

Form **990-PF**Department of the Treasury
Internal Revenue Service**Return of Private Foundation
or Section 4947(a)(1) Trust Treated as Private Foundation**

- Do not enter social security numbers on this form as it may be made public.
► Information about Form 990-PF and its separate instructions is at www.irs.gov/form990pf.

OMB No 1545-0052

2016

Open to Public Inspection

For calendar year 2016 or tax year beginning , 2016, 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

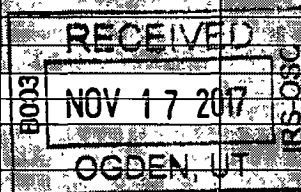
I Fair market value of all assets at end of year (from Part II, column (c), line 16)
► \$ 703,235,992.

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)
1 Contributions, gifts, grants, etc., received (attach schedule)	91,875,000.			
2 Check <input type="checkbox"/> if the foundation is not required to attach Sch B				
3 Interest on savings and temporary cash investments	70,015.	70,015.		
4 Dividends and interest from securities				
5a Gross rents				
b Net rental income or (loss)				
6a Net gain or (loss) from sale of assets not on line 10	7,059,963.			
b Gross sales price for all assets on line 6a	7,059,963.			
7 Capital gain net income (from Part IV, line 2)		5,378,982.		
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	10,464,160.	10,519,242.	19,976.	
12 Total. Add lines 1 through 11	109,469,138.	15,968,239.	19,976.	
13 Compensation of officers, directors, trustees, etc.	336,099.		2,430.	333,669.
14 Other employee salaries and wages	1,136,949.		3,240.	1,133,709.
15 Pension plans, employee benefits	328,677.		1,043.	327,634.
16a Legal fees (attach schedule) See St 2	99,551.		4,459.	95,092.
b Accounting fees (attach sch) See St 3	103,660.	21,090.		81,570.
c Other professional fees (attach sch) See St 4	555,224.			555,224.
17 Interest				
18 Taxes (attach schedule)(see instrs) See Stm 5	602,500.			
19 Depreciation (attach schedule) and depletion See Stmt 6	105,464.			
20 Occupancy	433,599.			433,599.
21 Travel, conferences, and meetings	148,032.			148,032.
22 Printing and publications				
23 Other expenses (attach schedule)				
See Statement 7	8,181,810.	7,477,482.		285,544.
24 Total operating and administrative expenses. Add lines 13 through 23	12,031,565.	7,498,572.	11,172.	3,394,073.
25 Contributions, gifts, grants paid Part XV	40,322,770.			40,322,770.
26 Total expenses and disbursements. Add lines 24 and 25	52,354,335.	7,498,572.	11,172.	43,716,843.
27 Subtract line 26 from line 12				
a Excess of revenue over expenses and disbursements	57,114,803.			
b Net investment income (if negative, enter -0-)		8,469,667.		
c Adjusted net income (if negative, enter -0-)			8,804.	



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Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)		
		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
ASSETS	1 Cash — non-interest-bearing	3,426,478.	3,783,534.	3,783,534.
	2 Savings and temporary cash investments	40,630,753.	86,612,469.	86,612,469.
	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		26,433.	26,433.
	10a Investments — U.S. and state government obligations (attach schedule)			
	b Investments — corporate stock (attach schedule) Statement 8		6,875,000.	7,620,245.
	c Investments — corporate bonds (attach schedule)			
	LIABILITIES	11 Investments — land, buildings, and equipment basis		
Less: accumulated depreciation (attach schedule)				
12 Investments — mortgage loans				
13 Investments — other (attach schedule) Statement 9		495,996,155.	498,972,459.	602,192,979.
14 Land, buildings, and equipment basis 1,339,000.				
Less: accumulated depreciation (attach schedule) See Stmt 10 336,211.		38,617.	1,002,789.	1,002,789.
15 Other assets (describe See Statement 11)		2,026,910.	2,026,947.	1,997,543.
16 Total assets (to be completed by all filers — see the instructions. Also, see page 1, item I)		542,118,913.	599,299,631.	703,235,992.
17 Accounts payable and accrued expenses		28,228.	35,052.	
18 Grants payable				
19 Deferred revenue				
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)	28,228.	35,052.		
NET ASSETS OR FUND BALANCES	Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31. <input type="checkbox"/>			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. <input checked="" type="checkbox"/>			
	27 Capital stock, trust principal, or current funds			
	28 Paid-in or capital surplus, or land, bldg, and equipment fund			
	29 Retained earnings, accumulated income, endowment, or other funds	542,090,685.	599,264,579.	
30 Total net assets or fund balances (see instructions)	542,090,685.	599,264,579.		
31 Total liabilities and net assets/fund balances (see instructions)	542,118,913.	599,299,631.		

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	542,090,685.
2 Enter amount from Part I, line 27a	2	57,114,803.
3 Other increases not included in line 2 (itemize) See Statement 12	3	59,091.
4 Add lines 1, 2, and 3	4	599,264,579.
5 Decreases not included in line 2 (itemize)	5	
6 Total net assets or fund balances at end of year (line 4 minus line 5) — Part II, column (b), line 30	6	599,264,579.

Part IV Capital Gains and Losses for Tax on Investment Income

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

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 5,378,982.			5,378,982.
b			
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
a			5,378,982.
b			
c			
d			
e			

2 Capital gain net income or (net capital loss).	<div style="border: 1px solid black; padding: 2px;"> If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 </div>	2	5,378,982.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6)	<div style="border: 1px solid black; padding: 2px;"> If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8 </div>	3	0.

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

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

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

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

☐ Yes☒ No

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

(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))
2015	42,730,059.	606,713,928.	0.070429
2014	38,338,274.	526,133,594.	0.072868
2013	57,843,771.	438,568,794.	0.131892
2012	30,655,898.	272,059,909.	0.112681
2011	25,595,085.	288,591,841.	0.088690

2 Total of line 1, column (d)	2	0.476560
3 Average distribution ratio for the 5-year base period — divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	0.095312
4 Enter the net value of noncharitable-use assets for 2016 from Part X, line 5	4	643,438,736.
5 Multiply line 4 by line 3	5	61,327,433.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	84,697.
7 Add lines 5 and 6	7	61,412,130.
8 Enter qualifying distributions from Part XII, line 4	8	44,786,479.

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

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

1 a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter 'N/A' on line 1. Date of ruling or determination letter _____ (attach copy of letter if necessary – see instructions)		
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here. <input type="checkbox"/> and enter 1% of Part I, line 27b		1 169,393.
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		3 169,393.
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-		5 169,393.
6 Credits/Payments		
a 2016 estimated tax pmts and 2015 overpayment credited to 2016	6 a 446,080.	
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	
d Backup withholding erroneously withheld	6 d	
7 Total credits and payments. Add lines 6a through 6d	7 446,080.	
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	10 276,687.	
11 Enter the amount of line 10 to be Credited to 2017 estimated tax	276,687. 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 Instructions for the definition)? <i>If the answer is 'Yes' to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities</i>		X
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? <i>If 'Yes,' attach a detailed description of the activities</i>		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? <i>If 'Yes,' attach a conformed copy of the changes</i>		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? <i>If 'Yes,' attach the statement required by General Instruction T</i>		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? <i>If 'Yes,' complete Part II, col (c), and Part XV</i>	X	
8 a Enter the states to which the foundation reports or with which it is registered (see instructions) MA		
b If the answer is 'Yes' to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? <i>If 'No,' attach explanation</i>	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 2016 or the taxable year beginning in 2016 (see instructions for Part XIV)? <i>If 'Yes,' complete Part XIV</i>		X
10 Did any persons become substantial contributors during the tax year? <i>If 'Yes,' attach a schedule listing their names and addresses</i>		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 and enter the amount of tax-exempt interest received or accrued during the year <u>15</u> N/A		N/A
16 At any time during calendar year 2016, 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? See the instructions for exceptions and filing requirements for FinCEN Form 114. If 'Yes,' enter the name of the foreign country	16	X

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)? Organizations relying on a current notice regarding disaster assistance check here <input type="checkbox"/>	1 b	X
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 2016?	1 c	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 2016, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2016? If 'Yes,' list the years <u>20</u> , <u>20</u> , <u>20</u> , <u>20</u>	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer 'No' and attach statement - see instructions)	2 b	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</u> , <u>20</u> , <u>20</u> , <u>20</u>		
3 a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b If 'Yes,' did it have excess business holdings in 2016 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 2016)	3 b	N/A
4 a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4 a	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 2016?	4 b	X

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Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required (continued)**5a** During the year did the foundation pay or incur any amount to

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?

☐ Yes ☒ No

(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?

☐ Yes ☒ No

(3) Provide a grant to an individual for travel, study, or other similar purposes?

☐ Yes ☒ No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? (see instructions)

☒ Yes ☐ No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?

☐ Yes ☒ No**b** If any answer is 'Yes' to 5a(1)–(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?☐

Organizations relying on a current notice regarding disaster assistance check here

c If the answer is 'Yes' to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?☒ Yes ☐ No

If 'Yes,' attach the statement required by Regulations section 53.4945–5(d)

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?☐ Yes ☒ No**b** Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

If 'Yes' to 6b, file Form 8870

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?☐ Yes ☒ No**b** If 'Yes,' did the foundation receive any proceeds or have any net income attributable to the transaction?

N/A

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors**1** List all officers, directors, trustees, foundation managers and their compensation (see instructions).

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
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. Direct 40.00	315,000.	21,099.	0.

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

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
Laura Sherman PO Box 171627 Boston, MA 02117	Dir BO Grantmaking 40	180,500.	44,768.	0.
Karen Gill PO Box 171627 Boston, MA 02117	Dir Ops & Adm 32	166,750.	41,749.	0.
Lara Bethke PO Box 171627 Boston, MA 02117	Dir Med/Sci Research 40	165,000.	8,209.	0.
Jonathan Horowitz PO Box 171627 Boston, MA 02117	Sr Prog Ofcr 40	110,577.	10,575.	0.
Erin Peterson PO Box 171627 Boston, MA 02117	Grants Mgr 40	99,500.	30,360.	0.

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

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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
RAND Corporation 1776 Main Street, PO Box 2138 Santa Monica, CA 90407	Program strategy research and consulting - veterans/military	210,000.
CFAR 4 Penn Center Philadelphia, PA 19103	Organizational strategy	127,908.
Weber Shandwick Worldwide 40 Broad Street Boston, MA 02109	Communications consulting	54,140.
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	
b	Average of monthly cash balances	1 b	46,104,005.
c	Fair market value of all other assets (see instructions)	1 c	607,133,290.
d	Total (add lines 1a, b, and c)	1 d	653,237,295.
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	653,237,295.
4	Cash deemed held for charitable activities. Enter 1-1/2% of line 3 (for greater amount, see instructions)	4	9,798,559.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	643,438,736.
6	Minimum investment return. Enter 5% of line 5	6	32,171,937.

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	32,171,937.
2a	Tax on investment income for 2016 from Part VI, line 5	2 a	169,393.
b	Income tax for 2016 (This does not include the tax from Part VI)	2 b	100,599.
c	Add lines 2a and 2b	2 c	269,992.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	31,901,945.
4	Recoveries of amounts treated as qualifying distributions	4	58,604.
5	Add lines 3 and 4	5	31,960,549.
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	31,960,549.

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	43,716,843.
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	1,069,636.
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	44,786,479.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b (see instructions).	5	
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	44,786,479.

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 2015	(c) 2015	(d) 2016
1 Distributable amount for 2016 from Part XI, line 7				31,960,549.
2 Undistributed income, if any, as of the end of 2016				
a Enter amount for 2015 only			0.	
b Total for prior years 20__, 20__, 20__		0.		
3 Excess distributions carryover, if any, to 2016				
a From 2011	11,344,989.			
b From 2012	17,122,971.			
c From 2013	36,577,104.			
d From 2014	12,411,363.			
e From 2015	12,672,685.			
f Total of lines 3a through e	90,129,112.			
4 Qualifying distributions for 2016 from Part XII, line 4 ▶ \$ 44,786,479.				
a Applied to 2015, 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 2016 distributable amount				31,960,549.
e Remaining amount distributed out of corpus	12,825,930.			
5 Excess distributions carryover applied to 2016 (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	102,955,042.			
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 2015 Subtract line 4a from line 2a Taxable amount — see instructions			0.	
f Undistributed income for 2016 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2017				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 2011 not applied on line 5 or line 7 (see instructions)	11,344,989.			
9 Excess distributions carryover to 2017. Subtract lines 7 and 8 from line 6a	91,610,053.			
10 Analysis of line 9				
a Excess from 2012	17,122,971.			
b Excess from 2013	36,577,104.			
c Excess from 2014	12,411,363.			
d Excess from 2015	12,672,685.			
e Excess from 2016	12,825,930.			

BAA

Form 990-PF (2016)

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 Statement 15				
Total				▶ 3a 40,322,770.
b Approved for future payment See Statement 16				
Total				▶ 3b 41,052,900.

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated

Enter gross amounts unless otherwise indicated		Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions)
		(a) Business code	(b) Amount	(c) Exclu- sion code	(d) Amount	
1	Program service revenue.					
a						
b						
c						
d						
e						
f						
g	Fees and contracts from government agencies					
2	Membership dues and assessments					
3	Interest on savings and temporary cash investments			14	70,015.	
4	Dividends and interest from securities					
5	Net rental income or (loss) from real estate					
a	Debt-financed property					
b	Not debt-financed property					
6	Net rental income or (loss) from personal property					
7	Other investment income					
8	Gain or (loss) from sales of assets other than inventory	525990	1,680,981.	18	5,378,982.	
9	Net income or (loss) from special events					
10	Gross profit or (loss) from sales of inventory					
11	Other revenue					
a	Interest income from PRI					19,976.
b	Passthrough K-1 income	525990	-161,997.	14	10,557,252.	
c	Security deposit refund			1	48,929.	
d						
e						
12	Subtotal. Add columns (b), (d), and (e)		1,518,984.		16,055,178.	19,976.
13	Total. Add line 12, columns (b), (d), and (e)				13	17,594,138.

(See worksheet in line 13 instructions to verify calculations)

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

[illegible]

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.**

► Information about Schedule B (Form 990, 990-EZ, 990-PF) and its instructions is at www.irs.gov/form990.

OMB No 1545-0047

2016

Name of the organization

The Klarman Family Foundation

Employer identification number

04-3105768

Organization type (check one)

Filers of:

Form 990 or 990-EZ

Section:

- ☐ 501(c)() (enter number) organization
☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation
☐ 527 political organization

Form 990-PF

- ☒ 501(c)(3) exempt private foundation
☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation
☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.

Note. Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

General Rule

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

Special Rules

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

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

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

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

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

Schedule B (Form 990, 990-EZ, or 990-PF) (2016)

Name of organization

The Klarman Family Foundation

Employer identification number

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	\$ 6,875,000.	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II for noncash contributions)
2	Seth A. Klarman PO Box 171627 Boston, MA 02117	\$ 85,000,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
			Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
			Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
			Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
			Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
			Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)

Employer identification number

04-3105768

Part II

[illegible]

Schedule B (Form 990, 990-EZ, or 990-PF) (2016)

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

The Klarman Family Foundation

04-3105768

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

	(a) Revenue per Books	(b) Net Investment Income	(c) Adjusted Net Income
Interest income from PRI	\$ 19,976.	\$ 19,976.	\$ 19,976.
Passthrough K-1 income	10,395,255.	10,499,266.	
Security deposit refund	48,929.		
Total	\$10,464,160.	\$10,519,242.	\$ 19,976.

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	\$ 20,703.			\$ 20,703.
Grants management	53,877.			53,877.
Program-related investment matters	4,459.		\$ 4,459.	
Tax matters	19,147.			19,147.
Trademark matters	1,365.			1,365.
Total	\$ 99,551.	\$ 0.	\$ 4,459.	\$ 95,092.

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	\$ 53,178.			\$ 53,178.
Investment accounting	21,090.	\$ 21,090.		
Tax compliance	29,392.			28,392.
Total	\$ 103,660.	\$ 21,090.	\$ 0.	\$ 81,570.

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

	(a) Expenses per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
403b admin and recordkeeping	\$ 8,441.			\$ 8,441.
Communications	54,140.			54,140.
Executive search and recruiting	45,038.			45,038.
Grants management system support	7,228.			7,228.
HR and benefit consulting	2,100.			2,100.
IT and phone services	20,233.			20,233.

The Klarman Family Foundation

04-3105768

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

	(a) Expenses per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Organizational strategy	\$ 127,908.			\$ 127,908.
Professional staffing	9,200.			9,200.
Program evaluation	38,686.			38,686.
Program strategy research & consulting	226,500.			226,500.
Scientific committee honorarium	15,750.			15,750.
Total	<u>\$ 555,224.</u>	<u>\$ 0.</u>	<u>\$ 0.</u>	<u>\$ 555,224.</u>

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

	(a) Expenses per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Excise tax	\$ 602,500.			
Total	<u>\$ 602,500.</u>	<u>\$ 0.</u>	<u>\$ 0.</u>	<u>\$ 0.</u>

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

Date Acquired	Cost Basis	Prior Yr Depr	Method	Rate	Life	Current Yr Depr	Net Invest Income	Adjusted Net Income
Equipment Various	96,100	36,641	S/L		5	15,133	0	0
Software 6/12/13	18,629	16,042	S/L		3	2,587	0	0
Furniture Various	456,233	178,064	S/L		5	36,968	0	0
Leasehold improvements Various	768,038		S/L		10	50,776	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
Bank charges	\$ 1,035.			\$ 1,035.
Computer expenses	34,699.			34,699.
Dues, memberships & subscriptions	161,222.			161,222.

The Klarman Family Foundation

04-3105768

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

	(a) Expenses per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Insurance	\$ 9,704.			\$ 9,704.
Office supplies	49,175.			49,175.
Parking	1,047.			1,047.
Passthrough K-1 expenses	7,896,266.	\$ 7,477,482.		
Payroll processing fees	2,940.			2,940.
Repairs and maintenance	23,722.			23,722.
State filing fees	2,000.			2,000.
Total	\$ 8,181,810.	\$ 7,477,482.	\$ 0.	\$ 285,544.

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

<u>Corporate Stocks</u>	<u>Valuation Method</u>	<u>Book Value</u>	<u>Fair Market Value</u>
Foghorn Therapeutics Inc	Cost	\$ 1,875,000.	\$ 1,875,000.
Gwynnie Bee Inc Series A-4	Cost	118,985.	305,699.
Gwynnie Bee Inc Series A-5	Cost	195,415.	431,190.
Gwynnie Bee Inc Series A-8	Cost	4,685,600.	5,008,356.
Total		\$ 6,875,000.	\$ 7,620,245.

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

<u>Other Investments</u>	<u>Valuation Method</u>	<u>Book Value</u>	<u>Fair Market Value</u>
See attachment	Cost	\$ 498972459.	\$ 602,192,979.
Total		\$ 498972459.	\$ 602,192,979.

Statement 10
Form 990-PF, Part II, Line 14
Land, Buildings, and Equipment

<u>Category</u>	<u>Basis</u>	<u>Accum. Deprec.</u>	<u>Book Value</u>	<u>Fair Market Value</u>
Furniture and Fixtures	\$ 456,233.	\$ 215,032.	\$ 241,201.	\$ 241,201.
Machinery and Equipment	114,729.	70,403.	44,326.	44,326.
Improvements	768,038.	50,776.	717,262.	717,262.
Total	\$ 1,339,000.	\$ 336,211.	\$ 1,002,789.	\$ 1,002,789.

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	\$ 29,404.	
PRI - Home Funders Loan	\$ 1,997,543.	\$ 1,997,543.
Total	<u>\$ 2,026,947.</u>	<u>\$ 1,997,543.</u>

Statement 12
Form 990-PF, Part III, Line 3
Other Increases

Recovery of prior year loss	\$ 487.
Returned grants	\$ 58,604.
Total	<u>\$ 59,091.</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 a by-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 a by-invitation only basis. The two

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

Submission Deadlines:
 Restrictions on Awards:

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

Statement 15
Form 990-PF, Part XV, Line 3a
Recipient Paid During the Year

<u>Name and Address</u>	<u>Donee Relationship</u>	<u>Found- ation Status</u>	<u>Purpose of Grant</u>	<u>Amount</u>
Addressing Anti-Semitism and Other Forms of Hate	N/A		See attachment pages 3-5	\$ 4,375,000.
Arab Israeli Employment and Education	N/A		See attachment pages 5-6	2,275,000.
Connecting to Israel	N/A		See attachment pages 6-7	3,466,000.
Funder Collaborations and Bold Bets	N/A		See attachment pages 7-10	5,452,871.
Good Philanthropic Citizen and Community Grants	N/A		See attachment pages 11-20	8,210,671.
Medical and Scientific Research	N/A		See attachment page 20	6,700,000.
Music Pathways for Youth	N/A		See attachment pages 21-24	2,024,570.
Other Grants and Contributions	N/A		See attachment pages 24-27	7,818,658.
Total				<u>\$ 40,322,770.</u>

Statement 16
Form 990-PF, Part XV, Line 3b
Recipient Approved for Future Payment

<u>Name and Address</u>	<u>Donee Relationship</u>	<u>Found- ation Status</u>	<u>Purpose of Grant</u>	<u>Amount</u>
Arab Israeli Employment and Education	N/A		See attachment page 1	\$ 3,600,000
Connecting to Israel	N/A		See attachment page 1	2,000,000
Funder Collaborations and Bold Bets	N/A		See attachment page 2	2,000,000
Good Philanthropic Citizen and Community	N/A		See attachment pages 2-5	4,340,200
Medical and Scientific Research	N/A		See attachment page 5	18,306,000
Music Pathways for Youth	N/A		See attachment pages 6-7	1,156,700
Other	N/A		See attachment pages 7-8	9,650,000
Total				<u>\$ 41,052,900</u>

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

	Proceeds	Cost	Gain/Loss
Amounts reported in Part IV	\$ 5,379,469	-	\$ 5,379,469
Passthrough K-1 short-term capital gain UBTI	638,683	-	638,683
Passthrough K-1 long-term capital gain UBTI	131,918	-	131,918
Passthrough K-1 751 gain UBTI	23,870	-	23,870
Passthrough K-1 1231 gain UBTI	353,860	-	353,860
Passthrough K-1 1256 gain UBTI	532,650	-	532,650
Total Gain/Loss per Part I, Line 6	<u>\$ 7,060,450</u>	<u>-</u>	<u>\$ 7,060,450</u>

Part II, Line 13 - Other Investments

	Book Value	Fair Market Value
Abrams Capital Partners I, L.P.	\$ 30,783,842	\$ 34,046,919
Abrams Capital Partners II, L.P.	36,136,315	38,328,131
Al Bawadar	505,443	499,246
Arbiter Partners, L.P.	8,778,556	8,844,154
Attestor Value Fund, LP	28,931,028	22,010,566
Berkshire Fund VII (OS), LP	42,936	64,101
Berkshire Fund VII, LP	55,365	186,581
Berkshire Fund VIII (IND), LP	1,262,475	1,721,508
Boulderado Partners LLC	4,296,598	5,708,522
Brookside Capital Partners Fund	10,632,262	11,108,506
Columbus Hill Partners LP	13,576,312	15,287,070
Covalent Partners	564,467	626,360
Cross Shore Overseas	2,500,000	2,400,600
Cue Ball Capital L.P.	1,417,690	1,325,745
EcoR1 Capital Fund, LP	7,876,437	8,507,851
FIMI Opportunity 6, LP	135,069	172,000
FIMI Opportunity V, LP	3,302,000	5,458,000
Finepoint Capital Partners II	9,546,613	9,921,900
Flybridge Capital Partners III	281,070	629,510
Flybridge Capital Partners IV	310,179	455,964
Flybridge II, LLC	284,754	382,970
Flare Capital Partners I LP	344,218	422,305
GC Entrepreneurs Fund II	6,307	6,577
GC Entrepreneurs Fund IV	24,959	50,801
Greenlight Capital Offshore (Gold), LTD	20,000,000	22,068,018
Greylock Israel II LP	1,305,945	1,515,021
Hawkeye Institutional Cap LP	6,406,893	6,436,296
Hayman Capital	2,606,740	2,707,622
Highfields Capital Ltd.	5,394,762	5,524,879
JHL Capital Group	16,482,873	16,787,036
Jeereddi I, LP	3,699,570	4,291,311
Kensico Offshore Fund	97,839,000	149,106,183
Magma Venture Capital III Fund	2,875,035	6,706,781
Magma Venture Capital IV Fund	1,217,048	1,461,217
Newtyn TE Partners	13,341,730	14,290,401
Ostra Capital	11,343,824	11,727,167
Perry Partners, LP	2,949,388	3,130,195
Pitango Growth Fund I L.P.	204,518	195,234
Pitango Venture Capital Fund VI L.P.	1,516,235	2,432,844
Pitango Venture Capital Fund VII L.P.	246,565	234,563
Privatvarde Fund	265,472	66,840

Part II, Line 13 - Other Investments

	Book Value	Fair Market Value
Raffles Associates, LP	12,390,003	17,587,457
Riva Capital Partners LP	468,375	455,187
Route One Fund I, LP	27,866,385	33,392,245
Sessa Capital International Fund	2,000,000	3,799,712
Slate Path Partners LP	43,235,834	48,123,812
Spruce House Capital	25,307,025	43,224,734
Swiftcurrent Offshore (Bridger Capital)	7,500,000	8,523,338
Takwin Labs L.P.	382,992	399,248
The Varde Fund IX, LP	1,513,869	1,523,505
The Varde Fund VII, LP	659,139	190,086
The Varde Fund VIII, LP	804,423	536,399
The Varde Fund X, LP	9,981,034	9,510,370
The Varde Fund, LP	524,276	303,575
TBC Partners LP	15,054,310	15,636,828
Varde Investment Partners, LP	1,994,301	2,138,988
	<u>\$ 498,972,459</u>	<u>\$ 602,192,979</u>

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: | <p>Home Funders submitted a complete report on the following dates in 2016 of the type ordinarily required by commercial investors under similar circumstances:
3/8/2016, 5/3/16, 7/14/2016, and 10/13/2016.</p> <p>This investment remained on the Foundation's books as of 12/31/16.</p> | | | | | | | | | | | | | | | | | | | | |
| (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 2016 or which had reports outstanding during 2016:

- | | | | |
|-------------|-------------------------------------|---|--|
| (i) | Grantee: | Strategic Grant Partners ("SGP")
240 Newbury Street, 2 nd Floor, Boston, MA 02116 | |
| (ii) | Date and Amount of Grant: | 7/22/15 \$605,228
12/4/15 \$597,858 | |
| (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 10/26/16. | |
| (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 2016 or which had reports outstanding during 2016:

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

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

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

Our work is guided by the following principles and values:

- We approach our work both with a seriousness of purpose and evaluative rigor, and also 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 as fast as or faster than wealth can compound, 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 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. As we are continually learning, 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:

Addressing Anti-Semitism and Other Forms of Hate: History demonstrates that hate in all forms endangers the fabric of civil society. The Foundation is committed to addressing hatred, bigotry and intolerance and invests in efforts to support groups threatened by hate, as well as in research and the monitoring of hate. The Foundation also invests in educational and intergroup efforts fostering tolerance and positive relationships across difference. 4,375,000

Arab Israeli Employment and Education: The Foundation is committed to improving the quality of life and access to opportunities for Israel's Arab citizens, and to ensuring a strong Jewish and democratic state in which all citizens might participate in the country's economic growth. The Foundation's grant making focuses on increasing access to and success in higher education, leadership development and professional employment for Arabs in Israel. 2,275,000

Connecting 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. 3,466,000

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

Funder Collaborations and Bold Bets: The Foundation values working in partnerships as an effective means to increase learning, build capacity, minimize risk and maximize impact. In addition, the Foundation supports a small number of organizations, outside of current areas of interest, led by extraordinary leaders whose bold ideas and comprehensive plans to scale initial outcomes hold significant promise for positive, wide scale impact. 5,452,871

Good Philanthropic Citizen and Community Grants: The Foundation works to expand access to the critical services and enrichment opportunities that help make communities stronger, healthier and more vibrant. While the majority of grants in this category focus on Greater Boston as well as on the Jewish community, the Foundation also values the role it can play within some national and global contexts, acting nimbly as opportunities or needs arise. 8,210,671

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

Medical and Scientific Research: The Foundation invests in research efforts to advance understanding of the biological basis of health and illness. 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. 6,700,000

Music Pathways for Youth: The Foundation believes in the power of music education to enrich the lives of individuals. It seeks to create a stronger, more accessible music pathway so that young people in Greater Boston, regardless of their financial means, can pursue training - from beginner to mastery - according to their highest level of interest and ability. In addition to providing operating support grants to high quality, music education programs, the Foundation addresses other barriers such as lack of access to appropriate instruments and limited professional development opportunities for music educators and teaching artists to strengthen their ability to teach and mentor students along the music pathway. 2,024,570

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. 7,818,658

\$40,322,770

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

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
<u>Addressing Anti-Semitism and Other Forms of Hate</u>			
American Society for Yad Vashem, Inc. 500 Fifth Avenue, 42nd Floor New York, NY 10110-4299	PC	Unrestricted operating support for fiscal years 2014, 2015 and 2016	\$ 100,000
Anti Defamation League 605 Third Avenue New York, NY 10158	PC	To support the mission and organizational goals of the ADL nationally, including its work in the New England Region	650,000
Bagly, Inc. P.O. Box 960814 Boston, MA 02196	PC	Unrestricted operating support	25,000
Combined Jewish Philanthropies of Greater Boston, Inc. 126 High Street Boston, MA 02129	PC	To support the mission and organizational goals of the Jewish Community Relations Council of Greater Boston	300,000
Facing History and Ourselves, Inc. 16 Hurd Road Brookline, MA 02445	PC	Unrestricted operating support for fiscal years 2016 and 2017	1,000,000
GLBTQ Legal Advocates & Defenders, Inc. 30 Winter Street, STE 800 Boston, MA 12108	PC	Unrestricted operating support	50,000
International Association Yahad-In Unum 30 Rue Garibaldi Saint Ouen 93400 France	PC	Unrestricted operating support for fiscal years 2015 and 2016	250,000
Irish International Immigrant Center, Inc. 1 State St., 8th Floor Boston, MA 02109	PC	Unrestricted operating support for fiscal years 2014, 2015 and 2016	25,000
Keshet, Inc. 284 Amory Street Boston, MA 02130	PC	Unrestricted operating support for fiscal years 2014, 2015 and 2016	50,000
Lambda Legal Defense And Education Fund, Inc. 120 Wall Street, 19th Floor New York, NY 10005	PC	Unrestricted operating support	100,000

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

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
Massachusetts Alliance of Portuguese Speakers, Inc. 1046 Cambridge St. Cambridge, MA 02139	PC	Unrestricted operating support	25,000
Massachusetts Immigrant and Refugee Coalition, Inc. 105 Chauncy Street, Suite 901 Boston, MA 02111	PC	Unrestricted operating support	100,000
Massachusetts Legal Assistance Corporation 7 Winthrop Square, 2nd Floor Boston, MA 02110-1245	PC	Unrestricted operating support	500,000
NAACP Legal Defense and Educational Fund, Inc. 40 Rector Street, 5th floor New York, NY 10006	PC	Unrestricted operating support	50,000
National Center for Transgender Equality 1400 16th St. NW Suite 510 Washington, DC 20036	PC	Unrestricted operating support	50,000
National Council of La Raza 1126 16th St. NW Suite 600 Washington, DC 20036	PC	Unrestricted operating support	100,000
Southern Poverty Law Center, Inc. 400 Washington Ave. Montgomery, AL 36104	PC	Unrestricted operating support	100,000
The Lenny Zakim Fund, Inc. c/o DLA Piper 33 Arch Street 26th Floor Boston, MA 02110	PC	Unrestricted operating support for fiscal years 2014, 2015 and 2016	65,000
The Lenny Zakim Fund, Inc. c/o DLA Piper 33 Arch Street 26th Floor Boston, MA 02110	PC	To support expanded grant making by The Lenny Zakim Fund in fiscal year 2017	75,000
United States Holocaust Memorial Museum 100 Raoul Wallenberg Place SW Washington, DC 20024-2126	PC	Unrestricted operating support for fiscal years 2014, 2015 and 2016	100,000

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

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
United States Holocaust Memorial Museum 100 Raoul Wallenberg Place SW Washington, DC 20024-2126	PC	Capital grant for the Collections and Conservation Center for fiscal years 2014, 2015 and 2016	660,000
Subtotal Addressing Anti-Semitism and Other Forms of Hate			4,375,000
<u>Arab Israeli Employment and Education</u>			
Injaz Center for Professional Arab Local Governance (R A.) 4 Wadi el Haj Street, Industrial Zone Nazareth, Israel 16000 Israel	PC	Unrestricted operating support for fiscal years 2016 and 2017	75,000
Jewish Funders Network 150 W 30th Street, Suite 900 New York, NY 10001	PC	To support the Social Venture Fund for Jewish-Arab Equality and Shared Society for 2016-2017	50,000
Kav Mashve - Employers Coalition for the Enhancement of Equality of Employment for Academic Arabs and other Minorities 39 Ha'atzmaut Road Haifa 3303320 Israel	PC	Unrestricted operating support for fiscal years 2014, 2015 and 2016	200,000
Matan - Investing in the Community 33 Ya'avets St. Tel Aviv 6525832 Israel	PC	To support Collective Impact - The Partnership for a Breakthrough in Arab Employment for fiscal years 2016 and 2017	400,000
Seal-Maoz Hachoshlim 6, 6th Floor Herzliya 4673306 Israel	PC	To support MAOZ in providing access to leadership opportunities and improving the quality of life for all citizens of Israel for fiscal years 2017 and 2018	500,000
Technion - Israel Institute of Technology Technion City, Haifa 3200004 Israel	PC	Capital grant to support the undergraduate student village at Technion's Haifa campus for fiscal years 2015, 2016 and 2017	750,000

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

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
The Davidson Institute of Science Education, at the Weizmann Institute of Science (R.A.) 234 Herzl St. PO Box 26 Rehovot, Israel 7610001 Israel	PC	To support the Davidson Institute Ma'ala Program in Sciences for Arab Students at the Weizmann Institute for fiscal years 2015 and 2016.	300,000
Subtotal Arab Israeli Employment and Education			2,275,000
<u>Connecting to Israel</u>			
American Jewish Committee 165 East 56 Street New York, NY 10022	PC	To support Project Interchange for fiscal year 2016	100,000
Combined Jewish Philanthropies of Greater Boston, Inc. 126 High Street Boston, MA 02129	PC	To support the IACT initiative and Faculty Study Tours to Israel for fiscal years 2015 and 2016	400,000
Gann Academy The New Jewish High School of Greater Boston Inc 333 Forest St Waltham, MA 02452	PC	To support the pilot of My Israel: A four- year integrated approach to Israel education for fiscal years 2017 and 2018	250,000
Honeymoon Israel Foundation Inc 6070 Whitegate Crossing East Amherst, NY 14051	PC	Unrestricted operating support for fiscal years 2017, 2018, and 2019	250,000
Israel & Co. 205 East 42nd Street. 16th Floor New York, NY 10017	PC	Unrestricted operating support for fiscal years 2016 and 2017	1,766,000
Israel-America Academic Exchange 8383 Wilshire Boulevard, Suite 400 Beverly Hills, CA 90211	PC	Unrestricted operating support for fiscal years 2015 and 2016	100,000
Massachusetts Institute of Technology 77 Massachusetts Avenue Cambridge, MA 02139	PC	To support the MIT International Science and Technology Initiatives (MISTI)-Israel's Global Seed Fund for 2015 and 2016 grant making cycles	150,000

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

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
The David Project, Inc. PO Box 52390 Boston, MA 02205	PC	To support the 2015-2016 pilot program to scale the "Israel Uncovered" program	50,000
The David Project, Inc. PO Box 52390 Boston, MA 02205	PC	Unrestricted operating support for fiscal years 2017 and 2018	300,000
Vibe Israel 3 Ha'arad Street Tel Aviv 6971056 Israel	PC	Unrestricted operating support for fiscal years 2015 and 2016	100,000
Subtotal Connecting to Israel			3,466,000

Funder Collaborations and Bold Bets

Actors' Shakespeare Project 191 Highland Avenue, Suite 2B Somerville, MA 02143	PC	To support capacity building of Actors' Shakespeare Project as part of the Barr-Klarman Arts Capacity Building Initiative for fiscal years 2015 and 2016	75,000
Artists for Humanity, Inc. 100 West Second Street Boston, MA 02127	PC	To support capacity building of Artists for Humanity as part of the Barr-Klarman Arts Capacity Building Initiative for fiscal years 2015 and 2016	50,000
Ballet Theatre of Boston, Inc. 400 Harvard Street Cambridge, MA 02138	PC	To support capacity building of the Ballet Theatre of Boston as part of the Barr-Klarman Arts Capacity Building Initiative for fiscal years 2015 and 2016	125,000
Boston Ballet, Inc. 19 Clarendon Street Boston, MA 02116	PC	To support capacity building of the Boston Ballet, Inc. as part of the Barr-Klarman Arts Capacity Building Initiative for fiscal years 2015 and 2016	125,000
Boston Center for the Arts, Inc. 539 Tremont Street Boston, MA 02116	PC	To support capacity building of Boston Center for the Arts as part of the Barr-Klarman Arts Capacity Building Initiative for fiscal years 2015 and 2016	100,000

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

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
Boston Children's Chorus, Inc. 112 Shawmut Avenue, Suite 5B Boston, MA 02118	PC	To support capacity building of Boston Children's Chorus as part of the Barr-Klarman Arts Capacity Building Initiative for fiscal years 2015 and 2016	50,000
Boston City Singers, Inc. 17 Waldeck Street Dorchester, MA 02124	PC	To support capacity building of Boston City Singers as part of the Barr-Klarman Arts Capacity Building Initiative for fiscal years 2015 and 2016	25,000
Boston Lyric Opera Company 11 Avenue de Lafayette Boston, MA 02111	PC	To support capacity building of Boston Lyric Opera as part of the Barr-Klarman Arts Capacity Building Initiative for fiscal years 2015 and 2016	100,000
Boston Youth Symphony Orchestras, Inc. 855 Commonwealth Avenue Boston, MA 02215	PC	To support capacity building of Boston Youth Symphony Orchestra as part of the Barr-Klarman Arts Capacity Building Initiative for fiscal years 2015 and 2016	50,000
Brigham and Women's Hospital 75 Francis Street Boston, MA 02494	PC	To support Ariadne Labs: A Joint Center for Health Systems Innovation for fiscal years 2016, 2017 and 2018	1,000,000
Community Music Center of Boston 34 Warren Ave Boston, MA 02116	PC	To support capacity building of the Community Music Center of Boston as part of the Barr-Klarman Arts Capacity Building Initiative for fiscal years 2015 and 2016	50,000
Emerson College 120 Boylston Street Boston, MA 02116	PC	To support capacity building of Emerson College as part of the Barr-Klarman Arts Capacity Building Initiative for fiscal years 2015 and 2016	100,000
From the Top, Inc. 295 Huntington Avenue, Suite 201 Boston, MA 02115	PC	To support capacity building of From the Top as part of the Barr-Klarman Arts Capacity Building Initiative for fiscal years 2015 and 2016	37,500
Handel and Haydn Society 9 Harcourt St Boston, MA 02116	PC	To support capacity building of Handel and Haydn Society as part of the Barr-Klarman Arts Capacity Building Initiative for fiscal years 2015 and 2016	50,000

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

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
Hyde Square Task Force, Inc 375 Centre Street Jamaica Plain, MA 02130	PC	To support capacity building of Hyde Square Task Force as part of the Barr-Klarman Arts Capacity Building Initiative for fiscal years 2015 and 2016	50,000
Inquilinos Boricuas en Acción 405 Shawmut Avenue Boston, MA 02118	PC	To support capacity building of Inquilinos Boricuas en Acción as part of the Barr-Klarman Arts Capacity Building Initiative for fiscal years 2015 and 2016	75,000
Lyric Stage Company of Boston, Inc. 140 Clarendon Street Boston, MA 02116	PC	To support capacity building of Lyric Stage Company as part of the Barr-Klarman Arts Capacity Building Initiative for fiscal years 2015 and 2016	50,000
Madison Park Development Corporation 184 Dudley Street, Suite 102 Roxbury, MA 02119	PC	To support capacity building of Madison Park Development Corporation as part of the Barr-Klarman Arts Capacity Building Initiative for fiscal years 2015 and 2016	75,000
Museum of African American History, Inc. 14 Beacon Street, Suite 401 Boston, MA 02108	PC	To support capacity building of the Museum of Afro American History as part of the Barr-Klarman Arts Capacity Building Initiative for fiscal years 2015 and 2016	100,000
Origination P.O. Box 191878 Roxbury, MA 02119	PC	To support capacity building of Origination as part of the Barr-Klarman Arts Capacity Building Initiative for fiscal years 2015 and 2016	37,500
Project STEP, Inc. Symphony Hall 301 Massachusetts Avenue Boston, MA 02115	PC	To support capacity building of Project STEP as part of the Barr-Klarman Arts Capacity Building Initiative for fiscal years 2015 and 2016	30,000
Roca, Inc 101 Park Street Chelsea, MA 02150	PC	To support the mission and organizational goals of Roca, Inc. for fiscal years 2016, 2017, and 2018.	175,000
Sociedad Latina, Inc. 1530 Tremont Street Boston, MA 02120	PC	To support capacity building of Sociedad Latina as part of the Barr-Klarman Arts Capacity Building Initiative for fiscal years 2015 and 2016	37,500

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

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
Strategic Grant Partners, Inc. 240 Newbury St. Second Floor Boston, MA 02116	PF	To provide outstanding nonprofits with funding and technical assistance to improve the lives of struggling individuals & families in Massachusetts.	1,695,371
Technical Development Corporation 31 Milk Street, Suite 310 Boston, MA 02109	PC	To support the management, technical assistance and training for the Barr-Klarman Arts Capacity Building Initiative for fiscal years 2016 and 2017	300,000
Theater Offensive, Inc. 565 Boylston Street, 3rd Floor Boston, MA 02116	PC	To support capacity building of The Theater Offensive as part of the Barr-Klarman Arts Capacity Building Initiative for fiscal years 2015 and 2016	42,500
Urbano Project, Inc 29 Germania Street Jamaica Plain, MA 02130	PC	To support capacity building of the Urbano Project as part of the Barr-Klarman Arts Capacity Building Initiative for fiscal years 2016 and 2017	30,000
West End House, Inc. 105 Allston St Allston, MA 02134	PC	To support capacity building of the West End House Boys & Girls Clubs as part of the Barr-Klarman Arts Capacity Building Initiative for fiscal years 2015 and 2016	42,500
World Music, Inc 720 Massachusetts Avenue Cambridge, MA 02139	PC	To support capacity building of World Music as part of the Barr-Klarman Arts Capacity Building Initiative for fiscal years 2015 and 2016	125,000
Year Up, Inc. 45 Milk St Fl 9 Boston, MA 02109	PC	To support the mission and organizational goals of Year Up including its Boston operations	600,000
ZUMIX, Inc 260 Sumner Street Boston, MA 02128	PC	To support capacity building of ZUMIX as part of the Barr-Klarman Arts Capacity Building Initiative for fiscal years 2015 and 2016	50,000
Subtotal Funder Collaborations and Bold Bets			5,452,871

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

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 Fuel Assistance Program for fiscal years 2017, 2018, and 2019	25,000
Action for Boston Community Development, Inc. 178 Tremont Street Boston, MA 02111	PC	To support the SummerWorks program in summers 2016 and 2017	30,000
Adolescent Consultation Services, Inc. 189 Cambridge Street Cambridge, MA 02134	PC	Unrestricted operating support for fiscal years 2017, 2018, and 2019	35,000
American Friends of the Hebrew University One Battery Park Plaza, 25th Floor New York, NY 10004	PC	To support the Advanced Graduate Studies Program (AGSP) in Political Science and International Relations for fiscal years 2014, 2015 and 2016	60,000
American Jewish World Service, Inc. 45 West 36th St. New York, NY 10018	PC	To support the mission and organizational goals for fiscal years 2016, 2017, 2018 and 2019	250,000
American Jewish World Service, Inc. 45 West 36th St. New York, NY 10018	PC	To support Hurricane Matthew relief work in Haiti	75,000
Baton Rouge Area Foundation 100 North Street Suite 900 Baton Rouge, LA 70802	PC	To support the Flood Relief Fund	50,000
Beth Israel Deaconess Medical Center, Inc. 330 Brookline Avenue Boston, MA 02215	PC	Unrestricted operating support	20,000
Big Sister Association of Greater Boston, Inc. 161 Massachusetts Avenue Boston, MA 02115	PC	Unrestricted operating support for fiscal years 2016 and 2017	20,000
Boston After School and Beyond, Inc. 89 South Street, Suite 601 Boston, MA 02111	PC	To support the Summer Learning Project for summer 2015 and 2016	75,000

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

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 for fiscal years 2016 and 2017	125,000
Boston Debate League 225 Friend St., Suite 401 Boston, MA 02114	PC	Unrestricted operating support for fiscal years 2016 and 2017	50,000
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 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 Medical Center Corporation 801 Massachusetts Avenue 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 Bottom Line Massachusetts' Growth Campaign in Boston for fiscal years 2014, 2015, and 2016	150,000
Boys and Girls Clubs of Boston, Inc. 200 High Street, 3rd Floor Boston, MA 02110	PC	To support the mission and organizational goals for fiscal years 2015, 2016, and 2017	500,000
Brigham and Women's Hospital 75 Francis Street Boston, MA 02494	PC	Unrestricted operating support	20,000
Brookline Community Mental Health Center, Inc. 41 Garrison Road Brookline, MA 02445	PC	To support the Bridge for Resilient Youth in Transition (BRYT) program for fiscal years 2016 and 2017	125,000
Brookline Teen Center, Inc. 40 Aspinwall Ave Brookline, MA 02446	PC	Unrestricted operating support	50,000
Celebrity Series of Boston 20 Park Plaza, Suite 1032 Boston, MA 02116	PC	To support Play Me, I'm Yours!, Street Pianos Boston 2016	25,000

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

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
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
Combined Jewish Philanthropies of Greater Boston, Inc. 126 High Street Boston, MA 02129	PC	To support the mission and organizational goals of CJP, and to support local network agencies for fiscal years 2015 and 2016	920,000
Commonwealth Shakespeare Company, Inc. 231 Forest Street Babson Park, MA 02457	PC	To support Shakespeare on the Common for fiscal years 2015 and 2016	25,000
Community Economic Development Assistance Corporation One Center Plaza, Suite 350 Boston, MA 02108	PC	To support the Children's Investment Fund for fiscal years 2017 and 2018	150,000
Cradles to Crayons 155 North Beacon St. Brighton, MA 02135	PC	Unrestricted operating support for fiscal years 2016 and 2017	25,000
Crisis Text Line 24 West 25th Street, 6th Fl New York, NY 10010	PC	To support the Veterans Initiative for fiscal years 2015 and 2016	100,000
Cristo Rey Boston High School, Inc. 100 Savin Hill Avenue Boston, MA 02125	PC	To support wi-fi network upgrades	38,900
Dudley Street Neighborhood Initiative 504 Dudley Street Roxbury, MA 02119	PC	To support the GOTCHA Youth Jobs Collaborative in summers 2016 and 2017	20,000
Economic Mobility Pathways Inc. One Washington Mall, 3rd Floor Boston, MA 02108	PC	Unrestricted operating support for fiscal years 2016 and 2017	75,000

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

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
EdVestors, Inc. 140 Clarendon Street Suite 401 Boston, MA 02116	PC	To support the mission and organizational goals for fiscal years 2017 and 2018	600,000
English for New Bostonians 105 Chauncy St., 4th floor Boston, MA 02111	PC	Unrestricted operating support for fiscal years 2016 and 2017	100,000
Family Nurturing Center of Massachusetts, Inc. 200 Bowdoin Street Dorchester, MA 02122	PC	Unrestricted operating support for fiscal years 2016 and 2017	25,000
Food Project, Inc. 10 Lewis Street Lincoln, MA 01773	PC	Unrestricted operating support	20,000
Forsyth Dental Infirmary For Children 245 First Street Cambridge, MA 02142	PC	To support the purchase of equipment for pediatric restorative dental treatment and preventive care in homeless shelters and motels	29,200
Foundation for Jewish Camp, Inc. 253 West 35th Street, 4th Fl New York, NY 10001	PC	To support the Disabilities Inclusion Initiative for fiscal years 2015, 2016, and 2017	65,000
Franciscan Hospital for Children, Inc. 30 Warren Street Brighton, MA 02135	PC	Unrestricted operating supporting	20,000
Free for All Concert Fund, Inc. 168 Brattle St Cambridge, MA 02138	PC	To support Boston Landmarks Orchestra	50,000
Gateways Access to Jewish Education, Inc. 333 Nahanton Street Newton, MA 02459-3213	PC	Unrestricted operating support for fiscal years 2017 and 2018	75,000
Gay, Lesbian, Bisexual & Transgender Community Center of Central Florida, Inc. 946 N Mills Ave Orlando, FL 32803	PC	To support ongoing services for people affected by the Pulse nightclub shootings.	25,000

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

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
Health Care For All, Inc. One Federal Street, 5th Floor Boston, MA 02110	PC	Unrestricted operating support for fiscal years 2016 and 2017	25,000
Health Law Advocates, Inc. One Federal Street, 5th Floor Boston, MA 02110	PC	Unrestricted operating support for fiscal years 2017, 2018, and 2019	100,000
Health Leads, Inc 24 School Street, 6th Floor Boston, MA 02108	PC	To support the mission and organizational goals of Health Leads Boston for fiscal years 2015 and 2016	40,000
Hebrew SeniorLife, Inc. 1200 Centre Street Boston, MA 02131	PC	Unrestricted operating support	20,000
HomeStart, Inc. 105 Chauncy Street, Suite 502 Boston, MA 02111	PC	Unrestricted operating support	40,000
HomeStart, Inc. 105 Chauncy Street, Suite 502 Boston, MA 02111	PC	To support a "Bed Fund" pilot program	50,000
Housing Families, Inc. 919 Eastern Ave Malden, MA 02148	PC	To support the furnishing of the renovated youth program space and offices	50,721
Institute for National Security Studies, a Think Tank By Tel Aviv University, Ltd. 40 Haim Levanon Tel Aviv 6997556 Israel	PC	Unrestricted operating support for fiscal years 2017 and 2018	200,000
Irgun Rabbanei Tzohar (R.A.) HaMelacha 1 Lod 71520 Israel	PC	Unrestricted operating support for fiscal years 2015 and 2016	125,000
Jerusalem Academy of Music and Dance Givat Ram Jerusalem 9190401 Israel	PC	To provide scholarship assistance to students pursuing a dual degree in Performance and Music Education for fiscal years 2015 and 2016	10,000

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

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
Jewish Family & Children's Service 1430 Main Street Waltham, MA 02451	PC	To support Community Services, the Center for Early Relationship Support (CERS), and Services for People with Disabilities for fiscal years 2016 and 2017	300,000
Jewish Funders Network 150 W 30th Street, Suite 900 New York, NY 10001	PC	To support the mission and organizational goals of the Jewish Funders Network for fiscal years 2015 and 2016, including the Peer Network for Disabilities in 2015, and the International Conference in 2016	115,000
Jewish Vocational Service, Inc. 75 Federal Street 3rd Floor Boston, MA 02110	PC	Unrestricted operating support for fiscal years 2015, 2016, and 2017	200,000
Jewish Women's Archive, Inc. One Harvard Street Brookline, MA 02445	PC	Unrestricted operating support for fiscal years 2015, 2016, and 2017	50,000
Judge Baker Children's Center 53 Parker Hill Avenue Boston, MA 02120	PC	Unrestricted operating support	20,000
Julie's Family Learning Program, Inc. 133 Dorchester Street South Boston, MA 02127	PC	Unrestricted operating support for fiscal years 2017, 2018, and 2019	30,000
KOLOT INC (RA) 17 Rachel Immeinu Jerusalem 91083 Israel	PC	Unrestricted operating support for fiscal years 2015, 2016, and 2017	75,000
Lawrence CommunityWorks 168 Newbury Street Lawrence, MA 01841	PC	To support repainting of the main building, which houses the "Movement City" youth programs	11,100
Lazarus House, Inc. PO Box 408 Lawrence, MA 01842	PC	To support the purchase of a new van	750

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

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
Little Sisters of the Assumption Family Health Services, Inc. 550 Dudley Street Roxbury, MA 02119	PC	Unrestricted operating support for Little Sisters of the Assumption Family Health Services (dba Project Hope) for fiscal years 2017, 2018 and 2019	50,000
Longwood Symphony Orchestra, Inc. 320 Washington Street, Suite 200 Boston, MA 02135	PC	Unrestricted operating support for fiscal years 2015 and 2016	25,000
Massachusetts Advocates for Children, Inc. 25 Kingston St. #2F Boston, MA 02111	PC	Unrestricted operating support for fiscal years 2016, 2017, and 2018	40,000
Massachusetts Society for the Prevention of Cruelty to Children 3815 Washington Street, Suite 2 Boston, MA 02130	PC	Unrestricted operating support for fiscal years 2016 and 2017	30,000
MASSCreative, Inc. 15 Channel Center Street, Suite 103 Boston, MA 02210	PC	Unrestricted operating support for fiscal years 2017 and 2018	40,000
Merrimack Valley Food Bank, Inc. P.O. Box 8638 Lowell, MA 01853	PC	Unrestricted operating support for fiscal years 2017, 2018, and 2019	25,000
National Consumer Law Center, Inc. 7 Winthrop Square Boston, MA 02110-1245	PC	To support Project Stay Connected for fiscal years 2017, 2018, and 2019	25,000
One Family, Inc. 800 South Street, Suite 610 Waltham, MA 02453	PC	Unrestricted operating support for fiscal years 2016 and 2017	25,000
Operation Homefront, Inc. 1355 Central Parkway S, Suite 100 San Antonio, TX 78232	PC	To support the Emergency Assistance Program for Military Families in Crisis for fiscal years 2015 and 2016	30,000
Our Military Kids, Inc. 6861 Elm Street, Suite 2A McLean, VA 22101	PC	Unrestricted operating support for fiscal years 2015 and 2016	50,000

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

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
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
Partners in Health a Nonprofit Corporation 800 Boylston Street, Suite 1400 Boston, MA 02199	PC	To support Hurricane Matthew relief work in Haiti	100,000
Pine Street Inn, Inc 444 Harrison Avenue Boston, MA 02118	PC	Unrestricted operating support	250,000
Project Bread - The Walk for Hunger, Inc. 145 Border Street East Boston, MA 02128	PC	Unrestricted operating support for fiscal years 2017, 2018, and 2019	25,000
Rosie's Place, Inc. 889 Harrison Avenue Boston, MA 02118	PC	Unrestricted operating support for fiscal years 2016 and 2017	30,000
Soldier On, Inc. 421 N. Main Street Building 6 Leeds, MA 01053	PC	Unrestricted operating support	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	To support the mission and organizational goals of Summer Search Boston for fiscal years 2014, 2015, and 2016	85,000
Table to Table - Leket Israel 11 HaSadna; P.O. Box 2297 Ra'anana 43650-06 Israel	PC	Unrestricted operating support for fiscal years 2015 and 2016	75,000
Technical Development Corporation 31 Milk Street, Suite 310 Boston, MA 02109	PC	To support Boston Creates, the City of Boston's cultural planning process	95,000

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

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 2016 and 2017	10,000
The Boston Private Industry Council, Inc. 2 Oliver Street, 3rd Floor Boston, MA 02109	PC	To support the Summer Learning Project in summers 2016 and 2017.	45,000
The Food Bank of Western Massachusetts, Inc. 97 North Hatfield Road Hatfield, MA 01038	PC	Unrestricted operating support for fiscal years 2017, 2018, and 2019	25,000
The Greater Boston Food Bank, Inc. 70 South Bay Avenue Boston, MA 02118	PC	Unrestricted operating support for fiscal years 2017, 2018, and 2019	50,000
The McLean Hospital Corporation 115 Mill Street Belmont, MA 02478	PC	Unrestricted operating support	25,000
The Reut Institute - From Vision to Policy Kalman Magen 3 Tel Aviv 6107075 Israel	PC	Unrestricted operating support for fiscal years 2016 and 2017	125,000
The UMass Memorial Foundation, Inc. 333 South St Shrewsbury, MA 01545	PC	To support the Sibling Support Program: A Family-Centered Mental Health Initiative of the Eunice Kennedy Shriver Center for fiscal years 2017 and 2018	40,000
United Way Of Massachusetts Bay, Inc 51 Sleeper Street Boston, MA 02210	PC	To support the mission and organizational goals 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 2015 and 2016	75,000
Veterans Legal Services, Inc. P.O. Box 8457 Boston, MA 02114	PC	Unrestricted operating support for fiscal years 2016 and 2017	50,000

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

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
Veterans, Inc. 69 Grove Street Worcester, MA 01605	PC	Unrestricted operating support for fiscal years 2017 and 2018	35,000
Washington Institute for Near East Policy 1111 19th Street, NW Suite 500 Washington, DC 20036	PC	To support the mission and organizational goals for fiscal years 2015 and 2016	125,000
Worcester County Food Bank, Inc. 474 Boston Turnpike Shrewsbury, MA 01545	PC	Unrestricted operating support for fiscal years 2017, 2018, and 2019	25,000
Youth Villages, Inc. 3320 Brother Blvd Bartlett, TN 38133	PC	To support Youth Villages' Massachusetts Five-Year Growth Plan	600,000

Subtotal Good Philanthropic Citizen and Community Grants

8,210,671

Medical and Scientific Research

Broad Institute, Inc. 415 Main Street Cambridge, MA 02142	PC	To develop and support scientific collaborations in cell circuitry between the Broad Institute and scientists throughout Israel.	1,500,000
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
Trustees Of Columbia University In The City Of New York 615 West 131st Street New York, NY 10027	PC	To support "A novel therapeutic target for anorexia nervosa"	200,000

Subtotal Medical and Scientific Research

6,700,000

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

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
<u>Music Pathways for Youth</u>			
Berklee College of Music, Inc. 1140 Boylston Street, MS-1140 IA Boston, MA 02215	PC	To support City Music Boston for fiscal years 2017, 2018, and 2019	135,000
Boston Arts Academy Foundation, Inc. 174 Ipswich Street Boston, MA 02215	PC	To purchase woodwind, brass, and string instruments and to repair string instruments and amplifiers	25,200
Boston Arts Academy Foundation, Inc. 174 Ipswich Street Boston, MA 02215	PC	Unrestricted operating support for fiscal years 2016 and 2017	50,000
Boston Children's Chorus, Inc. 112 Shawmut Avenue, Suite 5B Boston, MA 02118	PC	Unrestricted operating support for fiscal years 2017 and 2018	90,000
Boston City Singers, Inc. 17 Waldeck Street Dorchester, MA 02124	PC	Unrestricted operating support for fiscal years 2017 and 2018	50,000
Boston Youth Symphony Orchestras, Inc. 855 Commonwealth Avenue Boston, MA 02215	PC	To support the Intensive Community Program for fiscal years 2017 and 2018	100,000
Boys and Girls Clubs of Boston, Inc. 200 High Street, 3rd Floor Boston, MA 02110	PC	To purchase thirteen electric and acoustic guitars, two ukuleles, a cajon, a drum kit, and performance equipment for Music Clubhouses at the Blue Hills- Dorchester Club, the Charlestown Club, and the Yawkey Club	4,700
Bridge Boston Foundation 2 McLellan Street Dorchester, MA 02121	PC	To support the El Sistema program for fiscal years 2017 and 2018	30,000
Bridge Boston Foundation 2 McLellan Street Dorchester, MA 02121	PC	Capital grant to support building the music space in Bridge Boston's new school	500,000
Commonwealth of Massachusetts 10 St. James Avenue, 3rd Floor Boston, MA 02116-3803	PC	To support the Massachusetts Cultural Council for the Music Educator/Teaching Artist Fellowship Pilot Program	135,000

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

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
Community Music Center of Boston 34 Warren Ave Boston, MA 02116	PC	Unrestricted operating support for fiscal years 2017 and 2018	60,000
Conservatory Lab Charter School 2120 Dorchester Avenue Dorchester, MA 02124	PC	To support the El Sistema music program for fiscal years 2016 and 2017	30,000
Friends of Boston Latin Academy, Inc. 205 Townsend Street Boston, MA 02121	PC	To purchase percussion and brass instruments for the music program at Boston Latin Academy	39,300
From the Top, Inc. 295 Huntington Avenue, Suite 201 Boston, MA 02115	PC	Unrestricted operating support for fiscal years 2015 and 2016	200,000
Handel and Haydn Society 9 Harcourt St Boston, MA 02116	PC	Unrestricted operating support for fiscal years 2017 and 2018	50,000
Josiah Quincy Orchestra Program Limited 885 Washington Street Boston, MA 02111	PC	Unrestricted operating support for fiscal years 2017 and 2018	25,000
Lynn Business Education Foundation, Inc. 15 Johnson Street Lynn, MA 01902	PC	To purchase instruments for the music program in the Lynn Public Schools	61,300
Margarita Muñiz Academy Foundation 20 Child St Jamaica Plain, MA 02130	PC	To support the El Sistema music program for fiscal years 2017 and 2018	40,000
Music and Youth Initiative, Inc. 398 Columbus Ave #307 Boston, MA 02116	PC	To purchase 36 iPads, music applications and accessories for 12 Music Clubhouses in Greater Boston	24,540
musiConnects, Inc. 20 Belgrade Avenue Roslindale, MA 02131	PC	Unrestricted operating support for fiscal years 2017 and 2018	25,000
Perkins School for the Blind 175 North Beacon Street Watertown, MA 02472	PC	To support Perkins Secondary Music Program for fiscal years 2016 and 2017	60,000

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

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
Project STEP, Inc. Symphony Hall 301 Massachusetts Avenue Boston, MA 02115	PC	Unrestricted operating support for fiscal years 2017 and 2018	30,000
St. Pope John Paul II Catholic Academy 2200 Dorchester Ave. Dorchester, MA 02124	PC	To support music programming for fiscal years 2016 and 2017	35,000
The Boston Education Development Foundation, Inc. P.O. Box 190886 Roxbury, MA 02119	PC	To purchase accessories and instructional materials to support the music program at the Paul L. Dever Elementary School	600
The Boston Education Development Foundation, Inc. P.O. Box 190886 Roxbury, MA 02119	PC	To support a planning process for the Making Music Matters! program	5,100
The Boston Education Development Foundation, Inc. P.O. Box 190886 Roxbury, MA 02119	PC	To purchase four drum sets, nine guitars, accessories, and for instrument repairs for Charlestown High School music program	6,330
The Boston Education Development Foundation, Inc. P.O. Box 190886 Roxbury, MA 02119	PC	To purchase brass, woodwind, and percussion instruments and accessories for the Josiah Quincy Upper School music program	9,000
The Boston Education Development Foundation, Inc. P.O. Box 190886 Roxbury, MA 02119	PC	To purchase fifteen flutes and for instrument repairs for Making Music Matters!	9,000
The Boston Education Development Foundation, Inc. P.O. Box 190886 Roxbury, MA 02119	PC	To support the mission and organizational goals of the Making Music Matters! program	65,000
The Childrens Museum 308 Congress St. Boston, MA 02210	PC	To purchase an upright piano, dolly, and one year of piano tuning	4,500

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

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
Trustees of Boston University 25 Buick Street Boston, MA 02215	PC	To support need-based scholarships for the Boston University Tanglewood Institute, with a priority for students from Greater Boston, for fiscal years 2015 and 2016	50,000
ZUMIX, Inc. 260 Sumner Street Boston, MA 02128	PC	Unrestricted operating support for fiscal years 2017 and 2018	75,000
Subtotal Music Pathways for Youth			2,024,570

Other Grants and Contributions

American Jewish World Service, Inc. 45 West 36th St. New York, NY 10018	PC	Other community contributions - employee matching gift	40
American Lung Association of the Northeast, Inc 460 Totten Pond Rd #400 Waltham, MA 02451	PC	Other community contributions - employee matching gift	36
Beth Israel Deaconess Medical Center, Inc. 330 Brookline Avenue Boston, MA 02215	PC	To support the NICU Expansion Project (Capital)	2,000,000
Birthright Israel Foundation 33 East 33rd Street, 7th Floor New York, NY 10016	PC	Unrestricted operating support (Final Grant)	1,750,000
Boston Center for the Arts, Inc. 539 Tremont Street Boston, MA 02116	PC	Other community contributions - employee matching gift	3,196
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)	100,000
Boston Latin School Association 27 School Street, Suite 300 Boston, MA 02108	PC	Other community contributions - employee matching gift	600

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

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
Boston Medical Center Corporation 801 Massachusetts Avenue 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	1,000
Brookline Community Foundation, Inc. 40 Webster Place Brookline, MA 02445	PC	Other community contributions - employee matching gift	250
Chocorua Lake Conservancy PO Box 105 Chocorua, MA 03817	PC	Other community contributions - employee matching gift	1,000
Combined Jewish Philanthropies of Greater Boston, Inc. 126 High Street Boston, MA 02129	PC	Other community contributions - employee matching gift	180
Combined Jewish Philanthropies of Greater Boston, Inc. 126 High Street Boston, MA 02129	PC	Capital grant for building renovation	950,000
Commentary, Inc. 561 Seventh Avenue, Floor 16 New York, NY 10018	PC	Unrestricted operating support for fiscal years 2015, 2016 and 2017 (Final Grant)	50,000
Committee for Accuracy in Middle East Reporting in America, Inc. PO Box 35040 Boston, MA 02135	PC	Unrestricted operating support (Final Grant)	25,000
ELNET Europe Israel (R. A.) POB 476 Hod Hasharon 45103 Israel	PC	Unrestricted operating support (Final Grant)	25,000
Facing History and Ourselves, Inc. 16 Hurd Road Brookline, MA 02445	PC	Other community contributions - employee matching gift	350

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

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
Footsteps Inc 114 John Street, #930 New York, NY 10272	PC	Other community contributions - employee matching gift	100
Foundation for the Defense of Democracies, Inc. 1800 M Street NW Suite #800S Washington, DC 20036	PC	To support the mission and organizational goals (Final Grant)	500,000
Israel on Campus Coalition PO Box 34640 Washington, DC 20043	PC	Unrestricted operating support (Final Grant)	100,000
Johns Hopkins University 100 N. Charles St. Suite 316 Baltimore, MD 21201	PC	Other community contributions - employee matching gift	650
Joshua Venture Philanthropies, Inc. 25 Broadway, 17th Floor New York, NY 10004	PC	Other community contributions - employee matching gift	1,500
Meridian Academy, Inc. 54 Brookside Avenue Jamaica Plain, MA 02130	PC	Other community contributions - employee matching gift	200
Minyan Tehillah, Inc. 113 7th St. #2 Cambridge, MA 02141	PC	Other community contributions - employee matching gift	230
Nehar Shalom Community Synagogue 43 Lochstead Avenue Boston, MA 02130	PC	Other community contributions - employee matching gift	390
One Mission Inc. 1881 Worcester Road Suite 204 Framingham, MA 01701	PC	Other community contributions - employee matching gift	100
Planned Parenthood League of Massachusetts, Inc. 1055 Commonwealth Ave Boston, MA 02215	PC	Other community contributions - employee matching gift	200

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

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
Signal Group 53 Harishonim St Moshav Haniel, Israel 42865 Israel	PC	Unrestricted operating support (Final Grant)	50,000
Southern Poverty Law Center, Inc. 400 Washington Ave. Montgomery, AL 36104	PC	Other community contributions - employee matching gift	100
Temple Hillel B'nai Torah 120 Corey Street West Roxbury, MA 02132	PC	Other community contributions - employee matching gift	8,136
The Asperger-Autism Network Inc 51 Water Street, Suite 206 Watertown, MA 02130-2120	PC	Other community contributions - employee matching gift	100
The Childrens Museum 308 Congress St. Boston, MA 02210	PC	Other community contributions - employee matching gift	50
The McLean Hospital Corporation 115 Mill Street Belmont, MA 02478	PC	Capital support for the McLean Hospital Admissions Building Expansion and Renovation project	1,000,000
uAspire, Inc. 31 Milk Street, Suite 900 Boston, MA 02109	PC	Other community contributions - employee matching gift	200
West End House, Inc 105 Allston St Allston, MA 02134	PC	To support Expect More. The Campaign for West End House for fiscal years 2016, 2017, and 2018 (Capital)	250,000
Wiseburn Education Foundation 13530 Aviation Blvd Hawthorne, CA 90250	PC	Other community contributions - employee matching gift	50
Subtotal Other Grants and Contributions			7,818,658
Total Grants and Contributions Paid During the Year			\$ 40,322,770

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

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
<u>Arab Israeli Employment and Education</u>			
Matan - Investing in the Community 33 Ya'avets St Tel Aviv 6525832 Israel	PC	To support Collective Impact - The Partnership for a Breakthrough in Arab Employment for fiscal years 2016 and 2017	\$ 600,000
Seal-Maoz Hachoshlim 6, 6th Floor Herzliya 4673306 Israel	PC	To support MAOZ in providing access to leadership opportunities and improving the quality of life for all citizens of Israel for fiscal years 2017 and 2018	500,000
Technion - Israel Institute of Technology Technion City, Haifa 3200004 Israel	PC	Capital grant to support the undergraduate student village at Technion's Haifa campus for fiscal years 2018, 2019 and 2020	2,500,000
Subtotal Arab Israeli Employment and Education			3,600,000
<u>Connecting to Israel</u>			
Gann Academy The New Jewish High School of Greater Boston Inc 333 Forest St Waltham, MA 02452	PC	To support the pilot of My Israel: A four-year integrated approach to Israel education for fiscal years 2017 and 2018	250,000
Honeymoon Israel Foundation Inc 6070 Whitegate Crossing East Amherst, NY 14051	PC	Unrestricted operating support for fiscal years 2017, 2018, and 2019	500,000
Israel & Co. 205 East 42nd Street. 16th Floor New York, NY 10017	PC	Unrestricted operating support for fiscal years 2016 and 2017	1,000,000
The David Project, Inc PO Box 52390 Boston, MA 02205	PC	Unrestricted operating support for fiscal years 2017 and 2018	250,000
Subtotal Connecting to Israel			2,000,000

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

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
<u>Funder Collaborations and Bold Bets</u>			
Brigham and Women's Hospital 75 Francis Street Boston, MA 02494	PC	To support Ariadne Labs: A Joint Center for Health Systems Innovation for fiscal years 2016, 2017 and 2018	2,000,000
Subtotal Funder Collaborations and Bold Bets			2,000,000
<u>Good Philanthropic Citizen and Community Grants</u>			
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	80,000
Adolescent Consultation Services, Inc 189 Cambridge Street Cambridge, MA 02134	PC	Unrestricted operating support for fiscal years 2017, 2018, and 2019	70,000
American Jewish World Service, Inc. 45 West 36th St. New York, NY 10018	PC	To support the mission and organizational goals for fiscal years 2016, 2017, 2018, and 2019	750,000
Boston Ballet, Inc. 19 Clarendon Street Boston, MA 02116	PC	Unrestricted operating support for fiscal years 2016 and 2017	125,000
Boston Debate League 225 Friend St., Suite 401 Boston, MA 02114	PC	Unrestricted operating support for fiscal years 2016 and 2017	50,000
Boston Education Skills & Training Corp 33 Harrison Ave Boston, MA 02111	PC	To support technology needs at the Dudley Square training site	49,200
Boston Foundation, Inc. 75 Arlington Street Boston, MA 02116	PC	To support the Civic Leadership Fund for fiscal years 2017, 2018 and 2019	100,000
Boston Health Care for the Homeless Program, Inc. 780 Albany Street Boston, MA 02118	PC	Unrestricted operating support for fiscal years 2016, 2017, 2018 and 2019	150,000

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

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
Center for Jewish History, Inc. 15 West 16th Street New York, NY 10011	PC	Unrestricted operating support for fiscal years 2016, 2017, and 2018	50,000
Community Economic Development Assistance Corporation One Center Plaza, Suite 350 Boston, MA 02108	PC	To support the Children's Investment Fund for fiscal years 2017 and 2018	150,000
Dudley Street Neighborhood Initiative 504 Dudley Street Roxbury, MA 02119	PC	To support the GOTCHA Youth Jobs Collaborative in summers 2016 and 2017	20,000
EdVestors, Inc. 140 Clarendon St. Boston, MA 02116	PC	To support the mission and organizational goals for fiscal years 2017 and 2018	450,000
Gateways Access to Jewish Education, Inc 333 Nahanton Street Newton, MA 02459-3213	PC	Unrestricted operating support for fiscal years 2017 and 2018	75,000
Health Law Advocates, Inc. One Federal Street, 5th Floor Boston, MA 02110	PC	Unrestricted operating support for fiscal years 2017, 2018, and 2019	100,000
Institute for National Security Studies, a Think Tank By Tel Aviv University, Ltd. 40 Haim Levanon Tel Aviv 6997556 Israel	PC	Unrestricted operating support for fiscal years 2017 and 2018	200,000
Jewish Family & Children's Service 1430 Main Street Waltham, MA 02451	PC	To support Community Services, the Center for Early Relationship Support (CERS), and Services for People with Disabilities for fiscal years 2016 and 2017	300,000
Julie's Family Learning Program, Inc 133 Dorchester Street South Boston, MA 02127	PC	Unrestricted operating support for fiscal years 2017, 2018, and 2019	60,000
Little Sisters of the Assumption Family Health Services, Inc. 550 Dudley Street Roxbury, MA 02119	PC	Unrestricted operating support for Little Sisters of the Assumption Family Health Services (dba Project Hope) for fiscal years 2017, 2018 and 2019	100,000

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

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
Massachusetts Advocates for Children, Inc. 25 Kingston St #2F Boston, MA 02111	PC	Unrestricted operating support for fiscal years 2016, 2017, and 2018	80,000
MASScreative, Inc 15 Channel Center Street, Suite 103 Boston, MA 02210	PC	Unrestricted operating support for fiscal years 2017 and 2018	40,000
Merrimack Valley Food Bank, Inc P.O. Box 8638 Lowell, MA 01853	PC	Unrestricted operating support for fiscal years 2017, 2018, and 2019	50,000
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	50,000
One Family, Inc. 800 South Street, Suite 610 Waltham, MA 02453	PC	Unrestricted operating support for fiscal years 2016 and 2017	25,000
Parent Professional Advocacy League, Inc 15 Court Square Suite 660 Boston, MA 02108	PC	Unrestricted operating support for fiscal years 2017, 2018, and 2019	50,000
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	50,000
South Boston Neighborhood House Inc 136 H Street South Boston, MA 02127	PC	To support the purchase of a new van	36,000
Summer Search 3840 Washington Street Jamaica Plain, MA 02130	PC	To support the mission and organizational goals of Summer Search Boston for fiscal years 2017, 2018, and 2019	225,000
The Boston Jewish Film Festival, Inc. 1001 Watertown St West Newton, MA 02465	PC	Unrestricted operating support for fiscal years 2016 and 2017	10,000
The Boston Private Industry Council, Inc 2 Oliver Street, 3rd Floor Boston, MA 02109	PC	To support the Summer Learning Project in summers 2016 and 2017	45,000

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

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
The Food Bank of Western Massachusetts, Inc. 97 North Hatfield Road Hatfield, MA 01038	PC	Unrestricted operating support for fiscal years 2017, 2018, and 2019	50,000
The Greater Boston Food Bank, Inc. 70 South Bay Avenue Boston, MA 02118	PC	Unrestricted operating support for fiscal years 2017, 2018, and 2019	100,000
The Reut Institute - From Vision to Policy Kalman Magen 3 Tel Aviv 6107075 Israel	PC	Unrestricted operating support for fiscal years 2016 and 2017	125,000
The UMass Memorial Foundation, Inc 333 South St Shrewsbury, MA 01545	PC	To support the Sibling Support Program. A Family-Centered Mental Health Initiative of the Eunice Kennedy Shriver Center for fiscal years 2017 and 2018	40,000
United Way Of Massachusetts Bay, Inc. 51 Sleeper Street Boston, MA 02210	PC	To support the mission and organizational goals for fiscal years 2017, 2018, and 2019	400,000
Veterans, Inc 69 Grove Street Worcester, MA 01605	PC	Unrestricted operating support for fiscal years 2017 and 2018	35,000
Worcester County Food Bank, Inc 474 Boston Turnpike Shrewsbury, MA 01545	PC	Unrestricted operating support for fiscal years 2017, 2018, and 2019	50,000
Subtotal Good Philanthropic Citizen and Community Grants			4,340,200
<u>Medical and Scientific Research</u>			
Board Of Trustees Of The Leland Stanford Junior University 450 Serra Mall Stanford, CA 94305	PC	To support the Stanford Technology Analytics and Genomics in Sleep (STAGES) study	18,306,000
Subtotal Medical and Scientific Research			18,306,000

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

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
<u>Music Pathways for Youth</u>			
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	270,000
Boston Arts Academy Foundation, Inc. 174 Ipswich Street Boston, MA 02215	PC	To purchase woodwind, brass, and string instruments, and to repair string instruments and amplifiers	4,100
Boston Children's Chorus, Inc 112 Shawmut Avenue, Suite 5B Boston, MA 02118	PC	Unrestricted operating support for fiscal years 2017 and 2018	90,000
Boston City Singers, Inc. 17 Waldeck Street Dorchester, MA 02124	PC	Unrestricted operating support for fiscal years 2017 and 2018	50,000
Boston Youth Symphony Orchestras, Inc. 855 Commonwealth Avenue Boston, MA 02215	PC	To support the Intensive Community Program for fiscal years 2017 and 2018	125,000
Bridge Boston Foundation 2 McLellan Street Dorchester, MA 02121	PC	To support the El Sistema program for fiscal years 2017 and 2018	30,000
Commonwealth of Massachusetts 10 St James Avenue, 3rd Floor Boston, MA 02116-3803	PC	To Massachusetts Cultural Council to support the Music Educator/Teaching Artist Fellowship Pilot Program	135,000
Community Music Center of Boston 34 Warren Ave Boston, MA 02116	PC	Unrestricted operating support for fiscal years 2017 and 2018	135,000
Handel and Haydn Society 9 Harcourt St Boston, MA 02116	PC	Unrestricted operating support for fiscal years 2017 and 2018	50,000
Josiah Quincy Orchestra Program Limited 885 Washington Street Boston, MA 02111	PC	Unrestricted operating support for fiscal years 2017 and 2018	25,000

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

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
Margarita Muñiz Academy Foundation 20 Child St Jamaica Plain, MA 02130	PC	To support the El Sistema music program for fiscal years 2017 and 2018	40,000
musiConnects, Inc 20 Belgrade Avenue Roslindale, MA 02131	PC	Unrestricted operating support for fiscal years 2017 and 2018	25,000
Project STEP, Inc. Symphony Hall 301 Massachusetts Avenue Boston, MA 02115	PC	Unrestricted operating support for fiscal years 2017 and 2018	30,000
Shelter Music Boston Inc 243 Sylvia Street Arlington, MA 02476	PC	To support audio recording and editing equipment and accessories	5,000
Sociedad Latina, Inc. 1530 Tremont Street Boston, MA 02120	PC	To purchase three electric bass guitars, and amplifiers, microphones, and other recording equipment for the pathways to music mastery program, and ten acoustic guitars for its Boston Public Schools Arts Expansion school day classes	20,000
St. Pope John Paul II Catholic Academy 2200 Dorchester Ave. Dorchester, Massachusetts 02124	PC	To support music programming for fiscal years 2016 and 2017	35,000
The Boston Education Development Foundation, Inc. P O. Box 190886 Roxbury, MA 02119	PC	To purchase brass, woodwind, and percussion instruments and accessories for the in-school music program at the Josiah Quincy Upper School	11,600
ZUMIX, Inc. 260 Sumner Street Boston, MA 02128	PC	Unrestricted operating support for fiscal years 2017 and 2018	76,000
Subtotal Music Pathways for Youth			1,156,700
<u>Other</u>			
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)	150,000

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

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
Boston Medical Center Corporation 801 Massachusetts Avenue Boston, MA 02118	PC	To support the Building the New BMC Campaign (Capital)	9,000,000
West End House, Inc. 105 Allston St Allston, MA 02134	PC	To support Expect More: The Campaign for West End House for fiscal years 2016, 2017, and 2018 (Capital)	500,000
Subtotal Other			<u>9,650,000</u>
Total Grants and Contributions Approved for Future Periods			<u><u>\$ 41,052,900</u></u>