

**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.

2018**Open to Public Inspection****For calendar year 2018 or tax year beginning , 2018, 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)
▶ \$ 759,881,298.

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). . .	75,000,000.				
	2 Check <input type="checkbox"/> if the foundation is not required to attach Sch. B					
	3 Interest on savings and temporary cash investments	1,227,324.	1,227,324.	N/A		
	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	17,888,727.				
	b Gross sales price for all assets on line 6a	19,017,490.				
	7 Capital gain net income (from Part IV, line 2)		18,675,891.			
	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	12,491,808.	11,997,057.			
12 Total. Add lines 1 through 11		106,607,859.	31,900,272.			
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc.	403,898.	3,510.		400,388.	
	14 Other employee salaries and wages	1,535,619.	21,714.		1,513,905.	
	15 Pension plans, employee benefits	471,233.	7,082.		464,151.	
	16a Legal fees (attach schedule)	322,406.	105,449.		216,957.	
	b Accounting fees (attach sch)	111,755.	24,918.		81,837.	
	c Other professional fees (attach sch)	239,710.			239,710.	
	17 Interest					
	18 Taxes (attach schedule)(see instrs).	3,654.				
	19 Depreciation (attach schedule) and depletion	166,845.				
	20 Occupancy	568,246.			568,246.	
	21 Travel, conferences, and meetings	231,810.			231,810.	
	22 Printing and publications					
	23 Other expenses (attach schedule)					
		See Statement 7	10,847,728.	10,174,463.		325,024.
	24 Total operating and administrative expenses. Add lines 13 through 23		14,902,904.	10,337,136.		4,042,028.
25 Contributions, gifts, grants paid.		60,160,185.			60,160,185.	
26 Total expenses and disbursements. Add lines 24 and 25		75,063,089.	10,337,136.		64,202,213.	
27 Subtract line 26 from line 12:						
a Excess of revenue over expenses and disbursements		31,544,770.				
b Net investment income (if negative, enter -0-)			21,563,136.			
c Adjusted net income (if negative, enter -0-)						

Part II Balance Sheets		Beginning of year	End of year	
			(a) Book Value	(b) Book Value
Assets	1 Cash — non-interest-bearing	3,643,451.	6,702,197.	6,702,197.
	2 Savings and temporary cash investments	109,103,375.	90,981,286.	90,981,286.
	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)			
	Less: allowance for doubtful accounts			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges	3,477.	7,000.	7,000.
	10a Investments — U.S. and state government obligations (attach schedule)			
	b Investments — corporate stock (attach schedule)	10,000,000.	14,686,979.	16,780,397.
	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)	517,326,963.	559,305,580.	642,565,210.
	14 Land, buildings, and equipment: basis	1,453,171.		
	Less: accumulated depreciation (attach schedule)	635,029.	818,142.	818,142.
	15 Other assets (describe	2,026,905.	2,027,066.	2,027,066.
	16 Total assets (to be completed by all filers — see the instructions. Also, see page 1, item I)	642,974,573.	674,528,250.	759,881,298.
	17 Accounts payable and accrued expenses	12,707.	28,774.	
	18 Grants payable			
	19 Deferred revenue			
Net Assets or Fund 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)	12,707.	28,774.	
	Foundations that follow SFAS 117, check here			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here			
	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	642,961,866.	674,499,476.	
	30 Total net assets or fund balances (see instructions)	642,961,866.	674,499,476.	
	31 Total liabilities and net assets/fund balances (see instructions)	642,974,573.	674,528,250.	

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	642,961,866.
2	Enter amount from Part I, line 27a.	2	31,544,770.
3	Other increases not included in line 2 (itemize)	3	
4	Add lines 1, 2, and 3.	4	674,506,636.
5	Decreases not included in line 2 (itemize)	5	7,160.
6	Total net assets or fund balances at end of year (line 4 minus line 5) — Part II, column (b), line 30	6	674,499,476.

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 shs. MLC Co.)		(b) How acquired P — Purchase D — Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1 a Publicly traded securities				
b Distributions in excess of basis				
c Passthrough K-1 capital gain				
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 337,424.		341,599.	-4,175.
b 1,568,520.			1,568,520.
c 17,111,546.			17,111,546.
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69.

(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	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a			-4,175.
b			1,568,520.
c			17,111,546.
d			
e			

2 Capital gain net income or (net capital loss).....	2	18,675,891.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). See instructions. If (loss), enter -0- in Part I, line 8.....	3	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))
2017	50,226,432.	742,469,408.	0.067648
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

2 Total of line 1, column (d).....	2	0.412442
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	0.082488
4 Enter the net value of noncharitable-use assets for 2018 from Part X, line 5.....	4	735,175,813.
5 Multiply line 4 by line 3.....	5	60,643,182.
6 Enter 1% of net investment income (1% of Part I, line 27b).....	6	215,631.
7 Add lines 5 and 6.....	7	60,858,813.
8 Enter qualifying distributions from Part XII, line 4.....	8	64,316,798.

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 checked="" type="checkbox"/> and enter 1% of Part I, line 27b		1	215,631.
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	215,631.
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	215,631.
6 Credits/Payments:			
a 2018 estimated tax pmts and 2017 overpayment credited to 2018	6 a	204,954.	
b Exempt foreign organizations – tax withheld at source	6 b		
c Tax paid with application for extension of time to file (Form 8868)	6 c	187,000.	
d Backup withholding erroneously withheld	6 d		
7 Total credits and payments. Add lines 6a through 6d	7	391,954.	
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	176,323.	
11 Enter the amount of line 10 to be: Credited to 2019 estimated tax 176,323. 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 ▶ \$ 0. (2) On foundation managers ▶ \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ▶ \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If 'Yes,' attach a detailed description of the activities.		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 MA NY		
b If the answer is 'Yes' to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by <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 2018 or the tax year beginning in 2018? 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

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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 2018, 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>		X
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 2018? <u>1 c</u>		X
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 2018, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2018? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If 'Yes,' list the years <u>20__ , 20__ , 20__ , 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>		N/A
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__ , 20__ , 20__ , 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 checked="" type="checkbox"/> Yes <input type="checkbox"/> No		
b If 'Yes,' did it have excess business holdings in 2018 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 2018.) <u>3 b</u>		X
4 a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? <u>4 a</u>		X
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 2018? <u>4 b</u>		X

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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 instructions

Organizations relying on a current notice regarding disaster assistance, check here ☐

c If the answer is 'Yes' to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? ☒ Yes ☐ No
If 'Yes,' attach the statement required by Regulations section 53.4945–5(d).

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 N/A

8 Is the foundation subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment(s) during the year? ☐ Yes ☒ No

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors**1** List all officers, directors, trustees, 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	359,333.	44,565.	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
Karen Gill PO Box 171627 Boston, MA 02117	Dir Ops & Adm 32	208,000.	48,483.	0.
Laura Sherman PO Box 171627 Boston, MA 02117	Dir MA Grants 40	203,000.	50,105.	0.
Jonathan Horowitz PO Box 171627 Boston, MA 02117	Sr Prog Ofcr 40	173,000.	28,472.	0.
Lara Bethke PO Box 171627 Boston, MA 02117	Dir Med/Sci 24	141,200.	17,864.	0.
Erin Peterson PO Box 171627 Boston, MA 02117	Sr Grants Mgr 40	117,000.	29,683.	0.

Total number of other employees paid over \$50,000 ☐ 0

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)**3 Five highest-paid independent contractors for professional services. See instructions. If none, enter 'NONE.'**

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
Ropes & Gray 800 Boylston Street Boston, MA 02199-3600	Legal	295,166.
RSM US LLP 80 City Square Boston, MA 02129	Accounting	81,797.
CFAR 1700 Market Street, Suite 2140 Philadelphia, PA 19103	Organizational Strgy	59,337.
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.

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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	2,437,845.
b	Average of monthly cash balances.....	1 b	82,863,533.
c	Fair market value of all other assets (see instructions).....	1 c	661,070,006.
d	Total (add lines 1a, b, and c).....	1 d	746,371,384.
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	746,371,384.
4	Cash deemed held for charitable activities. Enter 1-1/2% of line 3 (for greater amount, see instructions).....	4	11,195,571.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4.....	5	735,175,813.
6	Minimum investment return. Enter 5% of line 5.....	6	36,758,791.

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	36,758,791.
2a	Tax on investment income for 2018 from Part VI, line 5.....	2a	215,631.
b	Income tax for 2018. (This does not include the tax from Part VI.).....	2b	3,592.
c	Add lines 2a and 2b.....	2c	219,223.
3	Distributable amount before adjustments. Subtract line 2c from line 1.....	3	36,539,568.
4	Recoveries of amounts treated as qualifying distributions.....	4	708.
5	Add lines 3 and 4.....	5	36,540,276.
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	36,540,276.

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	64,202,213.
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	114,585.
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	64,316,798.
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	215,631.
6	Adjusted qualifying distributions. Subtract line 5 from line 4.....	6	64,101,167.

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 2017	(c) 2017	(d) 2018
1 Distributable amount for 2018 from Part XI, line 7				36,540,276.
2 Undistributed income, if any, as of the end of 2018:				
a Enter amount for 2017 only			0.	
b Total for prior years: 20 __, 20 __, 20 __		0.		
3 Excess distributions carryover, if any, to 2018:				
a From 2013	36,577,104.			
b From 2014	12,411,363.			
c From 2015	12,672,685.			
d From 2016	12,825,930.			
e From 2017	13,184,280.			
f Total of lines 3a through e	87,671,362.			
4 Qualifying distributions for 2018 from Part XII, line 4: ► \$ 64,316,798.				
a Applied to 2017, 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 2018 distributable amount				36,540,276.
e Remaining amount distributed out of corpus ..	27,776,522.			
5 Excess distributions carryover applied to 2018. (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.	115,447,884.			
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 2017. Subtract line 4a from line 2a. Taxable amount — see instructions			0.	
f Undistributed income for 2018. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2019				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 2013 not applied on line 5 or line 7 (see instructions) ..	36,577,104.			
9 Excess distributions carryover to 2019. Subtract lines 7 and 8 from line 6a	78,870,780.			
10 Analysis of line 9:				
a Excess from 2014	12,411,363.			
b Excess from 2015	12,672,685.			
c Excess from 2016	12,825,930.			
d Excess from 2017	13,184,280.			
e Excess from 2018	27,776,522.			

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 2018, 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) 2018	(b) 2017	(c) 2016	(d) 2015	
2 a 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	60,160,185.
Total			3 a	60,160,185.
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	38,051,875.
Total			3 b	38,051,875.

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

2018

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 (entering 'N/A' in column (b) instead of the contributor name and address), 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) (2018)

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	\$ 75,000,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)

Name of organization

The Klarman Family Foundation

Employer identification number

04-3105768

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

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

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	N/A		
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee

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.	
Passthrough K-1 income.....	12,375,684.	11,917,282.	
Returned grant.....	708.		
Section 965 inclusion.....	59,892.	59,800.	
Tax refund.....	35,549.		
Total	<u>\$12,491,808.</u>	<u>\$11,997,057.</u>	<u>\$ 0.</u>

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.....	\$ 46,756.			\$ 46,756.
Grants management.....	87,254.			87,254.
Investments.....	105,449.	\$ 105,449.		
Program-related investment matters	13,286.			13,286.
Tax matters.....	69,475.			69,475.
Trademark matters.....	186.			186.
Total	<u>\$ 322,406.</u>	<u>\$ 105,449.</u>	<u></u>	<u>\$ 216,957.</u>

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.....	\$ 64,350.			\$ 64,350.
Investment accounting.....	17,448.	\$ 17,448.		
Payroll services.....	5,017.			5,017.
Tax compliance.....	24,940.	7,470.		12,470.
Total	<u>\$ 111,755.</u>	<u>\$ 24,918.</u>	<u></u>	<u>\$ 81,837.</u>

The Klarman Family Foundation

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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
Grant management system consulting \$	30,018.			\$ 30,018.
Grant program support.....	34,000.			34,000.
Human resources and benefit consulting				
	25,386.			25,386.
Information technology services....	32,963.			32,963.
Organizational strategy consulting	59,337.			59,337.
Program consulting and evaluation.	11,113.			11,113.
Program planning and facilitation.	24,790.			24,790.
Scientific advisors.....	20,503.			20,503.
Translation services.....	1,600.			1,600.
Total	<u>\$ 239,710.</u>	<u>\$ 0.</u>	<u></u>	<u>\$ 239,710.</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
New York Corporation Tax.....	\$ 3,654.			
Total	<u>\$ 3,654.</u>	<u>\$ 0.</u>	<u></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	166,844	69,970	S/L		3	34,270	0	0
Furniture								
Various	456,234	269,775	S/L		5	54,743	0	0
Leasehold improvements								
Various	777,294	128,440	S/L		10	77,832	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.	\$ 183,812.			\$ 183,812.
Insurance.....	16,668.			16,668.
Office supplies.....	63,131.			63,131.
Passthrough K-1 expenses.....	10522704.	\$ 10174463.		
Repairs and maintenance.....	13,882.			13,882.
State filing fees.....	1,000.			1,000.
Technology expense.....	46,531.			46,531.
Total	\$ 10847728.	\$ 10174463.		\$ 325,024.

Statement 8
Form 990-PF, Part II, Line 10b
Investments - Corporate Stocks

Corporate Stocks	Valuation Method	Book Value	Fair Market Value
222,448 shares Boston Omaha Corporation	Cost	\$ 4,686,979.	\$ 5,205,283.
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.	5,731,786.
Total		\$ 14,686,979.	\$ 16,780,397.

Statement 9
Form 990-PF, Part II, Line 13
Investments - Other

Other Investments	Valuation Method	Book Value	Fair Market Value
See attachment	Cost	\$ 559305580.	\$ 642,565,210.
Total		\$ 559305580.	\$ 642,565,210.

Statement 10
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.	\$ 324,517.	\$ 131,716.	\$ 131,716.
Machinery and Equipment	219,644.	104,240.	115,404.	115,404.
Improvements	777,294.	206,272.	571,022.	571,022.
Total	\$ 1,453,171.	\$ 635,029.	\$ 818,142.	\$ 818,142.

The Klarman Family Foundation

04-3105768

Statement 11
Form 990-PF, Part II, Line 15
Other Assets

	<u>Book Value</u>	<u>Fair Market Value</u>
PRI - Home Funders LLC.....	\$ 29,523.	\$ 29,523.
PRI - Home Funders Loan.....	1,997,543.	1,997,543.
Total	<u>\$ 2,027,066.</u>	<u>\$ 2,027,066.</u>

Statement 12
Form 990-PF, Part III, Line 5
Other Decreases

Prior year accounts payable adjustment.....	\$ 7,160.
Total	<u>\$ 7,160.</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
 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

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

Submission Deadlines:
Restrictions on Awards:

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.
See www.klarmanfoundation.org
See www.klarmanfoundation.org

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

	Proceeds	Cost	Gain/Loss
Amounts reported in Part IV	\$ 19,017,490	341,599	\$ 18,675,891
Passthrough K-1 short-term capital gain/(loss) UBTI			(3,197,461)
Passthrough K-1 long-term capital gain/(loss) UBTI			2,288,642
Passthrough K-1 751 gain/(loss) UBTI			117,625
Passthrough K-1 1231 gain/(loss) UBTI			57,392
Passthrough K-1 1256 gain/(loss) UBTI			(53,362)
Total Gain/Loss per Part I, Line 6			<u>\$ 17,888,727</u>

Part II, Line 13 - Other Investments

	Book Value	Fair Market Value
83North II Limited Partnership	\$ 1,206,204	\$ 2,062,679
Abrams Capital Partners I, L.P.	34,823,902	33,964,000
Abrams Capital Partners II, L.P.	40,173,524	37,385,344
Al Bawadar	191,684	161,889
Arbiter Partners, L.P.	7,726,420	7,373,253
Arbiter Special Opportunities Fund II LP	9,976,108	9,978,222
Attestor Value Fund, LP	52,216,298	58,219,666
Berkshire Fund IX-A (IND) LP	966,513	954,284
Berkshire Fund IX-A IND VP AIV LP	19,693	19,693
Berkshire Fund VII (OS), LP	-	30,343
Berkshire Fund VII, LP	2,746	60,702
Berkshire Fund VIII (IND), LP	843,527	1,123,867
Boulderado Partners LLC	-	117,220
Brookside Capital Partners Fund	11,543,215	11,785,379
Celsius Therapeutics Inc.	3,446,154	3,446,154
Columbus Hill Partners LP	13,950,301	14,347,176
Covalent Partners	619,179	519,929
Cross Shore Overseas	2,500,000	2,328,780
Cue Ball Capital L.P.	1,725,832	1,954,221
Dynamic Care	200,000	200,000
EcoR1 Capital Fund, LP	12,680,404	13,056,302
FIMI Opportunity 6, LP	1,283,621	1,502,000
FIMI Opportunity V, LP	3,608,123	7,227,000
Finepoint Capital	10,084,709	10,136,727
Flare Capital Partners I	991,355	1,430,303
Flybridge Capital Partners III	-	436,974
Flybridge Capital Partners IV	667,579	1,150,722
Flybridge II, LLC	157,320	22,441
Flybridge XFactor	498,638	500,000
GC Entrepreneurs Fund II	3,320	2,925
GC Entrepreneurs Fund IV	7,205	39,946
Greenlight Capital Offshore (Gold), LTD	20,000,000	14,722,538
Hawkeye Institutional Cap LP	6,652,712	6,519,267
Hayman Capital	2,320,457	1,666,127
Highfields Capital Ltd.	2,434,546	2,000,998
Imagry, Inc.	2,000,000	2,000,000
JHL Capital Group	15,935,525	15,307,221
Jeereddi I, LP	4,020,282	4,440,972
Kensico Offshore Fund	97,839,000	142,661,632
MFN Partners LP	32,983,739	30,417,571

Part II, Line 13 - Other Investments

	Book Value	Fair Market Value
Magma Venture Capital III Fund	4,294,424	11,365,873
Magma Venture Capital IV Fund	2,982,312	4,445,739
Newtyn TE Partners	14,488,956	14,237,730
Ostra Capital	12,023,511	11,902,180
Perry Partners, LP	646,091	586,053
Pitango Growth Fund I L.P.	1,054,908	1,760,514
Pitango Venture Capital Fund VI L.P.	1,639,869	3,781,061
Pitango Venture Capital Fund VII L.P.	1,111,906	2,743,326
Privatvarde Fund	174,759	581
Raffles Associates, LP	3,670,248	2,776,992
Riva Capital Partners LP	205,989	39,644
Route One Fund I, LP	31,330,638	36,104,925
S Capital, LP	484,496	475,895
Sessa Capital International Fund	2,000,000	3,793,698
Slate Path Partners LP	34,315,645	33,590,829
Spruce House Capital	34,229,296	57,144,879
Swiftcurrent Offshore (Bridger Capital)	7,500,000	8,250,885
TLV Partners II, L.P.	839,602	836,492
Takwin Labs L.P.	803,785	999,248
The Varde Fund IX, LP	167,399	43,530
The Varde Fund VII, LP	469,124	9,619
The Varde Fund VIII, LP	366,302	22,416
The Varde Fund X, LP	3,860,712	3,288,105
The Varde Fund, LP	229,965	7,325
Three Bays Capital	1,719,699	621,471
Varde Investment Partners, LP	2,396,109	2,461,733
Total Part II, Line 13 - Other Investments	\$ 559,305,580	\$ 642,565,210

Part VII-B, Line 5c – Expenditure Responsibility

Pursuant to IRC Regulation 53.4945-5(d)(2), the Foundation provides the following information for grants paid during 2018 or which had reports outstanding during 2018:

- | | | |
|-------------|---|---|
| (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 submitted a complete report of its expenditure of the grant funds on 11/5/18. |
| (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 VII-B, Line 5c – Expenditure Responsibility

Pursuant to IRC Regulation 53.4945-5(d)(2), the Foundation provides the following information for grants paid during 2018 or which had reports outstanding during 2018:

- | | | |
|-------------|---|---|
| (i) | Grantee: | Strategic Grant Partners (“SGP”)
240 Newbury Street, 2 nd Floor, Boston, MA 02116 |
| (ii) | Date and
Amount of
Grant: | 7/19/18 \$660,268
12/6/18 \$428,552 |
| (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 11/15/19. |
| (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 grants paid during 2018 or which had reports outstanding during 2018:

- | | | |
|-------------|-------------------------------------|--|
| (i) | Grantee: | Home Funders Collaborative LLC (“Home Funders”)
240 Newbury Street, 2 nd Floor, Boston, MA 02116 |
| (ii) | Date and Amount of Grant: | 10/11/18 \$5,250 |
| (iii) | Purpose of Grant: | To support legal and other costs incurred in documenting and implementing a services agreement with The Boston Foundation. The Home Funders mission is to support the creation of housing for extremely low-income families in a mixed income housing environment. |
| (iv) & (vi) | Reports of Amounts Expended: | Home Funders is expected to submit a complete report of its expenditure of the grant funds by 06/01/19. |
| (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) | PRI Recipient: | Home Funders Collaborative LLC (“Home Funders”)
240 Newbury Street, 2 nd Floor, Boston, MA 02116 | | | | | | | | | | | | | | | | | | | | |
| (ii) | Date and Amount of PRI: | <table border="0"> <tr><td>6/10/2009</td><td>\$375,000</td></tr> <tr><td>6/24/2011</td><td>\$300,000</td></tr> <tr><td>6/22/2012</td><td>\$200,000</td></tr> <tr><td>8/15/2012</td><td>\$100,000</td></tr> <tr><td>10/31/2012</td><td>\$116,667</td></tr> <tr><td>2/8/2013</td><td>\$100,000</td></tr> <tr><td>6/24/2013</td><td>\$289,916</td></tr> <tr><td>3/10/2014</td><td>\$150,000</td></tr> <tr><td>3/12/2015</td><td>\$225,000</td></tr> <tr><td>12/16/2015</td><td>\$143,417</td></tr> </table> | 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 |
| 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 10/23/18 of the type ordinarily required by commercial investors under similar circumstances. This investment remained on the Foundation’s books as of 12/31/18. | | | | | | | | | | | | | | | | | | | | |
| (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. | | | | | | | | | | | | | | | | | | | | |

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 and geographies. 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:

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 across Massachusetts 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. \$ 13,492,600

Grants in this category cluster around long-standing philanthropic interests such as bolstering a safety net and ensuring access to opportunities for vulnerable families, 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. The Foundation believes that 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. 13,960,000

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. 11,861,302

Funder Collaborations and Bold Bets: The Foundation values working in partnerships as an effective means to increase learning build capacity and maximize impact. This includes collaborative efforts that may be outside of Foundation strategies. 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. 6,413,695

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. 4,330,000

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. 2,100,000

Music Pathways for Youth: The Foundation seeks to create a stronger, more accessible music pathway so that young people in Massachusetts, regardless of their financial means, can pursue training according to their highest level of interest and ability. In addition to providing operating support grants, the Foundation has an Instrument Fund and supports professional development opportunities for music educators and teaching artists. 2,309,000

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. 5,693,588

Total Part XV, Line 3a – Grants and Contributions Paid During the Year \$ 60,160,185

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
<u>Good Philanthropic Citizen and Community Grants</u>			
Action for Boston Community Development, Inc. 178 Tremont Street Boston, MA 02111	PC	To support the SummerWorks program in summers 2018, 2019 and 2020	\$ 50,000
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
Adolescent Consultation Services, Inc. 189 Cambridge Street Cambridge, MA 02141	PC	Unrestricted operating support for fiscal years 2017, 2018, and 2019	35,000
American Friends of the Israel Museum 545 Fifth Avenue, Suite 920 New York, NY 10017	PC	To support the Face-to-Face exhibition	200,000
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 Inc 220 East 42nd Street New York, NY 10017	PC	To support earthquake and tsunami relief efforts in Indonesia	50,000
American Jewish World Service, Inc. 45 West 36th St. New York, NY 10018	PC	To support earthquake and tsunami relief efforts in Indonesia	150,000
American Jewish World Service, Inc. 45 West 36th St. New York, NY 10018	PC	To support the International Grantmaking program and the Reserve Fund for fiscal years 2016, 2017, 2018, and 2019	250,000
Beth Israel Deaconess Medical Center, Inc. 330 Brookline Avenue Boston, MA 02215	PC	Unrestricted operating support	20,000
Boston After School & Beyond, Inc. 89 South Street Boston, MA 02111	PC	Unrestricted operating support and the Summer Learning Project for fiscal years 2018 and 2019	100,000

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
Boston Ballet, Inc. 19 Clarendon Street Boston, MA 02116	PC	Unrestricted operating support and working capital fund for fiscal years 2018 - 2022	250,000
Boston Foundation, Inc. 75 Arlington Street Boston, MA 02116	PC	To support the Massachusetts United for Puerto Rico Fund	31,600
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
Boston Foundation, Inc. 75 Arlington Street Boston, MA 02116	PC	To support the MLK Boston Fund to build a memorial on the Boston Common commemorating the legacy of Dr. Martin Luther King, Jr. and Coretta Scott King and their connection to Boston	250,000
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 545 Concord Avenue, Suite 318 Cambridge, MA 02138	PC	Unrestricted operating support	50,000
Boston Medical Center Corporation One Boston Medical Center Place Boston, MA 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	15,000
Boys and Girls Clubs of Boston, Inc. 200 High Street, 3rd Floor Boston, MA 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

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
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	150,000
Catholic Schools Foundation Inc 67 Batterymarch Street, 6th Floor Boston, MA 02110	PC	To support the Inner-City Scholarship Fund for fiscal years 2018 and 2019	75,000
Center for Disaster Philanthropy Inc One Thomas Circle NW, Suite 700 Washington, DC 20005	PC	To support the California Wildfires Recovery Fund	250,000
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
Children's Hospital Corporation 300 Longwood Avenue Boston, MA 02115	PC	Unrestricted operating support	20,000
Childrens Investment Fund Inc 18 Tremont Street, Suite 500 Boston, MA 02108	PC	Unrestricted operating support and the loan fund for fiscal years 2019 and 2020	600,000
Combined Jewish Philanthropies of Greater Boston, Inc. Kraft Family Building 126 High Street Boston, MA 02110	PC	Unrestricted operating support, and support for local network agencies	1,250,000
Commonwealth Shakespeare Company, Inc. 231 Forest Street, Sorenson Center Wellesley, MA 02457	PC	To support Shakespeare on the Common for fiscal years 2017, 2018, and 2019	25,000
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
Economic Mobility Pathways Inc One Washington Mall, 3rd Floor Boston, MA 02108	PC	Unrestricted operating support for fiscal years 2018 and 2019	30,000

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
Edvestors Inc 140 Clarendon Street Boston, MA 02116	PC	Unrestricted operating support and BPS Arts Expansion for fiscal years 2019 and 2020	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	135,000
Essex County Community Foundation, Inc. 175 Andover St Danvers, MA 01923	PC	To support the Greater Lawrence Disaster Relief Fund	50,000
Family and Community Resources, Inc. 18 Newton Street Brockton, MA 02301	PC	To support technology hardware upgrades including desktop computers, laptops, and a leased color copier	21,000
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	PC	Unrestricted operating support for fiscal years 2019 and 2020	75,000
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
Hias Inc 1300 Spring Street, Suite 500 Silver Spring, MD 20910	PC	To implement security improvements and infrastructure upgrades	250,000

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
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 St. POB 39950 Tel Aviv, Israel 6997556	PC	Unrestricted operating support for fiscal years 2019 and 2020	250,000
Jewish Arts Collaborative Inc 1320 Centre Street, Suite 201 Newton Center, MA 02459	PC	Unrestricted operating support for fiscal years 2017 and 2018	150,000
Jewish Community Center of Greater Boston, Inc. 333 Nahanton Street Newton Centre, MA 02459-3213	PC	To support the mission & goals (including capital goals) of JCC of Greater Boston for fiscal years 2018 - 2021	250,000
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	Unrestricted operating support for fiscal years 2018 and 2019	350,000
Jewish Family Service of Los Angeles 3580 Wilshire Blvd, Suite 700 Los Angeles, CA 90010	PC	To support individuals and families impacted by the 2018 California wildfires	50,000
Jewish Federation of Greater Pittsburgh 2000 Technology Drive Pittsburgh, PA 15219	PC	To support the Our Victims of Terror Fund	250,000
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 2018, 2019, and 2020	250,000

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
Jewish Women's Archive, Inc. One Harvard Street, Suite 200 Brookline, MA 02445	PC	Unrestricted operating support for fiscal years 2018, 2019, and 2020	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
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 43650-06	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. 320 Washington Street, Suite 200 Brighton, 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 and strategic and succession planning	70,000
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
Massachusetts Wonderfund, Inc. 600 Washington Street, 6th floor Boston, MA 02111	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021	35,000

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
Masscreative Inc 15 Channel Center Street, Suite 103 Boston, MA 02210	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021	50,000
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
New Venture Fund 1201 Connecticut Ave. NW, Suite 300 Washington, DC 20036	PC	To support the mission and goals of the SafetyRespectEquity Coalition for fiscal years 2018, 2019, and 2020	50,000
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
Pine Street Inn, Inc. 444 Harrison Avenue Boston, MA 02118	PC	To support the Many Roads Home campaign	1,250,000
Pittsburgh Foundation Five PPG Place, Suite 250 Pittsburgh, PA 15222	PC	To support law enforcement officers injured in the attack at Tree of Life Synagogue through the Injured Officers Fund	50,000
President and Fellows of Harvard College 1033 Massachusetts Ave Cambridge, MA 02138	PC	To support the Chapter 115 Veterans Benefit Eligibility Tool for fiscal years 2018 and 2019	115,000
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 in Massachusetts	200,000

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
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. 10 Milk Street, Suite 1010 Boston, MA 02108	PC	To support the development and implementation of Veterans CARE Pay for Success Project for fiscal years 2017 - 2020	150,000
Soldier On Inc 290 Merrill Road Pittsfield, MA 01201	PC	Unrestricted operating support for fiscal years 2017 and 2018	50,000
Spaulding Rehabilitation Hospital Corporation 300 First Avenue Charlestown, MA 02129	PC	Unrestricted operating support	20,000
Summer Search 3840 Washington Street Jamaica Plain MA, 02130	PC	Unrestricted operating support for fiscal years 2017, 2018, and 2019	75,000
Teach for America Inc 60 Canal Street, 5th Floor Boston MA, 02114	PC	Unrestricted support in Massachusetts for fiscal years 2019 - 2022	100,000
The Boston Jewish Film Festival, Inc. 1001 Watertown St West Newton, MA 02465	PC	Unrestricted operating support for fiscal years 2018 and 2019	15,000
The Boston Private Industry Council, Inc. 2 Oliver Street, 3rd Floor Boston, MA 02109	PC	To support the School-to-Career Program for summers 2018, 2019, and 2020	50,000
The Center for Teen Empowerment, Inc. 384 Warren Street, 3rd Floor Roxbury, MA 02119	PC	To support the purchase of video conferencing equipment and software	35,000
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

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
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 Institute of Contemporary Art 25 Harbor Shore Drive Boston, MA 02210	PC	Unrestricted and capital support for fiscal years 2018-2021	250,000
The McLean Hospital Corporation 115 Mill Street Belmont, MA 02478-1064	PC	Unrestricted operating support	25,000
The Reut Institute - From Vision to Policy Hapelech 7 Tel-Aviv, Israel 6816727	PC	Unrestricted operating support for fiscal years 2018 and 2019	75,000
The UMass Memorial Foundation, Inc. 333 South St Shrewsbury, MA 01545	PC	To support the Sibling Support Program: A Family-Centered Mental Health Initiative for fiscal years 2019 and 2020	35,000
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 69 High Street Fitchburg, MA 01420	PC	Unrestricted operating support for fiscal years 2019 and 2020	75,000
Veterans Inc 69 Grove Street Worcester, MA 01605	PC	Unrestricted operating support for fiscal years 2019 and 2020	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 Washington, DC 20036	PC	Unrestricted operating support for fiscal years 2017 and 2018	125,000
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	250,000

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
Worcester County Food Bank, Inc. 474 Boston Turnpike Shrewsbury, MA 01545	PC	Unrestricted operating support for fiscal years 2017, 2018, and 2019	25,000
Yad Vashem - the Martyrs' and Heroes' Remembrance Authority 4 Har Hazikaron, P.O.B. 3477 JerUSAlem, Israel 9103401	PC	Unrestricted and capital support for fiscal years 2017 - 2020	870,000
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			13,492,600

Healthy Democracy

Anti-Defamation League 605 Third Avenue New York, NY 10158-0180	PC	To support the mission and goals of ADL nationally and 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
Campaign Legal Center Inc 1101 14th Street, NW, Suite 400 Washington, DC 20005	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021	250,000
Catholic Charitable Bureau of the Archdiocese of Boston Inc 275 West Broadway South Boston, MA 02127	PC	To support Immigration Legal Services	50,000
Combined Jewish Philanthropies of Greater Boston, Inc. Kraft Family Building 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 U.S. initiatives for fiscal years 2018 and 2019	200,000

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
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	2,000,000
German Marshall Fund of the United States 1744 R Street NW Washington, DC 20009	PC	To support the mission and goals of the Alliance for Securing Democracy for fiscal years 2019 and 2020	350,000
GLBTQ Legal Advocates & Defenders Inc 30 Winter St 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
Issue One 1401 K Street NW, Suite 350 Washington, DC 20005	PC	Unrestricted operating support for fiscal years 2019 and 2020	200,000
Keshet, Inc. 284 Amory Street Boston, MA 02130	PC	Unrestricted operating support for fiscal years 2018, 2019 and 2020	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

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
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 18 Tremont Street, Suite 1010 Boston, MA 02108	PC	Unrestricted operating support and immigration legal services for Massachusetts organizations for fiscal years 2018 and 2019	400,000
Massachusetts Legal Assistance Corporation 18 Tremont Street, Suite 1010 Boston, MA 02108	PC	To support the Greater Boston Immigrant Defense Fund	100,000
NAACP Legal Defense and Educational Fund, Inc. 40 Rector Street, 5th Floor New York, NY 10006	PC	Unrestricted operating support for fiscal years 2019 and 2020	500,000
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
Neo Philanthropy Inc 45 West 36th St, 6th Floor New York, NY 10018	PC	To support the State Infrastructure Fund for fiscal years 2018 and 2019	250,000
New Venture Fund 1201 Connecticut Ave. NW, Suite 300 Washington, DC 20036	PC	To support the Voter Engagement Fund	5,150,000
New Venture Fund 1201 Connecticut Ave. NW, Suite 300 Washington, DC 20036	PC	To support the 2020 Census Initiative for fiscal years 2018, 2019, and 2020	250,000
News Literacy Project Inc 5335 Wisconsin Ave. NW Washington, DC 20015	PC	Unrestricted operating support for fiscal years 2018 and 2019	150,000
Philanthropy Massachusetts, Inc. 133 Federal Street, Suite 802 Boston, MA 02110	PC	To support the Massachusetts Census Equity Fund 2020 for fiscal years 2018, 2019, and 2020	80,000

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
Pro Publica Inc 155 Avenue of the Americas, 13th Floor New York, NY 10013	PC	To support ProPublica's Reporting on Hate work	200,000
Project Citizenship Inc 4 Faneuil South Market Building, 3rd Floor Boston, MA 02109	PC	Unrestricted operating support for fiscal years 2019 and 2020	30,000
Reporters Committee for Freedom of the Press 1156 15th St NW, Suite 1250 Washington, DC 20005	PC	Unrestricted operating support for fiscal years 2018 and 2019	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 LZP 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 Project On Government Oversight Inc 1100 G Street NW, Suite 500 Washington, DC 20005	PC	Unrestricted operating support for fiscal years 2018, 2019, and 2020	300,000
The Shalom Hartman Institute of North America 475 Riverside Drive, Suite 1450 New York, NY 10115	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
William J Brennan Jr Center for Justice Inc 120 Broadway, Suite 1750 New York, NY 10271	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021	250,000
Subtotal Healthy Democracy			13,960,000

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	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	1,875,000
Broad Institute, Inc. 415 Main Street Cambridge, MA 02142	PC	To develop and support scientific collaborations between Israeli and Broad Institute scientists to address major problems in biomedicine	2,000,000
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	5,000,000
Israel Science Foundation Albert Einstein Square 43 Jabotinsky Street JerUSAlem, Israel 9104001	PC	To develop and support scientific collaborations between Israeli and Broad Institute scientists to address major problems in biomedicine	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	185,540
Regents of the University of Minnesota 2450 Riverside Ave Minneapolis, MN 55454	PC	Goal based learning and habit in Anorexia Nervosa	197,387
Royal Institution for the Advancement of Learning-McGill University 845 Sherbrooke St West Montreal Quebec, Canada H3A 2T5	PC	To support the Human Cell Atlas Ethics and Data Governance Project	125,000
Society for the Study of Ingestive Behavior Inc 2111 Chestnut Ave Glenview, IL 60025	PC	To sponsor an anorexia nervosa symposium at the 2018 annual meeting	10,000

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
The Board of Trustees of the Leland Stanford Junior University 450 Serra Mall Stanford, CA 94305-2004	PC	To support Stanford Technology Analytics and Genomics in Sleep (STAGES)	308,464
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	250,000
Trustees of Columbia University in the City of New York 615 West 131st Street New York, NY 10027	PC	To support and publish the results of a Delphi panel to define the stages of Anorexia Nervosa illness and recovery	25,000
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	230,924
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)	403,987
Subtotal Medical and Scientific Research			11,861,302

Funder Collaborations and Bold Bets

A Far Cry Inc 146A South Street Jamaica Plain, MA 02130	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021, as a part of the Barr-Klarman Massachusetts Arts Initiative	37,500
Barrington Stage Co Inc 122 North Street Pittsfield, MA 01201	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021, as a part of the Barr-Klarman Massachusetts Arts Initiative	69,625
Boston Chinatown Neighborhood Center Inc 885 Washington Street Boston, MA 02111	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021, as a part of the Barr-Klarman Massachusetts Arts Initiative	28,125

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
Boston Modern Orchestra Project Inc 376 Washington St Malden, MA 02148	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021, as a part of the Barr-Klarman Massachusetts Arts Initiative	37,500
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
Cape Ann Museum Inc 27 Pleasant Street Gloucester, MA 01930	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021, as a part of the Barr-Klarman Massachusetts Arts Initiative	46,875
Community Access to the Arts Inc 40 Railroad St., Suite #6 Great Barrington, MA 01230	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021, as a part of the Barr-Klarman Massachusetts Arts Initiative	41,500
Community Art Center, Inc. 119 Windsor Street Cambridge, MA 02139	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021, as a part of the Barr-Klarman Massachusetts Arts Initiative	37,500
Community Music School of Springfield Inc 127 State Street Springfield, MA 01103	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021, as a part of the Barr-Klarman Massachusetts Arts Initiative	50,875
Company One Inc 539 Tremont Street, Studio 202 Boston, MA 02116	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021, as a part of the Barr-Klarman Massachusetts Arts Initiative	28,125
Design Museum Foundation Inc 50 Milk St., 16th Floor Boston, MA 02109	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021, as a part of the Barr-Klarman Massachusetts Arts Initiative	28,125
Double Edge Theatre Productions Incorporated 948 Conway Road Ashfield, MA 01330	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021, as a part of the Barr-Klarman Massachusetts Arts Initiative	41,500
Eliot School Trustees 24 Eliot Street, PO Box 300351 Boston, MA 02130	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021, as a part of the Barr-Klarman Massachusetts Arts Initiative	37,500
Featherstone Center for the Arts Inc 30 Featherstone Lane Oak Bluffs, MA 02557	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021, as a part of the Barr-Klarman Massachusetts Arts Initiative	32,125

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
Fitchburg Art Museum 185 Elm Street Fitchburg, MA 01420	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021, as a part of the Barr-Klarman Massachusetts Arts Initiative	41,500
Home Funders Collaborative LLC 240 Newbury Street, 2nd Floor Boston, MA 02116	NC	To support legal and other costs incurred in documenting and implementing a services agreement with The Boston Foundation	5,250
Mahaiwe Performing Arts Center Inc PO Box 690 Great Barrington, MA 01230	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021, as a part of the Barr-Klarman Massachusetts Arts Initiative	60,250
Merrimack Repertory Theatre 132 Warren Street Lowell, MA 01852	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021, as a part of the Barr-Klarman Massachusetts Arts Initiative	56,250
New Bedford Museum and Art Center Inc 608 Pleasant Street New Bedford, MA 02740	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021, as a part of the Barr-Klarman Massachusetts Arts Initiative	22,750
New Bedford Symphony Orchestra Association Inc 128 Union Street, Suite 204 New Bedford, MA 02740	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021, as a part of the Barr-Klarman Massachusetts Arts Initiative	41,500
New Dance Complex Inc 536 Massachusetts Avenue Cambridge, MA 02139	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021, as a part of the Barr-Klarman Massachusetts Arts Initiative	28,125
Norman Rockwell Museum at Stockbridge Inc 9 Glendale Road / Rte 183 Stockbridge, MA 01262	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021, as a part of the Barr-Klarman Massachusetts Arts Initiative	79,000
Now and There Inc 108 Lincoln Street, No. 6A Boston, MA 02111	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021, as a part of the Barr-Klarman Massachusetts Arts Initiative	28,125
Payomet Performing Arts Charitable Trust 29 Old Dewline Rd. Truro, MA 02666	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021, as a part of the Barr-Klarman Massachusetts Arts Initiative	41,500
Provincetown Art Association and Museum Inc 460 Commercial Street Provincetown, MA 02657	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021, as a part of the Barr-Klarman Massachusetts Arts Initiative	50,875

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
Raw Art Works, Inc. 37 Central Square Lynn, MA 01901	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021, as a part of the Barr-Klarman Massachusetts Arts Initiative	56,250
Record Company Inc 960 Massachusetts Ave Boston, MA 02118	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021, as a part of the Barr-Klarman Massachusetts Arts Initiative	18,750
Speak Easy Stage Inc 539 Tremont Street Boston, MA 02116	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021, as a part of the Barr-Klarman Massachusetts Arts Initiative	46,875
Strategic Grant Partners, Inc. 177 Huntington Avenue, Suite 1500 Boston, MA 02115	PF	To provide nonprofits with funding and technical assistance to improve the lives of individuals & families in Massachusetts	1,088,820
Technical Development Corporation 31 Milk Street, Suite 310 Boston, MA 02109	PC	To support the management, technical assistance, and training for the Barr-Klarman Massachusetts Arts Initiative for fiscal years 2018, 2019, and 2020	323,000
The Northampton Academy of Music Inc 274 Main Street Northampton, MA 01060	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021, as a part of the Barr-Klarman Massachusetts Arts Initiative	22,750
Upstream USA Inc 426 17th Street, Suite 200 Oakland, CA 94612	PC	To support the expansion to Massachusetts for fiscal years 2018 - 2022	1,000,000
Worcester Art Museum 55 Salisbury Street Worcester, MA 01609	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021, as a part of the Barr-Klarman Massachusetts Arts Initiative	75,000
Year Up, Inc. 45 Milk St Fl 9 Boston MA 02109	PC	Unrestricted operating support, including Boston operations, for fiscal years 2017 - 2024	1,750,000
Zeiterion Theatre Inc 684 Purchase St New Bedford, MA 02740	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021, as a part of the Barr-Klarman Massachusetts Arts Initiative	60,250
Subtotal Funder Collaborations and Bold Bets			6,413,695

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
<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) 7 Giborei Israel 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	50,000
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 Co-Impact - The Partnership for a Breakthrough in Arab Employment for fiscal years 2016 - 2020	875,000
Matan - Investing in the Community 33 Ya'avets St. Tel Aviv, Israel 6525832	PC	To support Co-Impact's NGO Forum/Candidate Pipeline Pilot project	80,000
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	275,000
Seal-Maoz Hachoshlim 6, 6th Floor PO Box 12112 Herzliya, Israel 4673306	PC	Unrestricted operating support for fiscal years 2019 and 2020	1,000,000
Sikkuy: the Association for the Advancement of Civic Equality 17 Rachel Hameshoreret JerUSAlem, Israel 96348	PC	To support the project to maximize implementation of Resolution 922	100,000

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
Tapuah - the Association to Advance the Era of Technology in Israel Tchernikhovski St 3 Ramle, Israel 7244402	PC	To support the mission and goals of Tapuah, including its work in the Arab community for fiscal years 2017 and 2018	50,000
Technion - Israel Institute of Technology Technion City, Haifa, Israel 3200004	PC	To support the undergraduate student village at Technion's Haifa campus for fiscal years 2015, 2016 and 2017	1,000,000
The Abraham Fund Initiatives 5 HaMelacha Lod Israel, 7152011	PC	To support the Safe Communities project for fiscal years 2019 and 2020	100,000
The Association for Change in Education - Established by the Rashi Foundation Kfar Hanoar Ben Shemen Ben Shemen, Israel 7311200	PC	To support the Living Together initiative	100,000
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
The Portland Trust 54 Portland Place London, United Kingdom W1B 1DY	PC	To support a plan to develop a model for regional economic growth for the Arab sector in Israel	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			4,330,000

Connecting to Israel

A Wider Bridge 2912 Diamond Street #348 San Francisco, CA 94131	PC	To support leadership educational missions to Israel for fiscal years 2018 and 2019	75,000
Gann Academy the New Jewish High School of Greater Boston Inc 333 Forest Street Waltham, MA 02452	PC	To support the myIsrael program for fiscal years 2019 and 2020	250,000

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
Hillel: the Foundation for Jewish Campus Life 800 Eighth Street, NW Washington, DC 20001-3724	PC	To support the mission and goals of The David Project for fiscal year 2019	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-America Academic Exchange 8383 Wilshire Boulevard, Suite 400 Beverly Hills, CA 90211	PC	Unrestricted operating support for fiscal year 2018 and 2019	150,000
Itrek Inc. 1460 Broadway New York, NY 10036	PC	Unrestricted operating support for fiscal years 2019 and 2020	1,000,000
President and Fellows of Harvard College 1033 Massachusetts Ave Cambridge, MA 02138	PC	To support an educational seminar to Israel for Harvard faculty	25,000
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 Connecting to Israel			2,100,000

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. 45 Temple Place, 4th Floor Boston, MA 02111	PC	Unrestricted operating support and the Bridge program for fiscal years 2018 and 2019	225,000
Boston Children's Chorus, Inc. 20 Old Colony Avenue, 2nd Floor Boston, MA 02127	PC	Unrestricted operating support for fiscal years 2019 and 2020	90,000
Boston City Singers, Inc. 17 Waldeck Street Dorchester, MA 02124	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021	75,000

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
Boston String Academy P.O. Box 171035 Boston, MA 02117	PC	To rent 14 violins, 7 violas, and 5 cellos for the top ensemble	15,000
Boston Youth Symphony Orchestras, Inc. 855 Commonwealth Ave Boston, MA 02215	PC	To support the Intensive Community Program for fiscal years 2019, 2020, and 2021	125,000
Bridge Boston Foundation Inc 435 Warren Street Roxbury, MA 02119	PC	To purchase 4 violins, 1 viola, 4 cellos, and for accessories and instrument repairs	10,000
Bridge Boston Foundation Inc 435 Warren Street Roxbury, MA 02119	PC	To support the El Sistema program for fiscal years 2019 and 2020	50,000
Commonwealth of Massachusetts Cultural Council 10 St. James Avenue, 3rd Floor Boston, MA 02116-3803	PC	To manage the Music Educator/Teaching Artist Fellowship Program for fiscal years 2019 and 2020	90,000
Community Music Center of Boston 34 Warren Avenue Boston, MA 02116	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021	125,000
Community Music School of Springfield Inc 127 State Street Springfield, MA 01103	PC	To support the Sonido Musica program and student music lessons	40,000
Conservatory Lab Charter School Foundation 2120 Dorchester Avenue Dorchester, MA 02124	PC	To support the El Sistema program for fiscal years 2018 and 2019	40,000
Conservatory Lab Charter School Foundation 2120 Dorchester Avenue Dorchester, MA 02124	PC	A challenge grant to support the Almost Home Campaign	500,000
From the Top, Inc. 140 Clarendon Street, Suite 301 Boston, MA 02116	PC	Unrestricted operating support for fiscal years 2017 and 2018	200,000
Handel and Haydn Society 9 Harcourt St. Boston, MA 02116	PC	To support the Education Program for fiscal years 2019 and 2020	40,000

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
Hyde Square Task Force, Inc. P.O. Box 301871 Jamaica Plain, MA 02130	PC	Unrestricted operating support and the music program for fiscal years 2018 and 2019	100,000
Immigrant Family Services Institute, Inc. 575 American Legion Hwy Roslindale, MA 02131	PC	To purchase string and wind instruments	10,000
Josiah Quincy Orchestra Program Limited 885 Washington Street Boston, MA 02111	PC	Unrestricted operating support for fiscal years 2019 and 2020	35,000
Margarita Muniz Academy Foundation Inc 20 Child Street Jamaica Plain, MA 02130	PC	To support the El Sistema music program	20,000
Music and Youth Initiative Inc 398 Columbus Ave. Boston, MA 02116	PC	Unrestricted operating support for fiscal years 2018 and 2019	25,000
Musiconnects Inc 20 Belgrade Ave., Ste. 1 Roslindale, MA 02131	PC	Unrestricted operating support for fiscal years 2019 and 2020	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	45,000
Project STEP, Inc. Symphony Hall 301 Massachusetts Avenue, Symphony Hall Boston, MA 02115	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021	40,000
Project STEP, Inc. Symphony Hall 301 Massachusetts Avenue, Symphony Hall Boston, MA 02115	PC	A challenge grant to purchase string instruments	18,000
Saint John Paul II Catholic Academy Inc 2200 Dorchester Ave. Dorchester, MA 02124	PC	To support music programming for fiscal years 2018 and 2019	40,000
Sociedad Latina, Inc. 1530 Tremont Street Roxbury, MA 02120	PC	To support the music program	40,000

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
The Boston Education Development Foundation, Inc. 7 Palmer Street, 2nd Floor Roxbury, MA 02119	PC	To support the Making Music Matters program for fiscal years 2019 and 2020	75,000
ZUMIX, Inc. 260 Sumner St Boston, MA 02472	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021	75,000
ZUMIX, Inc. 260 Sumner St Boston, MA 02472	PC	To purchase ukeleles for the Sprouts Program	1,000
Subtotal Music Pathways for Youth			2,309,000

Other Grants and Contributions

AIDS Action Committee 75 Amory Street Boston, MA 02119	PC	Other community contributions - employee matching gift	25
Alaska Wilderness League 122 C St NW, Ste 240 Washington, DC 20001	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
American Jewish World Service, Inc. 45 West 36th St. New York, NY 10018	PC	Other community contributions - employee matching gift	25
Austin Friars Order of St Augustine PO Box 340 Villanova, PA 19085-0340	PC	Other community contributions - employee matching gift	100
Bay State Performing Arts Inc 539 Tremont Street Boston, MA 02116	PC	Other community contributions - employee matching gift	35
Beth Israel Deaconess Medical Center, Inc. 330 Brookline Avenue Boston, MA 02215	PC	To support the NICU Expansion Project (Capital)	2,000,000

Organization name and address	Fd 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	4,000
Boston Debate League 566 Columbus Ave. Boston, MA 02118	PC	Other community contributions - employee matching gift	25
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)	40,000
Boston Latin School Association 27 School Street, Suite 300 Boston, MA 02108	PC	Other community contributions - employee matching gift	100
Boston Medical Center Corporation One Boston Medical Center Place Boston, MA 02118	PC	To support the Building the New BMC Campaign (Capital)	1,000,000
Brandeis University P.O. Box 549110 Waltham, MA 02454-9110	PC	Other community contributions - employee matching gift	1,050
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
Camp Yavneh 160 Herrick Rd Newton, MA 02459	PC	Other community contributions - employee matching gift	180
Chocorua Lake Conservancy PO Box 105 Chocorua, NH 03817	PC	Other community contributions - employee matching gift	1,000
Combined Jewish Philanthropies of Greater Boston, Inc. Kraft Family Building 126 High Street Boston, MA 02110	PC	Other community contributions - employee matching gift	180

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
Community Servings Inc 18 Marbury Terrace Jamaica Plain, MA 02130	PC	Other community contributions - employee matching gift	75
Environmental Defense Fund 1875 Connecticut Ave NW Suite 600 Washington, DC 20009	PC	Other community contributions - employee matching gift	25
Equal Justice Initiative 122 Commerce Street Montgomery, AL 36104	PC	Other community contributions - employee matching gift	30
Everytown for Gun Safety Support Fund Po Box 4184 New York NY, 10163	PC	Other community contributions - employee matching gift	100
Family Nurturing Center of Massachusetts, Inc. 200 Bowdoin Street Dorchester, MA 02122	PC	To support the capital campaign	500,000
Fenway Community Health Center Inc 1340 Boylston Street Boston, MA 02215	PC	Other community contributions - employee matching gift	600
Footsteps Inc 114 John Street, #930 New York, NY 10272	PC	Other community contributions - employee matching gift	255
Friends of Israel Scouts Co, Inc. 575 8th Ave, 11th floor New York, NY 10018	PC	Other community contributions - employee matching gift	25
Gay & Lesbian Victory Institute Inc 1133 15th Street NW, Suite 350 Washington, DC 20005	PC	Other community contributions - employee matching gift	25
Greater Grove Hall Main Streets 320B Blue Hill Avenue Dorchester, MA 02121	PC	Unrestricted operating support	5,000
Guide Dog Foundation for the Blind 371 East Jericho Turnpike Smithtown, NY 11787-2976	PC	Other community contributions - employee matching gift	50

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
Heath School P.T.O. 100 Eliot Street Chestnut Hill, MA 02467	PC	Other community contributions - employee matching gift	150
Hias Inc 1300 Spring Street, Suite 500 Silver Spring, MD 20910	PC	Other community contributions - employee matching gift	25
History Unerased Inc P.O. Box 8421 Lowell, MA 01853	PC	Other community contributions - employee matching gift	35
Human Rights Campaign Foundation 1640 Rhode Island Ave, NW Washington, DC 20036	PC	Other community contributions - employee matching gift	75
Human Rights Campaign Foundation 1640 Rhode Island Ave, NW Washington, DC 20036	PC	Other community contributions - employee matching gift	35
Jewish Federation of Greater Pittsburgh 2000 Technology Drive Pittsburgh, PA 15219	PC	Other community contributions - employee matching gift	86
Keshet, Inc. 284 Amory Street Boston, MA 02130	PC	Other community contributions - employee matching gift	250
Lambda Legal Defense and Education Fund Inc 120 Wall Street, 19th Floor New York, NY 10005-3919	PC	Other community contributions - employee matching gift	25
Leukemia & Lymphoma Society Inc 3 International Drive, Suite 200 Rye Brook, NY 10573	PC	Other community contributions - employee matching gift	25
Leukemia & Lymphoma Society Inc 3 International Drive, Suite 200 Rye Brook, NY 10573	PC	Other community contributions - employee matching gift	25

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
Massachusetts College of Art and Design Foundation Inc 621 Huntington Avenue Boston, MA 02115	PC	Other community contributions - employee matching gift	50
Massachusetts General Hospital 125 Nashua Street Suite 540 Boston, MA 02114	PC	To support Home Base's move to Constitution Wharf	500,000
Mechon Hadar 190 Amsterdam Avenue New York, NY 10023	PC	Other community contributions - employee matching gift	25
Memorial Sloan-Kettering Cancer Center 1275 York Ave. New York, NY 10065	PC	Other community contributions - employee matching gift	50
Nehar Shalom Community Synagogue 43 Lochstead Avenue Boston, MA 02130	PC	Other community contributions - employee matching gift	360
New England Donor Services Inc 60 First Avenue Waltham, MA 02451	PC	Other community contributions - employee matching gift	1,683
New Israel Fund PO Box 96712 Washington, DC 20090-6712	PC	Other community contributions - employee matching gift	100
New York Public Radio 160 Varick Street, 9th Floor New York, NY 10013	PC	Other community contributions - employee matching gift	80
Oxfam-America Inc 226 Causeway St, 5th floor Boston, MA 02114	PC	Other community contributions - employee matching gift	2,000
Partnership for A Drug Free America Inc 352 Park Avenue South, 9th Floor New York, NY 10010	PC	Other community contributions - employee matching gift	25

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
Planned Parenthood League of Massachusetts Inc 1055 Commonwealth Avenue Boston, MA 02215	PC	Other community contributions - employee matching gift	200
REDF Two Embarcadero Center, Suite 650 San Francisco, CA 94111	PC	Other community contributions - employee matching gift	25
Refugee & Immigrant Center for Education & Legal Services 1305 N Flores Street San Antonio, TX 78212	PC	Other community contributions - employee matching gift	100
Shatterproof A Nonprofit Corp 135 West 41st Street, 6th Floor New York, NY 10036	PC	Other community contributions - employee matching gift	25
Shefa School Inc 40 East 29th Street New York, NY 10016	PC	Other community contributions - employee matching gift	150
Solomon Schechter Day School of Greater Boston 125 Wells Avenue Newton, MA 02459	PC	Other community contributions - employee matching gift	118
Temple Hillel B'nai Torah 120 Corey Street West Roxbury, MA 02132	PC	Other community contributions - employee matching gift	2,000
The James D. St. Clair Court Public Education Project One Courthouse Way, Suite 3120 Boston, MA 02210	PC	Other community contributions - employee matching gift	316
The McLean Hospital Corporation 115 Mill Street Belmont, MA 02478-1064	PC	To support the McLean Hospital Admissions Building Expansion and Renovation project (Capital)	1,000,000
Trustees of Boston University 25 Buick Street Boston, MA 02215	PC	Other community contributions - employee matching gift	100

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
UNICEF USA 125 Maiden Lane New York, NY 10038	PC	Other community contributions - employee matching gift	5,000
University of Massachusetts Foundation Inc 100 Morrissey Blvd. Boston, MA 02125-3393	PC	Other community contributions - employee matching gift	80
UpStart Bay Area 1111 Broadway, 3rd Floor Oakland, CA 94607	PC	Other community contributions - employee matching gift	1,000
UpStart Bay Area 1111 Broadway, 3rd Floor Oakland, CA 94607	PC	Other community contributions - employee matching gift	1,250
Vilna Shul, Boston's Center for Jewish Culture, Inc. 18 Phillips Street Boston, MA 02114	PC	To support From Hidden Gem to Rising Star: Capital Campaign to Preserve Our History and Ensure Our Future	125,000
WGBH Educational Foundation One Guest Street Boston, MA 02135	PC	Other community contributions - employee matching gift	90
Subtotal Other Grants and Contributions			5,693,588
Total Grants and Contributions Paid During the Year			\$ 60,160,185

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
<u>Good Philanthropic Citizen and Community Grants</u>			
Action for Boston Community Development, Inc. 178 Tremont Street Boston, MA 02111	PC	To support the SummerWorks program in summers 2018, 2019 and 2020	\$ 100,000
Boston Ballet, Inc. 19 Clarendon Street Boston, MA 02116	PC	Unrestricted operating support and working capital fund for fiscal years 2018 - 2022	750,000
Boston Foundation, Inc. 75 Arlington Street Boston, MA 02116	PC	To support the Housing and Neighborhoods program, including work in support of extremely low income families	150,000
Catholic Schools Foundation Inc 67 Batterymarch Street, 6th Floor Boston, MA 02110	PC	To support the Inner-City Scholarship Fund for fiscal years 2018 and 2019	75,000
Childrens Investment Fund Inc 18 Tremont Street, Suite 500 Boston, MA 02108	PC	Unrestricted operating support and the loan fund for fiscal years 2019 and 2020	600,000
Edvestors Inc 140 Clarendon Street Boston, MA 02116	PC	A challenge grant for the transition fund for fiscal year 2019	100,000
Edvestors Inc 140 Clarendon Street Boston, MA 02116	PC	Unrestricted operating support and BPS Arts Expansion for fiscal years 2019 and 2020	700,000
Gateways Access to Jewish Education, Inc. 333 Nahanton Street Newton, MA 02459	PC	Unrestricted operating support for fiscal years 2019 and 2020	75,000
Institute for National Security Studies, a Think Tank By Tel Aviv University, Ltd. 40 Haim Levanon St. POB 39950 Tel Aviv, Israel 6997556	PC	Unrestricted operating support for fiscal years 2019 and 2020	250,000
Jewish Arts Collaborative Inc 1320 Centre Street, Suite 201 Newton Center, MA 02459	PC	Unrestricted operating support for fiscal years 2019 and 2020	75,000

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
Jewish Community Center of Greater Boston, Inc. 333 Nahanton Street Newton Centre, MA 02459-3213	PC	Unrestricted operating support for fiscal years 2018 - 2021 (Capital)	750,000
Jewish Family & Children's Service 1430 Main Street Waltham, MA 02451	PC	Unrestricted operating support for fiscal years 2018 and 2019	350,000
Jewish Vocational Service, Inc. 75 Federal Street, 3rd Floor Boston, MA 02110	PC	Unrestricted operating support for fiscal years 2018, 2019, and 2020	500,000
Jewish Women's Archive, Inc. One Harvard Street, Suite 200 Brookline, MA 02445	PC	Unrestricted operating support for fiscal years 2018, 2019, and 2020	100,000
Massachusetts Wonderfund, Inc. 600 Washington Street, 6th floor Boston, MA 02111	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021	70,000
Masscreative Inc 15 Channel Center Street, Suite 103 Boston. MA 02210	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021	100,000
MissionSAFE 18 John Eliot Square Roxbury, MA 02119	PC	To support office and program space improvements	15,000
New Venture Fund 1201 Connecticut Ave. NW, Suite 300 Washington, DC 20036	PC	To support the SafetyRespectEquity Coalition for fiscal years 2018, 2019, and 2020	100,000
President and Fellows of Harvard College 1033 Massachusetts Ave Cambridge, MA 02138	PC	To support the Chapter 115 Veterans Benefit Eligibility Tool for fiscal years 2018 and 2019	115,000
President and Fellows of Harvard College Massachusetts Hall Cambridge, MA 02138	PC	To support the Chapter 115 Veterans Benefit Eligibility Tool for fiscal years 2018 and 2019	115,000
Teach for America Inc 60 Canal Street, 5th Floor Boston, MA 02114	PC	Unrestricted support in Massachusetts for fiscal years 2019 - 2022	300,000

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
The Boston Jewish Film Festival, Inc. 1001 Watertown St West Newton, MA 02465	PC	Unrestricted operating support for fiscal years 2018 and 2019	15,000
The Boston Private Industry Council, Inc. 2 Oliver Street, 3rd Floor Boston, MA 02109	PC	To support the School-to-Career Program for summers 2018, 2019, and 2020	100,000
The Institute of Contemporary Art 25 Harbor Shore Drive Boston, MA 02210	PC	Unrestricted and capital support for fiscal years 2018-2021	750,000
The Reut Institute - From Vision to Policy Hapelech 7 Tel-Aviv, Israel 6816727	PC	Unrestricted operating support for fiscal years 2018 and 2019	50,000
The Umass Memorial Foundation Inc. 333 South St Shrewsbury, MA 01545	PC	To support the Sibling Support Program: A Family-Centered Mental Health Initiative for fiscal years 2019 and 2020	25,000
Veteran Homestead Inc 69 High Street Fitchburg, MA 01420	PC	Unrestricted operating support for fiscal years 2019 and 2020	50,000
Veterans Inc 69 Grove Street Worcester, MA 01605	PC	Unrestricted operating support for fiscal years 2019 and 2020	35,000
Yad Vashem - the Martyrs' and Heroes' Remembrance Authority 4 Har Hazikaron, P.O.B. 3477 JerUSAlem, Israel 9103401	PC	Unrestricted and capital support for fiscal years 2018, 2019, and 2020	1,530,000
Subtotal Good Philanthropic Citizen and Community Grants			7,945,000

Healthy Democracy

Campaign Legal Center Inc 1101 14th Street, NW, Suite 400 Washington, DC 20005	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021	500,000
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Organization name and address	Fd Status	Purpose of grant or contribution	Amount
Committee to Protect Journalists Inc 330 Seventh Avenue, 11th Floor New York, NY 10001	PC	To support U.S. initiatives for fiscal years 2018 and 2019	200,000
German Marshall Fund of the United States 1744 R Street NW Washington, DC 20009	PC	To support the mission and goals of the Alliance for Securing Democracy for fiscal years 2019 and 2020	400,000
Issue One 1401 K Street NW, Suite 350 Washington, DC 20005	PC	Unrestricted operating support for fiscal years 2019 and 2020	200,000
Keshet, Inc. 284 Amory Street Boston, MA 02130	PC	Unrestricted operating support for fiscal years 2018, 2019, and 2020	200,000
NAACP Legal Defense and Educational Fund, Inc. 40 Rector Street, 5th Floor New York, NY 10006	PC	Unrestricted operating support for fiscal years 2019 and 2020	500,000
Neo Philanthropy Inc 45 West 36th St, 6th Floor New York, NY 10018	PC	To support the State Infrastructure Fund for fiscal years 2018 and 2019	250,000
New Venture Fund 1201 Connecticut Ave. NW, Suite 300 Washington, DC 20036	PC	To support the 2020 Census Initiative for fiscal years 2018, 2019, and 2020	500,000
News Literacy Project Inc 5335 Wisconsin Ave. NW Washington, DC 20015	PC	Unrestricted operating support for fiscal years 2018 and 2019	150,000
Philanthropy Massachusetts, Inc. 133 Federal Street, Suite 802 Boston, MA 02110	PC	To support the Massachusetts Census Equity Fund 2020 for fiscal years 2018, 2019, and 2020	170,000
Project Citizenship Inc 4 Faneuil South Market Building, 3rd Floor Boston, MA 02109	PC	Unrestricted operating support for fiscal years 2019 and 2020	30,000
Protect Democracy Project 2020 Pennsylvania Ave NW, STE 163 Washington, DC 20006	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021	1,500,000

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
Reporters Committee for Freedom of the Press 1156 15th St NW, Suite 1250 Washington, DC 20005	PC	Unrestricted operating support for fiscal years 2018 and 2019	150,000
The Project on Government Oversight Inc 1100 G Street NW, Suite 500 Washington, DC 20005	PC	Unrestricted operating support for fiscal years 2018, 2019, and 2020	600,000
William J Brennan Jr Center for Justice Inc 120 Broadway, Suite 1750 New York, NY 10271	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021	500,000
Subtotal Healthy Democracy			5,850,000

Medical and Scientific Research

Israel Science Foundation Albert Einstein Square, 43 Jabotinsky Street JerUSAlem, Israel 9104001	PC	To support operational expenses related to the Israel Precision Medicine Partnership	500,000
Israel Science Foundation Albert Einstein Square, 43 Jabotinsky Street JerUSAlem, Israel 9104001	PC	To support research grants within the framework of the Israel Precision Medicine Partnership	15,000,000
Trustees of Columbia University In the City of New York 615 West 131st Street New York, NY 10027	PC	To support and publish the results of a Delphi panel to define the stages of Anorexia Nervosa illness and recovery	30,000
Subtotal Medical and Scientific Research			15,530,000

Funder Collaborations and Bold Bets

A Far Cry Inc 146A South Street Jamaica Plain, MA 02130	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021, as a part of the Barr-Klarman Massachusetts Arts Initiative	112,500
Barrington Stage Co Inc 122 North Street Pittsfield, MA 01201	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021, as a part of the Barr-Klarman Massachusetts Arts Initiative	204,875

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
Boston Chinatown Neighborhood Center Inc 885 Washington Street Boston, MA 02111	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021, as a part of the Barr-Klarman Massachusetts Arts Initiative	84,375
Boston Modern Orchestra Project Inc 376 Washington St Malden, MA 02148	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021, as a part of the Barr-Klarman Massachusetts Arts Initiative	112,500
Cape Ann Museum Inc 27 Pleasant Street Gloucester, MA 01930	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021, as a part of the Barr-Klarman Massachusetts Arts Initiative	140,625
Community Access to the Arts Inc 40 Railroad St., Suite #6 Great Barrington, MA 01230	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021, as a part of the Barr-Klarman Massachusetts Arts Initiative	120,500
Community Art Center, Inc. 119 Windsor Street Cambridge, MA 02139	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021, as a part of the Barr-Klarman Massachusetts Arts Initiative	112,500
Community Music School of Springfield Inc 127 State Street Springfield, MA 01103	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021, as a part of the Barr-Klarman Massachusetts Arts Initiative	148,625
Company One Inc 539 Tremont Street, Studio 202 Boston, MA 02116	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021, as a part of the Barr-Klarman Massachusetts Arts Initiative	84,375
Design Museum Foundation Inc 50 Milk St., 16th Floor Boston, MA 02109	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021, as a part of the Barr-Klarman Massachusetts Arts Initiative	84,375
Double Edge Theatre Productions Incorporated 948 Conway Road Ashfield, MA 01330	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021, as a part of the Barr-Klarman Massachusetts Arts Initiative	120,500
Eliot School Trustees 24 Eliot Street Boston, MA 02130	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021, as a part of the Barr-Klarman Massachusetts Arts Initiative	112,500
Featherstone Center for the Arts Inc 30 Featherstone Lane Oak Bluffs, MA 02557	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021, as a part of the Barr-Klarman Massachusetts Arts Initiative	92,375

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
Fitchburg Art Museum 185 Elm Street Fitchburg, MA 01420	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021, as a part of the Barr-Klarman Massachusetts Arts Initiative	120,500
Mahaiwe Performing Arts Center Inc PO Box 690 Great Barrington, MA 01230	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021, as a part of the Barr-Klarman Massachusetts Arts Initiative	176,750
Merrimack Repertory Theatre 132 Warren Street Lowell, MA 01852	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021, as a part of the Barr-Klarman Massachusetts Arts Initiative	168,750
New Bedford Museum and Art Center Inc 608 Pleasant Street New Bedford, MA 02740	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021, as a part of the Barr-Klarman Massachusetts Arts Initiative	64,250
New Bedford Symphony Orchestra Association Inc 128 Union Street, Suite 204 New Bedford, MA 02740	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021, as a part of the Barr-Klarman Massachusetts Arts Initiative	120,500
New Dance Complex Inc 536 Massachusetts Avenue Cambridge, MA 02139	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021, as a part of the Barr-Klarman Massachusetts Arts Initiative	84,375
Norman Rockwell Museum at Stockbridge Inc 9 Glendale Road / Rte 183 Stockbridge, MA 01262	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021, as a part of the Barr-Klarman Massachusetts Arts Initiative	233,000
Now and There Inc 108 Lincoln Street, No. 6A Boston, MA 02111	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021, as a part of the Barr-Klarman Massachusetts Arts Initiative	84,375
Payomet Performing Arts Charitable Trust 29 Old Dewline Rd. Truro, MA 02666	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021, as a part of the Barr-Klarman Massachusetts Arts Initiative	120,500
Provincetown Art Association and Museum Inc 460 Commercial Street Provincetown, MA 02657	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021, as a part of the Barr-Klarman Massachusetts Arts Initiative	148,625
Raw Art Works, Inc. 37 Central Square Lynn, MA 01901	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021, as a part of the Barr-Klarman Massachusetts Arts Initiative	168,750

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
Record Company Inc 960 Massachusetts Ave Boston, MA 02118	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021, as a part of the Barr-Klarman Massachusetts Arts Initiative	56,250
Speak Easy Stage Inc 539 Tremont Street Boston, MA 02116	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021, as a part of the Barr-Klarman Massachusetts Arts Initiative	140,625
Technical Development Corporation 31 Milk Street, Suite 310 Boston, MA 02109	PC	To support the management, technical assistance, and training for the Barr-Klarman Massachusetts Arts Initiative for	323,000
The Northampton Academy of Music Inc 274 Main Street Northampton, MA 01060	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021, as a part of the Barr-Klarman Massachusetts Arts Initiative	64,250
Worcester Art Museum 55 Salisbury Street Worcester, MA 01609	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021, as a part of the Barr-Klarman Massachusetts Arts Initiative	225,000
Zeiterion Theatre Inc 684 Purchase St New Bedford, MA 02740	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021, as a part of the Barr-Klarman Massachusetts Arts Initiative	176,750
Subtotal Funder Collaborations and Bold Bets			4,006,875
<u>Arab Israeli Employment and Education</u>			
Jewish Funders Network 150 W. 30th Street, Suite 900 New York, NY 10001	PC	To support the Arab Israeli funders initiative	100,000
Seal-Maoz Hachoshlim 6, 6th Floor, PO Box 12112 Herzliya, Israel 4673306	PC	Unrestricted operating support for fiscal years 2019 and 2020	1,000,000
The Abraham Fund Initiatives 5 HaMelacha Lod, Israel 7152011	PC	To support the Safe Communities project for fiscal years 2019 and 2020	100,000
Subtotal Arab Israeli Employment and Education			1,200,000

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
<u>Connecting to Israel</u>			
A Wider Bridge 2912 Diamond Street #348 San Francisco, CA 94131	PC	To support leadership missions to Israel for fiscal years 2018 and 2019	75,000
Gann Academy the New Jewish High School of Greater Boston Inc 333 Forest Street Waltham, MA 02452	PC	To support the myIsrael program for fiscal years 2019 and 2020	125,000
Israel-America Academic Exchange 8383 Wilshire Boulevard, Suite 400 Beverly Hills, CA 90211	PC	Unrestricted operating support for fiscal year 2018 and 2019	150,000
Itrek Inc. 1460 Broadway New York, NY 10036	PC	Unrestricted operating support for fiscal years 2019 and 2020	1,000,000
Subtotal Connecting to Israel			1,350,000
<u>Music Pathways for Youth</u>			
Boston Children's Chorus, Inc. 20 Old Colony Avenue, 2nd Floor Boston, MA 02127	PC	Unrestricted operating support for fiscal years 2019 and 2020	90,000
Boston City Singers, Inc. 17 Waldeck Street Dorchester, MA 02124	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021	150,000
Boston Youth Symphony Orchestras, Inc. 855 Commonwealth Ave Boston, MA 02215	PC	To purchase woodwind, brass, and percussion instruments for the Intensive Community Program expansion	20,000
Boston Youth Symphony Orchestras, Inc. 855 Commonwealth Ave Boston, MA 02215	PC	To support the Intensive Community Program for fiscal years 2019, 2020, and 2021	250,000
Bridge Boston Foundation Inc 435 Warren Street Roxbury, MA 02119	PC	To support the El Sistema program for fiscal years 2019 and 2020	50,000

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
Commonwealth of Massachusetts Cultural Council 10 St. James Avenue, 3rd Floor Boston, MA 02116-3803	PC	To manage the Music Educator/Teaching Artist Fellowship Program for fiscal years 2019 and 2020	150,000
Community Music Center of Boston 34 Warren Avenue Boston, MA 02116	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021	250,000
Conservatory Lab Charter School Foundation 2120 Dorchester Avenue Dorchester, MA 02124	PC	A challenge grant to support the Almost Home Campaign	500,000
Handel and Haydn Society 9 Harcourt St. Boston, MA 02116	PC	To support the Education Program for fiscal years 2019 and 2020	40,000
Hyde Square Task Force, Inc. P.O. Box 301871 Jamaica Plain, MA 02130	PC	Unrestricted operating support and the music program for fiscal years 2018 and 2019	100,000
Josiah Quincy Orchestra Program Limited 885 Washington Street Boston, MA 02111	PC	Unrestricted operating support for fiscal years 2019 and 2020	35,000
Music and Youth Initiative Inc 398 Columbus Ave Boston, MA 02116	PC	Unrestricted operating support for fiscal years 2018 and 2019	25,000
Musiconnects Inc 20 Belgrade Ave., Ste. 1 Roslindale, MA 02131	PC	Unrestricted operating support for fiscal years 2019 and 2020	25,000
Project STEP, Inc. Symphony Hall 301 Massachusetts Avenue, Symphony Hall Boston, MA 02115	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021	80,000
Saint John Paul II Catholic Academy Inc 2200 Dorchester Ave. Dorchester, MA 02124	PC	To support music programming for fiscal years 2018 and 2019	40,000
Springfield Public Schools 1250 State Street Springfield, MA 01109	PC	To purchase instruments for the Springfield High School Science and Technology Band	15,000

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
The Boston Education Development Foundation, Inc. 7 Palmer Street, 2nd Floor Roxbury, MA 02119	PC	To support the Making Music Matters program for fiscal years 2019 and 2020	75,000
ZUMIX, Inc. 260 Sumner St Boston, MA 02472	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021	150,000
Subtotal Music Pathways for Youth			3,395,000
<u>Other Grants and Contributions</u>			
Vilna Shul, Boston's Center for Jewish Culture, Inc. 18 Phillips Street Boston, MA 02114	PC	To support From Hidden Gem to Rising Star: Capital Campaign to Preserve Our History and Ensure Our Future (Capital)	125,000
Subtotal Other Grants and Contributions			125,000
Total Grants and Contributions Approved for Future Payment			\$ 38,051,875