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Form 990-PF

Return of Private Foundation

or Section 4947(a)(1) Nonexempt Charitable Trust Treated as a Private Foundation

Note. The foundation may be able to use a copy of this return to satisfy state reporting requirements

OMB No 1545-0052 2009

Department of the Treasury Internal Revenue Service For calendar year 2009, or tax year beginning and ending Final return G Check all that apply Initial return Initial return of a former public charity Address change Amended return Name change A Employer identification number Name of foundation Use the IRS label. THE BOGER CHARITABLE TRUST 22-2776296 Otherwise. Number and street (or P O. box number if mail is not delivered to street address) Room/suite print B Telephone number or type. 357 NASHAWTUC ROAD 978-369-1476 See Specific City or town, state, and ZIP code C If exemption application is pending, check here Instructions. CONCORD, MA 01742 1. Foreign organizations, check here 2. Foreign organizations meeting the 85% test, check here and attach computation X Section 501(c)(3) exempt private foundation H Check type of organization Section 4947(a)(1) nonexempt charitable trust Other taxable private foundation E If private foundation status was terminated X Cash I Fair market value of all assets at end of year | J Accounting method Accruat under section 507(b)(1)(A), check here (from Part II, col. (c), line 16) Other (specify) If the foundation is in a 60-month termination 2,009,238. (Part I, column (d) must be on cash basis) ▶\$ under section 507(b)(1)(B), check here Part | Analysis of Revenue and Expenses (d) Disbursements (a) Revenue and (b) Net investment (c) Adjusted net (The total of amounts in columns (b), (c), and (d) may not necessanly equal the amounts in column (a)) for chantable purposes (cash basis only) expenses per books income income N/A 44,808. Contributions, gifts, grants, etc., received 2 Check I If the foundation is not required to attach Sch. B. Interest on savings and temporary cash investments 49,916 49,916 STATEMENT 4 Dividends and interest from securities 5a Gross rents b Net rental income or (loss) -92,2506a Net gain or (loss) from sale of assets not on line 10 b Gross sales price for all assets on line 6a 419,230. n 7 Capital gain net income (from Part IV, line 2) 8 Net short-term capital gain 9 Income modifications 10a Gross sales less retur b Less Cost of goods sold c Gross profit or (loss) SCAMMED MAN 11 Other income $47\overline{4}$ 49.916 12 Total. Add lines 1 through 11 Ō Ō. 0. Compensation of officers, directors, trustees, etc. 14 Other employee salaries and wages 15 Pension plans, employee benefits Ō. STMT 2 4,259 0. 16a Legal fees **b** Accounting fees STMT 3 18,000. 18,000. 0. c Other professional fees **Administrative** 17 Interest STMT 4 509 0. Ō. 18 Taxes 19 Depreciation and depletion 20 Occupancy 887. 0 21 Travel, conferences, and meetings 0. 22 Printing and publications 100. Operating 23 Other expenses STMT 5 0. 0. 24 Total operating and administrative 23,755 a 18,000. expenses. Add lines 13 through 23 128,835. 128,835. 25 Contributions, gifts, grants paid 26 Total expenses and disbursements 152,590 Add lines 24 and 25 18,000. 128,835. 27 Subtract line 26 from line 12 -150,116.2 Excess of revenue over expenses and disbursements 31,916 b Net investment income (if negative, enter -0-) N/A c Adjusted net income (if negative, enter -0-)

Form **990-PF** (2009)

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Page 2

10)->-+	Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only	Beginning of year		End of	year
	arı	column should be for end-of-year amounts only	(a) Book Value	(b) Book Value		(c) Fair Market Value
	1	Cash - non-interest-bearing	4,225.	3,82	23.	3,823.
	2	Savings and temporary cash investments	109,949.	89,44	18.	89,448.
	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				
	7	Other notes and loans receivable				
		Less allowance for doubtful accounts ▶				
ţ	8	Inventories for sale or use				_
Assets	9	Prepaid expenses and deferred charges				
ä	10a	Investments - U S and state government obligations				
	b	Investments - corporate stock STMT 7	1,742,494.	1,611,53	36.	1,910,464.
	C	Investments - corporate bonds				
	11	Investments - land, buildings, and equipment basis				······································
		Less. accumulated depreciation	Ì		- 1	
	12	Investments - mortgage loans				
	13	Investments - other				
	14	Land, buildings, and equipment basis ▶				······································
		Less. accumulated depreciation			1	
	15	Other assets (describe ► STATEMENT 8)	4,857.	5,50	3.	5,503.
						· · · · · · · · · · · · · · · · · · ·
	16	Total assets (to be completed by all filers)	1,861,525.	1,710,31	10.	2,009,238.
	17	Accounts payable and accrued expenses				
	18	Grants payable				
S	19	Deferred revenue				
Liabilities	20	Loans from officers, directors, trustees, and other disqualified persons				
abi	21	Mortgages and other notes payable				
	1	Other liabilities (describe STATEMENT 9)	21,226.	19,12	25.	
			· · · · · · · · · · · · · · · · · · ·			
	23	Total liabilities (add lines 17 through 22)	21,226.	19,12	25.	
		Foundations that follow SFAS 117, check here			\neg	
		and complete lines 24 through 26 and lines 30 and 31.				
Ces	24	Unrestricted				
Net Assets or Fund Balance	25	Temporarily restricted			\neg	
Ba	26	Permanently restricted			\neg	
ā		Foundations that do not follow SFAS 117, check here				
Ţ.		and complete lines 27 through 31.				
õ	27	Capital stock, trust principal, or current funds	1,840,299.	1,691,18	35.	
set	28	Paid-in or capital surplus, or land, bldg, and equipment fund	0.		0.	
Ąŝ	29	Retained earnings, accumulated income, endowment, or other funds	0.		0.	
Ę	l	Total net assets or fund balances	1,840,299.	1,691,18	1	
_						
	31	Total liabilities and net assets/fund balances	1,861,525.	1,710,31	اءما	
		······		<u> </u>	. . .	
_	art					
1	Total	net assets or fund balances at beginning of year - Part II, column (a), line	30			
	(mus	t agree with end-of-year figure reported on prior year's return)			1	1,840,299.
2	Ente	amount from Part I, line 27a			2	-150,116.
3	Othe	r increases not included in line 2 (itemize)	SEE STA	TEMENT 6	3	1,002.
4	Add	ines 1, 2, and 3			4	1,691,185.
5	Decr	eases not included in line 2 (itemize)			5	0.
6_	Total	net assets or fund balances at end of year (line 4 minus line 5) - Part II, co	lumn (b) line 30		6	1,691,185,

Page 3

THE BOGER CHARITABLE TRUST

		nd(s) of property sold (e g or common stock, 200 shs			P-F	w acquired Purchase Donation		acquired lay, yr)	(d) Date sold (mo , day, yr.)
<u>1a</u>									
b SEE ATTACHE	D STA	PEMENTS							
<u>C</u>					 				
<u>d</u> e					 -	············			
(e) Gross sales price	(f)	Depreciation allowed (or allowable)		t or other basis xpense of sale				ain or (loss s (f) minus	
<u>a</u>					+				
<u>b</u>									
d							-	•	
e 419,230				511,48	0.				-92 , 250.
Complete only for assets show				• • • • • • • • • • • • • • • • • • • •				ol (h) gain not less tha	
(i) F M V as of 12/31/69	· [(i) Adjusted basis as of 12/31/69		cess of col (ı) col (ı), ıf any		·		(from col (
a	<u> </u>								···
b									
C									
<u>d</u>	 	·							00 050
<u>e</u>					- -	<u> </u>			-92,250
2 Capital gain net income or (net	capital loss	If gain, also enter If (loss), enter -0-	in Part I, line in Part I, line	7 7	} :	2			-92,250
3 Net short-term capital gain or (I If gain, also enter in Part I, line 8 If (loss), enter -0- in Part I, line	3, column (d (6)		}			N/A	
Part V Qualification		ection 4940(e) for	Reduced	Tax on Net	Inves	tment Ir	come	11/12	·
(For optional use by domestic prival if section 4940(d)(2) applies, leave Was the foundation liable for the self "Yes," the foundation does not quite the self th	this part bl ection 4942	ank tax on the distributable am	ount of any ye	ar in the base per					Yes X No
1 Enter the appropriate amount in					es				
(a) Base period years Calendar year (or tax year begini	ning in)	(b) Adjusted qualifying dist		Net value of no					(d) oution ratio vided by col (c))
2008			6,404.			387,62			.057130
2007			8,493. 5,014.			724,59 148,26			.039820
2005			6,725.			207,45			.048347
2004	-		1,040.			946,74			.041629
									
2 Total of line 1, column (d)							2		.229819
3 Average distribution ratio for the			n line 2 by 5,	or by the number	of years	:			045064
the foundation has been in exist	ence it less	tnan 5 years					3		.045964
4 Enter the net value of noncharita	able-use as:	sets for 2009 from Part X, i	ine 5				4		1,737,020
5 Multiply line 4 by line 3							5		79,840.
6 Enter 1% of net investment inco	me (1% of	Part I, line 27b)					6		319.
7 Add lines 5 and 6							7		80,159.
8 Enter qualifying distributions fro	m Part XII,	, line 4							128,835.

	1 990-PF (2009) THE BOGER CHARITABLE TRUST		22-277			Page 4
Pa	irt VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 494	0(e), or 4	1948 - see	instru	<u>ictio</u>	ns)
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	Domestic foundations that meet the section 4940(e) requirements in Part V, check here X and enter 1%)	1 1		3	19.
	of Part I, line 27b					
c	All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)	, J				
	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	, ,	2			0.
	Add lines 1 and 2		3		$\overline{3}$	19.
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		4			0.
	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-		5		_ 3	19.
	Credits/Payments					
	· 1 1	3,354.				
		7, 334.	1			
	Exempt foreign organizations - tax withheld at source 6b		1			
	Tax paid with application for extension of time to file (Form 8868) 6c 6c		-			
	Backup withholding erroneously withheld . 6d		_		2 2	E 1
7	Total credits and payments Add lines 6a through 6d		7		3,3	34.
8	Enter any penalty for underpayment of estimated tax. Check here if Form 2220 is attached		8			
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed		9			
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	•	10		3,0	
		funded 🕨	11			0.
Pa	art 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	e in		Yes	
	any political campaign?			1a		Х
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for o	definition)?		1b		X
	If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any material	als publishe	ed or			
	distributed by the foundation in connection with the activities.			i		
C	Did the foundation file Form 1120-POL for this year?			10		X
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.				
е	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on four		-			
	managers ▶ \$ 0.					
2	Has the foundation engaged in any activities that have not previously been reported to the IRS?			2	į (X
	If "Yes," attach a detailed description of the activities.				1	
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of inc	ornoration	nr.		1	
•	bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes	orporation,	,	3	i '	X
42	Did the foundation have unrelated business gross income of \$1,000 or more during the year?			4a	 	X
	If "Yes," has it filed a tax return on Form 990-T for this year?		N/A	4b	<u> </u>	
	Was there a liquidation, termination, dissolution, or substantial contraction during the year?		217 22	5		х
·	If "Yes," attach the statement required by General Instruction T.			-		
6						
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 the state of t	with the state	e law	1 _		1
_	remain in the governing instrument?			6	X	
7	Did the foundation have at least \$5,000 in assets at any time during the year?			7	X	ļ
_	If "Yes," complete Part II, col (c), and Part XV					
Вa	Enter the states to which the foundation reports or with which it is registered (see instructions)			-		
	MA			-	•	1
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or desig	nate)			1	
	of each state as required by General Instruction G? If "No," attach explanation			8b	X	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)	(j)(5) for cale	endar			
	year 2009 or the taxable year beginning in 2009 (see instructions for Part XIV)? If "Yes," complete Part XIV			9		X
10	Did any persons become substantial contributors during the tax year? If 'Yes,' attach a schedule listing their names and add	Iresses		10		X

10 X Form **990-PF** (2009)

Part VII-A Statements Regarding Activities (continued) 11	UIIII	SSO-FF (2003) THE BOGER CHARTTABLE TRUST	2-2110	230		
section 512(b)(13)? If 1%2* attach schedule (see instructions) 20 th the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008? 30 the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008? 31 X X 32 X 13 X X 33 X I The books are in care of PTHE FOUNDATION 37 NASHAWTUC ROAD, CONCORD, MA 37 NASHAWTUC ROAD, CONCORD, MA 38 Y I Section 4947(b)(1) nonexempt charatable trusts firing form 930-PF in lieu of Farm 140+ Check here 39 And enter the amount of flax-exempt interest reservate or accrued during the year 40 August 17. 2008 File Form 4720 If any item is checked in the "Yes" column, unless an exception applies. 51 A During they say did the foundation (either direct) or indirect)) (1) Engage in the sale or exchange, or leasing of property with a disqualified person? (2) Borrow momes from, lend momes (to, or shorewes exend circled for accept it from) a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? (5) Transfer any income or assets to a disqualified person? (6) Agree to pay momey or property to a government official? (Exception, Check 'No' if the foundation angreed to make a grant to or to employ the official for a pend after termination of government service, if terminating within 90 days) 1 I any answer exist to 1(1)(6) did any of the acts date to qualify funder the exceptions described in Regulations section 53 4941(6):3 or in a current notice regarding disaster assistance	Pa	rt VII-A Statements Regarding Activities (continued)				
12 Oil the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008? Webste address ► N/A The books are in care of ► THE FOUNDATION Telephone no ►978-369-1476 Located at ►357 NASHAWTUC ROAD, CONCORD, MA Telephone no ►978-369-1476 Section 497(0)1) nonexempt charable funds thing form 990-PF in level of Form 1491 - Check here and enter the amount of tax-exempt interest received or accrued during the year 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. 10 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? (2) Borrow money from, lend money (o, or otherwise extend ciredii to (or accept it from) a disqualided person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or remittee the expenses of, a disqualified person? (5) Agnetic to ye money from, lend money to, or otherwise extends or disqualified person? (6) Agnetic to ye money from, lend money to, or otherwise expenses of, a disqualified person? (7) Furnish goods, services, or facilities to (or accept them form) a disqualified person? (8) Furnish goods, services, or facilities to (or accept them form) a disqualified person? (9) Furnish goods, services, or facilities to (or accept them form) a disqualified person? (9) Furnish goods, services, or facilities to (or accept them form) (9) Furnish goods, services, or facilities to (or accept them f	11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of				
12 Dut the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008? 13 Dut the foundation comply with the public inspection requirements for its annual returns and exemption application? 14 Name and the public inspection requirements for its annual returns and exemption application? 15 The books are in care of ▶ THE FOUNDATION 16 The books are in care of ▶ THE FOUNDATION 17 The books are in care of ▶ THE FOUNDATION 18 Section 4947(4)(1) nonexempt of marbatible trusts timp form 990-Fin lieu of Form 1041-Check here and enter the amount of tax-exempt interest received or accrued during the year. 18 Section 4947(4)(1) nonexempt of tax-exempt interest received or accrued during the year. 19 Pert 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. 10 During the year of the foundation (either directly or indirectly): 10 Biggree in the sale or exchange, or leasing of property with a disqualified person? 11 Engage in the sale or exchange, or leasing of property with a disqualified person? 12 Institute of the sale or exchange, or leasing of property with a disqualified person? 13 Firmsh goods, services, or facilities to (or accept them from) a disqualified person? 14 Pay compensation to, or pay or reimburse the expenses of, a disqualified person? 15 Formsh goods, services, or facilities to (or accept them from) a disqualified person? 16 Agrice to pay maney or property to a government official? (Exception, Check No* 17 Institute the foundation of powerments error, it termination with 90 days. 18 Agrice to spy maney or property to a government official? (Exception, Check No* 19 Institute the foundation engage in a prior year in any of the acts fail to qualify under the exceptions described in Regulations section 33 4941(6)-3 or in a current notice regarding disaster assistance check here 19 Dit the foundation engage in a prior year in any				11		<u>X</u>
Website audiess N/A Telephone no 978-369-1476	12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before				
13		August 17, 2008?		12		X
Website address N/A	13		ļ	13	Х	
Located at M 357 NASHAWTUC ROAD, CONCORD, MA IS Section 4947(a)(1) nonexempt charable trusts filing form 990-PF in lieu of Form 1041 - Check here and enter the amount of tax-exempt intenst received or accrued during the year of the month of the exempt intenst received or accrued during the year 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. 1a During the year did the foundation (either directly or indirectly) (1) Engage in the sale or exchange, or leasing of property with a dequalified person? Yes No (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? Yes No (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? Yes No (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? Yes No (5) Transfer any income or assets to a disqualified person (or make any of either available Yes No (6) Agree to pay money or property to a government official? (Exception, Check 'No' If the foundation of government service, if termination gwithing 90 days!) Yes No (6) Agree to pay money or property to a government official? (Exception, Check 'No' If the foundation of government service, if termination gwithing 90 days!) Yes No (7) If the foundation engage in a prior year in any of the acts fail to qualify under the exceptions described in Regulations section 53 4941(9)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)? N/A 1b N/A 2b N/A 2b			•			
Located at M 357 NASHAWTUC ROAD, CONCORD, MA IS Section 4947(a)(1) nonexempt charable trusts filing form 990-PF in lieu of Form 1041 - Check here and enter the amount of tax-exempt intenst received or accrued during the year of the month of the exempt intenst received or accrued during the year 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. 1a During the year did the foundation (either directly or indirectly) (1) Engage in the sale or exchange, or leasing of property with a dequalified person? Yes No (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? Yes No (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? Yes No (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? Yes No (5) Transfer any income or assets to a disqualified person (or make any of either available Yes No (6) Agree to pay money or property to a government official? (Exception, Check 'No' If the foundation of government service, if termination gwithing 90 days!) Yes No (6) Agree to pay money or property to a government official? (Exception, Check 'No' If the foundation of government service, if termination gwithing 90 days!) Yes No (7) If the foundation engage in a prior year in any of the acts fail to qualify under the exceptions described in Regulations section 53 4941(9)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)? N/A 1b N/A 2b N/A 2b	14	The books are in care of ▶ THE FOUNDATION Telephone no ▶	978-36	9-1	476	
15 Section 4947(a)(1) nonexempt charatable trusts timp Form 990-PF in leu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year N/A Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required File Form 4720 if any item is checked in the "Yea" column, unless an exception applies. 1 a During they ard did the foundation (either directly or indirectly) (1) Engage in the sale or exchange, or leasing of property with a disqualified person? Yes No (2) Borrow money from, land money (to, or otherwise extend credit to (or accept it from) a disqualified person? Yes No (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? Yes No (4) Pay compensation to, or, pay or remibures the expenses of, a disqualified person? Yes 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) (or make any of either available for the benefit or use of a disqualified person) Yes No (6) Agree to pay money or property to a government official? (Exception. Check 'No' If the foundation agreed to make agriant to or to employ the official for a period after termination of government service, it terminating within 90 days) Yes No b If any answer is 'Yes' to 1a(1)-(6), did any of the acts fati to quality under the exceptions described in Regulations section 53 4941(d)-3 or in a current notice regarding dissater assistance (see page 20 of the instructions)? N/A 1b N/A 1b N/A 1b N/A 1b N/A 1b N/A 1b N/A N						
Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required	15					
File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. 1 a Duning the year did the foundation (either directly or indirectly) (1) Engage in the sale or exchange, or lessing of property with a disqualified person? (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? (3) Furmish goods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? (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 (or make any of either available for the benefit or use of a disqualified person (or make any of either available for the benefit or use of a disqualified person (or make any of either available for the benefit or use of a disqualified person (or make any of either available for the benefit or use of a disqualified person (or make any of either available for the benefit or use of a disqualified person (or make any of either available for the benefit or use of a disqualified person (or make any of either available for the benefit or use of a disqualified person (or make any of either available for the benefit or use of a disqualified person (or make any of either available for the benefit or use of a disqualified person (or make any of either available for the benefit or use of a disqualified person (or make any of either available for the benefit or use of a disqualified person (or make any of either available for the benefit or use of a disqualified person (or make any of either available for the benefit or use of a disqualified person (or make any of either available for the paymoney or property to a government official? (Exception, Check No' If the foundation engage in a part or any or the many of each statement and the exception of each the exception of each the exception of each the exception described in English (like the exception of eac		•	15	N	/A	
File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.	Pa					
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c if the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.		valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach	ĺ			
Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? Yes X No		statement - see instructions)	N/A	2b		
during the year? b If "Yes," did it have excess business holdings in 2009 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 2009.) 10 A Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 2 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 2009? 3 b 4 b X	C	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.				
during the year? b If "Yes," did it have excess business holdings in 2009 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 2009.) 10 A Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 2 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 2009? 3 b 4 b X		>	İ			
b If "Yes," did it have excess business holdings in 2009 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 2009.) N/A Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 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 2009? Ab X	3a					
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 2009.) As Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? By 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 2009? Ab X		during the year?	X No			
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 2009.) 1 3b 1 4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 2 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 2009? 3 b 4 a X	b	If "Yes," did it have excess business holdings in 2009 as a result of (1) any purchase by the foundation or disqualified persons after	r			
Form 4720, to determine if the foundation had excess business holdings in 2009.) 4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 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 2009? Ab X		May 26, 1969, (2) the tapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dis	pose			
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 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 2009? 4b X		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,	,			
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 2009? 4b X		· · · · · · · · · · · · · · · · · · ·	N/A	3b		<u> </u>
had not been removed from jeopardy before the first day of the tax year beginning in 2009? 4b X	4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		4a		X
	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 2009?				<u> </u>

Form 990-PF (2009) THE BOGER CHARITABLE TRU			22-27762	96	Page 6
Part VII-B Statements Regarding Activities for Which I	orm 4720 May Be	Required (contin	ued)		
5a During the year did the foundation pay or incur any amount to					
(1) Carry on propaganda, or otherwise attempt to influence legislation (section			es X No		
(2) Influence the outcome of any specific public election (see section 4955), o	r to carry on, directly or indire				
any voter registration drive?		Ye	es X No		
(3) Provide a grant to an individual for travel, study, or other similar purposes		Ye	s X No		
(4) Provide a grant to an organization other than a charitable, etc., organization	n described in section				
509(a)(1), (2), or (3), or section 4940(d)(2)?		Ye	es X No		
(5) Provide for any purpose other than religious, charitable, scientific, literary,	or educational purposes, or t				
the prevention of cruelty to children or animals?		Y6	s X No		
b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify und	der the exceptions described	ın Regulations			
section 53 4945 or in a current notice regarding disaster assistance (see instru	ctions)?		N/A	5b	
Organizations relying on a current notice regarding disaster assistance check h	ere				
c If the answer is "Yes" to question 5a(4), does the foundation claim exemption fi	rom the tax because it mainta	ined			
expenditure responsibility for the grant?	N	√A 🔲 Υι	es 🔲 No		
If "Yes," attach the statement required by Regulations section 53.494	5-5 <i>(d</i>).		1		
6a Did the foundation, during the year, receive any funds, directly or indirectly, to	• •				
a personal benefit contract?	• • • • • • •	☐ Yı	s X No		
b Did the foundation, during the year, pay premiums, directly or indirectly, on a p	ersonal benefit contract?			6b	X
If "Yes" to 6b, file Form 8870.			<u> </u>		
7a At any time during the tax year, was the foundation a party to a prohibited tax s	helter transaction?		s X No		
b If yes, did the foundation receive any proceeds or have any net income attribut.			N/A	7b	 ·
Information About Officers Directors Truct		nagere Highly			
Part VIII Paid Employees, and Contractors	ees, i oundation we	inagers, mgm	•		
1 List all officers, directors, trustees, foundation managers and their	compensation.				
	(b) Title, and average	(c) Compensation	(d) Contributions to employee benefit plans	(e) Expense
(a) Name and address	hours per week devoted to position	(If not paid, enter -0-)	and deterred compensation	000	ount, other lowances
WILLIAM P. BOGER, III	TRUSTEE	1	Comparation	 	
357 NASHAWTUC ROAD					
CONCORD, MA 01742	0.00	0.	О.		0.
	TRUSTEE			1	
357 NASHAWTUC ROAD					
CONCORD, MA 01742	0.00	0.	0.		0.
CONCORD/ IM 01/42				'	
				+	
2 Compensation of five highest-paid employees (other than those inc	luded on line 1\ If none	enter "NONE "	<u>L</u>		.
2 Compensation of the mignest-paid employees (other than those inc	(b) Title, and average	enter NONE.	(d) Contributions to	10) Expense
(a) Name and address of each employee paid more than \$50,000	hours per week	(c) Compensation	employee benefit plans and deterred	acc	ount, other
NONE	devoted to position		compensation	al	lowances
NONE					
		ļ			
· · · · · · · · · · · · · · · · · · ·				ļ	
			<u> </u>	<u></u>	
Total number of other employees paid over \$50,000			•		0

Form 990-PF (2009) THE BOGER CHARITABLE TRUST	22-277	6296 Page 7
Part VIII Information About Officers, Directors, Trustees, Foundation Management Paid Employees, and Contractors (continued)		
3 Five highest-paid independent contractors for professional services. If none, enter "NONE.	ıı	
(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)
Part IX-A Summary of Direct Charitable Activities		
List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical inform number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	ation such as the	Expenses
N/A		•

		•
Port IV.R. Common of December Deleted Investment		
Part IX-B Summary of Program-Related Investments Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and	10	
N/A	. 2	Amount
N/A		
All other program-related investments. See instructions		

Form **990-PF** (2009)

0.

Total. Add lines 1 through 3

P	art X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations	ndations,	see instructions.)
1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes.		<u> </u>
a	Average monthly fair market value of securities	1 _a	1,618,390.
	Average of monthly cash balances .	1b	1,618,390. 145,082.
C	Fair market value of all other assets	10	•
d	Total (add lines 1a, b, and c)	10	1,763,472.
е	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	1,763,472.
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	26,452.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	1,737,020.
6	Minimum Investment return. Enter 5% of line 5	6	86,851.
P	art XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations are foreign organizations check here and do not complete this part.)	id certain	
1	Minimum investment return from Part X, line 6	1	86,851.
2a	Tax on investment income for 2009 from Part VI, line 5		
b	Income tax for 2009 (This does not include the tax from Part VI)		
C	Add lines 2a and 2b	2c	319.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	86,532.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	86,532.
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	86,532.
P	art XII Qualifying Distributions (see instructions)	, <u>,</u>	
1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
а	Expenses, contributions, gifts, etc - total from Part I, column (d), line 26	1a	128,835.
b	Program-related investments - total from Part IX-B	16	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		
	Suitability test (prior IRS approval required)	3a	
	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	128,835.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment		04.0
_	income Enter 1% of Part I, line 27b	5	319. 128,516.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	
	Note. The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation of 4940(e) reduction of tax in those years	jualifies fo	r the section

Form **990-PF** (2009)

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
1 Distributable amount for 2009 from Part XI, line 7				86,532.
2 Undistributed income, if any, as of the end of 2009				00,332.
a Enter amount for 2008 only		{	110,629.	
b Total for prior years			110/023.	
b rotal to prior your		0.		
3 Excess distributions carryover, if any, to 2009			 	i
a From 2004		į		
b From 2005	1			
¢ From 2006				
d From 2007				
e From 2008	1			
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2009 from				
Part XII, line 4 ► \$ 128,835.	1			
a Applied to 2008, but not more than line 2a			110,629.	
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 2009 distributable amount				18,206.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2009 (If an arrount appears in column (d), the same amount must be shown in column (a))	0.			0.
6 Enter the net total of each column as indicated below				
2 Corpus Add lines 3f, 4c, and 4e Subtract line 5	0.			
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 2008. Subtract line				
4a from line 2a Taxable amount - see instr			0.	
f Undistributed income for 2009 Subtract		l		
lines 4d and 5 from line 1. This amount must		Į		
be distributed in 2010				68,326.
7 Amounts treated as distributions out of				
corpus to satisfy requirements imposed by		§		
section 170(b)(1)(F) or 4942(g)(3)	0.			••••••
8 Excess distributions carryover from 2004				
not applied on line 5 or line 7	0.			·····
9 Excess distributions carryover to 2010.		l l		
Subtract lines 7 and 8 from line 6a	0.			·····
A Analysis of line 9		Ē.		
a Excess from 2005				
b Excess from 2006 c Excess from 2007		[
d Excess from 2008				
e Excess from 2009				
E003 III0II 660073 C				

	ER CHARITAB			22-27	76296 Page 10
Part XIV Private Operating F	oundations (see in:	structions and Part Vi	I-A, question 9)	N/A	
1 a If the foundation has received a ruling of	r determination letter that	it is a private operating			
foundation; and the ruling is effective fo	r 2009, enter the date of t	he ruling	>		
b Check box to indicate whether the found	dation is a private operatir	ig foundation described	ın section	4942(j)(3) or 49	942(j)(5)
2 a Enter the lesser of the adjusted net	Tax year		Prior 3 years		
income from Part I or the minimum	(a) 2009	(b) 2008	(c) 2007	(d) 2006	(e) Total
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			ļ		
alternative test relied upon					
a "Assets" alternative test - enter					
(1) Value of all assets					
(2) Value of assets qualifying under section 4942(i)(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				i	
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)			<u> </u>		
(3) Largest amount of support from			i		
an exempt organization		<u> </u>			
(4) Gross investment income	<u> </u>				<u> </u>
Part XV Supplementary Info			if the foundation	n had \$5,000 or m	ore in assets
at any time during t	the year-see the	nstructions.)			
1 Information Regarding Foundation	on Managers:				
a List any managers of the foundation wh			tributions received by th	e foundation before the clo	ose of any tax
year (but only if they have contributed r	nore than \$5,000) (See s	ection 507(d)(2))			
BARBARA C. BOGER	<u> </u>				
b List any managers of the foundation wh			(or an equally large port	tion of the ownership of a p	partnership or
other entity) of which the foundation ha	s a 10% or greater interes	st.			
NONE					
2 Information Regarding Contribut	ion, Grant, Gift, Loan,	Scholarship, etc., P	rograms:		
Check here $lackbox X$ if the foundation eta	only makes contributions	to preselected charitable	organizations and does	not accept unsolicited req	uests for funds If
the foundation makes gifts, grants, etc	(see instructions) to indiv	viduals or organizations (under other conditions, o	complete items 2a, b, c, an	d d
a The name, address, and telephone num	ber of the person to who	n applications should be	addressed		
b The form in which applications should t	pe submitted and informa	tion and materials they s	hould include		
c Any submission deadlines					
d Any restrictions or limitations on award	e euch ac hy accarachio	al areae, obardable fields	kinds of institutions	other factors	
e Any restrictions of infiliations of award	s, such as by geographic	ai aicas, ciiaillavie lielus	, kinus oi mstitutions, of	Outer Idelets	

22-2776296

3 Grants and Contributions Paid During the Ye	ear or Approved for Future	Payment		
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of	Purpose of grant or contribution	Amount
Name and address (home or business)	or substantial contributor	recipient	COMMISSION	
a Paid during the year	or substantial contributor	recipient		
SEE STATEMENT 10				120 025
Total b Approved for future payment			<u>▶ 3a</u>	128,835.
NONE				
Total	L	 	<u></u>	

Part XVI-A **Analysis of Income-Producing Activities**

Enter gross amounts unless otherwise indicated	Unrelated business income			ed by section 512, 513, or 514	(e)		
	(a) Business	(b) Amount	(C) Exclu- sion	(d)	Related or exempt		
1 Program service revenue	code	Amount	code	Amount	function income		
a							
b	.						
C	·						
d							
8	·						
·							
g Fees and contracts from government agencies							
2 Membership dues and assessments							
3 Interest on savings and temporary cash investments							
4 Dividends and interest from securities			14	49,916.			
5 Net rental income or (loss) from real estate							
a Debt-financed property							
b Not debt-financed property							
6 Net rental income or (loss) from personal property							
7 Other investment income							
8 Gain or (loss) from sales of assets other than inventory			18	-92,250.			
9 Net income or (loss) from special events							
10 Gross profit or (loss) from sales of inventory							
11 Other revenue		•					
a							
b							
C							
d	1						
e							
12 Subtotal Add columns (b), (d), and (e)			0.	-42,334.	0.		
13 Total. Add line 12, columns (b), (d), and (e)				13	-42,334.		
(See worksheet in line 13 instructions to verify calculations.)							

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

Form 990-PF (2009) 22-2776296 Page 13 Part XVII Information Regarding Transfers To and Transactions and Relationships With Noncharitable **Exempt Organizations** Yes No Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations? a Transfers from the reporting foundation to a noncharitable exempt organization of (1) Cash 1a(1) (2) Other assets 1a(2) **b** Other transactions (1) Sales of assets to a noncharitable exempt organization 1b(1) (2) Purchases of assets from a noncharitable exempt organization 16(2) (3) Rental of facilities, equipment, or other assets 1b(3) (4) Reimbursement arrangements 1b(4) (5) Loans or loan guarantees 1b(5) X (6) Performance of services or membership or fundraising solicitations 1b(6) c Sharing of facilities, equipment, mailing lists, other assets, or paid employees d If the answer to any of the above is "Yes," complete the following schedule Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received (a) Line no (b) Amount involved (c) Name of noncharitable exempt organization (0) Description of transfers, transactions, and sharing arrangements N/A 2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? X No Yes b If "Yes," complete the following schedule (a) Name of organization (b) Type of organization (c) Description of relationship N/A Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete Declaration of preparer (other than taxpayer or fiduciary) is based on all information of which preparer has any knowledge TRUSTEE Sign Here Signature of officer or trustee Date Check if self-Preparer's identifying number Preparer's

Form **990-PF** (2009)

617-951-0800

signature

Firm's name (or yours

LYNCH,

BOSTON

BREWER, HOFFMAN & FINK,

101 FEDERAL ST, 22ND FLOOR

MA 02110-1800

5/5/10

employed >

EIN ▶

Phone no

Schedule B (Form 990, 990-EZ, or 990-PF)

Department of the Treasury Internal Revenue Service

Name of the organization

Schedule of Contributors

► Attach to Form 990, 990-EZ, or 990-PF.

OMB No 1545-0047

Employer identification number

Schedule B (Form 990, 990-EZ, or 990-PF) (2009)

2009

T.	HE BOGER CHARITABLE TRUST	22-2776296
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	X 501(c)(3) exempt private foundation	
	4947(a)(1) nonexempt charitable trust treated as a private foundation	
	501(c)(3) taxable private foundation	
	is covered by the General Rule or a Special Rule. c)(7), (8), or (10) organization can check boxes for both the General Rule and a Specia	Rule. See instructions.
General Rule		
TW7		
	on filing Form 990, 990-EZ, or 990-PF that received, during the year, \$5,000 or more (i plete Parts I and II.	n money or property) from any one
Special Rules		
509(a)(1) and 170	(c)(3) organization filing Form 990 or 990-EZ that met the 33 1/3% support test of the (b)(1)(A)(vi), and received from any one contributor, during the year, a contribution of (i) Form 990, Part VIII, line 1h or (ii) Form 990-EZ, line 1. Complete Parts I and II.	
aggregate contrib	(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one coutions of more than \$1,000 for use exclusively for religious, charitable, scientific, literacruelty to children or animals. Complete Parts I, II, and III.	=
contributions for or If this box is check purpose. Do not or	(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one couse exclusively for religious, charitable, etc., purposes, but these contributions did not ked, enter here the total contributions that were received during the year for an exclusion complete any of the parts unless the General Rule applies to this organization because, etc., contributions of \$5,000 or more during the year.	t aggregate to more than \$1,000. sively religious, charitable, etc.,
but it must answer "No" or	that is not covered by the General Rule and/or the Special Rules does not file Schedun Part IV, line 2 of its Form 990, or check the box on line H of its Form 990-EZ, or on lifting requirements of Schedule B (Form 990, 990-FZ, or 990-PF).	•

LHA For Privacy Act and Paperwork Reduction Act Notice, see the Instructions

for Form 990, 990-EZ, or 990-PF.

Name of organization

Employer identification number

THE BOGER CHARITABLE TRUST

22-2776296

Part I	Contributors (see instructions)		
(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
1	THE CRAWFORD CLUT FOR CHILDREN NORTHERN TRUST, 50 SOUTH LASALLE STREET B-3 CHICAGO, IL 60603	\$	Person X Payroll
(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
2	THE CRAWFORD CLUT FOR GRANDCHILDREN NORTHERN TRUST, 50 SOUTH LASALLE STREET B-3 CHICAGO, IL 60603	\$\$	Person X Payroll
(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
		\$	Person Payroll Noncash (Complete Part II if there is a noncash contribution.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
		\$	Person Payroll Noncash (Complete Part II if there is a noncash contribution.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
		\$	Person Payroll Noncash (Complete Part II if there is a noncash contribution.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
		\$	Person Payroll Noncash (Complete Part II if there is a noncash contribution.)

Don't Ref. Combat Color and Large for Town I level		70230 INGE I OI 2
Part IV Capital Gains and Losses for Tax on Invest		(h) How acquired
(a) List and describe the kind(s) of 2-story brick warehouse, or con	nmon stock, 200 shs MLC Co	(b) How acquired P - Purchase (mo , day, yr) (d) Date sold (mo , day, yr)
1a 400 BANK OF AMERICA CORE		P 01/29/0804/30/09
b 600 BANK OF AMERICA CORP		P 01/29/0804/30/09
c 200 BARD C R INCORPORATE		P 04/15/0308/03/09
	20	P 03/31/0308/03/09
e 200 BECTON DICKINSON & C	20	P 03/31/0308/03/09
	20	P 03/31/0308/03/09
g 1000 CVS CAREMARK CORP		P 08/19/0211/09/09
h 300 CEPHALON INC		P 04/16/0711/23/09
2000 ISHARES MSCI JPN II	X FD	P 09/27/0507/23/09
1100 ISHARES S&P SMCAP V	P VARIOUS 06/19/09	
k 600 ISHARES TR MSCI EAFE	E FD	P VARIOUS 07/02/09
500 JPMORGAN CHASE & CO		P 03/17/0806/19/09
m 100 LOCKHEED MARTIN CORP		P 10/11/0706/04/09
n 100 LOCKHEED MARTIN CORF		P 10/11/0706/04/09
0 100 LOCKHEED MARTIN CORP		P 10/11/0706/04/09
(e) Gross sales price (f) Depreciation	allowed (g) Cost or other basis	(h) Gain or (loss)
(or allowate	plus expense of sale	(e) plus (f) minus (g)
a 3,596.	16,732.	-13,136.
b 5,395.	25,097.	-19,702.
c 14,812.	6,251.	8,561.
d 12,892.	6,922.	5,970.
e 12,892.	6,922.	5,970.
f 38,677.	20,766.	17,911.
g 30,582.	14,697.	15,885.
h 16,375.	22,519.	-6,144.
19,233.	23,667.	-4,434.
52,586.	75,742.	-23,156.
k 27,183.	48,100.	-20,917.
17,201.	19,904.	-2,703.
m 8,456.	11,316.	-2,860.
n 8,456.	11,316.	-2,860.
0 8,456.	11,316.	-2,860.
Complete only for assets showing gain in column (h) a	and owned by the foundation on 12/31/69	(I) Losses (from col (h))
(i) F M V as of 12/31/69 (j) Adjusted as of 12/31		Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
a		-13,136.
b		-19,702.
С		8,561.
d		5,970.
8		5,970.
f		17,911.
9		15,885.
h		-6,144.
1		-4,434.
		-23,156.
k		-20,917.
1		-2,703.
m		-2,763. -2,860.
n		-2,860. -2,860.
0		-2,860. -2,860.
<u> </u>		-2,860.
2 Capital gain net income or (net capital loss) { if g	gain, also enter in Part I, line 7 loss), enter "-0-" in Part I, line 7	2
3 Net short-term capital gain or (loss) as defined in section		
If gain, also enter in Part I, line 8, column (c)	}	
If (loss), enter "-0-" in Part I, line 8		3
· · · · · · · · · · · · · · · · · · ·		

Part IV Capital Gains and Loss	ses for Tax on Investment Income				
	describe the kind(s) of property sol ck warehouse, or common stock, 2		(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
1a 200 LOCKHEED MA	ARTIN CORP		P	10/11/07	06/04/09
b 300 MONSANTO CO	NEW DEL		P	10/08/08	
c 100 PAYCHEX INC			P	11/27/02	06/24/09
d 300 PAYCHEX INC			P		06/24/09
e 600 PAYCHEX INC			P	11/27/02	06/24/09
	PLC SPON ADR F		P	01/30/08	02/18/09
g 400 TARGET CORE			P	05/12/08	10/26/09
h 600 TARGET CORE	PORATION		P	05/12/08	10/26/09
1 200 WATERS CORE				05/06/08	
_ 200 WATERS CORE			P	05/06/08	02/18/09
k CAPITAL GAINS D	DIVIDENDS				
1					
m					
<u>n</u>					
0					
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale		Gain or (loss) lus (f) minus (g)	
a 16,912.		22,633.			-5,721.
b 23,498.		23,079.			419.
c 2,656.		2,877.			-221.
d 7,965.		8,632.			-667.
e 15,931.		17,263.			-1,332.
f 10,729.		38,348.			-27,619.
g 19,601.		21,031.			-1,430.
h 29,400.		31,547.			-2,147.
7,591.		12,402.			-4,811.
7,591.		12,401.	··		-4,810.
k 564.					564.
1			<u> </u>		
<u>m</u>					
n	 -				
Complete only for accets showing	goin in column (h) and award his	the foundation on 10/21/60			<u> </u>
(i) F.M V as of 12/31/69	g gain in column (h) and owned by (j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	Gains (excess o	ses (from col (h)) of col (h) gain over ot less than "-0-")	
a	· · · · · · · · · · · · · · · · · · ·				-5,721.
b		-	· _··		419.
С					-221.
d				 .	-667.
e				-	-1,332.
f					-27,619.
g					-1,430.
h					-2,147.
I				. <u>-</u>	-4,811.
<u></u>					-4,810.
k					564.
<u> </u>					
m					
n					
0					
2 Capital gain net income or (net cap	ital loss) { If gain, also enter in the loss in the lo	r in Part I, line 7)-" in Part I, line 7	2		-92,250.
3 Net short-term capital gain or (loss if gain, also enter in Part I, line 8, culf (loss), enter "-0-" in Part I, line 8) as defined in sections 1222(5) an	_ I		N/A	
a cossi silei ar illevil ille A		1 1	74 I	ri / /\	

FORM 990-PF DIVIDENI	DS AND	INTER	EST FROM	SECUE	RITIES	STATEMENT	1
SOURCE		GROSS	AMOUNT		ITAL GAINS IVIDENDS	COLUMN (A AMOUNT)
CHARLES SCHWAB	-		50,480.		564.	49,9	16.
TOTAL TO FM 990-PF, PART I, I	LN 4		50,480.		564.	49,9	16.
FORM 990-PF		LEGAL	FEES			STATEMENT	2
DESCRIPTION	EXPE	A) NSES BOOKS	(B) NET INVI MENT INC		(C) ADJUSTED NET INCOM		
LEGAL		4,259.		0.			0.5
TO FM 990-PF, PG 1, LN 16A		4,259.		0.	-		0 •
FORM 990-PF (OTHER 1	PROFES	SIONAL FI	EES		STATEMENT	3
DESCRIPTION	EXPE	A) NSES BOOKS	(B) NET INVI MENT INC		(C) ADJUSTED NET INCOM		
ACCOUNT MANAGEMENT	18	8,000.	18	,000.			0.
TO FORM 990-PF, PG 1, LN 16C	18	8,000.	18	,000.			0.
FORM 990-PF		TAX	ES			STATEMENT	4
DESCRIPTION	EXPE	A) NSES BOOKS	(B) NET INVI MENT INC		(C) ADJUSTED NET INCOM		
MASSACHUSETTS - 2008 FORM	•		*			·····	
PC CHARLES SCHWAB FOREIGN		70.		0.			0.
TAXES		439.		0.			0.
TO FORM 990-PF, PG 1, LN 18		509.		0.			0.

FORM 990-PF	OTHER E	XPENSES	 _			STATEMENT	5
	(A) EXPENSES PER BOOKS	(B) NET INVE MENT INC		(C ADJU NET I	STED	(D) CHARITA PURPOS	
CITIBUSINESS CREDIT CARD FEE PHOTOCOPYING EXPENSES	75. 25.		0.				0.
TO FORM 990-PF, PG 1, LN 23	100.		0.				0.
FORM 990-PF OTHER INCREASES	IN NET ASS	ETS OR FU	JND BAI	ANCES		STATEMENT	6
DESCRIPTION						AMOUNT	
ROUNDING ADJUSTMENT LIABILITY ADJUSTMENT					_	1,0	2. 00.
TOTAL TO FORM 990-PF, PART III	, LINE 3				=	1,0	02.
FORM 990-PF	CORPORAT	E STOCK				STATEMENT	7
DESCRIPTION			B001			FAIR MARKE	ጥ
			200.	VALU	E	VALUE	•
EQUITIES - SEE ATTACHED STATEM	ENT			611,5			
EQUITIES - SEE ATTACHED STATEMETOTAL TO FORM 990-PF, PART II,			1,		36.		64.
		ASSETS	1,	611,5	36.	1,910,4	64.
TOTAL TO FORM 990-PF, PART II, FORM 990-PF	LINE 10B OTHER BEGIN	ASSETS NING OF K VALUE	1 , 1 , 1 , 1 , 1 , 1 , 1 , 1 , 1 , 1 ,	611,5	36. 36.	1,910,4	64.
TOTAL TO FORM 990-PF, PART II, FORM 990-PF DESCRIPTION DIVIDEND RECEIVABLE	LINE 10B OTHER BEGIN	NING OF	1 , 1 , 1 , 1 , 1 , 1 , 1 , 1 , 1 , 1 ,	611,5 611,5 OF YEA	36. 36.	1,910,4 1,910,4 STATEMENT FAIR MARKE	64. 64. 8
TOTAL TO FORM 990-PF, PART II, FORM 990-PF DESCRIPTION DIVIDEND RECEIVABLE CAPITAL GAIN DISTRIBUTION RECEIVABLE	LINE 10B OTHER BEGIN	NING OF K VALUE	1 , 1 , 1 , 1 , 1 , 1 , 1 , 1 , 1 , 1 ,	611,5 611,5 OF YEA VALU	36. 36. ================================	1,910,4 1,910,4 STATEMENT FAIR MARKE VALUE 3,7	64. 64. 8
TOTAL TO FORM 990-PF, PART II, FORM 990-PF DESCRIPTION DIVIDEND RECEIVABLE CAPITAL GAIN DISTRIBUTION	LINE 10B OTHER BEGIN	NING OF K VALUE	1 , 1 , 1 , 1 , 1 , 1 , 1 , 1 , 1 , 1 ,	611,5 611,5 OF YEA VALU	36. 36. 36. =	1,910,4 1,910,4 STATEMENT FAIR MARKE VALUE 3,7	64. 64. 64. 0.

FORM 990-PF	OTHER LIABILITIES	····	STATEME	NT 9
DESCRIPTION		BOY AMOUNT	EOY AMOU	UNT
UNCLEARED CHECKS	_	17,150.	18	8,000.
CREDIT CARD CHARGES PAID IN FOLLOWING YEAR FOREIGN TAX PAID IN FOLLOWING YEAR DIVIDEND ADJUSTMENT MADE IN FOLLOWING		1,000. 379.		850. 275.
YEAR	PTOMING	2,697.		0.
TOTAL TO FORM 990-PF, PART II, LINE 22		21,226.	19,12	
	TS AND CONTRIBUTIONS ID DURING THE YEAR	3	STATEME	NT 10
RECIPIENT NAME AND ADDRESS	RECIPIENT RELAT AND PURPOSE OF			MOUNT
MOUNT HOLYOKE COLLEGE	THE PURPOSE OF E	501(C))(3)	500.
AMHERST COLLEGE	IS TO PROVIDE SU FOR THE	501(C))(3)	1,000.
ST MARK'S	CHARITABLE OBJEC	501(C))(3)	100.
DICKINSON COLLEGE	RESPECTIVE ORGANIZATION, INCLUDING	501(C))(3)	1,500. -
WGBH	RESEARCH AND USI FUNDS TO	501(C)	(3)	250.

THE BOGER CHARITABLE TRUST					22-2776296
HARRIS CENTER	BENEFIT THOSE	E IN	NEED.	501(C)(3)	500.
HEALING GARDEN				501(C)(3)	250
CHESAPEAKE BAY FOUNDATION				501(C)(3)	100.
SOCIETY FOR PROTECTION OF NH FORESTS				501(C)(3)	50.
NATIONAL PARKS CONSERVATION ASSOCIATION				501(C)(3)	100.
TRINITARIAN CONGREGATIONAL CHURCH				501(C)(3)	3,000.
MCLEAN HOSPITAL				501(C)(3)	58,000.
ORGANIZATION FOR ASSABET RIVER				501(C)(3)	100.
CONCORD CARLISLE COMMUNITY CHEST				501(C)(3)	1,000.
SUDBURY VALLEY TRUSTEES				501(C)(3)	500.

THE BOGER CHARITABLE TRUST		22-2776296
CONCORD LAND CONSERVATION TRUST	501(C)(3)	250.
MARCH OF DIMES	501(C)(3)	150.
NEW HAMPSHIRE LAKES ASSOCIATION	501(C)(3)	100.
CARE	501(C)(3)	500.
EMERSON HOSPITAL	501(C)(3)	26,000.
MA GENERAL HOSPITAL	501(C)(3)	2,100.
FENN SCHOOL	501(C)(3)	1,150.
LAWRENCE ACADEMY	501(C)(3)	1,100.
HARVARD MEDICAL SCHOOL	501(C)(3)	500.
WESLEYAN UNIVERSITY	501(C)(3)	1,000.

THE BOGER CHARITABLE TRUST		22-2776296
TUFTS UNIVERSITY	501(C)(3)	250.
DANA FARBER JIMMY FUND	501(C)(3)	200.
THE KOMEN FOUNDATION	501(C)(3)	500.
WINCHESTER HOSPITAL	501(C)(3)	100.
MA EYE & EAR INFIRMARY	501(C)(3)	1,000.
CHILDREN'S HOSPITAL TRUST ROBB-PETERSEN ENDOW	501(C)(3)	2,000.
MOUNT AUBURN HOSPITAL	501(C)(3)	100.
CONCORD FREE PUBLIC LIBRARY	501(C)(3)	250.
BOSTON COLLEGE	501(C)(3)	1,000.
STEPPINGSTONE FOUNDATION	501(C)(3)	660.

THE BOGER CHARITABLE TRUST		22-2776296
BOSTON UNIVERSITY	501(C)(3)	1,000.
PAN MASS CHALLENGE	501(C)(3)	250.
PEOPLE'S EMERGENCY CENTER	501(C)(3)	1,000.
FOOD PROJECT	501(C)(3)	1,000.
MEADOWBROOK SCHOOL	501(C)(3)	1,500.
SHRINER'S HOSPITAL FOR CHILDREN	501(C)(3)	500.
HOSPITALITY HOMES	501(C)(3)	250.
EDVESTERS	501(C)(3)	6,600.
FAMILIES FOR DEPRESSION AWARENESS	501(C)(3)	2,500.
HUNTINGTON THEATER EDUCATION PROGRAM	501(C)(3)	5,000.

THE BOGER CHARITABLE TRUST		22-2776296
ADOLESCENT WELLNESS	501(C)(3)	1,000.
OCEAN CONSERVANCY	501(C)(3)	250.
PREVENT BLINDNESS AMERICA	501(C)(3)	100.
PROJECT BREAD	501(C)(3)	100.
SOUTH AFRICA DEVELOPMENT FUND	501(C)(3)	500 _{.5}
TUFTS MEDICAL CENTER	501(C)(3)	75.
PROJECT A.B.L.E.	501(C)(3)	1,000.
DELTAVILLE LOWER MIDDLESEX FIRE DEPARTMENT	501(C)(3)	50.
DELTAVILLE COMMUNITY ASSOCIATION	501(C)(3)	50.
ASSOC EARLY CARE & EDUCATION	501(C)(3)	; 250.
TOTAL TO FORM 990-PF, PART XV, LINE 3A		128,835.

Year End 12/31/2009

. # of Shares	Description	Date	Book Basis	Tax Basis	FMV
1,000	AFLAC Inc	8/19/02	30,998.89	30,998 89	46,250 00
-	Apple Inc	12/13/06	26,532.95	26,532.95	63,219.60
	Bard C R Incorporated	4/15/03	18,752.97	18,752.97	46,740.00
	Baxter International Inc	8/3/09	84,629.85	84,629.85	88,020.00
	Best Buy Inc	3/7/08	19,825.95	19,825.95	19,730.00
	Boeing Co	1/1/51	21,320.00	7,708 00	62,249.50
,	C	6/4/09	24,808.45	24,808 45	
1,000	Bristol-Myers Squibb Co	2/18/09	20,937.95	20,937.95	25,250.00
	Brown Forman Corp Cl B	4/16/07	32,188.95	32,188 95	33,481 25
	CVS Caremark Corp	5/8/07	36,599.95	36,599.95	32,210.00
900	Caterpillar Inc	06, 07	59,777.40	59,777 40	51,291.00
	Chesapeake Energy Corp	07	42,102.70	42,102.70	31,056.00
	China Mobile LTD ADR	6/4/09	15,158.95	15,158 95	13,929.00
1,000	Cisco Systems Inc	07	26,618.80	26,618.80	23,940.00
	Core Laboratories	5/23/05	18,515 75	18,515 75	94,496.00
750	Factset Research Systems	8/19/02	11,091.34	11,091.34	49,402 50
	Fedex Corporation	7/28/06	42,104.95	42,104.95	33,380 00
	General Electric Co	1/1/61	7,920.00	9,381.00	23,073.25
•		01, 05, 08	47,577.50	47,577.50	
100	Google Inc Class A	5/31/07	50,551.18	50,551.18	61,998.00
	Halliburton Co Hldg Co	8/30/07	34,278.41	34,278.41	30,090 00
	Intl Business Machines	7/17/07	33,075.35	33,075.35	39,270.00
500	Johnson & Johnson	8/19/02	26,747.01	26,747.01	32,205 00
2,000	JPMorgan Chase 8.625%	6/19/09	50,764.95	50,764.95	56,480.00
	Microsoft Corp	6/19/09	19,352.15	19,352 15	24,384 00
	Nortel Networks Cp	1/1/51	1,040.00	7,987.00	0.46
	Pepsico Incorporated	11/9/01	49,286.00	49,286.00	60,800 00
	Pimco Floating Rate Stra	9/11/09	42,779 95	42,779.95	49,400 00
	Rockwell Automation Inc	1/1/51	6,274.74	80.92	23,490 00
600	Rockwell Collins Inc	1/1/51	8,137.78	1,132 66	33,216.00
300	Sohu com Inc	11/6/08	15,500.95	15,500.95	17,184 00
500	Stryker Corp	3/8/05	24,429.95	24,429 95	25,185 00
500	Verizon Communications	12/15/08	15,993 45	15,993 45	16,565.00
1,000	Wal-mart Stores Inc	10/26/09	50,167.95	50,167.95	53,450 00
5,231.226	Goldman Sachs Absolute Return Tracker FD Inst	8/11/08	50,157.04	50,157 04	47,656 47
1,000	Archer Daniels 6 25% 6/1/11	7/2/09	36,388.95	36,388.95	43,610.00
1,000	HCP Inc	8/19/02	20,002.03	20,002 03	30,540 00
1,500	Ishares MSCI Aus Idx Fd	10/1/07	48,264.95	48,264 95	34,260.00
400	Ishares MSCI Brazil Indx Brazil Free Index Fund	4/28/08	35,136.15	35,136 15	29,844 00
1,000	Ishares MSCI CDA Idx Fd	9/27/05	21,319.95	21,319 95	26,330.00
900	Ishares MSCI Pac Ex Japn	12/12/06	37,382.45	37,382.45	37,233.00
2,000	Ishares MSCI Singapore Free Index Fund	7/23/09	19,886.95	19,886 95	22,980.00
2,000	Ishares S&P Smallcap 600 Growth	04, 06	113,289 20	113,289.20	114,280 00
	Ishares S&P U S PFD Fund	08	106,994.90	106,994.90	146,800.00
500	Ishares Tr S&P Midcap 400 Index	4/17/07	43,681.87	43,681.87	36,205.00
900	Ishares Trust Index Fund FTSE Xinhua HK China	11/22/06	28,674.95	28,674.95	38,034 00
600	Sector SPDR Materials Fd	4/30/09	15,488.95	15,488.95	19,794.00
200	SPDR Gold Trust	3/10/08	19,024 75	19,024 75	21,462.00
TOTAL	_	•	1,611,536.21	1,593,133.27	1,910,464.03