

Return of Private Foundation

Form Department of the Treasury Internal Revenue Service

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.

For calendar year 2020, or tax year beginning 01-01-2020, and ending 12-31-2020

Name of foundation: PAUL AND JOANNE EGERMAN FAMILY CHARITABLE FOUNDATION. A Employer identification number: 04-6835621. B Telephone number: (781) 453-8700. C If exemption application is pending, check here. D 1. Foreign organizations, check here. E If private foundation status was terminated under section 507(b)(1)(A), check here. F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here. I Fair market value of all assets at end of year: \$25,916,553. J Accounting method: Cash.

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions).)

Table with 4 columns: (a) Revenue and expenses per books, (b) Net investment income, (c) Adjusted net income, (d) Disbursements for charitable purposes (cash basis only). Rows include Revenue (1-12) and Operating and Administrative Expenses (13-26), leading to Total revenue of 1,263,664 and Total expenses of 1,458,119, resulting in a net investment income of 1,034,619.

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			
	2 Savings and temporary cash investments	701,941	1,408,644	1,408,644
	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)	1,399,225	1,398,288	1,492,360
	b Investments—corporate stock (attach schedule)	2,381,194	2,982,219	4,943,289
	c Investments—corporate bonds (attach schedule)	2,806,545	2,819,993	2,994,482
	11 Investments—land, buildings, and equipment: basis ▶ _____ Less: accumulated depreciation (attach schedule) ▶ _____			
	12 Investments—mortgage loans			
	13 Investments—other (attach schedule)	13,460,982	11,980,797	15,077,778
	14 Land, buildings, and equipment: basis ▶ _____ Less: accumulated depreciation (attach schedule) ▶ _____			
15 Other assets (describe ▶ _____)				
16 Total assets (to be completed by all filers—see the instructions. Also, see page 1, item I)	20,749,887	20,589,941	25,916,553	
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	20,749,887	20,589,941	
	29 Total net assets or fund balances (see instructions)	20,749,887	20,589,941	
30 Total liabilities and net assets/fund balances (see instructions)	20,749,887	20,589,941		

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	20,749,887
2 Enter amount from Part I, line 27a	2	-190,485
3 Other increases not included in line 2 (itemize) ▶ _____	3	32,352
4 Add lines 1, 2, and 3	4	20,591,754
5 Decreases not included in line 2 (itemize) ▶ _____	5	1,813
6 Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 29.	6	20,589,941

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.)
1 a	160 SHARES AON PLC REGISTERED S HS CL A	P	2019-11-06	2020-06-08
b	223 SHARES AON PLC REGISTERED S HS CL A	P	2020-05-01	2020-06-08
c	2407 SHARES CLARIVATE ANALYTICS PLC	P	2019-07-25	2020-03-30
d	238 SHARES AMERCO COMMON STOCK	P	2019-10-23	2020-03-11
e	66 SHARES AMERCO COMMON STOCK	P	2019-11-06	2020-03-11
	1168 SHARES CROWN HLDGS INC COM	P	2019-11-06	2020-05-05
	264 SHARESCROWN HLDGS INC COM	P	2020-01-08	2020-05-05
	1651 SHARES ELANCO ANIMAL HEALTH INC COM	P	2019-08-16	2020-05-08
	2875 SHARES ELANCO ANIMAL HEALTH INC COM	P	2019-09-03	2020-05-08
	1392 SHARES HEXCEL CORP NEW COM	P	2020-02-27	2020-03-24
	1628 SHARES HYATT HOTELS CORP COM CL A	P	2020-06-05	2020-08-26
	929 SHARES HYATT HOTELS CORP COM CL A	P	2020-06-08	2020-08-26
	943 SHARES INSTRUCTURE INC COM	P	2019-04-05	2020-01-08
	369 SHARES INSTRUCTURE INC COM	P	2019-04-05	2020-03-11
	1171 SHARES INSTRUCTURE INC COM	P	2019-04-16	2020-03-11
	536 SHARES INSTRUCTURE INC COM	P	2019-10-09	2020-03-11
	51 SHARES MARTIN MARIETTA MATLS INC COM	P	2020-03-30	2020-10-07
	2001 SHARES MEDALLIA INC COM	P	2020-09-02	2020-11-04
	1512 SHARES MEDALLIA INC COM	P	2020-09-08	2020-11-04
	920 SHARES PTC INC COM	P	2019-09-23	2020-07-08
	525 SHARES PTC INC COM	P	2019-09-23	2020-09-04
	309 SHARES PTC INC COM	P	2019-11-06	2020-09-04
	458 SHARES PTC INC COM	P	2020-01-08	2020-09-04
	186 SHARES SVB FINL GROUP COM	P	2019-10-03	2020-05-21
	14 SHARES SHERWIN WILLIAMS CO COM	P	2020-05-08	2020-09-22
	1212 SHARES TWITTER INC COM	P	2020-03-12	2020-09-22
	366 SHARES WOODWARD INC COM	P	2020-03-30	2020-04-22
	1409 SHARES WOODWARD INC COM	P	2020-03-24	2020-04-22
	338 SHARES AON PLC REGISTERED S HS CL A	P	2019-03-15	2020-06-08
	306 SHARES APTIV PLC SHS COM	P	2016-01-14	2020-02-11
	39 SHARES APTIV PLC SHS COM	P	2017-11-27	2020-02-11
	1090.75 SHARES ARCONIC CORP COM	P	2018-07-17	2020-04-06
	272.25 SHARES ARCONIC CORP COM	P	2018-10-29	2020-04-06
	879 SHARES BALL CORP COM	P	2019-07-29	2020-11-04
	179 SHARES ELANCO ANIMAL HEALTH INC COM	P	2019-01-14	2020-05-08
	105 SHARES EQUINIX INC COM	P	2017-12-21	2020-03-30
	39 SHARES EQUINIX INC COM	P	2018-01-11	2020-03-30
	43 SHARES EQUINIX INC COM	P	2018-01-11	2020-06-05
	85 SHARES EQUINIX INC COM	P	2018-03-22	2020-06-05
	57 SHARES EQUINIX INC COM	P	2019-01-16	2020-06-05
	368 SHARES FISERV INC COM	P	2018-01-09	2020-03-03
	364 SHARES GUIDEWIRE SOFTWARE INC COM	P	2018-12-07	2020-01-14
	382 SHARES GUIDEWIRE SOFTWARE INC COM	P	2018-12-07	2020-04-01
	512 SHARES GUIDEWIRE SOFTWARE INC COM	P	2019-03-12	2020-04-01
	965 SHARES HEXCEL CORP NEW COM	P	2018-11-09	2020-01-08
	760 SHARES HEXCEL CORP NEW COM	P	2018-11-19	2020-01-08
	4363 SHARES HOWMET AEROSPACE INC COM	P	2018-07-17	2020-04-06
	1089 SHARES HOWMET AEROSPACE INC COM	P	2018-10-29	2020-04-06
	483 SHARES IQVIA HLDGS INC COM	P	2015-05-21	2020-09-04
	1044 SHARES KEYSIGHT TECHNOLOGIES INC COM	P	2017-06-22	2020-05-19
	356 SHARES MARTIN MARIETTA MATLS INC COM	P	2018-10-30	2020-07-23
	52 SHARES MARTIN MARIETTA MATLS INC COM	P	2018-10-30	2020-10-07
	143 SHARES MARTIN MARIETTA MATLS INC COM	P	2018-11-19	2020-10-07
	1771 SHARES NEW YORK TIMES CO CL A	P	2018-07-27	2020-03-30
	484 SHARES STARBUCKS CORP COM	P	2018-07-13	2020-02-11
	125000 SHARES GOLDMAN SACHS GROUP INC SR GLOBAL NT	P	2014-05-08	2020-11-30
	25000 SHARES GOLDMAN SACHS GROUP INC SR GLOBAL NT	P	2017-11-01	2020-11-30
	125000 SHARES INTERCONTINENTAL EXCHANGE INC GTD FXD RT	P	2017-01-17	2020-12-09
	50000 SHARES INTERCONTINENTAL EXCHANGE INC GTD FXD RT	P	2017-11-30	2020-12-09
	125000 SHARES JPMORGAN CHASE & CO FIXED RT NOTES	P	2015-09-09	2020-09-21
	50000 SHARES JPMORGAN CHASE & CO FIXED RT NOTES	P	2017-11-30	2020-09-21
	125000 SHARES PEPSICO INC SR NT	P	2018-01-29	2020-12-09
	200000 SHARES UNITED STATES TREAS NTS 2.750%	P	2018-12-20	2020-05-21
	125000 SHARES WELLS FARGO & CO NEW MEDIUM TERM SR NTS FIXED RT SER	P	2016-03-23	2020-07-01
	50000 SHARES WELLS FARGO & CO NEW MEDIUM TERM SR NTS FIXED RT SER	P	2016-09-07	2020-07-01
	.500 SHARES BROOKFIELD RENEWABLE CORPORATION EXCH REGISTERED SHS -A-	P	2020-11-16	2020-12-16
	12000 SHARES FLEXSHARES TR MORNINGSTAR GLOBAL UPSTREAM NAT RES INDEX FD	P	2019-05-24	2020-03-12
	1338 SHARES ISHARES TR CORE S&P SMALL-CAP ETF	P	2019-05-24	2020-05-08
	9357 SHARES VANGUARD BD INDEX FD S VANGUARD TOTAL BD MARKET ETF	P	2019-05-24	2020-03-12
	2343 SHARES VANGUARD BD INDEX FD S VANGUARD TOTAL BD MARKET ETF	P	2020-02-19	2020-03-12
	1708 SHARES VANGUARD BD INDEX FD S VANGUARD TOTAL BD MARKET ETF	P	2020-08-19	2020-11-16
	30170 SHARES VANGUARD INTL EQUITY INDEX FDS ETSE EMERGING MKTS ETF	P	2019-05-31	2020-05-08
	29725 SHARES FLEXSHARES TR MORNINGSTAR GLOBAL UPSTREAM NAT RES INDEX FD	P	2017-02-27	2020-03-12
	5997 SHARES ISHARES TR CORE S&P SMALL-CAP ETF	P	2015-05-18	2020-05-08
	1355 SHARES ISHARES TR CORE S&P SMALL-CAP ETF	P	2018-05-14	2020-05-08
	1596 SHARES ISHARES TR CORE S&P SMALL-CAP ETF	P	2019-02-14	2020-05-08
	10132 SHARES VANGUARD INTL FD FTSE DEVELOPED MKTS ETF	P	2014-04-24	2020-08-19
	440 SHARES VANGUARD INTL FD FTSE DEVELOPED MKTS ETF	P	2018-08-29	2020-08-19
	3504 SHARES VANGUARD INTL EQUITY INDEX FDS GLOBAL EX-US REAL ESTATE INDE	P	2013-12-13	2020-05-08
	1438 SHARES VANGUARD INTL EQUITY INDEX FDS GLOBAL EX-US REAL ESTATE INDE	P	2013-12-17	2020-05-08
	6960 SHARES VANGUARD INTL EQUITY INDEX FDS GLOBAL EX-US REAL ESTATE INDE	P	2014-04-24	2020-05-08
	341 SHARES VANGUARD INTL EQUITY INDEX FDS GLOBAL EX-US REAL ESTATE INDE	P	2018-08-29	2020-05-08
	4504 SHARES VANGUARD INTL EQUITY INDEX FDS FTSE EMERGING MKTS ETF	P	2017-11-14	2020-08-19
	720 SHARES VANGUARD INTL EQUITY INDEX FDS FTSE EMERGING MKTS ETF	P	2018-08-29	2020-08-19
	457 SHARES VANGUARD INDEX FDS VANGUARD TOTAL STK MKT ETF	P	2018-02-20	2020-02-19
	2987.750 SHARES WASATCH INTERNATIONAL GROWTH FUND INSTL CLASS	P	2017-11-14	2020-11-16
	617.917 SHARES WASATCH INTERNATIONAL GROWTH FUND INSTL CLASS	P	2017-12-27	2020-11-16
	1039.142 SHARES WASATCH INTERNATIONAL GROWTH FUND INSTL CLASS	P	2019-05-24	2020-11-16
	532 SHARES ISHARES TR RUSSELL 1000 EFT	P	2009-04-09	2020-02-19
	1880 SHARES ISHARES TR RUSSELL 1000 EFT	P	2009-04-09	2020-08-19
	1238 SHARES ISHARES TR RUSSELL 1000 EFT	P	2009-04-09	2020-11-16
	2154 SHARES VANGUARD INDEX FDS REAL ESTATE INDEX FD ETF	P	2010-09-15	2020-08-19
	766 SHARES VANGUARD INDEX FDS REAL ESTATE INDEX FD ETF	P	2010-10-04	2020-08-19
	152 SHARES VANGUARD INDEX FDS REAL ESTATE INDEX FD ETF	P	2010-09-15	2020-11-16
	1602 SHARES VANGUARD INDEX FDS REAL ESTATE INDEX FD ETF	P	2010-10-04	2020-11-16
	1501 SHARES VANGUARD INDEX FDS VANGUARD TOTAL STK MKT ETF	P	2011-10-05	2020-02-19

CAPITAL GAINS DIVIDENDS

	(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	31,708		30,987	721
b	44,192		39,216	4,976
c	48,881		38,891	9,990
d	73,059		96,773	-23,714
e	20,261		28,096	-7,835
	74,033		87,983	-13,950
	16,733		18,692	-1,959
	33,200		48,242	-15,042
	57,814		74,688	-16,874
	47,556		95,272	-47,716
	89,734		104,801	-15,067
	51,206		62,062	-10,856
	45,735		43,356	2,379
	17,999		16,966	1,033
	57,119		57,418	-299
	26,145		22,165	3,980
	13,521		9,128	4,393
	56,122		78,039	-21,917
	42,407		50,371	-7,964
	71,694		61,289	10,405
	46,252		34,975	11,277
	27,222		22,326	4,896
	40,349		34,990	5,359
	35,823		36,342	-519
	9,655		7,618	2,037
	49,742		33,215	16,527
	19,063		23,308	-4,245
	73,389		78,136	-4,747
	66,979		57,328	9,651
	27,812		17,086	10,726
	3,545		3,269	276
	7,924		9,554	-1,630
	1,978		2,495	-517
	83,112		63,415	19,697
	3,600		5,610	-2,010
	66,942		47,076	19,866
	24,864		17,118	7,746
	28,614		18,873	9,741
	56,562		35,386	21,176
	37,930		21,675	16,255
	40,566		20,964	19,602
	40,897		31,008	9,889
	28,898		32,541	-3,643
	38,733		46,894	-8,161
	71,480		59,790	11,690
	56,295		45,043	11,252
	58,534		74,255	-15,721
	14,610		19,392	-4,782
	76,883		36,304	40,579
	101,088		39,555	61,533
	80,181		58,546	21,635
	13,786		8,552	5,234
	37,912		26,691	11,221
	55,693		42,283	13,410
	42,446		24,682	17,764
	128,952		126,457	2,495
	25,791		25,436	355
	137,195		128,707	8,488
	54,878		51,687	3,191
	132,250		127,047	5,203
	52,900		51,219	1,681
	136,321		127,454	8,867
	202,781		200,084	2,697
	128,819		127,014	1,805
	51,528		50,982	546
	25		24	1
	256,857		374,881	-118,024
	84,071		100,537	-16,466
	762,025		762,689	-664
	190,812		200,065	-9,253
	149,990		151,445	-1,455
	1,099,695		1,215,851	-116,156
	636,255		884,274	-248,019
	376,812		351,324	25,488
	85,139		110,121	-24,982
	100,282		125,653	-25,371
	426,446		419,460	6,986
	18,519		19,237	-718
	157,735		190,705	-32,970
	64,733		77,681	-12,948
	313,309		383,635	-70,326
	15,350		19,951	-4,601
	198,694		200,113	-1,419
	31,763		30,838	925
	78,769		64,021	14,748
	109,352		100,000	9,352
	22,616		21,188	1,428
	38,033		29,719	8,314
	100,157		24,644	75,513
	355,364		87,089	268,275
	249,952		57,249	192,603
	172,625		100,308	72,417
	61,389		35,071	26,318
	13,005		6,919	6,086
	137,071		72,953	64,118
	258,715		86,591	172,124
	139,050			139,050

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) Gain (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col.(h))
a				721
b				4,976
c				9,990
d				-23,714
e				-7,835
				-13,950
				-1,959
				-15,042
				-16,874
				-17,716
				-15,067
				-10,856
				2,379
				1,033
				-299
				3,980
				4,393
				-21,917
				-7,964
				10,405
				11,277
				4,896
				5,359
				-519
				2,037
				-4,245
				-4,747
				9,651
				10,726
				276
				-1,630
				-517
				19,697
				-2,010
				19,866
				7,746

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

1a Exempt operating foundations described in section 4940(d)(2), check here [] and enter "N/A" on line 1.
Date of ruling or determination letter: _____ (attach copy of letter if necessary—see instructions)
b Reserved 1 14,381
c All other domestic foundations enter 1.39% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) 2 0
3 Add lines 1 and 2. 3 14,381
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) 4 0
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0- 5 14,381
6 Credits/Payments:
a 2020 estimated tax payments and 2019 overpayment credited to 2020 6a 14,344
b Exempt foreign organizations—tax withheld at source 6b
c Tax paid with application for extension of time to file (Form 8868) 6c 0
d Backup withholding erroneously withheld 6d 0
7 Total credits and payments. Add lines 6a through 6d 7 14,344
8 Enter any penalty for underpayment of estimated tax. Check here [x] if Form 2220 is attached. 8 0
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed 9 37
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid. 10
11 Enter the amount of line 10 to be: Credited to 2021 estimated tax Refunded 11

Part VII-A Statements Regarding Activities

1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign? Yes No
1a No No
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? (see Instructions for definition). Yes No
1b No No
If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.
c Did the foundation file Form 1120-POL for this year?. Yes No
1c No No
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year:
(1) On the foundation. \$ 0 (2) On foundation managers. \$ 0
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. \$ 0
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? Yes No
2 No No
If "Yes," attach a detailed description of the activities.
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes Yes No
3 No No
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year? Yes No
4a No No
b If "Yes," has it filed a tax return on Form 990-T for this year? Yes No
4b No No
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? Yes No
5 No No
If "Yes," attach the statement required by General Instruction T.
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either:
• By language in the governing instrument, or
• By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument? Yes
6 Yes
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV. Yes
7 Yes
8a Enter the states to which the foundation reports or with which it is registered (see instructions) MA
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation Yes
8b Yes
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2020 or the taxable year beginning in 2020? See the instructions for Part XIV. If "Yes," complete Part XIV Yes No
9 No No
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses. Yes No
10 No No

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule. See instructions.				No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement. See instructions				No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ▶ <u>N/A</u>	Yes			
14	The books are in care of ▶ <u>P EGERMAN CO J SOLOMON CPA</u> Telephone no. ▶ <u>(781) 453-8700</u> Located at ▶ <u>KATZ NANNIS SOLOMON PC 800 SOUTH STREET SUITE 250 WALTHAM MA 024531480</u> ZIP+4 ▶ _____				
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 15				
16	At any time during calendar year 2020, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes", enter the name of the foreign		Yes	No	No

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.

				Yes	No
1a During the year did the foundation (either directly or indirectly):					
(1) Engage in the sale or exchange, or leasing of property with a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No					
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No					
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No					
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No					
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No					
(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No					
b If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions Organizations relying on a current notice regarding disaster assistance check here. ▶ <input type="checkbox"/>	1b				
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2020?	1c				No
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):					
a At the end of tax year 2020, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2020? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years ▶ 20____, 20____, 20____, 20____					
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions.)	2b				
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ▶ 20____, 20____, 20____, 20____					
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No					
b If "Yes," did it have excess business holdings in 2020 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period?(Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2020.)	3b				
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a				No
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2020?	4b				No

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

- 5a** During the year did the foundation pay or incur any amount to:
 - (1)** Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? Yes No
 - (2)** Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive? Yes No
 - (3)** Provide a grant to an individual for travel, study, or other similar purposes? Yes No
 - (4)** Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions. Yes No
 - (5)** Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? Yes No
- b** If any answer is "Yes" to 5a(1)–(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance? See instructions. Organizations relying on a current notice regarding disaster assistance check here. Yes No
- c** If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? Yes No
If "Yes," attach the statement required by Regulations section 53.4945–5(d).
- 6a** Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? Yes No
- b** Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? Yes No
If "Yes" to 6b, file Form 8870.
- 7a** At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? Yes No
- b** If "Yes", did the foundation receive any proceeds or have any net income attributable to the transaction? Yes No
- 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? Yes No

	Yes	No
5b		
6b		No
7b		

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
PAUL EGERMAN 77 WESTCLIFF ROAD WESTON, MA 02493	TRUSTEE 1.00	0	0	0
JOANNE EGERMAN 77 WESTCLIFF ROAD WESTON, MA 02493	TRUSTEE 1.00	0	0	0
BENJAMIN CHIGIER C/O 77 WESTCLIFF ROAD WESTON, MA 02493	TRUSTEE 1.00	0	0	0

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

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
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)

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 IX-A Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.

	Expenses
1 NONE	0
2	
3	
4	

Part IX-B Summary of Program-Related Investments (see instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.	Amount
1 NONE	0
2	
All other program-related investments. See instructions.	
3 	0
Total. Add lines 1 through 3	0

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities.	1a	24,106,084
b	Average of monthly cash balances.	1b	1,055,292
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	25,161,376
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	25,161,376
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	377,421
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	24,783,955
6	Minimum investment return. Enter 5% of line 5.	6	1,239,198

Part XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here and do not complete this part.)

1	Minimum investment return from Part X, line 6.	1	1,239,198
2a	Tax on investment income for 2020 from Part VI, line 5.	2a	14,381
b	Income tax for 2020. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b.	2c	14,381
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	1,224,817
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	1,224,817
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 XIII, line 1.	7	1,224,817

Part XII Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
a	Expenses, contributions, gifts, etc.—total from Part I, column (d), line 26.	1a	1,155,000
b	Program-related investments—total from Part IX-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 V, line 8, and Part XIII, line 4	4	1,155,000
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b. See instructions.	5	0
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	1,155,000

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 2019	(c) 2019	(d) 2020
1 Distributable amount for 2020 from Part XI, line 7				1,224,817
2 Undistributed income, if any, as of the end of 2020:				
a Enter amount for 2019 only.			0	
b Total for prior years: 20____, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2020:				
a From 2015.				
b From 2016.	215,664			
c From 2017.	650,687			
d From 2018.	412,387			
e From 2019.	376,523			
f Total of lines 3a through e.	1,655,261			
4 Qualifying distributions for 2020 from Part XII, line 4: ▶ \$ <u>1,155,000</u>				
a Applied to 2019, 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 2020 distributable amount				1,155,000
e Remaining amount distributed out of corpus	0			
5 Excess distributions carryover applied to 2020. (If an amount appears in column (d), the same amount must be shown in column (a).)	69,817			69,817
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	1,585,444			
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 2020				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 2015 not applied on line 5 or line 7 (see instructions)	0			
9 Excess distributions carryover to 2021. Subtract lines 7 and 8 from line 6a	1,585,444			
10 Analysis of line 9:				
a Excess from 2016	145,847			
b Excess from 2017	650,687			
c Excess from 2018.	412,387			
d Excess from 2019	376,523			
e Excess from 2020				

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 2020, 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
b 85% of line 2a
c Qualifying distributions from Part XII, line 4 for each year listed
d Amounts included in line 2c not used directly for active conduct of exempt activities
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c
3 Complete 3a, b, or c for the alternative test relied upon:
a "Assets" alternative test—enter:
(1) Value of all assets
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)
b "Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed
c "Support" alternative test—enter:
(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)
(3) Largest amount of support from an exempt organization
(4) Gross investment income

Table with 5 columns: (a) 2020, (b) 2019, (c) 2018, (d) 2017, (e) Total. Rows correspond to items 2a through 3(4).

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).)
PAUL EGERMAN

Horizontal scroll bar for item 1a.

- 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:

Horizontal scroll bar for item 2a-d.

Part XV **Supplementary Information** (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year				
ACTBLUE CHARITIES INC 366 SUMMER ST SOMERVILLE,MA 02144	N/A	501(C)(3)	UNRESTRICTED CHARITABLE GIFT	20,000
ANTI DEFAMATION LEAGUE DEPTRL PO BOX 96226 WASHINGTON,DC 200906226	N/A	PUBLIC 501(C)(3)	UNRESTRICTED CHARITABLE GIFT	200,000
DEMOS 1340 CENTRE ST STE 209 NEWTON CENTRE,MA 02459	N/A	PUBLIC 501(C)(3)	UNRESTRICTED CHARITABLE GIFT	200,000
HARVARD UNIVERSITY MASSACHUSETTS HALL CAMBRIDGE,MA 02138	N/A	PUBLIC 501(C)(3)	UNRESTRICTED CHARITABLE GIFT	75,000
HEALTH LAW ADVOCATES INC 1 FEDERAL STREET 5TH FLOOR BOSTON,MA 02110	N/A	PUBLIC 501(C)(3)	UNRESTRICTED CHARITABLE GIFT	10,000
HUMAN RELATIONS SERVICES INC 11 CHAPEL PLACE WELLESLEY HILLS,MA 02481	N/A	PUBLIC 501(C)(3)	UNRESTRICTED CHARITABLE GIFT	10,000
IF NOT NOW EDUCATION FUND PO BOX 26425 WASHINGTON,DC 20001	N/A	PUBLIC 501(C)(3)	UNRESTRICTED CHARITABLE GIFT	15,000
J STREET EDUCATIONAL FUND PO BOX 66073 WASHINGTON,DC 20035	N/A	PUBLIC 501(C)(3)	UNRESTRICTED CHARITABLE GIFT	65,000
JEWISH CURRENTS PO BOX 130049 BROOKLYN,NY 11213	N/A	PUBLIC 501(C)(3)	UNRESTRICTED CHARITABLE GIFT	50,000
MUSEUM OF SCIENCE 1 SCIENCE PARK BOSTON,MA 02114	N/A	PUBLIC 501(C)(3)	UNRESTRICTED CHARITABLE GIFT	65,000
PLANNED PARENTHOOD LEAGUE OF MASSACHUSETTS 1055 COMMONWEALTH AVE BOSTON,MA 02115	N/A	PUBLIC 501(C)(3)	UNRESTRICTED CHARITABLE GIFT	100,000
PURPOSE FOUNDATION 507 58TH STREET NE WASHINGTON,DC 20019	N/A	PUBLIC 501(C)(3)	UNRESTRICTED CHARITABLE GIFT	25,000
T'RUAH 266 W37TH STREET NEW YORK,NY 10018	N/A	PUBLIC 501(C)(3)	UNRESTRICTED CHARITABLE GIFT	10,000
TEMPLE BETH ELOHIM 10 BETHEL ROAD WELLESLEY,MA 02481	N/A	PUBLIC 501(C)(3)	UNRESTRICTED CHARITABLE GIFT	10,000
TIDES FOUNDATION PO BOX 29903 SAN FRANCISCO,CA 941290903	N/A	PUBLIC 501(C)(3)	UNRESTRICTED CHARITABLE GIFT	100,000
YAMPOL - EGERMAN SCHOLARSHIP FUND UNIVERSITY OF CALIFORNIA ONE SHIELDS AVENUE DAVIS,CA 95616	N/A	PUBLIC 501(C)(3)	UNRESTRICTED CHARITABLE GIFT	200,000
Total				3a 1,155,000
b Approved for future payment				
Total				3b 0

Additional Data

Return to Form

Software ID:

Software Version:

Form 990PF - Special Condition Description:

Special Condition Description

TY 2020 IRS 990 e-File Render

Name: PAUL AND JOANNE EGERMAN FAMILY
CHARITABLE FOUNDATION

EIN: 04-6835621

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
KATZ, NANNIS + SOLOMON, P.C	3,000	3,000		0

TY 2020 IRS 990 e-File Render

Name: PAUL AND JOANNE EGGERMAN FAMILY
CHARITABLE FOUNDATION

EIN: 04-6835621

Category	Amount
NONE	0

TY 2020 IRS 990 e-File Render

Name: PAUL AND JOANNE EGERMAN FAMILY
CHARITABLE FOUNDATION

EIN: 04-6835621

Name of Bond	End of Year Book Value	End of Year Fair Market Value
PERSHING LLC	2,819,993	2,994,482

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Name: PAUL AND JOANNE EGERMAN FAMILY
CHARITABLE FOUNDATION

EIN: 04-6835621

Name of Stock	End of Year Book Value	End of Year Fair Market Value
PERSHING LLC	2,982,219	4,943,289

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Name: PAUL AND JOANNE EGERMAN FAMILY
CHARITABLE FOUNDATION

EIN: 04-6835621

**US Government Securities - End of
Year Book Value:**

570,674

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

604,708

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

827,614

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

887,652

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Name: PAUL AND JOANNE EGGERMAN FAMILY
CHARITABLE FOUNDATION

EIN: 04-6835621

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
PERSHING LLC	AT COST	11,980,797	15,077,778

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Name: PAUL AND JOANNE EGGERMAN FAMILY
CHARITABLE FOUNDATION

EIN: 04-6835621

Description	Amount
UNREALIZED DEPRECIATION	1,813

TY 2020 IRS 990 e-File Render

Name: PAUL AND JOANNE EGGERMAN FAMILY
CHARITABLE FOUNDATION

EIN: 04-6835621

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
COMMONWEALTH OF MASSACHUSETTS - FILING FEES	500	500		0
INVESTMENT FEES	23,765	23,765		0

TY 2020 IRS 990 e-File Render

Name: PAUL AND JOANNE EGGERMAN FAMILY
CHARITABLE FOUNDATION

EIN: 04-6835621

Description	Amount
NON-DIVIDEND DISTRIBUTIONS	32,352

TY 2020 IRS 990 e-File Render

Name: PAUL AND JOANNE EGERMAN FAMILY
CHARITABLE FOUNDATION

EIN: 04-6835621

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOREIGN TAXES PAID	11,295	11,295		0
FEDERAL TAX PAYMENTS	70,104	0		0