

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.  
 ▶ Go to [www.irs.gov/Form990PF](http://www.irs.gov/Form990PF) for instructions and the latest information.

OMB No 1545-0052  
**2019**  
**Open to Public Inspection**

**For calendar year 2019, or tax year beginning 01-01-2019 , and ending 12-31-2019**

Name of foundation EVERETT FOUNDATION INC		A Employer identification number 11-6038040	
Number and street (or P O box number if mail is not delivered to street address) 150 EAST 69TH STREET		Room/suite	
B Telephone number (see instructions) (212) 503-8800		C If exemption application is pending, check here <input type="checkbox"/>	
City or town, state or province, country, and ZIP or foreign postal code NEW YORK, NY 10021		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>	
G Check all that apply <input type="checkbox"/> Initial return <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Final return <input type="checkbox"/> Amended return <input type="checkbox"/> Address change <input type="checkbox"/> Name change		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>	
H Check type of organization <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>	
I Fair market value of all assets at end of year (from Part II, col (c), line 16) ▶ \$ <u>4,111,831</u>		J Accounting method <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ (Part I, column (d) must be on cash basis)	

<b>Part I Analysis of Revenue and Expenses</b> <i>(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions) )</i>		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
<b>Revenue</b>	<b>1</b> Contributions, gifts, grants, etc , received (attach schedule)				
	<b>2</b> Check <input checked="" type="checkbox"/> if the foundation is <b>not</b> required to attach Sch B				
	<b>3</b> Interest on savings and temporary cash investments				
	<b>4</b> Dividends and interest from securities	123,177	122,939		
	<b>5a</b> Gross rents				
	<b>b</b> Net rental income or (loss)				
	<b>6a</b> Net gain or (loss) from sale of assets not on line 10	79,676			
	<b>b</b> Gross sales price for all assets on line 6a <u>1,278,584</u>				
	<b>7</b> Capital gain net income (from Part IV, line 2)		79,676		
	<b>8</b> Net short-term capital gain				
	<b>9</b> Income modifications				
	<b>10a</b> Gross sales less returns and allowances				
<b>b</b> Less Cost of goods sold					
<b>c</b> Gross profit or (loss) (attach schedule)					
<b>11</b> Other income (attach schedule)	882	0			
<b>12 Total.</b> Add lines 1 through 11	203,735	202,615			
<b>Operating and Administrative Expenses</b>	<b>13</b> Compensation of officers, directors, trustees, etc	0	0		0
	<b>14</b> Other employee salaries and wages				
	<b>15</b> Pension plans, employee benefits				
	<b>16a</b> Legal fees (attach schedule)				
	<b>b</b> Accounting fees (attach schedule)	7,500	5,625		1,875
	<b>c</b> Other professional fees (attach schedule)	30,276	30,276		0
	<b>17</b> Interest				
	<b>18</b> Taxes (attach schedule) (see instructions)	3,567	847		0
	<b>19</b> Depreciation (attach schedule) and depletion				
	<b>20</b> Occupancy				
	<b>21</b> Travel, conferences, and meetings				
	<b>22</b> Printing and publications				
	<b>23</b> Other expenses (attach schedule)	1,457	0		1,457
	<b>24 Total operating and administrative expenses.</b> Add lines 13 through 23	42,800	36,748		3,332
	<b>25</b> Contributions, gifts, grants paid	752,735			752,735
<b>26 Total expenses and disbursements.</b> Add lines 24 and 25	795,535	36,748		756,067	
<b>27</b> Subtract line 26 from line 12					
<b>a Excess of revenue over expenses and disbursements</b>	-591,800				
<b>b Net investment income</b> (if negative, enter -0-)		165,867			
<b>c Adjusted net income</b> (if negative, enter -0-)					

<b>Part II Balance Sheets</b> 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
<b>Assets</b>	<b>1</b> Cash—non-interest-bearing . . . . .	234,979	65,598	65,598
	<b>2</b> Savings and temporary cash investments . . . . .			
	<b>3</b> Accounts receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	<b>4</b> Pledges receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	<b>5</b> Grants receivable . . . . .			
	<b>6</b> Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions) . . . . .			
	<b>7</b> Other notes and loans receivable (attach schedule) ▶ _____ Less allowance for doubtful accounts ▶ _____			
	<b>8</b> Inventories for sale or use . . . . .			
	<b>9</b> Prepaid expenses and deferred charges . . . . .			
	<b>10a</b> Investments—U S and state government obligations (attach schedule)	200,933	98,246	98,570
	<b>b</b> Investments—corporate stock (attach schedule) . . . . .	1,388,330	1,289,986	1,812,961
	<b>c</b> Investments—corporate bonds (attach schedule) . . . . .	2,306,972	2,077,260	2,134,702
	<b>11</b> Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	<b>12</b> Investments—mortgage loans . . . . .			
	<b>13</b> Investments—other (attach schedule) . . . . .			
	<b>14</b> Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
<b>15</b> Other assets (describe ▶ _____)				
<b>16 Total assets</b> (to be completed by all filers—see the instructions Also, see page 1, item I)	4,131,214	3,531,090	4,111,831	
<b>Liabilities</b>	<b>17</b> Accounts payable and accrued expenses . . . . .			
	<b>18</b> Grants payable . . . . .			
	<b>19</b> Deferred revenue . . . . .			
	<b>20</b> Loans from officers, directors, trustees, and other disqualified persons			
	<b>21</b> Mortgages and other notes payable (attach schedule) . . . . .			
	<b>22</b> Other liabilities (describe ▶ _____)			
	<b>23 Total liabilities</b> (add lines 17 through 22) . . . . .	0	0	
<b>Net Assets or Fund Balances</b>	<b>Foundations that follow FASB ASC 958, check here</b> ▶ <input type="checkbox"/> <b>and complete lines 24, 25, 29 and 30.</b>			
	<b>24</b> Net assets without donor restrictions . . . . .			
	<b>25</b> Net assets with donor restrictions . . . . .			
	<b>Foundations that do not follow FASB ASC 958, check here</b> ▶ <input checked="" type="checkbox"/> <b>and complete lines 26 through 30.</b>			
	<b>26</b> Capital stock, trust principal, or current funds . . . . .	4,131,214	3,531,090	
	<b>27</b> Paid-in or capital surplus, or land, bldg , and equipment fund	0	0	
	<b>28</b> Retained earnings, accumulated income, endowment, or other funds	0	0	
<b>29 Total net assets or fund balances</b> (see instructions) . . . . .	4,131,214	3,531,090		
<b>30 Total liabilities and net assets/fund balances</b> (see instructions) .	4,131,214	3,531,090		

<b>Part III Analysis of Changes in Net Assets or Fund Balances</b>			
<b>1</b> Total net assets or fund balances at beginning of year—Part II, column (a), line 29 (must agree with end-of-year figure reported on prior year's return) . . . . .		<b>1</b>	4,131,214
<b>2</b> Enter amount from Part I, line 27a . . . . .		<b>2</b>	-591,800
<b>3</b> Other increases not included in line 2 (itemize) ▶ _____		<b>3</b>	0
<b>4</b> Add lines 1, 2, and 3 . . . . .		<b>4</b>	3,539,414
<b>5</b> Decreases not included in line 2 (itemize) ▶ _____		<b>5</b>	8,324
<b>6</b> Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 29 .		<b>6</b>	3,531,090

**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 shs MLC Co.)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo, day, yr)	(d) Date sold (mo, day, yr)
<b>1 a</b> PUBLICLY TRADED SECURITIES	P		
<b>b</b> PUBLICLY TRADED SECURITIES	P		
<b>c</b> CAPITAL GAINS DIVIDENDS	P		
<b>d</b>			
<b>e</b>			

(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)
<b>a</b> 60,221		60,713	-492
<b>b</b> 1,212,721		1,138,195	74,526
<b>c</b> 5,642			5,642
<b>d</b>			
<b>e</b>			

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) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
<b>a</b>			-492
<b>b</b>			74,526
<b>c</b>			5,642
<b>d</b>			
<b>e</b>			

<b>2</b> Capital gain net income or (net capital loss)	<b>2</b>	79,676
<b>3</b> Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8	<b>3</b>	

**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.

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2018	831,566	4,715,368	0.176352
2017	973,567	5,366,633	0.181411
2016	827,297	5,330,784	0.155192
2015	933,518	4,239,514	0.220195
2014	947,074	7,501,786	0.126246

<b>2</b> Total of line 1, column (d)	<b>2</b>	0.859396
<b>3</b> Average distribution ratio for the 5-year base period—divide the total on line 2 by 5.0, or by the number of years the foundation has been in existence if less than 5 years	<b>3</b>	0.171879
<b>4</b> Enter the net value of noncharitable-use assets for 2019 from Part X, line 5	<b>4</b>	4,165,765
<b>5</b> Multiply line 4 by line 3	<b>5</b>	716,008
<b>6</b> Enter 1% of net investment income (1% of Part I, line 27b)	<b>6</b>	1,659
<b>7</b> Add lines 5 and 6	<b>7</b>	717,667
<b>8</b> Enter qualifying distributions from Part XII, line 4	<b>8</b>	756,067

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)

Table with 11 rows for excise tax calculations. Includes items like 'Exempt operating foundations', 'Domestic foundations that meet the section 4940(e) requirements', and 'Total credits and payments'. Total amount owed is 1,261.

Part VII-A Statements Regarding Activities

Table with 10 rows for activity statements. Includes questions like 'During the tax year, did the foundation attempt to influence any national, state, or local legislation?' and 'Has the foundation engaged in any activities that have not previously been reported to the IRS?'. Columns for Yes/No.

Part VII-A Statements Regarding Activities (continued)

Table with 3 columns: Question, Yes, No. Rows 11-14 regarding controlled entities, distributions, public inspection requirements, and books in care.

Located at 685 THIRD AVENUE NEW YORK NY ZIP+4 10017

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.

Table with 3 columns: Question, Yes, No. Row 16 regarding interest in foreign countries.

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.

Main table with 3 columns: Question, Yes, No. Rows 1a-4b regarding Form 4720 exceptions and requirements.

**Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required** (continued)

<b>5a</b>	During the year did the foundation pay or incur any amount to		<b>Yes</b>	<b>No</b>
(1)	Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(2)	Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(3)	Provide a grant to an individual for travel, study, or other similar purposes?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(4)	Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions.	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
<b>b</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.		<b>5b</b>	
	Organizations relying on a current notice regarding disaster assistance check here.	<input type="checkbox"/>		
<b>c</b>	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? If "Yes," attach the statement required by Regulations section 53.4945–5(d)	<input type="checkbox"/> Yes <input type="checkbox"/> No		
<b>6a</b>	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	<b>6b</b>	<b>No</b>
<b>b</b>	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? If "Yes" to 6b, file Form 8870			
<b>7a</b>	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	<b>7b</b>	
<b>b</b>	If "Yes", did the foundation receive any proceeds or have any net income attributable to the transaction?			
<b>8</b>	Is the foundation subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment during the year?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		

**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
See Additional Data Table				

**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
NONE				

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

**Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)**

<b>3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE".</b>		
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
<b>Total</b> 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
<b>1</b>	
<b>2</b>	
<b>3</b>	
<b>4</b>	

**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
<b>1</b>	
<b>2</b>	
All other program-related investments. See instructions.	
<b>3</b>	
<b>Total.</b> Add lines 1 through 3 . . . . . ▶	0

**Part X Minimum Investment Return** (All domestic foundations must complete this part. Foreign foundations, see instructions.)

<b>1</b>	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
<b>a</b>	Average monthly fair market value of securities.	<b>1a</b>	4,049,720
<b>b</b>	Average of monthly cash balances.	<b>1b</b>	179,483
<b>c</b>	Fair market value of all other assets (see instructions).	<b>1c</b>	0
<b>d</b>	<b>Total</b> (add lines 1a, b, and c).	<b>1d</b>	4,229,203
<b>e</b>	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	<b>1e</b>	0
<b>2</b>	Acquisition indebtedness applicable to line 1 assets.	<b>2</b>	0
<b>3</b>	Subtract line 2 from line 1d.	<b>3</b>	4,229,203
<b>4</b>	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	<b>4</b>	63,438
<b>5</b>	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. Enter here and on Part V, line 4	<b>5</b>	4,165,765
<b>6</b>	<b>Minimum investment return.</b> Enter 5% of line 5.	<b>6</b>	208,288

**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.)

<b>1</b>	Minimum investment return from Part X, line 6.	<b>1</b>	208,288
<b>2a</b>	Tax on investment income for 2019 from Part VI, line 5.	<b>2a</b>	1,659
<b>b</b>	Income tax for 2019 (This does not include the tax from Part VI).	<b>2b</b>	
<b>c</b>	Add lines 2a and 2b.	<b>2c</b>	1,659
<b>3</b>	Distributable amount before adjustments. Subtract line 2c from line 1.	<b>3</b>	206,629
<b>4</b>	Recoveries of amounts treated as qualifying distributions.	<b>4</b>	0
<b>5</b>	Add lines 3 and 4.	<b>5</b>	206,629
<b>6</b>	Deduction from distributable amount (see instructions).	<b>6</b>	0
<b>7</b>	<b>Distributable amount</b> as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1.	<b>7</b>	206,629

**Part XII Qualifying Distributions** (see instructions)

<b>1</b>	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes		
<b>a</b>	Expenses, contributions, gifts, etc.—total from Part I, column (d), line 26.	<b>1a</b>	756,067
<b>b</b>	Program-related investments—total from Part IX-B.	<b>1b</b>	0
<b>2</b>	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes.	<b>2</b>	
<b>3</b>	Amounts set aside for specific charitable projects that satisfy the		
<b>a</b>	Suitability test (prior IRS approval required).	<b>3a</b>	
<b>b</b>	Cash distribution test (attach the required schedule).	<b>3b</b>	
<b>4</b>	<b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	<b>4</b>	756,067
<b>5</b>	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.	<b>5</b>	1,659
<b>6</b>	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4.	<b>6</b>	754,408

**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 2018	(c) 2018	(d) 2019
<b>1</b> Distributable amount for 2019 from Part XI, line 7				206,629
<b>2</b> Undistributed income, if any, as of the end of 2019				
<b>a</b> Enter amount for 2018 only. . . . .			0	
<b>b</b> Total for prior years 20___, 20___, 20___		0		
<b>3</b> Excess distributions carryover, if any, to 2019				
<b>a</b> From 2014. . . . .	573,244			
<b>b</b> From 2015. . . . .	757,110			
<b>c</b> From 2016. . . . .	562,788			
<b>d</b> From 2017. . . . .	711,417			
<b>e</b> From 2018. . . . .	601,638			
<b>f</b> Total of lines 3a through e. . . . .	3,206,197			
<b>4</b> Qualifying distributions for 2019 from Part XII, line 4 ▶ \$ <u>756,067</u>				
<b>a</b> Applied to 2018, but not more than line 2a			0	
<b>b</b> Applied to undistributed income of prior years (Election required—see instructions). . . . .		0		
<b>c</b> Treated as distributions out of corpus (Election required—see instructions). . . . .	0			
<b>d</b> Applied to 2019 distributable amount. . . . .				206,629
<b>e</b> Remaining amount distributed out of corpus	549,438			
<b>5</b> Excess distributions carryover applied to 2019 (If an amount appears in column (d), the same amount must be shown in column (a) )				0
<b>6</b> Enter the net total of each column as indicated below:				
<b>a</b> Corpus Add lines 3f, 4c, and 4e Subtract line 5	3,755,635			
<b>b</b> Prior years' undistributed income Subtract line 4b from line 2b . . . . .		0		
<b>c</b> 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		
<b>d</b> Subtract line 6c from line 6b Taxable amount—see instructions . . . . .		0		
<b>e</b> Undistributed income for 2018 Subtract line 4a from line 2a Taxable amount—see instructions . . . . .			0	
<b>f</b> Undistributed income for 2019 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2020 . . . . .				0
<b>7</b> 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		
<b>8</b> Excess distributions carryover from 2014 not applied on line 5 or line 7 (see instructions). . . . .	573,244			
<b>9</b> Excess distributions carryover to 2020. Subtract lines 7 and 8 from line 6a . . . . .	3,182,391			
<b>10</b> Analysis of line 9				
<b>a</b> Excess from 2015. . . . .	757,110			
<b>b</b> Excess from 2016. . . . .	562,788			
<b>c</b> Excess from 2017. . . . .	711,417			
<b>d</b> Excess from 2018. . . . .	601,638			
<b>e</b> Excess from 2019. . . . .	549,438			

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

**1a** If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2019, enter the date of the ruling. . . . . ▶

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

**2a** Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed . . . . .

	Tax year	Prior 3 years			(e) Total
	(a) 2019	(b) 2018	(c) 2017	(d) 2016	
<b>b</b> 85% of line 2a . . . . .					
<b>c</b> Qualifying distributions from Part XII, line 4 for each year listed . . . . .					
<b>d</b> Amounts included in line 2c not used directly for active conduct of exempt activities . . . . .					
<b>e</b> Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c . . . . .					
<b>3</b> Complete 3a, b, or c for the alternative test relied upon					
<b>a</b> "Assets" alternative test—enter					
<b>(1)</b> Value of all assets . . . . .					
<b>(2)</b> Value of assets qualifying under section 4942(j)(3)(B)(i)					
<b>b</b> "Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed. . . . .					
<b>c</b> "Support" alternative test—enter					
<b>(1)</b> Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties) . . . . .					
<b>(2)</b> Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii). . . . .					
<b>(3)</b> Largest amount of support from an exempt organization					
<b>(4)</b> Gross investment income					

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

**1 Information Regarding Foundation Managers:**

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

**b** List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest

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

Check here  if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. to individuals or organizations under other conditions, complete items 2a, b, c, and d. See instructions.

**a** The name, address, and telephone number or email address of the person to whom applications should be addressed

---

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

---

**c** Any submission deadlines

---

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

**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
<b>a</b> <i>Paid during the year</i> See Additional Data Table				
<b>Total . . . . .</b> ▶ <b>3a</b>				752,735
<b>b</b> <i>Approved for future payment</i>				
<b>Total . . . . .</b> ▶ <b>3b</b>				0

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated

Table with 5 main columns: (a) Business code, (b) Amount, (c) Exclusion code, (d) Amount, and (e) Related or exempt function income. Rows include items like Program service revenue, Fees and contracts from government agencies, Membership dues, Interest on savings, Dividends and interest from securities, Net rental income, Other investment income, Gain or (loss) from sales of assets, Net income from special events, Gross profit from sales of inventory, and Other revenue.

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

Table with 2 columns: Line No. and Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes) (See instructions).

Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

Part XVII

- 1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?
a Transfers from the reporting foundation to a noncharitable exempt organization of
(1) Cash.
(2) Other assets.
b Other transactions
(1) Sales of assets to a noncharitable exempt organization.
(2) Purchases of assets from a noncharitable exempt organization.
(3) Rental of facilities, equipment, or other assets.
(4) Reimbursement arrangements.
(5) Loans or loan guarantees.
(6) Performance of services or membership or fundraising solicitations.
c Sharing of facilities, equipment, mailing lists, other assets, or paid employees.
d If the answer to any of the above is "Yes," complete the following schedule

Table with 4 columns: (a) Line No, (b) Amount involved, (c) Name of noncharitable exempt organization, (d) Description of transfers, transactions, and sharing arrangements

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) (other than section 501(c)(3)) or in section 527? [ ] Yes [x] No

Table with 3 columns: (a) Name of organization, (b) Type of organization, (c) Description of relationship

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.
Sign Here [Signature] 2020-05-19 [Title]
May the IRS discuss this return with the preparer shown below (see instr) [x] Yes [ ] No

Table for Paid Preparer Use Only with columns: Print/Type preparer's name, Preparer's Signature, Date, Check if self-employed, PTIN, Firm's name, Firm's address, Firm's EIN, Phone no.

**Form 990PF Part VIII Line 1 - List all officers, directors, trustees, foundation managers and their compensation**

<b>(a)</b> Name and address	Title, and average hours per week <b>(b)</b> devoted to position	<b>(c)</b> Compensation (If not paid, enter -0-)	<b>(d)</b> Contributions to employee benefit plans and deferred compensation	Expense account, <b>(e)</b> other allowances
EDITH EVERETT 150 EAST 69TH STREET NEW YORK, NY 10021	PRESIDENT/CHAIRWOMAN 40 00	0	0	0
DAVID F EVERETT 150 EAST 69TH STREET NEW YORK, NY 10021	VICE PRESIDENT/DIRECTOR 10 00	0	0	0
MARK LEVENFUS 150 EAST 69TH STREET NEW YORK, NY 10021	TREASURER/DIRECTOR 10 00	0	0	0
DANIEL REINGOLD 150 EAST 69TH STREET NEW YORK, NY 10021	DIRECTOR 10 00	0	0	0
FRAN BLACK 150 EAST 69TH STREET NEW YORK, NY 10021	SECRETARY & DIRECTOR 10 00	0	0	0

**Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient	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
Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
ACHP FOUNDATION 401 F STREET NW SUITE 308 WASHINGTON, DC 20001	NONE	PC	UNRESTRICTED USE	1,000
ACLU FOUNDATION 125 BROAD STREET 18TH FLOOR NEW YORK, NY 10004	NONE	PC	UNRESTRICTED USE	1,000
AJC165 EAST 56TH STREET NEW YORK, NY 10022	NONE	PC	UNRESTRICTED USE	1,000
<b>Total . . . . .</b> ▶ <b>3a</b>				752,735

**Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient	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
Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
AMERICAN SUPPORTERS OF YEDID 245 5TH AVENUE NEW YORK, NY 10016	NONE	PC	UNRESTRICTED USE	50,000
ARNOLD P GOLD FOUNDATION 619 PALISADE AVE ENGLEWOOD CLIFFS, NJ 07632	NONE	PC	UNRESTRICTED USE	1,000
B3 THE BOOMER JEWISH PLATFORM 101 WARREN ST APT 3110 NEW YORK, NY 10007	NONE	PC	UNRESTRICTED USE	1,000
<b>Total . . . . .</b> ▶ <b>3a</b>				752,735



**Form 990PF Part XV Line 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
<b>a</b> <i>Paid during the year</i>				
BEND THE ARC 330 7TH AVE 19TH FLOOR NEW YORK, NY 10001	NONE	PC	UNRESTRICTED USE	1,000
CAMP RAMAH IN THE BERKSHIRES 91 RAMAH RD WINGDALE, NY 12594	NONE	PC	UNRESTRICTED USE	4,900
COALITION FOR PEACE 40 WITHERSPOON STREET PRINCETON, NJ 08542	NONE	PC	UNRESTRICTED USE	1,000
<b>Total . . . . .</b> ▶ <b>3a</b>				752,735

**Form 990PF Part XV Line 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
<b>a</b> <i>Paid during the year</i>				
CONGREGATION ANSCHE CHESED 251 W 100TH ST NEW YORK, NY 10025	NONE	PC	UNRESTRICTED USE	28,980
EAST MIDWOOD JEWISH CENTER 1625 OCEAN AVE BROOKLYN, NY 11230	NONE	PC	UNRESTRICTED USE	650
EVERETT JEWISH LIFE CENTER PO BOX 315 CHAUTAUQUA, NY 14722	NONE	PC	UNRESTRICTED USE	2,000
<b>Total . . . . .</b>				<b>752,735</b>

▶ **3a**

**Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient	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
Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
FJC520 EIGHTH AVE NEW YORK, NY 10018	NONE	PC	UNRESTRICTED USE	41,000
FRIENDS OF ETHIOPIAN JEWS PO BOX 960059 BOSTON, MA 02196	NONE	PC	UNRESTRICTED USE	3,725
FRIENDS OF ISRAEL SCI-TECH 25 WEST 45TH STREET NEW YORK, NY 10036	NONE	PC	UNRESTRICTED USE	99,081
<b>Total . . . . .</b>				<b>752,735</b>

**▶ 3a**

**Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient	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
Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
FRIENDS OF YEMIN ORDE 4340 E WEST HWY STE 202 BETHESDA, MD 20814	NONE	PC	UNRESTRICTED USE	7,500
GREEN AMERICA 1612 K STREET NW SUITE 600 WASHINGTON, DC 20006	NONE	PC	UNRESTRICTED USE	25,000
HEBREW HOME AT RIVERDALE 5901 PALISADE AVE BRONX, NY 10471	NONE	PC	UNRESTRICTED USE	15,000
<b>Total . . . . .</b> ▶ <b>3a</b>				752,735

**Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient	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
Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
ISRAEL POLICY FORUM 355 LEXINGTON AVENUE 4TH FL NEW YORK, NY 10017	NONE	PC	UNRESTRICTED USE	5,000
J STREET EDUCATION FUND INC PO BOX 66073 WASHINGTON, DC 20035	NONE	PC	UNRESTRICTED USE	5,000
JEWISH BOOK COUNCIL 520 8TH AVENUE 4TH FLOOR NEW YORK, NY 10018	NONE	PC	UNRESTRICTED USE	15,600
<b>Total . . . . .</b> ▶ <b>3a</b>				752,735

**Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient	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
Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
JEWISH FOUNDERS NETWORK 150 WEST 30TH ST NEW YORK, NY 10001	NONE	PC	UNRESTRICTED USE	1,200
JEWISH MUSEUM (THE) 1109 FIFTH AVENUE NEW YORK, NY 10128	NONE	PC	UNRESTRICTED USE	10,000
JEWISH THEOLOGICAL SEMINARY OF AMERICA 3080 BROADWAY NEW YORK, NY 10027	NONE	PC	UNRESTRICTED USE	5,000
<b>Total . . . . .</b> ▶ <b>3a</b>				752,735

**Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient	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
Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
JUDAISM DEMOCRACY ACTION ALLIANCE 309 W 99TH ST 6B NEW YORK, NY 10025	NONE	PC	UNRESTRICTED USE	50,000
MEDICARE RIGHTS CENTER 266 WEST 37TH ST 3RD FLOOR NEW YORK, NY 10018	NONE	PC	UNRESTRICTED USE	18,520
METROPOLITAN MUSEUM OF ART 1000 FIFTH AVENUE NEW YORK, NY 10028	NONE	PC	UNRESTRICTED USE	373
<b>Total . . . . .</b> ▶ <b>3a</b>				752,735

**Form 990PF Part XV Line 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
<b>a</b> <i>Paid during the year</i>				
MOMENT MAGAZINE 4115 WISCONSIN AVENUE NW SUITE LL10 WASHINGTON, DC 20016	NONE	PC	UNRESTRICTED USE	3,000
NATIONAL CENTER FOR JEWISH FILM 415 S ST 102 MS053 WALTHAM, MA 02453	NONE	PC	UNRESTRICTED USE	10,000
NEW ISRAEL FUND1101 14TH STREET WASHINGTON, DC 20005	NONE	PC	UNRESTRICTED USE	162,766
<b>Total . . . . .</b>				<b>752,735</b>



**3a**



**Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient	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
Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
NEW YORK BOTANICAL GARDEN BRONX RIVER PARKWAY AT FORDHAM ROAD BRONX, NY 10458	NONE	PC	UNRESTRICTED USE	50,000
PEF ISRAEL ENDOWMENT FUND 630 3RD AVE 15TH NEW YORK, NY 10017	NONE	PC	UNRESTRICTED USE	25,000
PUBLIC CITIZEN FOUNDATION 16000 20TH STREET WASHINGTON, DC 20009	NONE	PC	UNRESTRICTED USE	1,000
<b>Total . . . . .</b> ▶ <b>3a</b>				752,735

**Form 990PF Part XV Line 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
<b>a</b> <i>Paid during the year</i>				
SMITHSONIAN INSTITUTION 1000 JEFFERSON DRIVE SW WASHINGTON, DC 20560	NONE	PC	UNRESTRICTED USE	500
SOUTHERN POVERTY LAW CENTER 400 WASHINGTON AVE MONTGOMERY, AL 36104	NONE	PC	UNRESTRICTED USE	500
TANGER HILLEL AT BROOKLYN COLLEGE 2901 CAMPUS RD BROOKLYN, NY 11210	NONE	PC	UNRESTRICTED USE	10,000
<b>Total . . . . .</b>				752,735



**3a**

**Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient	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
Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
THE HUNTER COLLEGE FOUNDATION 695 PARK AVE ROOM 1601E NEW YORK, NY 10065	NONE	PC	UNRESTRICTED USE	500
THE JEWISH EDUCATION PROJECT 5 BEEKMAN STREET NEW YORK, NY 10038	NONE	PC	UNRESTRICTED USE	690
THE NEW YORK HISTORICAL SOCIETY 170 CENTRAL PARK WEST NEW YORK, NY 10024	NONE	PC	UNRESTRICTED USE	6,000
<b>Total . . . . .</b> ▶ <b>3a</b>				752,735

**Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient	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
Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
TRUSTEES OF THE COLUMBIA UNIVERSITY 615 WEST 131 STREET 3RD FLOOR NEW YORK, NY 10027	NONE	PC	UNRESTRICTED USE	25,000
UNION SQUARE REFORMED JUDAISM 633 3RD AVENUE NEW YORK, NY 10017	NONE	PC	UNRESTRICTED USE	35,000
UNITED STATES HOLOCAUST MEMORIAL 100 RAOUL WALLENBERG PLACE SW WASHINGTON, DC 20024	NONE	PC	UNRESTRICTED USE	25,000
<b>Total . . . . .</b> ▶ <b>3a</b>				752,735

<b>Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment</b>				
Recipient	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
Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
UPPER EAST SIDE HATZOLAH INC 125 E 85TH ST NEW YORK, NY 10028	NONE	PC	UNRESTRICTED USE	1,000
VISITING NURSE SERVICE OF NY 220 E 42ND ST NEW YORK, NY 10017	NONE	PC	UNRESTRICTED USE	1,250
<b>Total . . . . .</b>			<b>▶ 3a</b>	752,735

**TY 2019 Accounting Fees Schedule****Name:** EVERETT FOUNDATION INC**EIN:** 11-6038040

<b>Category</b>	<b>Amount</b>	<b>Net Investment Income</b>	<b>Adjusted Net Income</b>	<b>Disbursements for Charitable Purposes</b>
ACCOUNTING FEE	7,500	5,625		1,875

**TY 2019 Investments Corporate Bonds Schedule****Name:** EVERETT FOUNDATION INC**EIN:** 11-6038040**Investments Corporate Bonds Schedule**

<b>Name of Bond</b>	<b>End of Year Book Value</b>	<b>End of Year Fair Market Value</b>
SAN JOSE CALIFORNIA REDEVELOPMENT AGENCY	100,000	100,273
BIOGEN INC	50,020	50,368
FORD MOTOR CREDIT CO LLC	99,156	99,816
CATERPILLAR FINANCIAL SERVICE	72,648	74,892
HOUSTON TEXAS	100,000	102,245
CHEVRON CORP	75,099	75,991
ACTAVIS FUNDING SERVICES	75,861	76,723
BANK OF NOVA SCOTIA	98,844	101,509
AMERICAN TOWER CORP	101,552	103,633
PRUDENTIAL FINANCIAL INC	76,065	79,817
ACE INA HOLDINGS	76,725	79,028
PARKER-HANNIFIN CORP	97,894	104,767
APPLE INC	100,890	105,908
INGERSOLL-RAND	101,262	104,624
WALMART INC	80,162	80,499
WELLS FARGO & COMPANY	53,000	53,663
AEGON NV	45,621	61,286
METLIFE INC	100,284	101,288
DOUBLELINE TOTAL RETURN BOND FUND	33,749	32,974
MUZINICH CREDIT OPPORTUNITIES FUND	204,692	216,214

## Investments Corporate Bonds Schedule

<b>Name of Bond</b>	<b>End of Year Book Value</b>	<b>End of Year Fair Market Value</b>
VIRTUS SEIX FLT RT HIGH INCOME R6	200,000	193,215
FROST TOTAL RETURN BOND FUND	133,736	135,969



**TY 2019 Investments Corporate Stock Schedule****Name:** EVERETT FOUNDATION INC**EIN:** 11-6038040**Investments Corporation Stock Schedule**

<b>Name of Stock</b>	<b>End of Year Book Value</b>	<b>End of Year Fair Market Value</b>
CELANESE CORP COMMON	11,632	23,270
WESTROCK CO	12,015	16,949
AMAZON.COM INC	10,788	27,718
HOME DEPOT INC	14,421	26,206
TJX COS INC	14,061	24,424
AUTOZONE INC	21,084	23,826
ROYAL CARIBBEAN CRUISES LTD	19,512	21,362
NIKE INC - CLASS B	10,943	18,742
DOMINO'S PIZZA INC	12,999	17,627
BEST BUY COMPANY INC	8,557	10,975
BORG WARNER AUTOMOTIVE INC	9,116	10,845
THERMO FISHER SCIENTIFIC INC	15,657	39,959
UNITEDHEALTH GROUP INC	11,600	29,986
ABBOTT LABS	18,922	22,584
BLACKSTONE GROUP INC	24,710	27,970
CBRE GROUP INC	11,680	27,581
MORGAN STANLEY	18,790	22,493
CHUBB LTD	14,468	20,080
SYNCHRONY FINANCIAL	14,242	18,365
BLACKROCK INC	13,464	17,595
ROPER TECHNOLOGIES INC	10,019	21,254
MICROSOFT CORP	13,287	40,844
APPLE INC	13,145	40,230
MASTERCARD INC	10,517	36,428
TEXAS INSTRUMENTS INC	10,923	27,454
ACCENTURE PLC	13,192	27,164
ADOBE INC	8,672	26,385
ALIBABA GROUP HOLDING LTD	16,953	21,210
ANSYS INC	6,026	18,019
IPG PHOTONICS CORP	14,601	14,492

**Investments Corporation Stock Schedule**

<b>Name of Stock</b>	<b>End of Year Book Value</b>	<b>End of Year Fair Market Value</b>
APPLIED MATERIALS INC	7,808	9,156
ALPHABET INC	26,097	33,485
DFA US CORE SUSTAINABILITY CORE 1	360,000	486,762
DFA US CORE SUSTAINABILITY CORE	276,936	337,004
DFA US CORE SUSTAINABILITY CORE 1-INST	203,937	201,305
AMERICAN TOWER CORP REIT	9,212	23,212

**TY 2019 Investments Government Obligations Schedule****Name:** EVERETT FOUNDATION INC**EIN:** 11-6038040**US Government Securities - End  
of Year Book Value:**

98,246

**US Government Securities - End  
of Year Fair Market Value:**

98,570

**State & Local Government  
Securities - End of Year Book  
Value:**

0

**State & Local Government  
Securities - End of Year Fair  
Market Value:**

0

**TY 2019 Other Decreases Schedule****Name:** EVERETT FOUNDATION INC**EIN:** 11-6038040

<b>Description</b>	<b>Amount</b>
INVESTMENT ADJUSTMENT	8,324

**TY 2019 Other Expenses Schedule****Name:** EVERETT FOUNDATION INC**EIN:** 11-6038040**Other Expenses Schedule**

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INSURANCE	1,207	0		1,207
FILING FEES	250	0		250

**TY 2019 Other Income Schedule****Name:** EVERETT FOUNDATION INC**EIN:** 11-6038040**Other Income Schedule**

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
LITIGATION SETTLEMENT	882	0	882

**TY 2019 Other Professional Fees Schedule****Name:** EVERETT FOUNDATION INC**EIN:** 11-6038040

<b>Category</b>	<b>Amount</b>	<b>Net Investment Income</b>	<b>Adjusted Net Income</b>	<b>Disbursements for Charitable Purposes</b>
MANAGEMENT FEE	30,276	30,276		0

**TY 2019 Taxes Schedule****Name:** EVERETT FOUNDATION INC**EIN:** 11-6038040

<b>Category</b>	<b>Amount</b>	<b>Net Investment Income</b>	<b>Adjusted Net Income</b>	<b>Disbursements for Charitable Purposes</b>
FEDERAL TAXES	2,720	0		0
FOREIGN TAXES	847	847		0