

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 for instructions and the latest information.**

OMB No. 1545-0047
2021
Open to Public Inspection

For calendar year 2021, or tax year beginning 01-01-2021, and ending 12-31-2021

Name of foundation TINY BEAM FUND INC CARMEN LEE		A Employer identification number 83-3062276	
Number and street (or P.O. box number if mail is not delivered to street address) 10 BOWDOIN STREET 506		B Telephone number (see instructions) (617) 439-2503	
City or town, state or province, country, and ZIP or foreign postal code BOSTON, MA 02114		C If exemption application is pending, check here <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		D 1. Foreign organizations, check here..... <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation ... <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		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>	
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ▶ \$ <u>12,833,063</u>		J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ <i>(Part I, column (d) must be on cash basis.)</i>	
		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>	

Part I Analysis of Revenue and Expenses <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)
Revenue	1 Contributions, gifts, grants, etc., received (attach schedule)	10,000,000			
	2 Check <input type="checkbox"/> if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments	318	318		
	4 Dividends and interest from securities	89,655	89,655		
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	2,445			
	b Gross sales price for all assets on line 6a <u>1,129,364</u>				
	7 Capital gain net income (from Part IV, line 2)		2,445		
	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)	10,675	0	10,675		
12 Total. Add lines 1 through 11	10,103,093	92,418	10,675		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc.	0	0	0	0
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)	818	614	0	204
	b Accounting fees (attach schedule)	2,500	1,875	0	625
	c Other professional fees (attach schedule)	12,827	9,620	0	3,207
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	1,132	1,132	0	0
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	28,487	28,335	0	151
	24 Total operating and administrative expenses. Add lines 13 through 23	45,764	41,576	0	4,187
	25 Contributions, gifts, grants paid	321,441			321,441
26 Total expenses and disbursements. Add lines 24 and 25	367,205	41,576	0	325,628	
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements	9,735,888				
b Net investment income (if negative, enter -0-)		50,842			
c Adjusted net income (if negative, enter -0-)			10,675		

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		-10	-10
	2 Savings and temporary cash investments	441,304	8,307,632	8,307,632
	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 schedule) ▶ _____ Less: allowance for doubtful accounts ▶ _____			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments—U.S. and state government obligations (attach schedule)			
	b Investments—corporate stock (attach schedule)			
	c Investments—corporate bonds (attach schedule)			
	11 Investments—land, buildings, and equipment: basis ▶ _____ Less: accumulated depreciation (attach schedule) ▶ _____			
	12 Investments—mortgage loans			
	13 Investments—other (attach schedule)			
	14 Land, buildings, and equipment: basis ▶ _____ Less: accumulated depreciation (attach schedule) ▶ _____			
15 Other assets (describe ▶ _____)	2,292,224	4,168,523	4,525,441	
16 Total assets (to be completed by all filers—see the instructions. Also, see page 1, item I)	2,733,528	12,476,145	12,833,063	
Liabilities	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable (attach schedule)			
	22 Other liabilities (describe ▶ _____)			
	23 Total liabilities (add lines 17 through 22)	0	0	
Net Assets or Fund Balances	Foundations that follow FASB ASC 958, check here ▶ <input type="checkbox"/> and complete lines 24, 25, 29 and 30.			
	24 Net assets without donor restrictions			
	25 Net assets with donor restrictions			
	Foundations that do not follow FASB ASC 958, check here ▶ <input checked="" type="checkbox"/> and complete lines 26 through 30.			
	26 Capital stock, trust principal, or current funds	0	0	
	27 Paid-in or capital surplus, or land, bldg., and equipment fund	0	0	
	28 Retained earnings, accumulated income, endowment, or other funds	2,733,528	12,476,145	
29 Total net assets or fund balances (see instructions)	2,733,528	12,476,145		
30 Total liabilities and net assets/fund balances (see instructions) .	2,733,528	12,476,145		

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 29 (must agree with end-of-year figure reported on prior year's return)	1	2,733,528
2 Enter amount from Part I, line 27a	2	9,735,888
3 Other increases not included in line 2 (itemize) ▶ _____	3	8,967
4 Add lines 1, 2, and 3	4	12,478,383
5 Decreases not included in line 2 (itemize) ▶ _____	5	2,238
6 Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 29 .	6	12,476,145

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.)
1a See Additional Data Table			
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 See Additional Data Table			
b			
c			
d			
e			

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

(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	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col.(h))
a See Additional Data Table			
b			
c			
d			
e			

2 Capital gain net income or (net capital loss)	{	If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7		
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c) (see instructions). If (loss), enter -0- in Part I, line 8	{		2	2,445
	}		3	-22,549

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

Table with 11 rows for excise tax calculation. Includes fields for exempt foundations, tax under section 511, subtitle A tax, tax based on investment income, credits/payments, and total tax due/overpayment.

Part VI-A Statements Regarding Activities

Table with 10 rows for activity statements. Includes questions about political campaigns, political expenditures, and substantial contributors.

Part VI-A Statements Regarding Activities (continued)

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

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

Part VII 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 VII 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
NONE		
Total number of others receiving over \$50,000 for professional services. ▶		0

Part VIII-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	
2	
3	
4	

Part VIII-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	
2	
All other program-related investments. See instructions.	
3	
Total. Add lines 1 through 3 ▶	0

Part IX 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.	1a	2,868,107
b	Average of monthly cash balances.	1b	2,899,534
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	5,767,641
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	0
2	Acquisition indebtedness applicable to line 1 assets.	2	0
3	Subtract line 2 from line 1d.	3	5,767,641
4	Cash deemed held for charitable activities. Enter 1.5% (0.015) of line 3 (for greater amount, see instructions).	4	86,515
5	Net value of noncharitable-use assets. Subtract line 4 from line 3.	5	5,681,126
6	Minimum investment return. Enter 5% (0.05) of line 5.	6	284,056

Part X 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 IX, line 6.	1	284,056
2a	Tax on investment income for 2021 from Part V, line 5.	2a	707
b	Income tax for 2021. (This does not include the tax from Part V.).	2b	
c	Add lines 2a and 2b.	2c	707
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	283,349
4	Recoveries of amounts treated as qualifying distributions.	4	10,675
5	Add lines 3 and 4.	5	294,024
6	Deduction from distributable amount (see instructions).	6	0
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XII, line 1.	7	294,024

Part XI 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.	1a	325,628
b	Program-related investments—total from Part VIII-B.	1b	0
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes.	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required).	3a	
b	Cash distribution test (attach the required schedule).	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part XII, line 4.	4	325,628

Part XII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2020	(c) 2020	(d) 2021
1 Distributable amount for 2021 from Part X, line 7				294,024
2 Undistributed income, if any, as of the end of 2021:				
a Enter amount for 2020 only.			0	
b Total for prior years: 20___, 20___, 20___		0		
3 Excess distributions carryover, if any, to 2021:				
a From 2016.				
b From 2017.				
c From 2018.				
d From 2019.			120,361	
e From 2020.			90,691	
f Total of lines 3a through e.	211,052			
4 Qualifying distributions for 2021 from Part XI, line 4: ► \$ <u>325,628</u>				
a Applied to 2020, 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 2021 distributable amount.				294,024
e Remaining amount distributed out of corpus	31,604			
5 Excess distributions carryover applied to 2021. (If an amount appears in column (d), the same amount must be shown in column (a).)				0
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	242,656			
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 2019. Subtract line 4a from line 2a. Taxable amount—see instructions.			0	
f Undistributed income for 2021. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2022.				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 2016 not applied on line 5 or line 7 (see instructions).	0			
9 Excess distributions carryover to 2022. Subtract lines 7 and 8 from line 6a.	242,656			
10 Analysis of line 9:				
a Excess from 2017.				
b Excess from 2018.				
c Excess from 2019.			120,361	
d Excess from 2020.			90,691	
e Excess from 2021.			31,604	

Part XIII Private Operating Foundations (see instructions and Part VI-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 2021, enter the date of the ruling					
b Check box to indicate whether the organization is a private operating foundation described in section <input type="checkbox"/> 4942(j)(3) or <input type="checkbox"/> 4942(j)(5)					
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part IX for each year listed	Tax year	Prior 3 years			(e) Total
	(a) 2021	(b) 2020	(c) 2019	(d) 2018	
b 85% (0.85) of line 2a					
c Qualifying distributions from Part XI, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon:					
a "Assets" alternative test—enter:					
(1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test— enter 2/3 of minimum investment return shown in Part IX, line 6 for each year listed					
c "Support" alternative test—enter:					
(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii).					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

Part XIV 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).)
CARMEN LEE
 - 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 XIV Supplementary Information (continued)

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)				
a <i>Paid during the year</i> See Additional Data Table				
Total ▶ 3a				321,441
b <i>Approved for future payment</i>				
Total ▶ 3b				0

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income

List and describe the kind(s) of property sold (e.g., real estate, (a) 2-story brick warehouse; or common stock, 200 shs. MLC Co.)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1 AMGEN INC - 30 SHS	P	2021-03-17	2021-12-27
1 COCA COLA CO - 400 SHS	P	2020-08-13	2021-01-04
COLGATE PALMOLIVE CO - 75 SHS	P	2020-11-10	2021-04-12
CONSTELLATION BRANDS INC CL A - 50 SHS	P	2021-03-17	2021-11-19
NORTHROP GRUMMAN CP - 25 SHS	P	2020-12-11	2021-01-06
ORGANON & CO - 30 SHS	P	2021-05-26	2021-08-19
QUALCOM INC - 25 SHS	P	2020-11-11	2021-04-12
TEXAS INSTRUMENTS - 145 SHS	P	2020-08-13	2021-05-26
TRUIST FINL CORP - 75 SHS	P	2021-03-17	2021-12-10
VISA INC CL A - 15 SHS	P	2021-03-17	2021-11-23

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
6,682		7,631	-949
21,116		20,216	900
6,019		6,209	-190
11,798		12,058	-260
7,371		7,491	-120
1,018		1,109	-91
3,465		3,552	-87
27,636		21,527	6,109
4,449		4,250	199
2,973		3,346	-373

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

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	
			-949
			900
			-190
			-260
			-120
			-91
			-87
			6,109
			199
			-373

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income

List and describe the kind(s) of property sold (e.g., real estate, (a) 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.)
3M COMPANY - 135 SHS	P	2020-08-13	2021-07-21
1 AMGEN INC - 40 SHS	P	2020-08-13	2021-12-27
GENL DYNAMICS CORP - 140 SHS	P	2020-10-28	2021-12-10
TRUIST FINL CORP - 425 SHS	P	2020-08-13	2021-12-10
VISA INC CL A - 45 SHS	P	2020-09-16	2021-11-23
ARK FINTECH INNOVATION ETF - 135 SHS	P	2020-11-30	2021-05-19
ARK GENOMIC REVOLUTION ETF - 50 SHS	P	2020-12-29	2021-05-19
COURSERA INC. - 125 SHS	P	2021-10-29	2021-12-21
FIRST TRUST CLOUD COMPUTING - 50 SHS	P	2020-12-29	2021-05-19
FIRST TRUST GLOBAL WIND ETF - 50 SHS	P	2020-12-29	2021-04-16

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
27,208		22,530	4,678
8,909		9,817	-908
28,676		19,481	9,195
25,211		17,767	7,444
8,919		9,462	-543
6,169		6,482	-313
4,136		4,340	-204
2,978		4,375	-1,397
4,674		4,800	-126
1,120		1,181	-61

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

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	
			4,678
			-908
			9,195
			7,444
			-543
			-313
			-204
			-1,397
			-126
			-61

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income

List and describe the kind(s) of property sold (e.g., real estate, (a) 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.)
CYBERSECURE ETF - 50 SHS	P	2020-12-29	2021-05-19
1 GLOBAL X CLOUD COMPUTING ETF - 300 SHS	P	2020-11-30	2021-05-19
GLOBAL X FINTECH ETF - 125 SHS	P	2020-12-29	2021-05-19
GLOBAL X INTERNET OF THINGS - 50 SHS	P	2021-01-15	2021-05-19
GLOBAL X RBTCS & ARTIFICI ETF - 150 SHS	P	2020-12-15	2021-05-19
INVESCO MSCI SUSTAINABLE FUT - 75 SHS	P	2021-01-15	2021-07-23
INVESCO SOLAR ETF - 35 SHS	P	2020-12-29	2021-05-19
ISHARES GLOBAL CLEAN ENERG ETF - 150 SHS	P	2020-12-12	2021-05-19
ISHARES ROBOTICS AND ARTIFICIA - 150 SHS	P	2020-12-15	2021-05-19
PROSHARES ONLINE RETAIL ETF - 60 SHS	P	2020-12-15	2021-05-19

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
2,106		2,225	-119
7,456		8,006	-550
5,223		5,730	-507
1,626		1,650	-24
4,811		4,927	-116
5,164		5,506	-342
2,757		3,100	-343
3,415		3,612	-197
6,012		6,486	-474
4,370		4,512	-142

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

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	
			-119
			-550
			-507
			-24
			-116
			-342
			-343
			-197
			-474
			-142

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income

List and describe the kind(s) of property sold (e.g., real estate, (a) 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.)
ARK FINTECH INNOVATION ETF - 300 SHS	P	2020-09-10	2021-12-22
1 ARK GENOMIC REVOLUTION ETF - 175 SHS	P	2020-09-10	2021-12-22
PROSHARES ONLINE RETAIL ETF - 215 SHS	P	2020-09-10	2021-12-21
GLOBAL X MLP & ENERGY INFRAS - 100 SHS	P	2021-05-21	2021-08-19
ISHARES ASIA/PACIFIC DIV ETF - 250 SHS	P	2021-02-19	2021-07-15
ISHARES BARCLAYS 1-3 YR TSY BD - 1,000 UNITS	P	2020-07-31	2021-03-16
ISHARES EMRG MKT DIV ETF - 500 SHS	P	2021-02-19	2021-07-15
ISHARES MSCI CHINA ETF - 1,000 SHS	P	2021-03-17	2021-08-19
KRANESHARES CSI CHINA INTERNET - 3,000 SHS	P	2021-08-19	2021-12-21
PIMCO ENHA LOW DUR ACTIVE ETF - 1,000 SHS	P	2020-07-31	2021-03-16

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
12,357		12,134	223
11,300		11,493	-193
12,277		14,040	-1,763
3,209		3,499	-290
10,204		10,245	-41
86,250		86,489	-239
19,269		19,481	-212
66,806		83,533	-16,727
116,891		126,741	-9,850
101,909		102,000	-91

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

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	
			223
			-193
			-1,763
			-290
			-41
			-239
			-212
			-16,727
			-9,850
			-91

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income

List and describe the kind(s) of property sold (e.g., real estate, (a) 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.)
PIMCO ENHANCED SHRT MTRT EXC - 1,500 SHS	P	2020-04-14	2021-05-14
1 ISHARES BARCLAYS 1-3 YR TSY BD - 1,000 UNITS	P	2019-10-08	2021-03-16
PIMCO ENHA LOW DUR ACTIVE ETF - 1,000 SHS	P	2019-02-27	2021-03-16
SPDR BBG BAR SRT TERM HI YIELD - 3,250 SHS	P	2019-02-27	2021-07-15
CAPITAL GAINS DIVIDENDS	P		

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
152,964		151,018	1,946
86,250		85,118	1,132
101,909		100,506	1,403
89,133		87,244	1,889
5,169			5,169

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

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	
			1,946
			1,132
			1,403
			1,889
			5,169

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

(a) Name and address	Title, and average hours per week (b) devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances
CARMEN LEE C/O NUTTER MCCLENNEN FISH LLP BOSTON, MA 02210	PRESIDENT 3.00	0	0	0
EDWIN LEE C/O NUTTER MCCLENNEN FISH LLP BOSTON, MA 02210	TREASURER 1.00	0	0	0
CARMEN LEE C/O NUTTER MCCLENNEN FISH LLP BOSTON, MA 02210	CLERK 1.00	0	0	0
CARMEN LEE C/O NUTTER MCCLENNEN FISH LLP BOSTON, MA 02210	DIRECTOR 1.00	0	0	0
EDWIN LEE C/O NUTTER MCCLENNEN FISH LLP BOSTON, MA 02210	DIRECTOR 1.00	0	0	0
JASON LEE C/O NUTTER MCCLENNEN FISH LLP BOSTON, MA 02210	DIRECTOR 1.00	0	0	0
ERIN E WHITNEY C/O NUTTER MCCLENNEN FISH LLP BOSTON, MA 02210	DIRECTOR 1.00	0	0	0
SINDY YEUNG C/O NUTTER MCCLENNEN FISH LLP BOSTON, ME 02210	DIRECTOR 1.00	0	0	0

Form 990PF Part XIV 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)				
a <i>Paid during the year</i>				
ALLISON D GRAY 74 EMPRESS AVENUE LONDON, ONTARIO N6H 1M7 CA	NONE	PC	FELLOWSHIP AWARD	25,000
ANIMAL CHARITY EVALUATORS PO BOX 348 BERKELEY, CA 94701	NONE	PC	GRANT	27,560
ANIMAL EQUALITY 8581 SANTA MONICA BLVD SUITE 350 LOS ANGELES, CA 90069	NONE	PC	GRANT	10,050
Total			▶ 3a	321,441

Form 990PF Part XIV 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)				
a <i>Paid during the year</i>				
BRIGHTER GREEN 165 COURT STREET 171 BROOKLYN, NY 11231	NONE	PC	GRANT	23,195
CHRISTIAN HENDERSON 34 KAGERSTRAAT LEIDEN 2334CR NL	NONE	I	FELLOWSHIP AWARD	20,000
COALITION OF AFRICAN ANIMAL WELFARE ORGANISATIONS UNIT 26 TRIDENT PART III 1 NIBLICK WAY SOMERSET WEST 7140 SF	NONE	PC	GRANT	6,000
Total ▶ 3a				321,441

Form 990PF Part XIV 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)				
a <i>Paid during the year</i>				
EMORY UNIVERSITY 1599 CLIFTON ROAD 3RD FLOOR ATLANTA, GA 30322	NONE	UNIVERSITY	GRANT	12,500
FORUM NACIONAL DE PROTECAO E DEFESA ANIMAL AV LUIZ EDUARDO TOLEDO PRADO 4300 RIBEIRAO PRETOSP Q5L114027-250 BR	NONE	PC	GRANT	7,000
GLOBAL FOOD PARTNERS 251 LITTLE FALLS DRIVE WILMINGTON, DE 19808	NONE	PC	GRANT	13,500
Total ▶ 3a				321,441

Form 990PF Part XIV 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)				
a <i>Paid during the year</i>				
INSTITUTE FOR AGRICULTURE AND TRADE POLICY 2015 1ST AVE S MINNEAPOLIS, MN 55405	NONE	PC	GRANT	10,000
KAREN HUDLET VAZQUEZ 950 MAIN STREET BOX 3470 WORCESTER, MA 01610	NONE	I	FELLOWSHIP AWARD	7,500
MARINA CRISTINA YUNES RODOVIA HAROLDO SOARES GLAVAN 3820 CASA 22 CACUPE FLORIANOPOLIS CEP 88050-005 BR	NONE	I	FELLOWSHIP AWARD	20,000
Total ▶ 3a				321,441

Form 990PF Part XIV 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)				
a <i>Paid during the year</i>				
MAUREEN KHADIERA LUVANDA PO BOX 8528-00300 RONALD NGALA STREET NAIROBI KE	NONE	I	FELLOWSHIP AWARD	15,000
MELANIE ERIN SOMMERVILLE C/O DEPT OF INTL ENVIRON DEVEL STUDIES NORWEGIAN UNIV OF LIFE SCIE LANDASVEIEN 3A 1 NO	NONE	I	FELLOWSHIP AWARD	12,500
NEW YORK UNIVERSITY DEPT OF ENVIRONMENTAL STUDIES 285 MERCER STREET NEW YORK, NY 10003	NONE	UNIVERSITY	GRANT	19,995
Total ▶ 3a				321,441

Form 990PF Part XIV 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)				
a <i>Paid during the year</i>				
PETER NEWTON 1205 BEAR MOUNTAIN DRIVE UNIT B BOULDER, CO 80305	NONE	I	FELLOWSHIP AWARD	10,000
REGENTS OF THE UNIVERSITY OF COLORADO OFFICE OF CONTRACTS GRANTS UNIVERSITY OF COLORADO BOULDER, CO 80303	NONE	UNIVERSITY	GRANT	9,986
ROYAL VETERINARY COLLEGE HAWKSHEAD LANE BROOKMANS PARK HATFIELD AL9 7TA UK	NONE	UNIVERSITY	GRANT	22,486
Total	▶ 3a			321,441

Form 990PF Part XIV 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)				
a <i>Paid during the year</i>				
TIMOTHY CLARK 809 DEMERIUS STREET APT K4 DURHAM, NC 27701	NONE	I	FELLOWSHIP AWARD	25,000
WLODZIMIERZ GOGLOZA KROZANSKA 4/15 WARSAW 02-578 PL	NONE	I	FELLOWSHIP AWARD	12,500
WORLD RESOURCES INSTITUTE 10 G STREET NE SUITE 800 WASHINGTON, DC 20002	NONE	PC	GRANT	11,669
Total ▶ 3a				321,441

TY 2021 Accounting Fees Schedule**Name:** TINY BEAM FUND INC

CARMEN LEE

EIN: 83-3062276

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
TAX PREP FEES - NUTTER	2,500	1,875	0	625

TY 2021 Legal Fees Schedule

Name: TINY BEAM FUND INC
CARMEN LEE

EIN: 83-3062276

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LEGAL FEES - NUTTER	818	614	0	204

TY 2021 Other Assets Schedule**Name:** TINY BEAM FUND INC

CARMEN LEE

EIN: 83-3062276**Other Assets Schedule**

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
MUTUAL FUNDS	500,240		
EXCHANGE TRADED & CLOSED END FUNDS	1,395,625	3,589,254	3,811,269
STOCKS	396,359	579,269	714,172

TY 2021 Other Decreases Schedule**Name:** TINY BEAM FUND INC

CARMEN LEE

EIN: 83-3062276

Description	Amount
2021 DIVIDEND REC'D IN 2022	1,156
2021 LTCGD REC'D IN 2022	264
2020 FOREIGN TAX PAID IN 2021	9
BASIS ADJUSTMENTS	809

TY 2021 Other Expenses Schedule**Name:** TINY BEAM FUND INC

CARMEN LEE

EIN: 83-3062276**Other Expenses Schedule**

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
MORGAN STANLEY FEES	27,961	27,960	0	0
2020 MA PC FEE	500	375	0	125
WIRE FEES	26	0	0	26

TY 2021 Other Income Schedule**Name:** TINY BEAM FUND INC

CARMEN LEE

EIN: 83-3062276**Other Income Schedule**

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
RETURN OF GRANT FUNDS	10,675		10,675

TY 2021 Other Increases Schedule**Name:** TINY BEAM FUND INC

CARMEN LEE

EIN: 83-3062276**Other Increases Schedule**

Description	Amount
2020 DIVIDEND REC'D IN 2021	530
2021 FOREIGN TAX PAID IN 2022	4
NON DIVIDEND DISTRIBUTIONS 2021	8,433

TY 2021 Other Professional Fees Schedule**Name:** TINY BEAM FUND INC

CARMEN LEE

EIN: 83-3062276

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
WEBSITE COUNSEL - TECH COLLECTIVE	6,100	4,575	0	1,525
PROFESSIONAL RESEARCH - GIVING EVIDENCE	3,520	2,640	0	880
MEMBERSHIP FEE - COUNCIL ON FOUNDATIONS	1,000	750	0	250
CONSULTING - HURWIT & ASSOCIATES	2,207	1,655	0	552

**TY 2021 Substantial Contributors
Schedule****Name:** TINY BEAM FUND INC

CARMEN LEE

EIN: 83-3062276**Substantial Contributors Schedule**

Name	Address
LEE FUNG KUNG WAH	10/F UNITED CENTRE 95 QUEENSWAY HK

TY 2021 Taxes Schedule**Name:** TINY BEAM FUND INC

CARMEN LEE

EIN: 83-3062276**Taxes Schedule**

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOREIGN TAXES WITHHELD	1,132	1,132	0	0

Schedule B
(Form 990)
Department of the Treasury
Internal Revenue Service

Schedule of Contributors
▶ Attach to Form 990, 990-EZ, or 990-PF.
▶ Go to www.irs.gov/Form990 for the latest information.

OMB No. 1545-0047
2021

Name of the organization
TINY BEAM FUND INC
CARMEN LEE

Employer identification number
83-3062276

Organization type (check one):

Filers of:

Section:

Form 990 or 990-EZ 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 other 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 33¹/₃% 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 990PF, Part I, line 2, to certify that it doesn't meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

Name of organization
 TINY BEAM FUND INC
 CARMEN LEE

Employer identification number
 83-3062276

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

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	LEE FUNG KUNG WAH 10/F UNITED CENTRE 95 QUEENSWAY HK	\$ 10,000,000	<input checked="" type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash (Complete Part II for noncash contributions.)
		\$	<input type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash (Complete Part II for noncash contributions.)
		\$	<input type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash (Complete Part II for noncash contributions.)
		\$	<input type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash (Complete Part II for noncash contributions.)
		\$	<input type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash (Complete Part II for noncash contributions.)
		\$	<input type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash (Complete Part II for noncash contributions.)

Name of organization
 TINY BEAM FUND INC
 CARMEN LEE

Employer identification number
 83-3062276

Part II Noncash Property

(a) No. from Part I	(b) Description of noncash property given <small>(see instructions). Use duplicate copies of Part II if additional space is needed.</small>	(c) FMV (or estimate) <small>(See instructions)</small>	(d) Date received
-	_____ _____ _____	_____ \$	_____
-	_____ _____ _____	_____ \$	_____
-	_____ _____ _____	_____ \$	_____
-	_____ _____ _____	_____ \$	_____
-	_____ _____ _____	_____ \$	_____
-	_____ _____ _____	_____ \$	_____
-	_____ _____ _____	_____ \$	_____
-	_____ _____ _____	_____ \$	_____
-	_____ _____ _____	_____ \$	_____

Name of organization
TINY BEAM FUND INC
CARMEN LEE

Employer identification number
83-3062276

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.) ▶ \$ _____
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
	_____ _____	_____ _____	_____ _____
(e) Transfer of gift			
Transferee's name, address, and ZIP 4		Relationship of transferor to transferee	
_____ _____		_____ _____	

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

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

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