fiscal years 2018 and 2019	50,000
News Literacy Project, Inc. 5335 Wisconsin Ave. NW Suite 440 Suite 440 Bethesda, MD 20814	PC	Unrestricted operating support	100,000
Reporters Committee For Freedom Of The Press 1156 15th St NW, Suite 1250 Washington, DC 20005	PC	Unrestricted operating support	150,000
Southern Poverty Law Center, Inc. 400 Washington Ave Montgomery, AL 36104	PC	Unrestricted operating support for fiscal years 2018 and 2019	50,000
The Lenny Zakim Fund, Inc. The LZFF c/o DLA Piper 33 Arch Street 26th Floor Boston, MA 02110	PC	Unrestricted operating support for fiscal years 2018 and 2019	125,000
The Shalom Hartman Institute of North America One Penn Plaza, Ste 1606 New York, NY 10119	PC	To support the mission and goals of SHINA for fiscal years 2018 and 2019	500,000
United States Holocaust Memorial Museum 100 Raoul Wallenberg Place SW Washington, DC 20024-2126	PC	Unrestricted operating support for fiscal years 2017, 2018, and 2019	150,000
Subtotal Healthy Democracy			7,400,000

Funder Collaborations and Bold Bets

Brigham & Women's Hospital 75 Francis Street Boston, MA 02115	PC	To support Ariadne Labs: A Joint Center for Health Systems Innovation for fiscal years 2016, 2017 and 2018	1,000,000
---------------------------------------------------------------------	----	------------------------------------------------------------------------------------------------------------	-----------

Part XV, Line 3a - Grants and Contributions Paid During the Year

Organization name and address	Status	Purpose of grant or contribution	Amount
Strategic Grant Partners, Inc. 240 Newbury St. Second Floor Boston, MA 02116	PF	To provide outstanding nonprofits with funding and technical assistance to improve the lives of struggling individuals & families in Massachusetts	1,194,525
Year Up, Inc. 45 Milk St Fl 9 Boston, MA 02109	PC	Unrestricted operating support, including Boston operations, for fiscal years 2017 - 2024	2,000,000
Subtotal Funder Collaborations and Bold Bets			4,194,525

Connections to Israel

Gann Academy The New Jewish High School of Greater Boston, Inc. 333 Forest Street Waltham, MA 02452	PC	To support the pilot of My Israel: A four-year integrated approach to Israel education for fiscal years 2017 and 2018	250,000
Honeymoon Israel Foundation, Inc. 6070 Whitegate Crossing East Amherst, NY 14051	PC	Unrestricted operating support for fiscal years 2017, 2018, and 2019	250,000
Israel & Co. 205 East 42nd Street. 16th Floor New York, NY 10017	PC	To support the mission and goals of Israel & Co. for fiscal years 2017 and 2018	1,061,000
Israel-America Academic Exchange 8383 Wilshire Boulevard, Suite 400 Beverly Hills, CA 90211	PC	Unrestricted operating support for fiscal years 2017	100,000
Massachusetts Institute of Technology 77 Massachusetts Avenue Cambridge, MA 02139	PC	To support the MIT International Science and Technology Initiatives (MISTI) Israel's Global Seed Fund for fiscal year 2018	150,000
The David Project, Inc. PO Box 52390 Boston, MA 02205	PC	Unrestricted operating support for fiscal years 2017 and 2018	250,000

Part XV, Line 3a - Grants and Contributions Paid During the Year

Organization name and address	Status	Purpose of grant or contribution	Amount
Vibe Israel (R.A.) 3 Ha'arad Street Tel Aviv, Israel 6971056	PC	Unrestricted operating support for fiscal years 2017 and 2018	100,000
Subtotal Connections to Israel			2,161,000
<u>Arab Israeli Employment and Education</u>			
Injaz Center for Professional Arab Local Governance (R.A.) 4 Wadi el Haj Nazareth, Israel 16000	PC	Unrestricted operating support for fiscal years 2018 and 2019	125,000
ITWorks Empowering People (A"R) 12 Giborei Yisrael POB 8836 Netanya, Israel 4250405	PC	To support the ExcelHT program for fiscal years 2017 and 2018	25,000
Jewish Funders Network 150 W 30th Street, Suite 900 New York, NY 10001	PC	To support the Social Venture Fund for Jewish-Arab Equality and Shared Society for 2017-2018	50,000
Kav Mashve - Employers Coalition for the Enhancement of Equality of Employment for Academic Arabs and other Minorities 39 Ha'atzmout Road Haifa, Israel 3303320	PC	Unrestricted operating support for fiscal years 2017 and 2018	150,000
Matan - Investing in the Community 33 Ya'avets St. Tel Aviv, Israel 6525832	PC	To support Collective Impact - The Partnership for a Breakthrough in Arab Employment for fiscal years 2016 and 2017	475,000
Rothschild Caesarea Partnerships Fellowship 7 Ha'eshel St. Southern Industrial Park Caesarea, Israel 30795	PC	To support the Cadets for Local Government program for fiscal years 2018, 2019, and 2020	200,000
Seal-Maoz Hachoshlim 6, 6th Floor PO Box 12112 Herzliya, Israel 4673306	PC	To support MAOZ in providing access to leadership opportunities and improving the quality of life for all citizens of Israel for fiscal years 2017 and 2018	500,000

Part XV, Line 3a - Grants and Contributions Paid During the Year

Organization name and address	Status	Purpose of grant or contribution	Amount
Sikkuy: The Association for the Advancement of Civic Equality 17 Hameshoreret Rachel St. Jerusalem, Israel 96348	PC	To support capacity building in Arab-Israeli municipalities for fiscal year 2017	100,000
Tapuah - The Association to Advance the Era of Technology in Israel 36 Brodetski St Ramat Aviv Tel Aviv, Israel 69051	PC	To support the mission and goals of Tapuah, including its work in the Arab community fiscal years 2017 and 2018	50,000
The Davidson Institute of Science Education, at the Weizmann Institute of Science (R.A.) 234 Herzl St. PO Box 26 Rehovot, Israel 7610001	PC	To support the Davidson Institute Ma'ala Program in Sciences for Arab Students at the Weizmann Institute for fiscal years 2018, 2019, and 2020	200,000
Tsofen High Technology Centers, LTD PO Box 50696 Nazareth, Israel 16164	PC	Unrestricted operating support for fiscal years 2017 and 2018	50,000
Subtotal Arab Israeli Employment and Education			900,000

Music Pathways for Youth

Berklee College of Music, Inc. 1140 Boylston Street, MS-1140 IA Boston, MA 02215	PC	To support City Music Boston for fiscal years 2017, 2018, and 2019	135,000
Boston Arts Academy Foundation, Inc. 174 Ipswich Street Boston, MA 02215	PC	To purchase woodwind, brass, and string instruments and to repair string instruments and amplifiers	4,100
Boston Arts Academy Foundation, Inc. 174 Ipswich Street Boston, MA 02215	PC	Unrestricted operating support and the Bridge program for fiscal years 2018 and 2019	100,000
Boston Children's Chorus, Inc. 112 Shawmut Avenue, Suite 5B Boston, MA 02118	PC	Unrestricted operating support for fiscal years 2017 and 2018	90,000

Part XV, Line 3a - Grants and Contributions Paid During the Year

Organization name and address	Status	Purpose of grant or contribution	Amount
Boston City Singers, Inc. 17 Waldeck Street Dorchester, MA 02124	PC	Unrestricted operating support for fiscal years 2017 and 2018	50,000
Boston Latin School Association 27 School Street, Suite 300 Boston, MA 02108	PC	To purchase string instruments for the music program	20,000
Boston Youth Symphony Orchestras, Inc. 855 Commonwealth Avenue Boston, MA 02215	PC	To purchase woodwinds, brass, and percussion instruments for the Intensive Community Program expansion	18,000
Boston Youth Symphony Orchestras, Inc. 855 Commonwealth Avenue Boston, MA 02215	PC	To support the Intensive Community Program for fiscal years 2017 and 2018	125,000
Bridge Boston Foundation 435 Warren Street Roxbury, MA 02119	PC	To support the El Sistema program for fiscal years 2017 and 2018	30,000
Building Bridges Through Music, Inc. 140 Union Street, Suite 209 Lynn, MA 01901	PC	To purchase violins, acoustic guitars, and electric mini-guitars and bass guitars	7,600
Commonwealth of Massachusetts Cultural Council 10 St. James Avenue, 3rd Floor Boston, MA 02116-3803	PC	To manage the Music Educator/Teaching Artist Fellowship Pilot Program	135,000
Community Music Center of Boston 34 Warren Ave Boston, MA 02116	PC	To purchase string and woodwind instruments for the Intensive Study and school outreach programs, and for instrument repairs	25,000
Community Music Center of Boston 34 Warren Ave Boston, MA 02116	PC	Unrestricted operating support and for the Lapin Fund for fiscal years 2017 and 2018	235,000
Conservatory Lab Charter School Foundation 2120 Dorchester Ave Dorchester, Massachusetts 02124	PC	To support the El Sistema program for fiscal years 2018 and 2019	40,000

Part XV, Line 3a - Grants and Contributions Paid During the Year

Organization name and address	Status	Purpose of grant or contribution	Amount
From the Top, Inc. 140 Clarendon Street, Suite 301 Boston, MA 02116	PC	Unrestricted operating support for fiscal years 2017 and 2018	200,000
Handel and Haydn Society 9 Harcourt St Boston, MA 02116	PC	Unrestricted operating support for fiscal years 2017 and 2018	50,000
Josiah Quincy Orchestra Program Limited 885 Washington Street Boston, MA 02111	PC	Unrestricted operating support for fiscal years 2017 and 2018	25,000
KIPP Massachusetts Fund, Inc. 90 High Rock Street Lynn, MA 01902	PC	To purchase instruments, platforms and and a choral folio cabinet	10,000
Margarita Muñiz Academy Foundation 20 Child Street Jamaica Plain, MA 02130	PC	To support the El Sistema music program for fiscal years 2017 and 2018	40,000
Music And Youth Initiative, Inc. 398 Columbus Ave PMB #307 Boston, MA 02116	PC	To purchase 36 iPads, music applications and accessories for 12 Music Clubhouses in Greater Boston	30,840
Musiconnects, Inc. 20 Belgrade Avenue Roslindale, MA 02131	PC	Unrestricted operating support for fiscal years 2017 and 2018	25,000
Perkins School for the Blind 175 North Beacon Street Watertown, MA 02472	PC	To support the Secondary Music Program for fiscal years 2018, 2019, and 2020	50,000
Pope John Paul II Catholic Academy, Inc. 2200 Dorchester Ave. Dorchester, MA 02124	PC	To purchase risers and music stands	10,500
Pope John Paul II Catholic Academy, Inc. 2200 Dorchester Ave. Dorchester, MA 02124	PC	To support music programming for fiscal years 2016 and 2017	35,000

Part XV, Line 3a - Grants and Contributions Paid During the Year

Organization name and address	Status	Purpose of grant or contribution	Amount
Project STEP, Inc. Symphony Hall 301 Massachusetts Avenue, Symphony Hall Boston, MA 02115	PC	Unrestricted operating support and strategic planning for fiscal years 2017 and 2018	60,000
Sociedad Latina, Inc. 1530 Tremont Street Roxbury, MA 02120	PC	To purchase three electric bass guitars, and amplifiers, microphones, and other recording equipment for the pathways to music mastery program, and ten acoustic guitars for its Boston Public Schools (BPS) Arts Expansion school day classes	20,000
The Boston Education Development Foundation, Inc. P.O. Box 320442 Roxbury, MA 02132	PC	To purchase brass, woodwind, and percussion instruments and accessories for the in-school music program at Josiah Quincy Upper School	11,600
The Boston Education Development Foundation, Inc. P.O. Box 320442 Roxbury, MA 02132	PC	To support the mission and goals of the Making Music Matters program for fiscal year 2018	75,000
ZUMIX, Inc. 260 Sumner Street Boston, MA 02128	PC	Unrestricted operating support and strategic planning for fiscal years 2017 and 2018	105,000
Subtotal Music Pathways for Youth			1,762,640

Other Grants and Contributions

Alzheimers Association 225 N. Michigan Ave., Fl. 17 Chicago, IL 60601-7633	PC	Other community contributions - employee matching gift	25
American Jewish World Service, Inc. 45 West 36th St. New York, NY 10018	PC	Other community contributions - employee matching gift	100
Bend the Arc 330 Seventh Avenue, Suite 1900 New York, NY 10001	PC	Other community contributions - employee matching gift	230

Part XV, Line 3a - Grants and Contributions Paid During the Year

Organization name and address	Status	Purpose of grant or contribution	Amount
Boston Center for the Arts, Inc. 539 Tremont Street Boston, MA 02116	PC	Other community contributions - employee matching gift	2,000
Boston Foundation, Inc. 75 Arlington Street Boston, MA 02116	PC	To support the Karoff Fund for Leadership in Philanthropy, in memory of Peter Karoff	5,000
Boston Health Care for the Homeless Program, Inc. 780 Albany Street Boston, MA 02118	PC	To provide a challenge grant to support the Medical Respite Program Expansion (Capital)	110,000
Boston Medical Center Corporation One Boston Medical Center Place Boston, Massachusetts 02118	PC	To support the Building the New BMC Campaign (Capital)	1,000,000
Beth Israel Deaconess Medical Center, Inc. 330 Brookline Avenue Boston, MA 02215-5491	PC	To support the NICU Expansion Project (Capital)	2,000,000
Brandeis University P.O. Box 549110 Waltham, MA 02454-9110	PC	Other community contributions - employee matching gift	868
Breakthrough Greater Boston, Inc. PO Box 381486 Cambridge, MA 02238-1486	PC	Other community contributions - employee matching gift	100
Brooke School Foundation 190 Cummins Highway Boston, MA 02131	PC	To support building the auditorium as part of the Campaign for Brooke High School (Capital)	500,000
Brookline Community Foundation, Inc. 40 Webster Place Brookline, MA 02445	PC	Other community contributions - employee matching gift	200
Camp Yavneh 160 Herrick Rd Newton, MA 02459	PC	Other community contributions - employee matching gift	180
Chocorua Lake Conservancy PO Box 105 Chocorua, MA 03817	PC	Other community contributions - employee matching gift	3,000

Part XV, Line 3a - Grants and Contributions Paid During the Year

Organization name and address	Status	Purpose of grant or contribution	Amount
Combined Jewish Philanthropies of Greater Boston, Inc. 126 High Street Boston, MA 02110	PC	Other community contributions - employee matching gift	180
Footsteps, Inc. 114 John Street, #930 New York, NY 10272	PC	Other community contributions - employee matching gift	268
Hebrew Free Loan Society 675 Third Avenue Suite 1905 New York, NY 10017	PC	Other community contributions - employee matching gift	100
Keshet, Inc. 284 Amory Street Boston, MA 02130	PC	Other community contributions - employee matching gift	750
Little Sisters of the Assumption Family Health Services, Inc. dba Project Hope 550 Dudley Street Roxbury, MA 02119	PC	Other community contributions - employee matching gift	5,000
Massachusetts General Hospital 125 Nashua Street Suite 540 Boston, MA 02114	PC	To support Home Base's move to Constitution Wharf	500,000
Massachusetts Immigrant And Refugee Advocacy Coalition, Inc. 105 Chauncy St., Ste 901 Boston, MA 02111	PC	Other community contributions - employee matching gift	202
Mayyim Hayyim Living Waters Community Mikveh and Educational Center, Inc. 1838 Washington Street Newton, MA 02466	PC	Other community contributions - employee matching gift	180
Mechon Hadar 190 Amsterdam Avenue New York, NY 10023	PC	Other community contributions - employee matching gift	25

Part XV, Line 3a - Grants and Contributions Paid During the Year

Organization name and address	Status	Purpose of grant or contribution	Amount
Meridian Academy, Inc. 54 Brookside Avenue Jamaica Plain, MA 02130	PC	Other community contributions - employee matching gift	100
New Israel Fund PO Box 96712 Washington, DC 20090-6712	PC	Other community contributions - employee matching gift	25
PEAK Grantmaking 1666 K Street, NW, Suite 440 Washington, DC 20006	PC	To support the Campaign for Excellence	25,000
Planned Parenthood League Of Massachusetts, Inc. 1055 Commonwealth Avenue Boston, MA 02215	PC	Other community contributions - employee matching gift	250
Reporters Committee For Freedom Of The Press 1156 15th St NW, Suite 1250 Washington, DC 20005	PC	Other community contributions - employee matching gift	50
Sharsheret, Inc. 1086 Teaneck Road Suite 2G Teaneck, NJ 07666	PC	Other community contributions - employee matching gift	50
Slingshot Fund, Inc. 25 Broadway, 9th Floor New York, NY 10004	PC	Other community contributions - employee matching gift	535
Solomon Schechter Day School of Greater Boston 125 Wells Avenue Newton, MA 02459	PC	Other community contributions - employee matching gift	72
Technion - Israel Institute of Technology Technion City Israel 3200004	PC	Capital grant to support the undergraduate student village at Technion's Haifa campus for fiscal years 2015, 2016 and 2017	750,000
Temple Hillel B'nai Torah 120 Corey Street West Roxbury, MA 02132	PC	Other community contributions - employee matching gift	7,353

Part XV, Line 3a - Grants and Contributions Paid During the Year

Organization name and address	Status	Purpose of grant or contribution	Amount
The McLean Hospital Corporation 115 Mill Street; Mail Stop 126 Belmont, MA 02478-1064	PC	Capital support for the McLean Hospital Admissions Building Expansion and Renovation project	1,000,000
Trustees Of Boston University Boston University 890 Commonwealth Ave, 3rd Floor Boston, MA 02215	PC	Other community contributions - employee matching gift	50
United Philanthropy Forum 1020 19th Street NW, Suite 360 Washington, DC 20036	PC	To support the 2018 Annual Conference	25,000
West End House, Inc. 105 Allston St Allston, MA 02134	PC	To support Expect More: The Campaign for West End House for fiscal years 2016, 2017, and 2018 (Capital)	250,000
WildAid 333 Pine Street Suite 300 San Francisco, CA 94104	PC	Other community contributions - employee matching gift	25
Yad Chessed Fund, Inc. PO Box 470752 Brookline Village, MA 02447	PC	Other community contributions - employee matching gift	25
Subtotal Other Grants and Contributions			6,186,943
Total Grants and Contributions Paid During the Year			\$ 46,414,081

Part XV, Line 3b - Grants and Contributions Approved for Future Payment

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
<u>Medical and Scientific Research</u>			
Beth Israel Deaconess Medical Center, Inc. 330 Brookline Avenue Boston, MA 02215-5491	PC	Focus on the positive: pathways for biasing responses to mixed-valence food cues	\$ 500,000
Broad Institute, Inc. 415 Main Street Cambridge, MA 02142	PC	To provide flexible, incubative and accelerant funding	5,000,000
Broad Institute, Inc. 415 Main Street Cambridge, MA 02142	PC	To provide flexible, incubative and accelerant funding for the Klarman Cell Observatory to systematically define cellular circuits in mammalian cells	25,000,000
Broad Institute, Inc. 415 Main Street Cambridge, MA 02142	PC	To develop and support scientific collaborations in cell circuitry between Israeli and Broad Institute scientists	5,000,000
Israel Science Foundation Albert Einstein Square 43 Jabotinsky Street Jerusalem, Israel 9104001	PC	To develop and support scientific collaborations in cell circuitry between Israeli and Broad Institute scientists	4,000,000
Johns Hopkins University 733 N. Broadway St. Suite 117 Baltimore, MD 21205	PC	Neural Mechanisms of Appetite Dysregulation in Anorexia Nervosa: The Role of AGRP	375,865
Regents of the University of Minnesota 2450 Riverside Ave Minneapolis, MN 55454	PC	Goal based learning and habit in Anorexia Nervosa	376,567
Trustees Of Columbia University In The City Of New York 615 West 131st Street New York, NY 10027	PC	Mechanisms of decision-making in Anorexia Nervosa: a computational psychiatry approach	466,626

Part XV, Line 3b - Grants and Contributions Approved for Future Payment

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
Trustees Of Columbia University In The City Of New York 615 West 131st Street New York, NY 10027	PC	Stress and Eating Behavior in Anorexia Nervosa	500,000
Subtotal Medical and Scientific Research			41,219,058
<u>Good Philanthropic Citizen and Community Grants</u>			
American Jewish Committee 165 East 56 Street New York, NY 10022	PC	Unrestricted operating support for fiscal years 2017 and 2018	150,000
Boston After School & Beyond, Inc. 89 South Street, Suite 601 Boston, MA 02111	PC	Unrestricted operating support and the Summer Learning Project for fiscal years 2018 and 2019	100,000
Boston Foundation, Inc. 75 Arlington Street Boston, MA 02116	PC	To support the staffing of the Massachusetts United for Puerto Rico Fund	31,600
Bottom Line 500 Amory St., Suite 3 Jamaica Plain, MA 02130	PC	Unrestricted operating support for fiscal years 2017 and 2018	15,000
Boys and Girls Clubs of Boston, Inc. 200 High Street, 3rd Floor Boston, Massachusetts 02110-3045	PC	Unrestricted operating support for fiscal years 2018, 2019, 2020, and 2021	750,000
Brookline Community Mental Health Center, Inc. 41 Garrison Road Brookline, MA 02445	PC	To support the Bridge for Resilient Youth in Transition (BRYT) program for fiscal years 2018, 2019, and 2020	275,000
Commonwealth Shakespeare Company, Inc. 231 Forest Street, Sorenson Center Babson Park, MA 02457	PC	To support Shakespeare on the Common for fiscal years 2017, 2018, and 2019	50,000
Crisis Text Line 24 W 25th St, Fl 6 New York, NY 10010	PC	Unrestricted operating support for fiscal years 2018 and 2019	300,000

Part XV, Line 3b - Grants and Contributions Approved for Future Payment

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
Economic Mobility Pathways, Inc. One Washington Mall, 3rd Floor Boston, MA 02108	PC	Unrestricted operating support for fiscal years 2018 and 2019	30,000
English for New Bostonians 105 Chauncy St., 4th floor Boston, MA 02111	PC	Unrestricted operating support for fiscal years 2018 and 2019	135,000
Health Care For All, Inc. One Federal Street, 5th Floor Boston, MA 02110	PC	Unrestricted operating support for fiscal years 2018 and 2019	35,000
Health Leads, Inc. 24 School Street, 6th Floor Boston, MA 02108	PC	Unrestricted operating support for fiscal years 2017, 2018 and 2019	80,000
Homestart, Inc. 105 Chauncy Street, Suite 502 Boston, MA 02111	PC	Unrestricted operating support for fiscal years 2017 and 2018	75,000
International Association Yahad-in Unum 30 Rue Garibaldi Saint Ouen, France 93400	PC	To support research missions for fiscal years 2017 and 2018	500,000
Jewish Community Relations Council of San Francisco, the Peninsula, Marin, Sonoma, Alameda and Contra Costa Counties 121 Steuart Street, Suite 301 San Francisco, CA 94105	PC	To support the Institute for Curriculum Services for fiscal years 2018, 2019, and 2020	200,000
Jewish Funders Network 150 W 30th Street, Suite 900 New York, NY 10001	PC	To support the mission and goals of JFN for fiscal years 2017 and 2018	100,000
Leading Edge Alliance, Inc. 85 Broad St. 16th Floor New York, NY 10004	PC	Unrestricted operating support for fiscal years 2018, 2019, and 2020	175,000

Part XV, Line 3b - Grants and Contributions Approved for Future Payment

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
Leket Israel 11 HaSadna; P.O. Box 2297 Ra'anana, Israel 4365006	PC	Unrestricted operating support for fiscal years 2017 and 2018	75,000
Longwood Symphony Orchestra, Inc. 10 Guest Street Suite 295 Boston, MA 02135	PC	Unrestricted operating support for fiscal years 2017, 2018, and 2019	50,000
Massachusetts Society for the Prevention of Cruelty to Children 3815 Washington Street, Suite 2 Boston, MA 02130	PC	Unrestricted operating support for fiscal years 2018 and 2019	25,000
Our Military Kids, Inc. 6861 Elm Street, Suite 2A McLean, VA 22101	PC	Unrestricted operating support for fiscal years 2017, 2018, and 2019	100,000
Pine Street Inn, Inc. 444 Harrison Avenue Boston, MA 02118	PC	To provide a challenge grant for the Many Roads Home Campaign for fiscal years 2018 - 2021	4,000,000
Pine Street Inn, Inc. 444 Harrison Avenue Boston, MA 02118	PC	Unrestricted operating support for fiscal years 2018 - 2021	1,000,000
Rosie's Place, Inc. 889 Harrison Avenue Boston, MA 02118	PC	Unrestricted operating support for fiscal years 2018 and 2019	15,000
Social Finance, Inc. 200 State Street, 14th Floor Boston, MA 02109	PC	To support the development and implementation of Veterans CARE Pay for Success Project for fiscal years 2017 - 2020	250,000
Soldier On, Inc. 290 Merrill Road Pittsfield, MA 01201	PC	Unrestricted operating support for fiscal years 2017 and 2018	50,000

Part XV, Line 3b - Grants and Contributions Approved for Future Payment

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
Veterans Legal Services, Inc. P.O. Box 8457 Boston, MA 02114	PC	Unrestricted operating support for fiscal years 2018, 2019, and 2020	200,000
Washington Institute for Near East Policy 1111 19th Street, NW Suite 500 Washington, DC 20036	PC	Unrestricted operating support for fiscal years 2017 and 2018	125,000
Yad Vashem - The Martyrs' and Heroes' Remembrance Authority 4 Har Hazikaron, P.O.B. 3477 Jerusalem, Israel 9103401	PC	Unrestricted operating support	100,000
Youth Villages, Inc. 3320 Brother Blvd Bartlett, TN 38133	PC	Unrestricted operating support for Youth Villages New England for fiscal years 2018 and 2019	600,000
Subtotal Good Philanthropic Citizen and Community Grants			9,591,600

Healthy Democracy

Anti-Defamation League 605 Third Avenue New York, NY 10158-0180	PC	To support the mission and goals of ADL nationally, including its work in the New England Region for fiscal years 2018 and 2019	750,000
Bagly, Inc. PO Box 960814 Boston, MA 02196-0814	PC	Unrestricted operating support for fiscal years 2018 and 2019	25,000
Equal Justice Initiative 122 Commerce Street Montgomery, AL 36104	PC	Unrestricted operating support and support for the capital campaign for fiscal years 2018 and 2019	500,000
Facing History And Ourselves, Inc. 16 Hurd Road Brookline, MA 02445	PC	Unrestricted operating support for fiscal years 2018, 2019, and 2020	4,000,000

Part XV, Line 3b - Grants and Contributions Approved for Future Payment

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
GLBTQ Legal Advocates & Defenders, Inc. 30 Winter St Ste 800 Boston, MA 02108	PC	Unrestricted operating support for fiscal years 2018 and 2019	100,000
Interfaith Youth Core 141 W. Jackson Blvd, Suite 3200 Chicago, Illinois 60604	PC	Unrestricted operating support for fiscal years 2018 and 2019	250,000
Irish International Immigrant Center, Inc. One State Street, Suite 800 Boston, MA 02109	PC	Unrestricted operating support for fiscal years 2018 and 2019	25,000
Massachusetts Alliance Of Portuguese Speakers, Inc. 1046 Cambridge Street Cambridge, MA 02139	PC	Unrestricted operating support for fiscal years 2018 and 2019	25,000
Massachusetts Immigrant And Refugee Advocacy Coalition, Inc. 105 Chauncy St., Ste 901 Boston, MA 02111	PC	Unrestricted operating support for fiscal years 2018 and 2019	100,000
Massachusetts Legal Assistance Corporation 7 Winthrop Square, 2nd Floor Boston, MA 02110-1245	PC	To support the Greater Boston Immigrant Defense Fund	100,000
Massachusetts Legal Assistance Corporation 7 Winthrop Square, 2nd Floor Boston, MA 02110-1245	PC	To support the mission and goals of MLAC, and for immigration legal services for Massachusetts organizations for fiscal years 2018 and 2019	400,000
National Center For Transgender Equality 1133 19th St NW Suite 302 Washington, DC 20036	PC	Unrestricted operating support for fiscal years 2018 and 2019	50,000
Southern Poverty Law Center, Inc. 400 Washington Ave Montgomery, AL 36104	PC	Unrestricted operating support for fiscal years 2018 and 2019	50,000

Part XV, Line 3b - Grants and Contributions Approved for Future Payment

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
The Lenny Zakim Fund, Inc. The LZF c/o DLA Piper 33 Arch Street 26th Floor Boston, MA 02110	PC	Unrestricted operating support for fiscal years 2018, 2019, and 2020	250,000
The Shalom Hartman Institute of North America One Penn Plaza, Ste 1606 New York, NY 10119	PC	To support the mission and goals of SHINA for fiscal years 2018 and 2019	500,000
United States Holocaust Memorial Museum 100 Raoul Wallenberg Place SW Washington, DC 20024-2126	PC	Unrestricted operating support for fiscal years 2017, 2018, and 2019	300,000
Subtotal Healthy Democracy			7,425,000

Funder Collaborations and Bold Bets

Upstream USA, Inc. 1630 San Pablo Avenue, Suite 400 Oakland, CA 94612	PC	To support the expansion to Massachusetts for fiscal years 2018 - 2022	5,000,000
Year Up, Inc. 45 Milk St Fl 9 Boston, MA 02109	PC	Unrestricted operating support, including Boston operations, for fiscal years 2017 - 2024	8,000,000
Subtotal Funder Collaborations and Bold Bets			13,000,000

Connections to Israel

Vibe Israel (R.A.) 3 Ha'arad Street Tel Aviv, Israel 6971056	PC	Unrestricted operating support for fiscal years 2017 and 2018	100,000
Subtotal Connections to Israel			100,000

Part XV, Line 3b - Grants and Contributions Approved for Future Payment

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
<u>Arab Israeli Employment & Education</u>			
Injaz Center for Professional Arab Local Governance (R.A.) 4 Wadi el Haj Nazareth, Israel 16000	PC	Unrestricted operating support for fiscal years 2018 and 2019	125,000
ITWorks Empowering People (A"R) 12 Giborei Yisrael POB 8836 Netanya, Israel 4250405	PC	To support the ExcelHT program for fiscal years 2017 and 2018	25,000
Kav Mashve - Employers Coalition for the Enhancement of Equality of Employment for Academic Arabs and other Minorities 39 Ha'atzmaut Road Haifa, Israel 3303320	PC	Unrestricted operating support for fiscal years 2017 and 2018	100,000
Matan - Investing in the Community 33 Ya'avets St. Tel Aviv, Israel 6525832	PC	To support Collective Impact - The Partnership for a Breakthrough in Arab Employment for fiscal years 2017, 2018, and 2019	2,250,000
Rothschild Caesarea Partnerships Fellowship 7 Ha'eshel St. Southern Industrial Park Caesarea, Israel 30795	PC	To support the Cadets for Local Government program for fiscal years 2018, 2019, and 2020	550,000
Tapuah - The Association to Advance the Era of Technology in Israel 36 Brodetski St Ramat Aviv Tel Aviv, Israel 69051	PC	To support the mission and goals of Tapuah, including its work in the Arab community for fiscal years 2017 and 2018	50,000
The Davidson Institute of Science Education, at the Weizmann Institute of Science (R.A.) 234 Herzl St. PO Box 26 Rehovot, Israel 7610001	PC	To support the Davidson Institute Ma'ala Program in Sciences for Arab Students at the Weizmann Institute for fiscal years 2018, 2019, and 2020	400,000

Part XV, Line 3b - Grants and Contributions Approved for Future Payment

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
Tsofen High Technology Centers, LTD PO Box 50696 Nazareth, Israel 16164	PC	Unrestricted operating support for fiscal years 2017 and 2018	50,000
Subtotal Arab Israeli Employment and Education			1,050,000
<u>Music Pathways for Youth</u>			
Boston Arts Academy Foundation, Inc. 174 Ipswich Street Boston, MA 02215	PC	To provide a challenge grant	125,000
Boston Arts Academy Foundation, Inc. 174 Ipswich Street Boston, MA 02215	PC	Unrestricted operating support and the Bridge program for fiscal years 2018 and 2019	100,000
Conservatory Lab Charter School Foundation 2120 Dorchester Ave Dorchester, Massachusetts 02124	PC	To support the El Sistema program for fiscal years 2018 and 2019	40,000
From the Top, Inc. 140 Clarendon Street, Suite 301 Boston, MA 02116	PC	Unrestricted operating support for fiscal years 2017 and 2018	200,000
Immigrant Family Services Institute, Inc. 575 American Legion Hwy Roslindale, MA 02131	PC	To purchase string and wind instruments	10,000
Perkins School for the Blind 175 North Beacon Street Watertown, MA 02472	PC	To support the Secondary Music Program for fiscal years 2018, 2019, and 2020	85,000
Project STEP, Inc. Symphony Hall 301 Massachusetts Avenue, Symphony Hall Boston, MA 02115	PC	To provide a challenge grant to purchase string instruments	18,000
Subtotal Music Pathways for Youth			578,000

Part XV, Line 3b - Grants and Contributions Approved for Future Payment

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
<u>Other</u>			
Brooke School Foundation 190 Cummins Highway Boston, MA 02131	PC	To support building the auditorium as part of the Campaign for Brooke High School (Capital)	500,000
Massachusetts General Hospital 125 Nashua Street Suite 540 Boston, MA 02114	PC	To support Home Base's move to Constitution Wharf	1,500,000
Subtotal Other			2,000,000
Total Grants and Contributions Approved for Future Periods			\$ 77,463,658