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Form **990-PF****Return of Private Foundation**
or Section 4947(a)(1) Trust Treated as Private Foundation

OMB No. 1545-0047

2019Department of the Treasury
Internal Revenue Service▶ Do not enter social security numbers on this form as it may be made public.
▶ Go to www.irs.gov/Form990PF for instructions and the latest information.

Open to Public Inspection

For calendar year 2019 or tax year beginning **07/01/19**, and ending **06/30/20**

Name of foundation TRUSTEES OF THE JOHN GREENLEAF WHITTIER HOMESTEAD		A Employer identification number 04-6047193
Number and street (or P.O. box number if mail is not delivered to street address) C/O MARCIA ROGERS, 136 NECK ROAD	Room/suite	B Telephone number (see instructions) 978-373-3979
City or town, state or province, country, and ZIP or foreign postal code WARD HILL MA 01835		C If exemption application is pending, check here ☐
G Check all that apply: ☐ Initial return ☐ Initial return of a former public charity ☐ Final return ☐ Amended return ☐ Address change ☐ Name change		D 1. Foreign organizations, check here ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ☐
H Check type of organization: ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here ☐
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ▶ \$ 985,274	J Accounting method: ☐ Cash ☒ Accrual ☐ Other (specify) _____	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions).)		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received (attach schedule)	1,561			
	2 Check ☒ if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments	630	630		
	4 Dividends and interest from securities	27,853	27,853		
	5a Gross rents	4,400	4,400		
	b Net rental income or (loss)	4,400			
	6a Net gain or (loss) from sale of assets not on line 10	51,794			
	b Gross sales price for all assets on line 6a	255,483			
	7 Capital gain net income (from Part IV, line 2)		51,794		
	8 Net short-term capital gain			0	
	9 Income modifications				
	10a Gross sales less returns and allowances	446			
Operating and Administrative Expenses	b Less: Cost of goods sold	572			
	c Gross profit or (loss) (attach schedule) STMT 1	-126		-126	
	11 Other income (attach schedule) STMT 2	7,645	7,468	177	
	12 Total. Add lines 1 through 11	93,757	92,145	51	
	13 Compensation of officers, directors, trustees, etc.	0			
	14 Other employee salaries and wages	2,441			2,4
	15 Pension plans, employee benefits	52			
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule) STMT 3	6,077			6,0
	c Other professional fees (attach schedule) STMT 4	5,076	4,396		6
	17 Interest				
	18 Taxes (attach schedule) (see instructions) STMT 5	2,875		2,875	
	19 Depreciation (attach schedule) and depletion STMT 6	4,566		4,566	
	20 Occupancy	24,811			24,8
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (att. sch.) STMT 7	12,526		7	12,5
	24 Total operating and administrative expenses. Add lines 13 through 23	58,424	4,396	7,448	46,5
	25 Contributions, gifts, grants paid	0			
	26 Total expenses and disbursements. Add lines 24 and 25	58,424	4,396	7,448	46,5
	27 Subtract line 26 from line 12:				
	a Excess of revenue over expenses and disbursements	35,333			
	b Net investment income (if negative, enter -0-)		87,749		
	c Adjusted net income (if negative, enter -0-)			0	

THE COMMONWEALTH OF MASSACHUSETTS

OFFICE OF THE ATTORNEY GENERAL

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NON-PROFIT ORGANIZATIONS/PUBLIC CHARITIES DIVISION

ONE ASHBURTON PLACE
BOSTON, MASSACHUSETTS 02108

MAURA HEALEY
ATTORNEY GENERAL

(617) 727-2200, ext. 2101
www.mass.gov/ago/charities

Form PC

Report for the Fiscal Period: 07/01/2019 to 06/30/2020Attorney General's Account #: 009577Federal ID #: 04-6047193

Electronic Payment Confirmation #: _____

When did the organization first engage in
charitable work in Massachusetts?

04/19/1893

Has the organization applied for or been
granted IRS tax exempt status?

☒ Yes ☐ No

If yes, date of application OR date of determination letter:

04/19/1893

IRS Exemption under 501(c):

3

If exempt under 501(c), are contributions to the organization
tax deductible as charitable contributions?

☒ Yes ☐ No

Check all items attached
(if applicable)

- ☒ Filing Fee or Printout of
Electronic Payment
Confirmation
- ☒ Copy of IRS Return
- ☐ Audited Financial
Statements/Review
- ☐ Amended Articles/
By-Laws
- ☒ Schedule A-1
- ☒ Schedule A-2
- ☐ Schedule RO
- ☐ Schedule VCO
- ☐ Probate Account

Organization Data

TRUSTEES OF THE JOHN GREENLEAF
Name: WHITTIER HOMESTEAD

Mailing Address: C/O MARCIA ROGERS, 136 NECK ROADCity: WARD HILLState: MAZip: 01835Phone Number: 978-373-3979

Fax Number: _____

Email: NECKRD@AOL.COMWebsite: WWW.JOHNGREENLEAFWHITTIER.COM

In the table below, please enter the appropriate codes from the corresponding tables found in the instructions.
Enter up to 2 codes from Table 3 for your organization's main purpose(s)

Category	Code	Category	Code
County (Table 1)	<u>5</u>	Organization Purpose Code 1	<u>8</u>
Type of Organization (Table 2)	<u>1</u>	Organization Purpose Code 2	<u>27</u>

Please check box if final return prior to dissolution: ☐

Office Use Only: Payment Received