

Application for Recognition of Exemption
Under Section 501(c)(3) of the Internal Revenue Code

To be filed in the key district for the area in which the organization has its principal office or place of business.

This application, when properly completed, shall constitute the notice required under section 508(a) of the Internal Revenue Code in order that an applicant may be treated as described in section 501(c)(3) of the Code, and the notice under section 508(b) appropriate to an organization claiming not to be a private foundation within the meaning of section 509(a). (Read the instructions for each part carefully before making any entries.) The organization must have an organizing instrument (See Part II) before this application may be filed.

Part I—Identification

1 Full name of organization The Harry L. Bradley, Jr. Charitable Fund		2 Employer identification number (If none, attach Form SS-4) None - Form SS-Y attached	
3(a) Address (number and street) Room 835, 73 Tremont Street		Check here if applying under section: <input type="checkbox"/> 501(e) <input type="checkbox"/> 501(f)	
3(b) City or town, State and ZIP code Boston, Massachusetts 02108		4 Name and phone number of person to be contacted Robert J. Morrissey 227-0185	
5 Month the annual accounting period ends June	6 Date incorporated or formed December 21, 1981	7 Activity Codes 600 602	
8(a) Has the organization filed Federal income tax returns? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," state the form number(s), year(s) filed, and Internal Revenue Office where filed ▶			
8(b) Has the organization filed exempt organization information returns? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," state the form number(s), year(s) filed, and Internal Revenue Office where filed ▶			

Part II.—Type of Entity and Organizational Documents (See instructions)

Check the applicable entity box below and attach a conformed copy of the organization's organizing and operational documents as indicated for each entity.

Corporation—Articles of incorporation, bylaws. Trust—Trust indenture. Other—Constitution or articles, bylaws.

Part III.—Activities and Operational Information

1 What are or will be the organization's sources of financial support? List in order of magnitude. If a portion of the receipts is or will be derived from the earnings of patents, copyrights, or other assets (excluding stock, bonds, etc.), identify such item as a separate source of receipts. Attach representative copies of solicitations for financial support.

Financial support for The Harry L. Bradley, Jr. Charitable Fund will be derived primarily from contributions by Harry L. Bradley and from interest income on the trust principal.

2 Describe the organization's fund-raising program, both actual and planned, and explain to what extent it has been put into effect. (Include details of fund-raising activities such as selective mailings, formation of fund-raising committees, use of professional fund raisers, etc.)

No fund-raising activities are planned.

I declare under the penalties of perjury that I am authorized to sign this application on behalf of the above organization and I have examined this application, including the accompanying statements, and to the best of my knowledge it is true, correct and complete.

Robert J. Morrissey
 (Signature)

Trustee
 (Title or authority of signer)

Dec 23, 1981
 (Date)

Part III.—Activities and Operational Information (Continued)

- 3 Give a narrative description of the activities presently carried on by the organization, and those that will be carried on. If the organization is not fully operational, explain what stage of development its activities have reached, what further steps remain for the organization to become fully operational, and when such further steps will take place. The narrative should specifically identify the services performed or to be performed by the organization. (Do not state the purposes of the organization in general terms or repeat the language of the organizational documents.) If the organization is a school, hospital, or medical research organization, include sufficient information in your description to clearly show that the organization meets the definition of that particular activity that is contained in the instructions for Part VII-A.

The Harry L. Bradley, Jr. Charitable Fund has been established to provide for the financial support of other charitable, religious scientific, literary and educational entities. Although the trust is not yet fully operational, it is anticipated that by January of 1982 sufficient funds will have been obtained to begin investment of the trust principal and distribution of income from and principal of the Fund, as the Trustee may deem appropriate, to charitable corporations, trusts, community chests, foundations or other entities organized and operated exclusively for religious, charitable, scientific, literary or educational purposes.

4 The membership of the organization's governing body is:

(a) Names, addresses, and duties of officers, directors, trustees, etc.	(b) Specialized knowledge, training, expertise, or particular qualifications
<p>Robert J. Morrissey, Trustee Withington, Cross, Park & Groden 73 Tremont Street Boston, Massachusetts 02108</p>	

The duties of the above Trustee is to hold, manage, invest and reinvest trust principal and income and to dispose of such

Part III.—Activities and Operational Information (Continued)

4 (c) Do any of the above persons serve as members of the governing body by reason of being public officials or being appointed by public officials? Yes No
If "Yes," please name such persons and explain the basis of their selection or appointment.

(d) Are any members of the organization's governing body "disqualified persons" with respect to the organization (other than by reason of being a member of the governing body) or do any of the members have either a business or family relationship with "disqualified persons"? (See specific instructions 4(d).) . . . Yes No
If "Yes," please explain.

Robert J. Morrissey, Trustee, is a manager and creator of trust

(e) Have any members of the organization's governing body assigned income or assets to the organization? . Yes No
If "Yes," attach a copy of assignment(s) and a list of items assigned.

(f) Is it anticipated that any current or future member of the organization's governing body will assign income or assets to the organization? Yes No
If "Yes," explain fully on an attached sheet.

5 Does the organization control or is it controlled by any other organization? Yes No
Is the organization the outgrowth of another organization, or does it have a special relationship to another organization by reason of interlocking directorates or other factors? Yes No
If either of these questions is answered "Yes," please explain.

6 Is the organization financially accountable to any other organization? Yes No
If "Yes," please explain and identify the other organization. Include details concerning accountability or attach copies of reports if any have been rendered.

7 (a) What assets does the organization have that are used in the performance of its exempt function? (Do not include property producing investment income.) If any assets are not fully operational, explain what stage of completion has been reached, what additional steps remain to be completed, and when such final steps will be taken.

None

(b) To what extent have you used, or do you plan to use contributions as an endowment fund, i.e., hold contributions to produce income for the support of your exempt activities?

To extent Trustee deems necessary.

8 (a) What benefits, services, or products will the organization provide with respect to its exempt function?
The Fund will provide financial support for other charitable, religious, scientific, literary and educational organizations.

Part III.—Activities and Operational Information (Continued)

8 (b) Have the recipients been required or will they be required to pay for the organization's benefits, services, or products? Yes No
If "Yes," please explain and show how the charges are determined.

9 Does or will the organization limit its benefits, services or products to specific classes of individuals? . . . Yes No
If "Yes," please explain how the recipients or beneficiaries are or will be selected.

10 Is the organization a membership organization? Yes No
If "Yes," complete the following:

(a) Please describe the organization's membership requirements and attach a schedule of membership fees and dues.

(b) Describe your present and proposed efforts to attract members, and attach a copy of any descriptive literature or promotional material used for this purpose.

(c) Are benefits, services, or products limited to members? Yes No
If "No," please explain.

11 Does or will the organization engage in activities tending to influence legislation or intervene in any way in political campaigns? Yes No
If "Yes," please explain. (Note: You may wish to file Form 5768, Election/Revocation of Election by an Eligible Section 501(c)(3) Organization to Make Expenditures to Influence Legislation.)

12 Does the organization have a pension plan for employees? Yes No

13 (a) Are you filing Form 1023 within 15 months from the end of the first month in which you were created or formed as required by section 508(a) and the Regulations thereunder? (See general instruction B.) . . Yes No

(b) If 13(a) is "No," and you are claiming that section 508(a) does not apply to you, attach an explanation of your basis for this claim.

(c) If 13(a) is "No," and section 508(a) does apply to you, your exemption can be recognized only from the date this application is filed with your key District Director. Therefore, is it your intention that this application be considered as a request for recognition of exemption from the date the application is received and not retroactively to the date you were formed? Yes No

Part IV.—Statement as to Private Foundation Status

1 Is the organization a private foundation? Yes No

2 If question 1 is answered "No," indicate the type of ruling being requested as to the organization's status under section 509 by checking the applicable box(es) below:

(a) Definitive ruling under section 509(a)(1), (2), (3), or (4) check here and complete Part VII.

(b) Advance ruling under section 170(b)(1)(A)(vi) or 509(a)(2)—See instructions.

(c) Extended advance ruling under section 170(b)(1)(A)(vi) or 509(a)(2)—See instructions.

3 If question 1 is answered "Yes" and the organization claims to be a private operating foundation, check here and complete Part VIII.

(Note: If an extended advance ruling is desired you must check the appropriate boxes for both 2(b) and 2(c).)

Statement of Revenue and Expenses, for period ending Dec. 23, 1981

Revenue	1	Gross contributions, gifts, grants and similar amounts received	\$100
	2	Gross dues and assessments of members	
	3	Gross amounts derived from activities related to organization's exempt purpose	
		Minus cost of sales	
	4	Gross amounts from unrelated business activities	
		Minus cost of sales	
	5	Gross amount received from sale of assets, excluding inventory items (attach schedule)	
	Minus cost or other basis and sales expenses of assets sold		
6	Interest, dividends, rents and royalties		
7	Total revenue	\$100	
Expenses	8	Fund raising expenses	
	9	Contributions, gifts, grants, and similar amounts paid (attach schedule)	
	10	Disbursements to or for benefit of members (attach schedule)	
	11	Compensation of officers, directors, and trustees (attach schedule)	
	12	Other salaries and wages	
	13	Interest	
	14	Rent	
	15	Depreciation and depletion	
	16	Other (attach schedule)	
	17	Total expenses	\$0
	18	Excess of revenue over expenses (line 7 minus line 17)	\$100

Balance Sheets

Enter dates ▶

Beginning date

Ending date

Dec. 21, 1981

Dec. 23, 1981

Assets

19	Cash (a) Interest bearing accounts	\$100	\$100
	(b) Other		
20	Accounts receivable, net		
21	Inventories		
22	Bonds and notes (attach schedule)		
23	Corporate stocks (attach schedule)		
24	Mortgage loans (attach schedule)		
25	Other investments (attach schedule)		
26	Depreciable and depletable assets (attach schedule)		
27	Land		
28	Other assets (attach schedule)		
29	Total assets	\$100	\$100

Liabilities

30	Accounts payable		
31	Contributions, gifts, grants, etc., payable		
32	Mortgages and notes payable (attach schedule)		
33	Other liabilities (attach schedules)		
34	Total liabilities	\$0	\$0

Fund Balance or Net Worth

35	Total fund balance or net worth	\$100	\$100
36	Total liabilities and fund balance or net worth (line 34 plus line 35)	\$100	\$100

Has there been any substantial change in any aspect of your financial activities since the period ending date shown above? Yes No
 If "Yes," attach a detailed explanation.

Part VI.—Required Schedules for Special Activities

	If "Yes," check here:	And, complete schedule—
1	Is the organization, or any part of it, a school?	A
2	Does the organization provide or administer any scholarship benefits, student aid, etc.?	B
3	Has the organization taken over, or will it take over, the facilities of a "for profit" institution?	C
4	Is the organization, or any part of it, a hospital or a medical research organization?	D
5	Is the organization, or any part of it, a home for the aged?	E
6	Is the organization, or any part of it, a litigating organization (public interest law firm or similar organization)?	F
7	Is the organization, or any part of it, formed to promote amateur sports competition?	G

Part VII.—Non-Private Foundation Status (Definitive ruling only)

A.—Basis for Non-Private Foundation Status

The organization is not a private foundation because it qualifies as:

✓	Kind of organization	Within the meaning of		Complete
1	a church	Sections 509(a)(1) and 170(b)(1)(A)(i)		
2	a school	Sections 509(a)(1) and 170(b)(1)(A)(ii)		
3	a hospital	Sections 509(a)(1) and 170(b)(1)(A)(iii)		
4	a medical research organization operated in conjunction with a hospital	Sections 509(a)(1) and 170(b)(1)(A)(iii)		
5	being organized and operated exclusively for testing for public safety	Section 509(a)(4)		
6	being operated for the benefit of a college or university which is owned or operated by a governmental unit	Sections 509(a)(1) and 170(b)(1)(A)(iv)		Part VII.—B
7	normally receiving a substantial part of its support from a governmental unit or from the general public	Sections 509(a)(1) and 170(b)(1)(A)(vi)		Part VII.—B
8	normally receiving not more than one-third of its support from gross investment income and more than one-third of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions (subject to certain exceptions)	Section 509(a)(2)		Part VII.—B
9	being operated solely for the benefit of or in connection with one or more of the organizations described in 1 through 4, or 6, 7, and 8 above	Section 509(a)(3)		Part VII.—C

B.—Analysis of Financial Support

	(a) Most recent taxable year	(Years next preceding most recent taxable year)			(e) Total
	19	(b) 19.....	(c) 19.....	(d) 19.....	
1 Gifts, grants, and contributions received					
2 Membership fees received					
3 Gross receipts from admissions, sales of merchandise or services, or furnishing of facilities in any activity which is not an unrelated business within the meaning of section 513					
4 Gross income from passive sources (see instructions for definition)					
5 Net income from organization's unrelated business activities not included on line 4					
6 Tax revenues levied for and either paid to or expended on behalf of the organization					
7 Value of services or facilities furnished by a governmental unit to the organization without charge (not including the value of services or facilities generally furnished the public without charge)					
8 Other income (not including gain or loss from sale of capital assets)—attach schedule					
9 Total of lines 1 through 8					
10 Line 9 minus line 3					
11 Enter 2% of line 10, column (e) only					
12 If the organization has received any unusual grants during any of the above taxable years, attach a list for each year showing the name of the contributor, the date and amount of grant, and a brief description of the nature of such grant. Do not include such grants in line 1 above. (See instructions)					

ATTACHMENT TO FORM 1023

for

THE HARRY L. BRADLEY, JR. CHARITABLE FUND
Room 835
73 Tremont Street
Boston, Massachusetts 02108

2 YEARS PROPOSED CLASSIFIED BUDGET

The Trustee anticipates that contributions for the next two years will total approximately \$20,000. These monetary contributions shall be placed in trust. It is the present intention of the Trustee to distribute all income from the trust for the next two years to charitable corporations, trusts, community chests, foundations or other entities organized and operated exclusively for religious, charitable, scientific, literary, or educational purposes.

Dated: _____

December 23, 1981



Robert J. Morrissey
Trustee of The Harry L. Bradley,
Jr. Charitable Fund