

# See a Social Security Number? Say Something! Report Privacy Problems to https://public.resource.org/privacy Or call the IRS Identity Theft Hotline at 1-800-908-4490



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

Depa	rtmen	t of the Treasury venue Service	lote. The foundat	ion mav	Treated as a Private be able to use a copy of this	e Founda return to satu	<b>ition</b> sty state repo	rting requirements	2011
		idar year 2011 or tax year			oo abio to abo a bopy or tillo	, and e		ting requirements	
Nai	ne of	foundation			· · · · · · · · · · · · · · · · · · ·		· · · · · · · · · · · · · · · · · · ·	A Employer identification	n number
Т	ΗE	BOGER CHAR	TABLE T	RUST	1			22-2776290	5
		and street (or P O box number					Room/suite	B Telephone number	
2	9	IRVING STREE	ET					978-369-14	176
		own, state, and ZIP code BRIDGE, MA	02138					C If exemption application is	pending, check here
		all that apply	Initial return		Initial return of a fo	rmer public c	harity	D 1. Foreign organization	is check hara
<u>.</u>	MICON	an that apply	Final return		Amended return	illier public c	ilality	1. Totelgii organization	is, check here
			Address change	)	Name change			Foreign organizations rr 2. check here and attach of	eeting the 85% test,
H (	heck	type of organization			kempt private foundation			E If private foundation st	·
	<u> </u>	ction 4947(a)(1) nonexem	npt charitable trus	<u>:t 🔲</u>	Other taxable private founda	tion		under section 507(b)(1	
Fa	ıır ma	arket value of all assets at (	end of year   <b>J</b>		ng method X Cash	Accr	ual	F If the foundation is in a	60-month termination
		Part II, col (c), line 16)	250 6		ther (specify)		<u> </u>	under section 507(b)(1	)(B), check here 🕨 🗀
	\$				mn (d) must be on cash b		<u> </u>		(4) -
76	ırt E	Analysis of Revenue and (The total of amounts in columecessanly equal the amounts)	imns (b), (c), and (d) i	may not	(a) Revenue and expenses per books	(b) Net in	vestment ome	(c) Adjusted net income	(0) Disbursements for chantable purposes
_	1	Contributions, gifts, gran			53,431.			N/A	(cash basis only)
	2	Check I if the foundation	n is not required to attacl	Sch B					
	3	Interest on savings and tempo cash investments	orary						***************************************
	4	Dividends and interest fro	om securities		59,625.	5	9,625.		STATEMENT 1
	5a	Gross rents					<del></del>		
	_	Net rental income or (loss)			24 027		<del>11   14/2] Hilliplia</del>		
ne	6a	Net gain or (loss) from sale of Gross sales price for all assets on line 6a	assets not on line 10 285,6		34,927.		·····		
Revenue	7 7	assets on line 6a  Capital gain net income (from		12.		3	4,927.	RE	CEIVER
æ	8	Net short-term capital gar				······································	1//2/	18/	1
	9	Income modifications					<del></del>	\ <sup>∞</sup> / MAY	19
	10a	Gross sales less returns and allowances							1 2012   01
	b	Less Cost of goods sold				***************************************	· · · · · · · · · · · · · · · · · · ·	LOGO	18
	!	Gross profit or (loss)						30	4-14, 1.17 ~
		Other income			147 002		4 552		
	12				147,983.	9	4,552. 0.		0.
	14	Other employee salaries a			•				0.
	l .	Pension plans, employee	-						
Ses	l .	Legal fees	STMT	2	4,470.		0.		0.
pen		Accounting fees		_					
Ä	ľ	Other professional fees	STMT	3	22,300.	2	2,300.		0.
Administrative Expenses	l	Interest	STMT	<b>A</b>	- COE		EDE		
stra	18 19	Taxes  Depreciation and depletion		4	605.	<del> </del>	535.		0.
Ë	20	Occupancy	)ri						
	21	Travel, conferences, and	meetinas		27.		0.		0.
and	22	Printing and publications	-			· · · · · · · · · · · · · · · · · · ·			
gu	23	Other expenses	STMT	5	96.		0.		0.
Operating	24	Total operating and adm				_			
Ö		expenses. Add lines 13 t	-		27,498.	2	2 <b>,</b> 835.		0.
_	25	Contributions, gifts, gran			95,890.				95,890.
	20	Total expenses and disb Add lines 24 and 25	ursements.		123,388.	າ	2,835.		95,890.
	27	Subtract line 26 from line	12		123/300.	<u></u>	٠, ٥٥٥.		33,030.
		Excess of revenue over expen		ents	24,595.				
		Net investment income (				7	1,717.	<u> </u>	
100	C	Adjusted net income (if n	egative, enter -0-)					N/A	
1235	U1 2-11	LHA For Paperwork R	eduction Act Not	ice, see	instructions.				Form <b>990-PF</b> (2011)

Tie	¥	Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only	Beginning of year	End of	year
	ar i	column should be for end-of-year amounts only	(a) Book Value	(b) Book Value	(c) Fair Market Value
	1	Cash - non-interest-bearing	1,592.	2,356.	
	2	Savings and temporary cash investments	46,579.	34,164.	34,164.
	3	Accounts receivable			
		Less allowance for doubtful accounts			
	4	Pledges receivable			
	l	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			
Assets	8	Inventories for sale or use			
Ass	9	Prepaid expenses and deferred charges			
		Investments - U.S. and state government obligations	1 700 005	1 720 202	2 144 255
		Investments - corporate stock STMT 6	1,708,205.	1,738,303.	2,144,355.
	l	Investments - corporate bonds	<u> </u>		
	11	Investments - land, buildings, and equipment basis			
	40	Less accumulated depreciation			
	I	Investments - mortgage loans		· · · · · · · · · · · · · · · · · · ·	
	13	Investments - other	<u></u>		
	14	Land, buildings, and equipment basis	-		
	15	Other assets (describe STATEMENT 7)	2,214.	1,475.	1,475.
	13	Other assets (describe DIATEMENT /	2,214.	1,413.	1,473.
	16	Total assets (to be completed by all filers)	1,758,590.	1,776,298.	2,182,350.
_		Accounts payable and accrued expenses	1,730,3300	1777072300	2/102/330.
	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	4		
=	1	Other liabilities (describe >	29,187.	22,300.	
		· · · · · · · · · · · · · · · · · · ·		•	
	23	Total liabilities (add lines 17 through 22)	29,187.	22,300.	
		Foundations that follow SFAS 117, check here			
		and complete lines 24 through 26 and lines 30 and 31.			
ĕ	24	Unrestricted			
<u>la</u>	25	Temporarily restricted			
Ö	26	Permanently restricted			
Ĕ		Foundations that do not follow SFAS 117, check here			
F		and complete lines 27 through 31.			
ts	27	Capital stock, trust principal, or current funds	1,729,403.	1,753,998.	
Net Assets or Fund Balances	28	Paid-in or capital surplus, or land, bldg, and equipment fund	0.	0.	
¥	29	Retained earnings, accumulated income, endowment, or other funds	0.	0.	
ž	30	Total net assets or fund balances	1,729,403.	1,753,998.	
		Takel Habilikhan and nak annak Mind batan na	1 750 500	1 776 200	
_		Total liabilities and net assets/fund balances	1,758,590.	1,776,298.	
F	art	Analysis of Changes in Net Assets or Fund B	Balances		
1	Tota	net assets or fund balances at beginning of year - Part II, column (a), line	30	·- · · · · · · · · · · · · · · · · · ·	<del></del>
•		st agree with end-of-year figure reported on prior year's return)	30	1	1,729,403.
2		r amount from Part I, line 27a		2	24,595.
		r increases not included in line 2 (itemize)		3	24,393.
		lines 1, 2, and 3		4	1,753,998.
		eases not included in line 2 (itemize)		5	0.
		net assets or fund balances at end of year (line 4 minus line 5) - Part II, c	olumn (b), line 30	6	1,753,998.
				- · · · · ·	Form <b>990-PF</b> (2011)

Part IV Capital Gains a	and Losses for Tax on In	vestment	Income					
	nbe the kind(s) of property sold (e g rehouse, or common stock, 200 shs			(b) How P - Pui D - Do	rchase	(c) Date (mo , d	acquired ay, yr )	(d) Date sold (mo , day, yr )
1a	<u>-</u> -							
b SEE ATTACHED	STATEMENTS	<u></u>						
<u>C</u>	<u></u>							
_d			<del> </del>	ļ				
<u>e</u>	(f) Depresietes allowed	(=) Coo	t as ather been	1		<b>(F)</b> 0		
(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> </u>					
<u>b</u>								<del></del>
d				_	<del></del>			
e 285,672.			250,74	5		<del></del>		34,927.
	g gain in column (h) and owned by t	the foundation		<del></del>		I) Gaine (C	ol (h) gain	
	(j) Adjusted basis		cess of col (i)			l (k), but i	not less thar	1 <b>-</b> 0-) or
(i) FMV as of 12/31/69	as of 12/31/69		col (j), if any			Losses	(from col (	h))
a	····			<del></del>				<del> </del>
<u>b</u>								
c d	<u> </u>			<del></del>				
e								34,927.
	C th assaults and a	un David Juna '		7				31/32/1
2 Capital gain net income or (net cap	pital loss) { If gain, also enter If (loss), enter -0-			)   2				34,927.
3 Net short-term capital gain or (los			,					
If gain, also enter in Part I, line 8,		iu (0)		]				
If (loss), enter -0- in Part I, line 8				<b>]</b> 3			N/A	
Part V Qualification U	nder Section 4940(e) for	Reduced	Tax on Net	Invest	ment In	come		
(For optional use by domestic private	foundations subject to the section 4	1940(a) tax on	net investment in	come )				
If section 4940(d)(2) applies, leave th	us nart hlank							
Tri soction 4540(0)(2) applies, leave th	no part blank							
Was the foundation liable for the sect			•	riod?				Yes X No
If "Yes," the foundation does not quali								
1 Enter the appropriate amount in e	each column for each year; see instri	uctions before	making any entri					(d)
Base periód vears	(b) Adjusted qualifying dis	tributions	Net value of no	(C) ncharitabl	a-iisa assate		Distrib	uitión ratio
Calendar year (or tax year beginnin 2010	'9 '''/	8,852.			72,45		(cor (b) aiv	ided by col (c)) • 052523
2009		8,516.	<del></del>		37,020			.073986
2008		6,404.		2.3	87,623	3.		.057130
2007		8,493.		2.7	24,596	5.	<del></del>	.039820
2006		5,014.	<del>.</del>	2,4	48,265	5.	•	.042893
		<del>- /</del> 1						7777
2 Total of line 1, column (d)						2		.266352
3 Average distribution ratio for the 5	5-year base period - divide the total o	on line 2 by 5,	or by the number	of years				<del></del>
the foundation has been in exister		•	•	•		3		.053270
	•							
4 Enter the net value of noncharitab	le-use assets for 2011 from Part X, I	line 5				4		2,307,929.
5 Multiply line 4 by line 3						5		122,943.
6 Enter 1% of net investment incom	e (1% of Part I, line 27b)					- 6		717.
7 Add lines 5 and 6								122 660
Ann migs 2 sin 0			•			7		123,660.
8 Enter qualifying distributions from	n Part XII, line 4					8		95,890.
	line 7, check the box in Part VI, line	1b, and comp	lete that part usin	g a 1% tax	k rate			
See the Part VI instructions			<del></del>					

	n 990-PF (2011) THE BOGER CHARITABLE TRUST		<u> 27762</u>			Page 4
Pa	ert VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or	4948	- see ir	stru	ıctio	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 🕨 🔲 and enter 1%	1			1,4	34.
	of Part I, line 27b					,
E	All other domestic foundations enter 2% 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			1,4	34.
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			1,4	34.
6	Credits/Payments					
а	2011 estimated tax payments and 2010 overpayment credited to 2011 6a 1,987	•				
b	Exempt foreign organizations - tax withheld at source					
C	Tax paid with application for extension of time to file (Form 8868)					
đ	Backup withholding erroneously withheld 6d					
7	Total credits and payments Add lines 6a through 6d	7			1,9	87.
8	Enter any <b>penalty</b> 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				
	p-y	10		•	5	53.
	Enter the amount of line 10 to be Credited to 2012 estimated tax ► 553 • Refunded ►	11				0.
	rt 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 interven	ne in			Yes	No
	any political campaign?			1a		X
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)?			1b		X
	If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials publish	hed or				
	distributed by the foundation in connection with the activities.					
	Did the foundation file Form 1120-POL for this year?			1c		X
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year					
	(1) On the foundation ► \$ O . (2) On foundation managers ► \$ O	<u>•</u>				
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation			Ì		
	managers > \$O.					
	Has the foundation engaged in any activities that have not previously been reported to the IRS?		ļ.	2		X
	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				
4-	bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes			3		X
	Did the foundation have unrelated business gross income of \$1,000 or more during the year?		/3	4a		X
	If "Yes," has it filed a tax return on Form 990-T for this year?	N	/A	4b		<del></del>
	Was there a liquidation, termination, dissolution, or substantial contraction during the year?		-	5		X
	If "Yes," attach the statement required by General Instruction T					
U	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 officetively amonds the government as that are used to be a superior or the state of the state					
	By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the statement of the property of the conflict with the statement of the property of the conflict with the statement of the property of the conflict with the statement of the property of the conflict with the statement of the property of the conflict with the statement of the property of the conflict with the statement of the property of the conflict with the statement of the property of the proper	te law	-	_	v	
7	remain in the governing instrument?		-	6	X	<del> </del>
	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.		ļ	7	Х	ļ
	· ·					
Ja	Enter the states to which the foundation reports or with which it is registered (see instructions)		<del></del>			
ь	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		l	٥.	v	
g	Is the foundation claiming status as a private operating foundation within the meaning of section $4942(j)(3)$ or $4942(j)(5)$ for ca	landa-	<u> </u>	8b	X	
	year 2011 or the taxable year beginning in 2011 (see instructions for Part XIV)? If "Yes," complete Part XIV	IEHUAT	ŀ		:	v
	7 The terrapid your boginning in 2011 (500 motiootions for rail xiv). It is 165, Complete Fail XIV		_	9		<u> </u>

	1990-PF (2011) THE BOGER CHARITABLE TRUST 22-2776	<u> </u>		Page 5
Pa	art 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)	11		X
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)	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	
	Website address ► N/A		=	
14	The books are in care of ▶ THE FOUNDATION  Telephone no ▶978-36	9-1	476	
•	Located at ▶29 IRVING STREET, CAMBRIDGE, MA ZIP+4 ▶02			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here	. 1 0 0		TT
	and enter the amount of tax-exempt interest received or accrued during the year	N	/A	
16	At any time during calendar year 2011, did the foundation have an interest in or a signature or other authority over a bank,		Yes	No
	securities, or other financial account in a foreign country?	1 16	162	X
	·	10		
	See the instructions for exceptions and filing requirements for Form TD F 90-22 1. If "Yes," enter the name of the foreign country.			
p,	art 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
12	During the year did the foundation (either directly or indirectly)		162	110
•••	(1) Engage in the sale or exchange, or leasing of property with a disqualified person?  Yes X No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from)			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?  Yes X 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)?			
	(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 )			
t	ı If any answer is "Yes" to 1a(1)-(6), did <b>any</b> 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)?	1b		
	Organizations relying on a current notice regarding disaster assistance check here			
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 2011?	10		X
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))			
ā	At the end of tax year 2011, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning			
	before 2011?			
	If "Yes," list the years 🚩,,,			
t	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 ) N/A	2b		
C	: If the provisions of section 4942(a)(2) are being applied to <b>any</b> of the years listed in 2a, list the years here			
	<b>&gt;</b>			
32	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time			
	during the year?			
t	of "Yes," did it have excess business holdings in 2011 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 2011)  N/A	3ь		
4;	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		X
	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that	70		
•	had not been removed from jeonardy before the first day of the tax year beginning in 20112	AL		v

orm 990-PF (2011) THE BOGER CHARITABLE TRU			22- <u>27762</u>	96	Page 6
Part VII-B Statements Regarding Activities for Which I	Form 4720 May Be F	Required (contin	ued)		
5a During the year did the foundation pay or incur any amount to				7	
(1) Carry on propaganda, or otherwise attempt to influence legislation (section	n 4945(e))?	Ye	s X No		
(2) Influence the outcome of any specific public election (see section 4955), of	or to carry on, directly or indire	ectly,			
any voter registration drive?		Ye	s X No		
(3) Provide a grant to an individual for travel, study, or other similar purposes	2	Ye	s X No		
(4) Provide a grant to an organization other than a charitable, etc., organizatio					
509(a)(1), (2), or (3), or section 4940(d)(2)?		☐ Ye	s X No		
(5) Provide for any purpose other than religious, charitable, scientific, literary,	or educational purposes, or f	•			
the prevention of cruelty to children or animals?		☐ Ye	s X No		
b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify uni	der the exceptions described :				
section 53 4945 or in a current notice regarding disaster assistance (see instru	•		N/A	5b	
Organizations relying on a current notice regarding disaster assistance check h	·		<b>▶</b>		
c If the answer is "Yes" to question 5a(4), does the foundation claim exemption f		ined			
expenditure responsibility for the grant?		, —	es D No		
If "Yes," attach the statement required by Regulations section 53 494	5-5 <i>(d</i> )				
6a Did the foundation, during the year, receive any funds, directly or indirectly, to	, -				
a personal benefit contract?	F=) F:0::::0:::0 VII	<b>□</b> Y <sub>5</sub>	s X No		
b Did the foundation, during the year, pay premiums, directly or indirectly, on a p	personal benefit contract?			6b	X
If "Yes" to 6b, file Form 8870.	J. J		ļ		
7a At any time during the tax year, was the foundation a party to a prohibited tax s	shelter transaction?		s X No		
b If "Yes," did the foundation receive any proceeds or have any net income attribute.		٠. بـــا	/	7b	
Information Albert Office District Total		nagers, Highly	•	•••	
Part VIII Paid Employees, and Contractors			•		
List all officers, directors, trustees, foundation managers and their	compensation.				
4.11	(b) Title, and average	(c) Compensation	(d) Contributions to employee benefit plans	(e)	Expense ount, other
(a) Name and address	hours per week devoted to position	(If not paid, enter -0-)	employee benefit plans and deferred compensation		owances
WILLIAM P. BOGER, III	TRUSTEE				
29 IRVING STREET					
CAMBRIDGE, MA 02138	0.00	0.	0.		0.
BARBARA C. BOGER	TRUSTEE				
29 IRVING STREET				}	
CAMBRIDGE, MA 02138	0.00	0.	0.		0.
	_				
	<u> </u>			<u> </u>	
2 Compensation of five highest-paid employees (other than those inc	· · · · · · · · · · · · · · · · · · ·	enter "NONE."	(d) co	1	
(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week	(c) Compensation	(d) Contributions to employee benefit plans	(e)	Expense ount, other
	hours per week devoted to position	(o) componention	and deferred compensation	ali	owances
NONE					
	_				
	1	ļ			
	1				
		<u> </u>	l		
Total number of other employees paid over \$50,000					0

Form 990-PF (2011) THE BOGER CHARITABLE TRUST	22-27	76296 Page 7
Part VIII Information About Officers, Directors, Trustees, Foundary Paid Employees, and Contractors (continued)	tion Managers, Highly	
3 Five highest-paid independent contractors for professional services. If none, enter	"NONE."	
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
	7	
	7	
	7	
	<u> </u>	
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 statistic	cal information such as the	Expenses
number of organizations and other beneficiaries served, conferences convened, research papers produ	uced, etc	Exhenses
1 N/A		
2		
^		
3		
A		
Part IX-B Summary of Program-Related Investments	<del></del>	
Describe the two largest program-related investments made by the foundation during the tax year on li	ines 1 and 2	Amount
1 N/A		
2		<del></del>
All other program-related investments. See instructions		
3		
Total. Add lines 1 through 3	<b>&gt;</b>	0.

P	Minimum Investment Return (All domestic foundations must complete this part. Foreign four	ndations,	see instructions.)
1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
а	Average monthly fair market value of securities	1a	2,270,993. 72,082.
	Average of monthly cash balances	1b	72,082.
C	Fair market value of all other assets	10	
d	Total (add lines 1a, b, and c)	1d	2,343,075.
	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	2,343,075.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	35,146.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4.	5	2,307,929.
6	Minimum investment return Enter 5% of line 5	6	115,396.
P	Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and foreign organizations check here  and do not complete this part.)	id certain	
1	Minimum investment return from Part X, line 6	1	115,396.
	Tax on investment income for 2011 from Part VI, line 5		
b	Income tax for 2011 (This does not include the tax from Part VI)		
C	Add lines 2a and 2b	20	1,434.
3	Distributable amount before adjustments Subtract line 2c from line 1	3	113,962.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	113,962.
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	113,962.
=	art XII Qualifying Distributions (see instructions)	11	
1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes		05 000
	Expenses, contributions, gifts, etc - total from Part I, column (d), line 26	1a	95,890.
b	Program-related investments - total from Part IX-B	1b	<u> </u>
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		
3	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	05 000
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	95,890.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment	]	0
	income Enter 1% of Part I, line 27b	5	0.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	95,890.
	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	qualifies fo	r the section

Form **990-PF** (2011)

# Part XIII Undistributed Income (see instructions)

Distributable amount for 2011 from Part XI, Inter 7   Undistributable innorm, flam, is of the end of 2011 a Enter amount for 2010 only		(a) Corpus	(b) Years prior to 2010	(c) 2010	(d) 2011
2 Undernoted Honors, damy, as of the end of 2011 and Earlier amount for 2010 only b Total for prior years  3 Excess distributions carryover, if any, to 2011 a From 2006 b From 2007 c From 2008 e From 2010 c From 2009 e From 2010 c From 2009 e From 2010 c From 2010 e From 2010 c From 2010 c From 2010 c From 2011			·		113,962.
3 Excess distributions carryover, if any, to 2011 a from 2006 b from 2007 c from 2008 d from 2010 c from 2010 d from 2011 d f	2 Undistributed income, if any, as of the end of 2011		, ,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,		
3 Excess distributions carryover, if any, to 2011 a from 2006 b from 2007 c from 2008 d from 2010 c from 2010 d from 2011 d f	a Enter amount for 2010 only			61,001.	
3 Excess distributions carryover, if any, to 2011 a From 2006 b From 2007 c From 2009 e From 2010 1 Total of lines 32 through e  4 Qualifying distribution for 2011 from Part XII, line 4 P § 95, 890 a Applied to 2010, but not more than line 2a b Applied to undistributed income of prior years (Election required - see instructions) c Treated as distributions out of corpus (Election required - see instructions) d Applied to 2011 distributable amount e Remaining amount distributed out of corpus (Election required - see instructions) d Applied to 2011 distributable amount e Remaining amount distributed out of corpus (Election required - see instructions) d Applied to 2011 distributable amount e Remaining amount distributed out of corpus (Election required - see instructions) d Applied to 2011 distributable amount e Remaining amount distributed out of corpus (Election required - see instructions) d Applied to 2011 distributed out of corpus (Election required - see instructions) d Applied to 2011 distributed income. Subtract line 4 brom line 2b  D From years' undistributed income. Subtract line 4b from line 2b  D From years' undistributed income. Subtract line 4b from line 2b  Subtract line 6c from line 6 from subset line which the section 49(20) tax has been previously assessed Undistributed income for 2010 Subtract line 4 from line 2a Taxable amount - see instructions Undistributed income for 2010 Subtract line 4 from line 2a Taxable amount - see instructions Undistributed income for 2011 Subtract line 4 from line 2a Taxable amount - see instructions Undistributed income for 2011 Subtract line 4 from line 2a Taxable amount - see instructions Undistributed income for 2010 Subtract line 4 from line 2a Taxable amount - see instructions Undistributed income for 2010 Subtract line 4 from line 2a Taxable amount - see instructions Undistributed income for 2010 Subtract line 4 from line 2a Taxable amount - see instructions Undistributed income for 2010 Subtract line 4 from line 2a Taxable amount - see instructions Undistribu	b Total for prior years		0		· · · · · · · · · · · · · · · · · · ·
From 2007	3 Excess distributions carryover, if any, to 2011				
E From 2008 d From 2010 From 2011 From 2010 From 2010 From 2011 F	a From 2006				
d From 2009 e From 2010    Total of Ines 3a through e	b From 2007				
e From 2010	c From 2008				
1 Total of lines 3 a through e 4 Qualifying distributions for 2011 from Part XII, line 4 № \$ 95,890.  a Applied to 2010, but not more than line 2a Applied to 2010, but not more than line 2a Applied to 2010, but not more than line 2a Applied to 2011 distributions out of corpus (Election required - see instructions) 4 Applied to 2011 distributable amount 8 Remaning amount distributed out of corpus 6 Remaning amount distributed out of corpus 7 Screes distributions carryoner about 10 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	d From 2009				
4 Qualifying distributions for 2011 from Part XI, line 4 ► \$ 95,890.  A Applied to undistributed income of prior years (Election required - see instructions) c Treated as distributions out of corpus (Election required - see instructions) d Applied to 2011 distributable amount e Remaining amount distributed out of corpus 5 Excess distributions carryover applied to 2011 amount must be shown or obluming 4).  6 Emission and the see that the same amount must be shown or obluming 4).  6 Edites the net total of each column as indicated below:  a Corpus Ada times 01.4c, and 46 Subtract line 5 b Prior years' undistributed income. Subtract line 40 from line 2b c 10.  6 Edites the amount of prior years' undistributed income. Subtract line 40 from line 2b c 10.  6 Edites the amount of prior years' undistributed income for which a notice of differency has been resued, or on which the section 4942(a) tax has been previously assessed 3 Subtract line 65 from line 60 Taxable amount - see instructions	e From 2010				
Part XI, line 4 ► \$ 95, 890.  a Applied to 2010, but not more than line 2a bapplied to 2010 but not more than line 2a bapplied to undistributed income of prior years (Election required - see instructions)  (I readed as distributions out of corpus (Election required - see instructions)  (Applied to 2011 distributable amount of Remaining amount distributed out of corpus  Election required - see instructions)  0.  4 Applied to 2011 distributable amount of Remaining amount distributed out of corpus  5 Excess distributions carry-ver applied to 2011  0.  5 Excess distributions carry-ver applied to 2011  0.  6 Enter the net fold of each Column as indicated below:  2 Corpus And time 3 (4.c, and 4e Subtract line 5  1 Prior years' undistributed income. Subtract line 4b from line 2b  Enter the net amount of prior years' undistributed income in which a notice of deficiency has been insued, or on which the section 494(2) tax has been previously assessed  3 Subtract line 6 from line 6b Taxable amount - see instructions  4 Undistributed income for 2010 Subtract line 4a from line 12 Taxable amount - see instructions  5 Undistributed income for 2011 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2012  7 Amounts treated as distributions out of corpus of salesty requirements imposed by section 170(b)(1)(F) or 4942(9)(3)  8 Excess from 2007  9 Excess from 2007  2 Excess from 2001  2 Excess from 2001  2 Excess from 2001  2 Excess from 2001  4 Excess from 2011	f Total of lines 3a through e	0.			•••••
a Applied to 2010, but not more than line 2a b Applied to undistributed income of prior years (Election required - see instructions) C Treated as distributions out of corpus (Election required - see instructions) d Applied to 2011 distributable amount R Remaining amount distributed out of corpus E-boses distributions curvover applied to 2011 (If an amount appears in column (a)) E-boses distributions curvover applied to 2011 (If an amount appears in column (a)) E-boses distributions curvover applied to 2011 (If an amount appears in column (a)) E-boses distributions curvover applied to 2011 (If an amount appears in column (a)) E-boses distribution activant (a))  E-boses distribution activant (a))  D-proy years' undistributed income of column as indicated below:  D-proy years' undistributed income (a) day and se subtinect line 5 D-proy years' undistributed income for which a notice of deficiency has been issued, or on which the section 494(a) tax has been previously assessed  Subtract line 6c from line 6b Taxable amount - see instructions  Undistributed income for 2010 Subtract line 4a from line 2a Taxable amount - see instructions  Undistributed income for 2011 Subtract line 4a from line 2a Taxable amount - see instructions  Undistributed income for 2011 Subtract line 4a from line 2a Taxable amount - see instructions  Undistributed income for 2011 Subtract line 4a from line 2a Taxable amount - see instructions  Excess from 2012  Excess distributions carryover from 2006 not applied on line 5 or line 7  Excess from 2007  Excess from 2009  Gexess from 2009  Gexess from 2001  Excess from 2001  Gexess from 2001  Excess from 2001		i	-		
b Applied to undistributed income of prior years (Election required - see instructions) c Treated as distributions out of corpus (Election required - see instructions) d Applied to 2011 distributable amount e Remaining amount distributed out of corpus 5	Part XII, line 4 ►\$ 95,890.				
years (Election required - see instructions)  t Treated as distributions out of corpus (Election required - see instructions)  d Applied to 2011 distributable amount e Remaining amount distributable amount of the section speems in column (k), the same amount must be aboven in exturn (k)  5 Enter the net total of each column as indicated below:  3 Corpus Add lines 31, 4c, and 4e Subtract tine 5 b Phor years' undistributed incorne. Subtract line 4b from line 2b  2 Enter the amount of prior years' undistributed incorne for which a notice of deficiency has been issued, or on which the section 344(a) tax has been previously assessed  d Subtract line 6c from line 6b Taxable amount - see instructions  e Undistributed incorne for 2010 Subtract line 4a from line 2 Taxable amount - see instructions  e Undistributed incorne for 2011 Subtract line 4a from line 2 Taxable amount - see instructions  e Undistributed incorne for 2011 Subtract line 4a from line 2 Taxable amount - see instructions  79,073.  Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)  8 Excess distributions carryover from 2006 not applied on line 5 or line 7  9 Excess distributions carryover from 2006 not applied on line 5 or line 7  9 Excess from 2009 de Excess from 2009 de Excess from 2009 de Excess from 2001 de Excess fro	a Applied to 2010, but not more than line 2a	12-1-1-1-1-1-1-1-1-1-1-1-1-1-1-1-1-1-1-		61,001.	
E Treated as distributions out of corpus (Election requiredsee instructions) d Applied to 2011 distributable amount e Remaining amount distributed out of corpus 5 Excess distributions carryover applied to 2011 7 Enter the net total of each column as indicated below: 8 Corpus Asid Immed 3 (4, and 46 Subtract line 5 9 Prory years' undistributed income. Subtract line 4b from line 2b 1 Prory years' undistributed income. Subtract line 4b from line 2b 2 Enter the amount of prior years' undistributed income for which a notice of deficiency has been sizued, or on which the section 4942(a) tax has been previously assessed 4 Subtract line 6c from line 6b 4 Trom line 2a Taxable amount - see instributions amount - see instructions 9 Undistributed income for 2010 Subtract line 4a from line 2a Taxable amount - see instributions 4 a from line 2a Taxable amount - see instributions 4 a from line 2a Taxable amount - see instributions 5 Corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(a)(3) 8 Excess distributions carryover from 2006 not applied on line 5 or line 7 9 Excess from 2007 9 Excess from 2009 6 Excess from 2001 6 Excess from 2001 6 Excess from 2001 6 Excess from 2001	<b>b</b> Applied to undistributed income of prior		_		
(Election required - see instructions) d Applied to 2011 distributable amount e Remaining amount distributed out of corpus 5	years (Election required - see instructions)		0.	· · · · · · · · · · · · · · · · · · ·	
d Applied to 2011 distributable amount e Remaining amount distributed out of corpus  5 Excess distributions carryvere applied to 2011 (fit an amount appears in column (of), the same amount must be shown in column (a))  5 Enter the net total of each column as indicated below:  8 Corpus And Ines 31, 4c, and 4e Subtract line 5  10 Prior years' undistributed income. Subtract line 4b from line 2b  10 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  10 Subtract line 6c from line 6b Taxable amount - see instructions  10 Undistributed income for 2010 Subtract line 4a from line 2a Taxable amount - see instr 1 Undistributed income for 2011 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2012  7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(a)(3)  8 Excess distributions carryover from 2006 not applied on line 5 or line 7  2 Excess distributions carryover to 2012. Subtract lines 7 and 8 from line 6a  10 Analysis of line 9  2 Excess from 2008  2 Excess from 2009  2 Excess from 2009  2 Excess from 2001  2 Excess from 2011	c Treated as distributions out of corpus	_			
e Remaining amount distributed out of corpus  5 Excess distributions carryover applied to 2011 (rin amount applied to 2011 (rin amount appears in column (b))  5 Enter the net total of each column as indicated below:  8 Corpus Add lines 31, 40, and 46 Subtract line 5  b Prior years' undistributed income. Subtract line 4b from line 2b  E faller the amount of pror years' undistributed income for which a notice of deficiency has been issued, or on which has section 4942(a) tax has been previously assessed  8 Undistributed income for which a notice of deficiency has been seued, or on which has section 4942(a) tax has been previously assessed  9 Undistributed income for 2010 Subtract line 4a from line 2a Taxable amount - see instructions  9 Undistributed income for 2011 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2012  7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(f) (F) of 4942(p)(3)  8 Excess distributions carryover from 2006 not applied on line 5 or line 7  9 Excess distributions carryover to 2012.  Subtract lines 7 and 8 from line 6a  10 Analysis of line 9  Excess from 2009  Excess from 2009  Excess from 2001	(Election required - see instructions)	0.			
5 Excess distributions carryover applied to 2011 That an amount appears in Submitted in the Same amount insults be shown in column (a)  5 Enter the net total of each column as indicated below:  3 Corpus Add lines 31, 4c, and 4e Subtract line 5  D Pror years' undistributed income. Subtract line 4b from line 2b  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  4 Subtract line 6c from line 6b Taxable amount - see instructions  4 arom line 2a Taxable amount - see instructions  4 arom line 2a Taxable amount - see instructions the distributed income for 2010 Subtract lines 4 and 5 from line 1 This amount must be distributed in 2012  7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)  8 Excess distributions carryover from 2006 not applied on line 5 or line 7  9 Excess distributions carryover to 2012. Subtract lines 7 and 8 from line 6a  10 Analysis of line 9  a Excess from 2009  d Excess from 2009  d Excess from 2009  d Excess from 2009  d Excess from 2011	d Applied to 2011 distributable amount		······		34,889.
(if an amount appears in column (d), the same amount must be shown in column (a) and an amount appears in column (d).  Enter the net total of each column as indicate below.  Included below.  A Corpus Add lines 31, 40, and 4e Subtract line 5  b Prior years' undistributed income. Subtract line 4b from line 2b  Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 942(a) as has been previously assessed  Subtract line 6c from line 6b Taxable amount - see instructions  e Undistributed income for 2010 Subtract line 4a from line 2a Taxable amount - see instructions  e Undistributed income for 2011 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2012  A mounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)  8 Excess distributions carryover from 2006 not applied on line 5 or line 7  9 Excess distributions carryover from 2006  10 Analysis of line 9  a Excess from 2007  b Excess from 2008  c Excess from 2009  d Excess from 2009  d Excess from 2010  d Excess from 2010  d Excess from 2011	e Remaining amount distributed out of corpus				1 - 21 - 1
6 Enter the net total of each column as indicated below:  2 Corpus Add interest 4.4, and 4e Subtract line 5  D Prior years' undistributed income. Subtract line 4b from line 2b  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  d Subtract line 6c from line 6b Taxable amount - see instructions  e Undistributed income for 2010 Subtract line 4a from line 2a Taxable amount - see instructions  e Undistributed income for 2011 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2012  79 Amounts treated as distributions out of corpus to satisty requirements imposed by section 170(b)(1)(F) or 4942(g)(3)  8 Excess distributions carryover from 2006  not applied on line 5 or line 7  9 Excess distributions carryover to 2012. Subtract lines 7 and 8 from line 6a  10 Analysis of line 9  a Excess from 2007  b Excess from 2008  c Excess from 2009  d Excess from 2009  d Excess from 2010  d Excess from 2011	(If an amount appears in column (d), the same amount	0.			0.
b Prior years' undistributed income. Subtract line 4b from line 2b  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  d Subtract line 6c from line 6b Taxable amount - see instructions  e Undistributed income for 2010 Subtract line 4a from line 2a Taxable amount - see instructions  f Undistributed income for 2011 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2012  7 Amounts treated as distributions out of corpus to saltsfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)  8 Excess distributions carryover from 2006 not applied on line 5 or line 7  9 Excess distributions carryover to 2012. Subtract lines 7 and 8 from line 6a  10 Analysis of line 9  a Excess from 2007 b Excess from 2007 c Excess from 2008 c Excess from 2010 d Excess from 2011 e Excess from 2011	6 Enter the net total of each column as				
Inne 4b from line 2b   C   E   E   C   C	2 Corpus Add lines 3f, 4c, and 4e Subtract line 5	0.			
Inne 4b from line 2b   C   E   E   C   C	b Prior years' undistributed income. Subtract				
undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed d Subtract line 6c from line 6b Taxable amount - see instructions e Undistributed income for 2010 Subtract line 4a from line 2a Taxable amount - see instr f Undistributed income for 2011 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2012 7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) 8 Excess distributions carryover from 2006 not applied on line 5 or line 7 9 Excess distributions carryover to 2012. Subtract lines 7 and 8 from line 6a 10 Analysis of line 9 a Excess from 2007 b Excess from 2007 c Excess from 2009 d Excess from 2010 a Excess from 2011 a Excess from 2011			0.		
amount - see instructions  e Undistributed income for 2010 Subtract line 4a from line 2a Taxable amount - see instr  f Undistributed income for 2011 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2012  7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)  8 Excess distributions carryover from 2006 not applied on line 5 or line 7  9 Excess distributions carryover to 2012. Subtract lines 7 and 8 from line 6a  10 Analysis of line 9 a Excess from 2007 b Excess from 2008 c Excess from 2009 d Excess from 2010 e Excess from 2011	undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously		0.		
e Undistributed income for 2010 Subtract line 4a from line 2a Taxable amount - see instr  f Undistributed income for 2011 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2012  7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)  8 Excess distributions carryover from 2006 not applied on line 5 or line 7  9 Excess distributions carryover to 2012. Subtract lines 7 and 8 from line 6a  10 Analysis of line 9 a Excess from 2007 b Excess from 2008 c Excess from 2009 d Excess from 2010 e Excess from 2010 e Excess from 2011	d Subtract line 6c from line 6b Taxable				
4a from line 2a Taxable amount - see instr  f Undistributed income for 2011 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2012  7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)  8 Excess distributions carryover from 2006 not applied on line 5 or line 7  9 Excess distributions carryover to 2012. Subtract lines 7 and 8 from line 6a  10 Analysis of line 9 a Excess from 2007 b Excess from 2008 c Excess from 2009 d Excess from 2010 e Excess from 2011	amount - see instructions		0.		
f Undistributed income for 2011 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2012  7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)  8 Excess distributions carryover from 2006 not applied on line 5 or line 7  9 Excess distributions carryover to 2012. Subtract lines 7 and 8 from line 6a  10 Analysis of line 9  a Excess from 2007 b Excess from 2008 c Excess from 2009 d Excess from 2010 e Excess from 2011	e Undistributed income for 2010 Subtract line				
Ilnes 4d and 5 from line 1 This amount must be distributed in 2012	4a from line 2a Taxable amount - see instr			0.	
be distributed in 2012  7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)  8 Excess distributions carryover from 2006 not applied on line 5 or line 7  9 Excess distributions carryover to 2012. Subtract lines 7 and 8 from line 6a  10 Analysis of line 9  a Excess from 2007 b Excess from 2008 c Excess from 2009 d Excess from 2010 e Excess from 2011	f Undistributed income for 2011 Subtract				
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)  8 Excess distributions carryover from 2006 not applied on line 5 or line 7  9 Excess distributions carryover to 2012. Subtract lines 7 and 8 from line 6a  10 Analysis of line 9  a Excess from 2007 b Excess from 2008 c Excess from 2009 d Excess from 2010 e Excess from 2011	lines 4d and 5 from line 1. This amount must				
corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)  8 Excess distributions carryover from 2006 not applied on line 5 or line 7  9 Excess distributions carryover to 2012. Subtract lines 7 and 8 from line 6a  10 Analysis of line 9  a Excess from 2007 b Excess from 2008 c Excess from 2009 d Excess from 2010 e Excess from 2011	be distributed in 2012				79 <b>,</b> 073.
section 170(b)(1)(F) or 4942(g)(3)  8	7 Amounts treated as distributions out of				
8 Excess distributions carryover from 2006 not applied on line 5 or line 7  9 Excess distributions carryover to 2012. Subtract lines 7 and 8 from line 6a  10 Analysis of line 9 a Excess from 2007 b Excess from 2008 c Excess from 2009 d Excess from 2010 e Excess from 2011	corpus to satisfy requirements imposed by	_			
not applied on line 5 or line 7  9 Excess distributions carryover to 2012.  Subtract lines 7 and 8 from line 6a  10 Analysis of line 9  a Excess from 2007  b Excess from 2008  c Excess from 2010  d Excess from 2011		0.	······		
9 Excess distributions carryover to 2012.  Subtract lines 7 and 8 from line 6a  10 Analysis of line 9  a Excess from 2007  b Excess from 2008  c Excess from 2010  d Excess from 2010  e Excess from 2011	8 Excess distributions carryover from 2006				
Subtract lines 7 and 8 from line 6a	The state of the s	0.	·····		
## 10 Analysis of line 9  ## a Excess from 2007  ## b Excess from 2008  ## Excess from 2009  ## Excess from 2010  ## Excess from 2011	·				
a Excess from 2007 b Excess from 2008 c Excess from 2009 d Excess from 2010 e Excess from 2011	<del> </del>	0.			
b Excess from 2008 c Excess from 2009 d Excess from 2010 e Excess from 2011					
© Excess from 2009  d Excess from 2010  e Excess from 2011					
d Excess from 2010 B Excess from 2011					
e Excess from 2011					
	B Excess from 2011	i			5 000 DE 100

	ER CHARITAB			22-27	76296 Page 10
Part XIV Private Operating F	oundations (see in	structions and Part VII	·A, question 9)	N/A	
1 a If the foundation has received a ruling of	or determination letter that	t it is a private operating			
foundation, and the ruling is effective fo	or 2011, enter the date of	the ruling	▶		
b Check box to indicate whether the foun	dation is a private operatii	ng foundation described i	n section	4942(j)(3) or 49	)42(j)(5)
2 a Enter the lesser of the adjusted net	Tax year		Prior 3 years	M1 ,	
income from Part I or the minimum	(a) 2011	(b) 2010	(c) 2009	(d) 2008	(e) Total
investment return from Part X for				<del>                                     </del>	
each year listed					
b 85% of line 2a				<u> </u>	
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)			<del> </del>		
(3) Largest amount of support from					
an exempt organization	·				
(4) Gross investment income		<u> </u>	id Ale e de consul a Ai e e		
Part XV Supplementary Info	rmation (Comple	te this part only	it the foundation	n nad \$5,000 or mo	ore in assets
	<del></del>	ructions.j		<del> </del>	
1 Information Regarding Foundation	•				
a List any managers of the foundation will year (but only if they have contributed)			ributions received by th	e foundation before the clo	se of any tax
BARBARA C. BOGER					
b List any managers of the foundation wi			or an equally large port	ion of the ownership of a p	artnership or
other entity) of which the foundation ha	is a 10% or greater intere	ST			
NONE					
2 Information Regarding Contribut					
Check here 🕨 🗶 if the foundation	only makes contributions	to preselected charitable	organizations and does	not accept unsolicited requ	ests for funds If
the foundation makes gifts, grants, etc	(see instructions) to indi-	viduals or organizations u	nder other conditions, o	complete items 2a, b, c, and	1 d
a The name, address, and telephone nun	nber of the person to who	m applications should be	addressed		
b The form in which applications should	he submitted and informa	tion and materials they st	nould include		
c Any submission deadlines		materials triey of		<del></del>	
	· · · · · · · · · · · · · · · · · · ·				
d Any restrictions or limitations on award	ls, such as by geographic	al areas, charitable fields,	kinds of institutions, or	other factors	-
<del></del>					

Part XV Supplementary Information (continued) 3 Grants and Contributions Paid During the Year or Approved for Future Payment If recipient is an individual, show any relationship to any foundation manager or substantial contributor Recipient Purpose of grant or contribution Foundation Amount status of Name and address (home or business) recipient a Paid during the year AMERICAN INDIAN COLLEGE FUND 501(C)(3) THE PURPOSE OF EACH CONTRIBUTION 250. AMHERST COLLEGE 501(C)(3) IS TO PROVIDE SUPPORT FOR THE 250. **ASAPROSAR** 501(C)(3) CHARITABLE OBJECTIVES OF THE 150. AUDUBON MASSACHUSETTS 501(C)(3) RESPECTIVE ORGANIZATION, INCLUDING 50. AUDUBON NATIONAL 501(C)(3) RESEARCH AND USING THE FUNDS TO 25. SEE CONTINUATION SHEET(S) ▶ 3a 95,890. b Approved for future payment NONE Total **▶** 3b 0.

Enter gross amounts unless otherwise indicated	Unrelated t	usiness income	Excluded b	y section 512, 513, or 514	(e)
•	(a)	(b)	(C) Exclu-	(d)	Related or exempt
1 Program service revenue	Business code	Amount	sion code	Amount	function income
a					
b					
C					
d					
e					
1	_ }				
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	59,625.	
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	34,927.	
9 Net income or (loss) from special events					
O Gross profit or (loss) from sales of inventory					
1 Other revenue					•
a					
b					
C					
d	i				
8					
2 Subtotal. Add columns (b), (d), and (e)	_		0.	94,552.	0
13 Total. Add line 12, columns (b), (d), and (e)				13	
(See worksheet in line 13 instructions to verify calculations.)	1				
		mlich-sant -f	Evamet D		
Part XVI-B Relationship of Activities	to the Accon	ipiisnment of	Exempt P	urposes	
Line No. Explain below how each activity for which in	come is reported in c	olumn (e) of Part X\	/I-A contributed	I importantly to the accomm	olishment of

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)
<del></del>	

Define programs directly or inderectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)) organizations) or in section 527, elithing to getteral organizations?	Part AV			egarding Iran: izations	sters 10 a	ind Iransac	ctions a	ina Kelationsi	nips With Noi	ncnantable	•	
the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?  3 Transfers from the reporting foundation to a noncharitable exempt organization of (1) Cash (2) Other assets (1) Sales of assets for an onicharitable exempt organization (2) Purchases of assets from a noncharitable exempt organization (3) Rental of Excitities, equipment, or other assets (5) Loans or loan quarantees (6) Rental organization of activities, organization organ	1 Did th				of the followin	a with any other	Organizațio	a decombed to cost	on F01/n) of		Vac	No
a Transfers from the reporting foundation to a noncharitable exempt organization of (1) Cash (2) Other assats b Other transactions (2) Purchases of assets to a noncharitable exempt organization (2) Purchases of assets to an anoncharitable exempt organization (3) Rendrid of foundations, equipment, or other assets (3) Rendrid of foundations, equipment, or other assets (3) Performance of services or membership of fundarising solicitations (3) Performance of services or membership of fundarising solicitations (3) Ferformance of services or membership of fundarising solicitations (3) Ferformance of services or membership of fundarising solicitations (3) Ferformance of services or membership of fundarising solicitations (3) Ferformance of services or membership of fundarising solicitations (3) Ferformance of services or membership of fundarising solicitations (3) Ferformance of services or membership of fundarising solicitations (3) Ferformance of services or membership of fundarising solicitations (3) Ferformance of services or membership of fundarising solicitations (3) Ferformance of services or membership of fundarising solicitations (3) Ferformance of services or membership of fundarising solicitations (4) Ferformance of services or membership of fundarising							=		011 30 1(0) 01		163	110
(2) Other sacets  (2) Other sacets  (3) Siles of assets to a noncharitable exempt organization  (1) Siles of assets to a noncharitable exempt organization  (2) Purchase of assets to an anoncharitable exempt organization  (3) Rehall of facilities, equipment, or other assets  (4) Reminuscrander arrangements  (5) Loans or loan quarantees  (6) Performance of services or membership or fundrasing solicitations  (5) Sharing of facilities, equipment, mailing lists, other assets, or paid employees  (5) Performance of services or membership or fundrasing solicitations  (5) Performance of services or membership or fundrasing solicitations  (5) Performance of services or membership or fundrasing solicitations  (5) Performance of services or membership or fundrasing solicitations  (6) Performance of services or membership or fundrasing solicitations  (7) Sharing of facilities, equipment, mailing lists, other assets, or paid employees  (8) Performance of services or membership or fundrasing selections  (9) Performance of services or membership or fundrasing selections  (9) Performance of services or membership or fundrasing selections  (9) Performance of services or membership or fundrasing selections or selections or sharing arrangement, show in column (19) thought always show the fair market value of the goods, the assets, or paid employees  (9) Lime no (9) Amount involved (C) Name of noncharitable exempt organization (4) Description of selections, and sharing arrangements  N/A  (9) Amount involved (19) Amo							ilicai organ	124(10115)				
(2) Other assets Other transactions (1) Sales of assets to a noncharidable exempt organization (2) Purchases of assets from a noncharidable exempt organization (3) Rental of facilities, equipment, or other assets (4) Rembursement arrangements (5) Loans or foat guarantee (6) Performance of services or membership or fundrasing solicitations (8) Performance of services or 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 acceived less than fair market value in any transaction or saming arrangements. Show in column (b) the value of the goods, other assets, or services given by the reporting foundation if the foundation acceived less than fair market value in any transaction or standing arrangements, show in column (b) the value of the goods, other assets, or services given by the reporting foundation if the foundation acceived less than fair market value in any transaction or standing arrangements. Show in column (b) the value of the goods, other assets, or services given by the reporting foundation if the foundation acceived less than fair market value in any transaction or standing arrangements. Show in column (b) the value of the goods, other assets, or services given by the reporting foundation. If the foundation acceived less than fair market value in any transaction or standing arrangements. Show in Column (b) Amount involved (c) Fairne of noncharidable exempt organization (d) Description of remaining, show in a standing arrangement. Show in Prescription of tendence, and sharing arrangements are standing as a standing arrangement or standing and standing access that the standing arrangement or standin			reporting rounds	ation to a nonchantat	ne exempt ort	Janization of				4 - 40		v
Differ fransactions   Third   X   Sales of assets to a noncharitable exempt organization   Third   X   Third	• •											
(1) Sales of assets from a noncharitable exempt organization  (2) Purchases of assets from a noncharitable exempt organization  (3) Rental of facilities, equipment, or other assets  (4) Rembursement arrangements  (5) Loans or foat guarantees  (5) Loans or foat guarantees  (6) Performance of services or membership or fundrasing solicitations  (7) Sharing of Endos guarantees  (8) Exharing of Endos guarantees  (9) Loans or foat guarantees  (9) Loans or foat guarantees  (10) Loans or foat guarantees  (10) Loans or foat guarantees  (11) Loans or foat guarantees  (12) Loans or foat guarantees  (13) Loans or foat guarantees  (14) Loans of the answer to any of the above is "ver, complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services received  (14) Loans of the value of the goods, other assets, or services received  (14) Loans of the value of the goods, other assets, or services received  (15) Loans of the value of the goods, other assets, or services received  (16) Amount involved  (17) Warne of noncharitable exempt organization  (18) Loans of the value of the goods, other assets, or services received  (19) Loans of the value of the goods, other assets, or services received  (19) Loans of the value of the goods, other assets, or services received  (19) Loans of the value of the goods, other assets, or services received  (19) Loans of the value of the goods, other assets, or services received  (19) Loans of the value of the goods, other assets, or services received  (19) Loans of the value of the goods, other assets, or services received  (19) Loans of the value of the goods, other assets, or services received  (19) Loans of the value of the goods, other assets, or services received  (19) Loans of the value of the goods, other assets, or services received  (19) Loans of the value of the goods, other assets, or services received  (19) Loans of the value of the goods, other assets, or services received  (19) Loans of the value of the goods, other asset			•							13(2)		Δ
(2) Purchases of assets from a nonchartable exempt organization  (3) Rental of facilities, equipment, or other assets (4) Rentmbursement arrangements (5) Loans or loan quarantees (6) Performance of services or membership or fundratising solicitations (7) Exhange of facilities, equipment, mailing lists, other assets, or paid employees (8) It file assets or a services greate by the reporting foundation. If the foundation necework less than fair market value in any transaction or sharing arrangement, show in column (et) the value of the goods, other assets, or services generally the value of the goods, other assets, or services greated (et) It is not to be possible of the goods, other assets, or services greated (et) It is not to be possible of the goods, other assets, or services greated (et) It is not to be possible or straining arrangement, show in column (et) the value of the goods, other assets, or services received (et) Amount involved (f) Amount involved (g) Name of noncharitable exempt organization (d) Description of treatment, transactions, and sharing arrangements  22 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 (ether than section 501(c)) of the Code (either than section 501(										ļ		v
133   X   143   X   X   143   X   X   X   X   X   X   X   X   X												
(4) Reimbursement arrangements (5) Loans or loan guarantees (5) Performance of services or membership or fundraising solicitations (5) Performance of services or membership or fundraising solicitations (6) Performance of services or membership or fundraising solicitations (7) Performance of services or services or services and the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services generous (d) the value of the goods, other assets, or services greated (d) the value of the goods, other assets, or services greated (d) the value of the goods, other assets, or services greated (d) the value of the goods, other assets, or services received (d) Amount involved (e) Name of nonchartable exampt organization (d) Description of transfers, transactions, and sharing arrangements  2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exampt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 52??  3. If Yes, complete the following schedules  (a) Name of organization (b) Type of organization (c) Description of relationship  N/A  (b) Type of organization (c) Description of relationship  N/A  (c) Description of relationship  N/A  (d) Name of organization (e) Description of relationship  N/A  (e) True the goods of the code (other than section 501(c)(3)) or in section 52??  (a) Name of organization (b) Type of organization (c) Description of relationship  N/A  (b) Type of organization (c) Description of relationship  N/A  (e) Description of relationship  N/A  (f) Description of relationship  N/A  (g) Name of organization (e) Description of relationship  N/A  (h) Type of organization (e) Description of relationship  N/A  (h) Type of organization (e) Description of relationship  N/A  (h) Type of organization (e) Description of relationship  N/A  (h) Type of organization (e) Description of relationship  N/A  (h) Type of organization (e) Description of relationship  N/A  (h) Type of organiz				•	rganization					<del></del> -		
(5) Loans or loan guarantees (8) Performance of services or membership or fundraising solicitations  c Sharing of facilities, equipment, making lists, other assets, or paid employees of 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 received of 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 received (a) Line no (b) Amount involved (c) Name of nonchartable exempt organization (d) Description of tensities, instructions, and sharing arrangements, show in column (d) the value of the goods, other assets, or services received (a) Line no (b) Amount involved (c) Name of nonchartable exempt organization (d) Description of tensities, instructions, 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?    If Yes, complete the following schedule   (b) Type of organization   (c) Description of relationship   N/A      Under pensities of penjury, I occlaim that I have examined this instrum, Including accompanying schedule   N/A      Under pensities of penjury, I occlaim that I have examined this instrum, Including accompanying schedule   N/A      Under pensities of penjury, I occlaim that I have examined this instrum, Including accompanying schedule   N/A      Under pensities of penjury, I occlaim that I have examined this instrum, Including accompanying schedule   N/A      Under pensities of penjury, I occlaim that I have examined this instrum, Including accompanying schedule   N/A      Under pensities of penjury, I occlaim that I have examined this instrum, Including accompanying schedule   N/A      Under pensities of penjury, I occlaim that I have examined this instrum, Including accompanying schedule   N/A												
(6) Performance of services or membership or fundrating solectations c Sharing of facilities, equipment, making itsis, 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 regions by the reporting foundation if the foundation received less than fair market value in any transaction or sharing arrangement, show in column (g) the value of the goods, other assets, or services regions (a) Livie no (b) Amount involved (c) Name of noncharitable exempt organization (d) Description of trinsitient, inavasactions, 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?  If "Yes" \times \										<del></del>		
E Sharing of facilities, equipment, mailing lates, 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 preserved or services greate 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) June no (b) Amount involved (c) Name of noncharitable exempt organization (d) Description of varieties, riansactions, 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?    If "Yes," complete the following schedule (a) Name of organization (b) Type of organization (c) Description of relationship  N/A    If 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?    If Yes, complete the following schedule (a) Name of organization (b) Type of organization (c) Description of relationship    If Yes, complete the following schedule (a) Name of organization (b) Type of organization (c) Description of relationship   N/A			="							<del></del>		
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 goven by the exporting foundation if the foundation received less than fair market value in any formaction or sharing arrangement, show in column (g) the value of the goods, other assets, or services received.    (a) Description of Immisters, transactions, and sharing arrangements in the value of the goods, other assets, or services received in the foundation of the foundation				·	•							
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  (b) Amount involved (c) Name of noncharitable exempt organization  (d) Description of transfers, transactions, and sharing arrangements  (e) Name of noncharitable exempt organization (d) Description of transfers, transactions, and sharing arrangements  2a is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 52??  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 52??  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 52??  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 52??  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 52??  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 52??  2b if Yes		•		•								<u>X</u>
(a) Line no (b) Amount involved (c) Name of noncharitable exempt organization (d) Description of transfers, transactions, and sharing arrangements    N / A											ets,	
(a) Line no (b) Amount involved (c) Name of noncharitable exempt organization (d) Description of transfers, transactions, and sharing amangements 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?  2 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?  2 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?  3 If Yes, complete the following schedule  (a) Name of organization (b) Type of organization (c) Description of relationship  N/A  1 Under penalties of penjury, I dictieve 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 taxosyre) to begg on all information of which preparer has any knowledge in the True of the Code (other than taxosyre) to begg on all information of which preparer has any knowledge in the True of the Code (other than taxosyre) to begg on all information of which preparer has any knowledge in the True of the Code (other than taxosyre) to begg on all information of which preparer has any knowledge in the True of the Code (other than taxosyre) to begg on all information of which preparer has any knowledge in the True of the Code (other than taxosyre) to begg on all information of which preparer has any knowledge in the True of the Code (other than taxosyre) to begg on all information of which preparer has any knowledge in the True of the Code (other than taxosyre) to begg on all information of which preparer has any knowledge in the True of the Code (other than taxosyre) to begg on the Code (other than t						ed less than fair i	market valu	ie in any transaction	or sharing arrange	ment, show in		
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?								1 (4)				
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?    Yes   No	(a) Line no	(D) Amol	int involved	(c) Name of		exempt organiza	ation	(0) Description	of transfers, transactio	ns, and sharing ar	rangeme	nts
In section 501(c) of the Code (other than section 501(c)(3)) or in section 527?  If 'Yes,' complete the following schedule  (a) Name of organization  (b) Type of organization  (c) Description of relationship  N/A  Under penalties of penjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge shown below (see instr)?  TRUSTEE  Signature of officer or trustee  Print/Type preparer's name  Preparer's signature  Print/Type preparer's name  Preparer's signature  Primt's name  LYNCH, BREWER, HOFFMAN & FINK, LLP  Firm's EIN ▶ 04-2619139  Firm's address ▶ 75 FEDERAL STREET, 7TH FLOOR					N/A			<del></del>				
In section 501(c) of the Code (other than section 501(c)(3)) or in section 527?  If 'Yes,' complete the following schedule  (a) Name of organization  (b) Type of organization  (c) Description of relationship  N/A  Under penalties of penjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge shown below (see instr)?  TRUSTEE  Signature of officer or trustee  Print/Type preparer's name  Preparer's signature  Print/Type preparer's name  Preparer's signature  Primt's name  LYNCH, BREWER, HOFFMAN & FINK, LLP  Firm's EIN ▶ 04-2619139  Firm's address ▶ 75 FEDERAL STREET, 7TH FLOOR												
In section 501(c) of the Code (other than section 501(c)(3)) or in section 527?  If 'Yes,' complete the following schedule  (a) Name of organization  (b) Type of organization  (c) Description of relationship  N/A  Under penalties of penjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge shown below (see instr)?  TRUSTEE  Signature of officer or trustee  Print/Type preparer's name  Preparer's signature  Print/Type preparer's name  Preparer's signature  Primt's name  LYNCH, BREWER, HOFFMAN & FINK, LLP  Firm's EIN ▶ 04-2619139  Firm's address ▶ 75 FEDERAL STREET, 7TH FLOOR									<del> </del>			
In section 501(c) of the Code (other than section 501(c)(3)) or in section 527?  If 'Yes,' complete the following schedule  (a) Name of organization  (b) Type of organization  (c) Description of relationship  N/A  Under penalties of penjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge shown below (see instr)?  TRUSTEE  Signature of officer or trustee  Print/Type preparer's name  Preparer's signature  Print/Type preparer's name  Preparer's signature  Primt's name  LYNCH, BREWER, HOFFMAN & FINK, LLP  Firm's EIN ▶ 04-2619139  Firm's address ▶ 75 FEDERAL STREET, 7TH FLOOR												
In section 501(c) of the Code (other than section 501(c)(3)) or in section 527?  If 'Yes,' complete the following schedule  (a) Name of organization  (b) Type of organization  (c) Description of relationship  N/A  Under penalties of penjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge and belief, it is true, correct, and complete Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge and belief, it is true, correct, and complete Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge and belief, it is true, correct, and complete Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge and belief, it is true, correct, and complete Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge and belief, it is true, correct, and complete Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge and belief, it is true, correct, and complete Declaration of preparer (other than taxpayer) is based on all information of which preparer shown below (see instr)?  TRUSTEE  Print/Type preparer's name  Preparer's signature  Print/Type preparer's name  Print/Type									<del></del>			
In section 501(c) of the Code (other than section 501(c)(3)) or in section 527?  If 'Yes,' complete the following schedule  (a) Name of organization  (b) Type of organization  (c) Description of relationship  N/A  Under penalties of penjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge shown below (see instr)?  TRUSTEE  Signature of officer or trustee  Print/Type preparer's name  Preparer's signature  Print/Type preparer's name  Preparer's signature  Primt's name  LYNCH, BREWER, HOFFMAN & FINK, LLP  Firm's EIN ▶ 04-2619139  Firm's address ▶ 75 FEDERAL STREET, 7TH FLOOR												
In section 501(c) of the Code (other than section 501(c)(3)) or in section 527?  If 'Yes,' complete the following schedule  (a) Name of organization  (b) Type of organization  (c) Description of relationship  N/A  Under penalties of penjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge shown below (see instr)?  TRUSTEE  Signature of officer or trustee  Print/Type preparer's name  Preparer's signature  Print/Type preparer's name  Preparer's signature  Primt's name  LYNCH, BREWER, HOFFMAN & FINK, LLP  Firm's EIN ▶ 04-2619139  Firm's address ▶ 75 FEDERAL STREET, 7TH FLOOR												
In section 501(c) of the Code (other than section 501(c)(3)) or in section 527?  If 'Yes,' complete the following schedule  (a) Name of organization  (b) Type of organization  (c) Description of relationship  N/A  Under penalties of penjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge shown below (see instr)?  TRUSTEE  Signature of officer or trustee  Print/Type preparer's name  Preparer's signature  Print/Type preparer's name  Preparer's signature  Primt's name  LYNCH, BREWER, HOFFMAN & FINK, LLP  Firm's EIN ▶ 04-2619139  Firm's address ▶ 75 FEDERAL STREET, 7TH FLOOR												
In section 501(c) of the Code (other than section 501(c)(3)) or in section 527?  If 'Yes,' complete the following schedule  (a) Name of organization  (b) Type of organization  (c) Description of relationship  N/A  Under penalties of penjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge shown below (see instr)?  TRUSTEE  Signature of officer or trustee  Print/Type preparer's name  Preparer's signature  Print/Type preparer's name  Preparer's signature  Primt's name  LYNCH, BREWER, HOFFMAN & FINK, LLP  Firm's EIN ▶ 04-2619139  Firm's address ▶ 75 FEDERAL STREET, 7TH FLOOR												
In section 501(c) of the Code (other than section 501(c)(3)) or in section 527?  If 'Yes,' complete the following schedule  (a) Name of organization  (b) Type of organization  (c) Description of relationship  N/A  Under penalties of penjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge shown below (see instr)?  TRUSTEE  Signature of officer or trustee  Print/Type preparer's name  Preparer's signature  Print/Type preparer's name  Preparer's signature  Primt's name  LYNCH, BREWER, HOFFMAN & FINK, LLP  Firm's EIN ▶ 04-2619139  Firm's address ▶ 75 FEDERAL STREET, 7TH FLOOR												
In section 501(c) of the Code (other than section 501(c)(3)) or in section 527?  If 'Yes,' complete the following schedule  (a) Name of organization  (b) Type of organization  (c) Description of relationship  N/A  Under penalties of penjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge shown below (see instr)?  TRUSTEE  Signature of officer or trustee  Print/Type preparer's name  Preparer's signature  Print/Type preparer's name  Preparer's signature  Primt's name  LYNCH, BREWER, HOFFMAN & FINK, LLP  Firm's EIN ▶ 04-2619139  Firm's address ▶ 75 FEDERAL STREET, 7TH FLOOR												
In section 501(c) of the Code (other than section 501(c)(3)) or in section 527?  If 'Yes,' complete the following schedule  (a) Name of organization  (b) Type of organization  (c) Description of relationship  N/A  Under penalties of penjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge shown below (see instr)?  TRUSTEE  Signature of officer or trustee  Print/Type preparer's name  Preparer's signature  Print/Type preparer's name  Preparer's signature  Primt's name  LYNCH, BREWER, HOFFMAN & FINK, LLP  Firm's EIN ▶ 04-2619139  Firm's address ▶ 75 FEDERAL STREET, 7TH FLOOR												
In section 501(c) of the Code (other than section 501(c)(3)) or in section 527?  If 'Yes,' complete the following schedule  (a) Name of organization  (b) Type of organization  (c) Description of relationship  N/A  Under penalties of penjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge shown below (see instr)?  TRUSTEE  Signature of officer or trustee  Print/Type preparer's name  Preparer's signature  Print/Type preparer's name  Preparer's signature  Primt's name  LYNCH, BREWER, HOFFMAN & FINK, LLP  Firm's EIN ▶ 04-2619139  Firm's address ▶ 75 FEDERAL STREET, 7TH FLOOR												
In section 501(c) of the Code (other than section 501(c)(3)) or in section 527?  If 'Yes,' complete the following schedule  (a) Name of organization  (b) Type of organization  (c) Description of relationship  N/A  Under penalties of penjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge shown below (see instr)?  TRUSTEE  Signature of officer or trustee  Print/Type preparer's name  Preparer's signature  Print/Type preparer's name  Preparer's signature  Primt's name  LYNCH, BREWER, HOFFMAN & FINK, LLP  Firm's EIN ▶ 04-2619139  Firm's address ▶ 75 FEDERAL STREET, 7TH FLOOR												
In section 501(c) of the Code (other than section 501(c)(3)) or in section 527?  If 'Yes,' complete the following schedule  (a) Name of organization  (b) Type of organization  (c) Description of relationship  N/A  Under penalties of penjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge shown below (see instr)?  TRUSTEE  Signature of officer or trustee  Print/Type preparer's name  Preparer's signature  Print/Type preparer's name  Preparer's signature  Primt's name  LYNCH, BREWER, HOFFMAN & FINK, LLP  Firm's EIN ▶ 04-2619139  Firm's address ▶ 75 FEDERAL STREET, 7TH FLOOR		45										
In section 501(c) of the Code (other than section 501(c)(3)) or in section 527?  If 'Yes,' complete the following schedule  (a) Name of organization  (b) Type of organization  (c) Description of relationship  N/A  Under penalties of penjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge shown below (see instr)?  TRUSTEE  Signature of officer or trustee  Print/Type preparer's name  Preparer's signature  Print/Type preparer's name  Preparer's signature  Primt's name  LYNCH, BREWER, HOFFMAN & FINK, LLP  Firm's EIN ▶ 04-2619139  Firm's address ▶ 75 FEDERAL STREET, 7TH FLOOR			_									
b If Yes, complete the following schedule  (a) Name of organization  (b) Type of organization  (c) Description of relationship  N/A  Sign  Under penalties of penjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge  TRUSTEE  TRUSTEE  Print/Type preparer's name  Peter W. FINK  Peter W. FINK  Peter W. FINK  Peter W. FINK  Pirm's name ► LYNCH, BREWER, HOFFMAN & FINK, LLP  Firm's address ► 75 FEDERAL STREET, 7TH FLOOR	2a Is the	foundation d	rectly or indirect	tly affiliated with, or r	elated to, one	or more tax-exe	mpt organi	zations described				
(a) Name of organization (b) Type of organization (c) Description of relationship N/A	ın sec	tion 501(c) o	f the Code (othe	r than section 501(c)	(3)) or in sect	ion 527?				Yes	X	] No
N/A  Sign Here  Under penalties of penury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge shown below (see instr)?  TRUSTEE  Print/Type preparer's name  Preparer's signature  Firm's name  LYNCH, BREWER, HOFFMAN & FINK, LLP  Firm's address  75 FEDERAL STREET, 7TH FLOOR	b If "Yes	," complete ti	ne following sch	edule								
Sign Here    Under penalties of penury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and bellef, it Is true, correct, and complete Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge shown below (see instr.)?    TRUSTEE			(a) Name of org	janization		(b) Type of org	anization		(c) Description of re	lationship		
Sign Here    Signature of officer or trustee   Date   Title			N/A									
Sign Here    Signature of officer or trustee   Date   Title												
Sign Here    Signature of officer or trustee   Date   Title				•								
Sign Here    Signature of officer or trustee   Date   Title												
Sign Here    Signature of officer or trustee   Date   Title												
Here    Signature of officer or trustee   Date   Self-employed										May the IRS	liectiee !	this
Here Signature of officer or trustee  Print/Type preparer's name  Preparer's signature  Preparer's signature  Date  Check	Sign a	nd belief, it is to	ue, correct, and cor	mplete Declaration of pro	parer (other tha	n taxpayer) is based	on all inform	nation of which preparer	has any knowledge	return with th	e prepar	er
Print/Type preparer's name  Print/Type preparer's name  Preparer's signature  Print/Type preparer's name  Preparer's signature  Preparer's signature  Date  Check if PTIN  setf- employed  PO0635003  Preparer  Use Only  Firm's name ► LYNCH, BREWER, HOFFMAN & FINK, LLP  Firm's EIN ► 04-2619139		N 30	me	(100	les	1575	アルコ	TRUSTE	EE			7 I
Paid Preparer Use Only Pirm's address ▶ 75 FEDERAL STREET, 7TH FLOOR  Petter W. FINK Proparer Firm's address ▶ 75 FEDERAL STREET, 7TH FLOOR		Signature of	officer or trustee	,		Date	1 -					
Paid Preparer Use Only Pirm's address ▶ 75 FEDERAL STREET, 7TH FLOOR  Petter W. FINK Proparer Firm's address ▶ 75 FEDERAL STREET, 7TH FLOOR		Print/Ty	pe preparer's na	ame	Preparer's s	ignature 🔿	-	Date	Check If	PTIN		
Preparer Use Only  Firm's address ▶ 75 FEDERAL STREET, 7TH FLOOR  Firm's address ▶ 75 FEDERAL STREET, 7TH FLOOR					<i>[].</i>	$\langle J \rangle$		1	self- employed			
Preparer Use Only  Firm's name ► LYNCH, BREWER, HOFFMAN & FINK, LLP  Firm's eln ► 04-2619139  Firm's address ► 75 FEDERAL STREET, 7TH FLOOR	Paid	PET	ER W. F	INK	l Leh 1	w Fig		13/2/12	•	P00635	003	
Use Only Firm's address ► 75 FEDERAL STREET, 7TH FLOOR					R, HOF	FMAN &	FINK.	LLP	Firm's FIN ▶ 0			
Firm's address ► 75 FEDERAL STREET, 7TH FLOOR	-		· ==•	, ==-=	.,		,	<b>_</b>				
			ddress ▶ 75	FEDERAL.	STREET	, 7TH F	LOOR		1			
						,			Phone no 6	17-951-	080	0

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

Department of the Treasury Internal Revenue Service

## **Schedule of Contributors**

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

OMB No 1545-0047

\$

2011

Name of the organization **Employer identification number** THE 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 Check if your organization is covered by the General Rule or a Special Rule. Note. Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule See instructions. General Rule X For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, \$5,000 or more (in money or property) from any one contributor Complete Parts I and II. **Special Rules** For a section 501(c)(3) organization filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi) and received from any one contributor, during the year, a contribution of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 for use exclusively for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals. Complete Parts I, II, and III For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year,

Caution. An organization that is not covered by the General Rule and/or the Special Rules does not file Schedule B (Form 990, 990-EZ, or 990-PF), but it must answer "No" on Part IV, line 2, of its Form 990; or check the box on line H of its Form 990-EZ or on Part I, line 2 of its Form 990-PF, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

religious, charitable, etc., contributions of \$5,000 or more during the year.

contributions for use exclusively for religious, charitable, etc., purposes, but these contributions did not total to more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an exclusively religious, charitable, etc., purpose. Do not complete any of the parts unless the **General Rule** applies to this organization because it received nonexclusively

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990, 990-EZ, or 990-PF. Schedule B (Form 990, 990-EZ, or 990-PF) (2011)

Name of organization

Employer identification number

# THE BOGER CHARITABLE TRUST

22-2776296

(a)	(b)	(c)	(d)
No.	Name, address, and ZIP + 4	Total contributions	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) Total contributions	(d) Type of contribution
2	THE CRAWFORD CLUT FOR GRANDCHILDREN NORTHERN TRUST, 50 SOUTH LASALLE STREET B-3 CHICAGO, IL 60603	\$26,688.	Person X Payroll Noncash (Complete Part II if there is a noncash contribution.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total 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) Total 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) Total 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) Total contributions	(d) Type of contribution
		\$	Person Payroll Noncash (Complete Part II if there is a noncash contribution.)

Name of organization

Employer identification number

# THE BOGER CHARITABLE TRUST

22-2776296

(a)	, , , , , , , , , , , , , , , , , , , ,		
No. from Part I	(b)  Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	<del></del>
(a) No. from Part I	(b)  Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
do. (b) Description of noncash property given and I  (a) No. (b) Description of noncash property given and I  (a) No. (b) Description of noncash property given and I  (a) No. (b) Description of noncash property given and I  (a) No. (b) Description of noncash property given and I  (a) No. (b) Description of noncash property given and I  (b) Description of noncash property given and I  (a) No. (b) Description of noncash property given and I  (b) Description of noncash property given and I  (b) Description of noncash property given and I  (c) Description of noncash property given and I  (d) No. (b) Description of noncash property given and I  (d) No. (b) Description of noncash property given and I  (d) No. (b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received	
		<b></b> \$	
(a) No. from		(c) FMV (or estimate) (see instructions)	(d) Date received
Part I			
		  \$	
(a)			
No. from Part I		(c) FMV (or estimate) (see instructions)	(d) Date received

Name of orga	Inization		Employer identification number
THE BO	GER CHARITABLE TRUST		22-2776296
Part III	Exclusively religious, charitable, etc., ind year. Complete columns (a) through (e) and the total of exclusively religious, charitable, etc. Use duplicate copies of Part III if addition	the following line entry. For organizat tc , contributions of \$1,000 or less fo	c)(7), (8), or (10) organizations that total more than \$1,000 for the
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
		(e) Transfer of gi	ift
	Transferee's name, address, a	and ZIP + 4	Relationship of transferor to transferee
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	Transferee's name, address, a	(e) Transfer of gi	ift  Relationship of transferor to transferee
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
		(e) Transfer of g	ift
	Transferee's name, address, a	and ZIP + 4	Relationship of transferor to transferee
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
-	Transferee's name, address, a	(e) Transfer of gi	Relationship of transferor to transferee

3 Grants and Contributions Paid During the Ye		<del></del>		
Recipient	If recipient is an individual, show any relationship to	Foundation status of	Purpose of grant or contribution	Amount
Name and address (home or business)	any foundation manager or substantial contributor	recipient	- Contribution	······································
AVON WALK FOR BREAST CANCER		501(C)(3)	BENEFIT THOSE IN NEED.	100
BOSTON COLLEGE		501(C)(3)		300
				300
BOSTON COLLEGE GRADUATE SCHOOL OF SOCIAL WORK		501(C)(3)		100
BOSTON UNIVERSITY		501(C)(3)		100
BROOKLINE ARTS ASSOCIATION		501(C)(3)		500
CHILDREN'S HOSPITAL		501(C)(3)		1,000
CONCORD CARLISLE COMMUNITY CHEST		501(C)(3)		250
CONCORD FREE PUBLIC LIBRARY		501(C)(3)		15(
CONCORD LAND CONSERVATION TRUST		501(C)(3)		50
DANA FARBER JIMMY FUND WALK		501(C)(3)		5(
Total from continuation sheets				95,16

3 Grants and Contributions Paid During the Y				
· Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation	Purpose of grant or contribution	Amount
Name and address (home or business)	or substantial contributor	status of recipient	contribution	Amount
DEPENDERS OF WILDLIFE		501(C)(3)		
				25.
DICKINSON COLLEGE		501(C)(3)		
	<del>-</del>			450.
EDVSTORS		501(C)(3)		
			-	6,600.
EMERSON HOSPITAL		501(C)(3)		3,000.
				,,,,,,,
FAMILIES FOR DEPRESSION AWARENESS		501(C)(3)		2,000.
FENN SCHOOL		501(C)(3)		
				600.
FOOD PROJECT		501(C)(3)		
				250.
HARRIS CENTER		501(C)(3)		
· · · · · · · · · · · · · · · · · · ·				200.
HARVARD MEDICAL SCHOOL		501(C)(3)		100.
HOLLINS		501(C)(3)		500.
Total from continuation sheets				

Part XV Supplementary Informatio	n			
3 Grants and Contributions Paid During the		<del></del>		
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		
HUNGTINGTON THEATER		501(C)(3)		640
				640.
HUNTINGTON THEATER EDUCATIONAL		501(C)(3)		
PROGRAM				5,000.
LAWRENCE ACADEMY		501(C)(3)		450.
				150.
MA GENERAL HOSPITAL		501(C)(3)		
				1,000.
MASS EYE & EAR INFIRMARY (DOHLAM PROFESSORSHIP)		501(C)(3)		1,000.
MCLEAN HOSPITAL		501(C)(3)		
				62,800.
MEADOWBROOK SCHOOL		501(C)(3)		1,500.
MIDDLESEX		501(C)(3)		
				100.
WYGGRYY NYROUG GWYNNYNY				
MISCELLANEOUS CHARITIES		501(C)(3)		50.
MOUNT AUBURN HOSPITAL		501(C)(3)		
Total from continuation sheets			· · · · · · · · · · · · · · · · · · ·	50.

Part XV Supplementary Information Grants and Contributions Paid During the Year (Continuation) Recipient If recipient is an individual, Purpose of grant or contribution Foundation show any relationship to Amount any foundation manager status of Name and address (home or business) or substantial contributor recipient MOUNT HOLYHOKE COLLEGE 501(C)(3) 25<u>0.</u> NATIONAL PARKS CONSERVATION 501(C)(3) ASSOCIATION 50. NATIONAL WILDLIFE FEDERATION 501(C)(3) 25. NEW HAMPSHIRE LAKES ASSOCIATION 501(C)(3) 100. PAN MASS CHALLENGE 501(C)(3) 250. POSSE FOUNDATION 501(C)(3) 2,500. PROJECT BREAD (HAMPTON WALK FOR 501(C)(3) HUNGER) 100. SHADY HILL 501(C)(3) 150. SHRINER'S HOSPITAL FOR CHILDREN 501(C)(3) 200. ST. MARK'S 501(C)(3) 100. Total from continuation sheets

Part XV Supplementary Information				·
3 Grants and Contributions Paid During the Ye		1		
Name and address (home as humana)	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		
SUDBURY VALLEY TRUSTEES		501(C)(3)		
				100.
THE STEPPINGSTONE FOUNDATION		E01/G2/32		
THE SIEPPINGSIONE FOUNDATION		501(C)(3)		100.
TRINITARIAN CONGREGATIONAL CHURCH		501(C)(3)		2,000.
WESLEYAN UNIVERSITY		501(C)(3)		200
WILLIAMS COLLEGE		501(C)(3)		100
WINCHESTER HOSPITAL		501(C)(3)		100
WORLD WILDLIFE FUND		501(C)(3)		25
CONCORD FREE PUBLIC LIBRARY - UNPAID 2010 CONTRIBUTION		501(C)(3)		-100
	!			
T-A-1-f				
Total from continuation sheets				<u> </u>

Part IV   Capital Gains and Li	osses 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				(c) Date acquired (d) Date sold (mo, day, yr)	
1a 1,000 SH. INTE	EL CORP.		D - Donation P	12/13/1003/16/11	
b 100 SH. POWERS			P	12/13/1011/01/11	
c 100 SH. POWERS			P	12/13/1011/01/11	
d 100 SH. POWERS			P	12/13/1011/01/11	
e 100 SH. POWERS			P	12/13/1011/01/11	
1 300 SH. POWERS			P	12/13/1011/01/11	
g 300 SH. POWERS			P	12/13/1011/01/11	
h 100 SH. APPLE				12/13/0602/18/11	
		CO		07/02/0906/02/11	
	R-DANIELS-MDLND CO				
		<u> </u>		07/02/0912/16/11	
k 100 SH. BAIDU				09/01/1009/22/11	
100 SH. BAIDU	INC ADR			09/01/1009/22/11	
	R INTERNATIONAL IN			08/03/0908/29/11	
	R INTERNATIONAL IN	NC		08/03/0908/29/11	
<sub>0</sub> 500 SH. BEST E	BUY INC		P	03/07/0803/24/11	
(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 19,954.		21,808.		-1,854.	
b 1,936.		2,447.		-511.	
c 1,936.		2,447.		-511.	
d 1,937.		2,447.		-510.	
e 1,937.		2,447.		-510.	
f 5,809.		7,340.		-1,531.	
g 5,809.		7,340.	<u>-</u>	-1,531.	
h 35,025.		8,844.		26,181.	
1 25.		23.		2.	
7,310		7,527.		-217.	
k 12,848.		8,202.		4,646.	
12,848		8,202.		4,646.	
E E 1 A		5,642.		-128.	
11 020		11,284.		-126· -256·	
16 107				-3,639.	
		19,826.			
(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	(I) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")		
a				-1,854.	
<u>b</u>	<del>                                     </del>			-511.	
C			<del> </del>	-511.	
d	<del>                                     </del>	<del></del>		-510.	
е				-510.	
f	<del> </del>		<del></del>	-1,531.	
	<del> </del>	- <del></del>		-1,531.	
9	<del></del>			26,181.	
<u>h</u>	<del> </del>			20,101.	
<u>.</u>	+			-217.	
1	<del> </del>				
<u>k</u>	<del> </del>			4,646.	
<u> </u>	<del> </del>			4,646.	
<u>m</u>	<del> </del>			-128.	
<u>n</u>			<del> </del>	-256.	
0				-3,639.	
2 Capital gain net income or (net d	capital loss) { If gain, also enter if (loss), enter "-0-	in Part I, line 7 -" in Part I, line 7			
If gain, also enter in Part I, line 8	oss) as defined in sections 1222(5) and 3, column (c)	<b>\</b>			
If (loss), enter "-0-" in Part I, line	ł 8	J   2	I		

Part IV   Capital Gains and Lo	isses 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				(c) Date acquired (d) Date sold (mo , day, yr )
1a 100 SH. CISCO	SYSTEMS INC		P	04/17/0707/27/11
b 100 SH. CISCO	SYSTEMS INC		P	04/17/0707/27/11
c 100 SH. CISCO	SYSTEMS INC		P	04/17/0707/27/11
d 200 SH. CISCO	SYSTEMS INC		P	04/17/0707/27/11
e 500 SH. CISCO	SYSTEMS INC		P	05/10/0707/27/11
				05/23/0512/16/11
g 50 SH. FACTSET			03/18/0304/20/11	
h 100 SH. ISHARE		P	11/22/0608/29/11	
1600 SH. ISHARE		n	P	11/22/06/08/29/11
100 SH. ISHARE 100 SH. ISHARE				04/28/0809/13/11
k 100 SH. ISHARE				04/28/0809/13/11
m 300 SH. ISHARE			P P	04/28/0809/13/11 11/28/0812/16/11
n 100 SH. JPMORG		PFD DEP SHS		06/19/0902/02/11
<sub>0</sub> 900 SH. JPMORG		PFD DEP SHS		06/19/0902/02/11
<del></del>	(f) Depreciation allowed	(g) Cost or other basis		Gain or (loss)
(e) Gross sales price	(or allowable)	plus expense of sale		lus (f) minus (g)
a 1,566.		2,680.		<u>-1,114.</u>
b 1,566.		2,680.		-1,114.
c 1,566. d 3,132.		2,680. 5,360.		-1,114.
7 001		13,219.		-2,228. -5,388.
f 11,372.		1,158.		10,214.
g 5,215.		740.		4,475.
h 3,750.		3,186.		564.
22,499.		19,117.		3,382.
5,951.		8,784.		-2,833.
k 5,951.		8,784.		-2,833.
11,902.		17,568.		-5,666.
m 10,743.		8,080.		2,663.
n 2,728.		2,538.		190.
<u>o</u> 24,552.		22,844.		1,708.
Complete only for assets snow	ng gain in column (h) and owned by			ses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any		of col (h) gain over col (k), ot less than "-0-")
a				-1,114.
<u>b</u>				-1,114.
<u>C</u>				$\frac{-1,114}{2,229}$
d				-2,228. -5,388.
f f				10,214.
9			<u> </u>	4,475.
h				564.
1				3,382.
			<u>-</u>	-2,833.
k				-2,833.
				-5,666.
m				2,663.
n				190.
0			<del>-   -   -   -   -   -   -   -   -   -  </del>	1,708.
2 Capital gain net income or (net c	anital loss) [ If gain, also enter	in Part I, line 7		
3 Net short-term capital gain or (lo	ss) as defined in sections 1222(5) an	_	2	
If gain, also enter in Part I, line 8 If (loss), enter "-0-" in Part I, line		}	3	

. • •			NTINUA		FOR	990-	PF,	PART	IV
THE BOGER CHARITA			-27762	96	P	AGE	3	OF	3
	sses for Tax on Investment Income			I/h\ t law as		<del></del>			
2-story br	describe the kind(s) of property solick warehouse, or common stock, 20	ld, e g , real estate, 100 shs MLC Co		(b) How ac P - Purc D - Dona	cquired hase ation	(c) Date ac (mo , day	quired , yr )	(d) Date s (mo , day,	yr )
1a 100 SH. SOHU.CO				P	•	11/06	/08	08/22,	
b 200 SH. SOHU.CO		· · · · · · · · · · · · · · · · · · ·		P		11/06	/08	08/22	<u>/11</u>
c CAPITAL GAINS I	DIVIDENDS	· · · · · · · · · · · · · · · · · · ·		<u> </u>					
d	<del></del>			<u> </u>					
e f				<del> </del>				_	
9	· · · · · · · · · · · · · · · · · · ·			<del>                                     </del>	-				
h	<del></del>								
1									
k	<u> </u>								
1									
<u>m</u>									
n								<del></del>	
0	(6) Department allowed	(=) 0446		L			l		
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	1			Gain or (lo: lus (f) minu			
a 6,966.	,	5,16	57.		1-7-		- 197	1,79	9.
b 13,932.		10,33	34.					3,59	98.
c 4,347.								4,34	17.
d									
е									
f									
9									
<u>h</u>						<del> </del>		-	
-									
k									
1					-				
m									
n									
0									
Complete only for assets showin	g gain in column (h) and owned by t	1		Gaine (a	(I) Los	ses (from c of col (h) ga	ol (h))	nol (k)	
(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		Gams (e	but n	ot less than	"-0-")	cor (k),	
a			<del></del>			<del></del>		1,79	99
b			<u> </u>				<del></del>	3,59	<del>)</del> 8.
С								4,34	17.
d									
е									
f									
9								<del></del>	
h I								<del></del>	
<u>k</u>				<del></del>					
				<u> </u>					
m									
<u>n</u>									
0		<u> </u>							
2 Capital gain net income or (net cap	pital loss) { If gain, also enter If (loss), enter *-0	r in Part I, line 7_ }	_					34,92	7
- anhura Annu not modilio of fuel cal	/ It (loss), enter "-0	J-" (n Part i, line 7 J	2	<u> </u>				_ J4, J4	<u>. /</u> •

3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) If (loss), enter "-0-" in Part I, line 8

N/A

FORM 990-PF DIVIDENT	OS AND	INTER	EST FRO	M SECU	RITIES	STATEMENT	1	
SOURCE				ITAL GAINS IVIDENDS	COLUMN (A) AMOUNT			
CHARLES SCHWAB			63,972.		4,347.	59,625.		
TOTAL TO FM 990-PF, PART I, I	LN 4		63,972		4,347.	59,6	25.	
FORM 990-PF		LEGAL	FEES			STATEMENT	2	
DESCRIPTION	(A) EXPENSES PER BOOK		(B) NET INVEST- MENT INCOME		(C) ADJUSTED NET INCOM		(D) CHARITABLE PURPOSES	
LEGAL	4,470		0.			<del></del>	0.	
TO FM 990-PF, PG 1, LN 16A		4,470.	0.		0.			
FORM 990-PF (	THER	PROFES	SIONAL	FEES		STATEMENT	3	
DESCRIPTION	EXPE	A) NSES BOOKS	(B NET IN MENT I	VEST-	(C) ADJUSTED NET INCOM			
ACCOUNT MANAGEMENT	2	2,300.	2	2,300.			0.	
TO FORM 990-PF, PG 1, LN 16C	2	2,300.	2	2,300.			0.	
FORM 990-PF	TAXES				STATEMENT 4			
DESCRIPTION	EXPE	A) NSES BOOKS	(B NET IN MENT I	VEST-	(C) ADJUSTED NET INCOM			
MASSACHUSETTS - 2009 FORM				-				
PC CHARLES SCHWAB FOREIGN		70.		0.			0.	
TAXES		535.		535.			0.	
TO FORM 990-PF, PG 1, LN 18		605.		535.			0.	

FORM 990-PF	OTHER EXPENSES				STATEMENT 5		
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVE MENT INC		(C) ADJUSTED NET INCOM			
CITIBUSINESS CREDIT CARD FEE PHOTOCOPYING EXPENSES	75. 21.		0.			0.	
TO FORM 990-PF, PG 1, LN 23	96.		0.			0.	
FORM 990-PF	CORPORAT	E STOCK			STATEMENT	6	
DESCRIPTION			вос	OK VALUE	FAIR MARKE VALUE	T	
EQUITIES - SEE ATTACHED STATE	EMENT			738,303.	2,144,3	55.	
TOTAL TO FORM 990-PF, PART II, LINE 10B			1,738,303.		2,144,355.		
FORM 990-PF	OTHER	ASSETS	<del></del>		STATEMENT	7	
DESCRIPTION		NING OF OK VALUE		OF YEAR OK VALUE	FAIR MARKE VALUE	:T	
DIVIDEND RECEIVABLE	<del> </del>	714.		1,475.	1,4	75.	
CAPITAL GAIN DISTRIBUTION RECEIVABLE	94.		0.			0.	
NONDIVIDEND DISTRIBUTIONS RECEIVABLE		1,406.		0.		0.	
TO FORM 990-PF, PART II, LINE	E 15	2,214.		1,475.	1,4	75.	

Year End 12/31/11

# of Shares	Description	Date	Book Basis	Tax Basis	FMV
1,000	AFLAC Inc	8/19/02	30,998 89	30,998 89	43,260 00
500	Analog Devices Inc	9/1/11	16,377 95	16,377 95	17,890 00
100	Apple Inc	12/13/06	8,844 32	8,844 32	40,500 00
1,000	Archer Daniels Midland Co	6/2/11	28,838 92	28,838 92	28,600 00
600	Bard C R Incorporated	4/15/03	18,752 97	18,752 97	51,300 00
800	Baxter International Inc	8/3/09	45,136 17	45,136 17	39,584 00
200	Blackrock Inc	12/21/11	33,913 35	33,913 35	35,648 00
•	Black Rock Cr Allo Inc Tr II	8/2/10	30,487 60	30,487 60	29,490 00
	Black Rock CP High Yield VI	8/24/10	34,343 05	34,343 05	34,140 00
1,000	Boeing Co	1/1/51	16,400 00	5,929 23	36,675 00
		6/4/09	24,808 45	24,808 45	36,675 00
	Bristol-Myers Squibb Co	2/18/09	20,937 95	20,937 95	35,240 00
	Broadcom Corp Class A	3/21/11	19,417 45	19,417 45	14,680 00
	CSX Corp	4/26/11	22,154 65	22,154 65	18,954 00
	CVS Caremark Corp	5/8/07	36,599 95	36,599 95	40,780 00
	Caterpillar Inc	06, 07	59,777 40	59,777 40	81,540 00
	Chesapeake Energy Corp	07	42,102 70	42,102 70	26,748 00
	China Mobile LTD ADR	6/4/09	15,158 95	15,158 95	14,547 00
	Core Laboratories	5/23/05	8,102 01	8,102 01	79,765 00
	Du Pont E I De Nemour & Co	9/16/11	22,287 95	22,287 95	22,890 00
	Factset Research Systems	8/19/02	8,872 33	8,872 33	52,368 00
	Fedex Corporation	7/28/06	42,104 95	42,104 95	33,404 00
	Google Inc Class A	5/31/07	50,551 18	50,551 18	64,590 00
	Halliburton Co Hldg Co	8/30/07	34,278 41	34,278 41	34,510 00
	Intl Business Machines	7/17/07	33,075 35	33,075 35	55,164 00
	Johnson & Johnson	8/19/02	26,747 01	26,747 01	32,790 00
	JPMorgan Chase & Co	2/7/11	22,868 15	22,868 15	16,625 00
	JPMorgan Chase 8 625%	6/19/09	25,382 47	25,382 47	27,600 00
1,500	Microsoft Corp	6/19/09	19,352 15	19,352 15	20,768 00
20	Nortel Networks Cp	9/27/11 1/1/51	17,641 95 1,040 00	17,641 95 7,987 00	18,172 00 0 33
	Nuveen Multi Strat Incm	3/10/10	49,024 25	49,024 25	48,300 00
•	Oracle Corporation	4/14/10	31,531 75	31,531 75	30,780 00
1,600	Ofacie Corporation	8/25/11	15,026 17	15,026 17	15,390 00
1.000	Pepsico Incorporated	11/9/01	49,286 00	49,286 00	66,350 00
	Pimco Floating Rate Stra	9/11/09	19,959 88	19,959 88	21,356 10
1,000	· ····································	4/22/10	14,077 70	14,077 70	15,243 90
5.000	Putnam High Income Securities Fund	3/29/11	42,041 47	42,041 47	38,400 00
	Rockwell Automation Inc	1/1/51	6,274 74	80 92	36,685 00
600	Rockwell Collins Inc	1/1/51	8,137 78	1,132 66	33,222 00
4,000	Royce Value Trust Inc	3/10/10	22,791 19	22,791 19	24,540 00
	•	2/7/11	28,916 62	28,916 62	24,540 00
600	Solazyme Inc	8/1/11	13,609 55	13,609 55	7,140 00
500	Stryker Corp	3/8/05	24,429 95	24,429 95	24,855 00
1,000	Templeton Dragon Fund	7/13/10	27,884 95	27,884 95	25,450 00
1,000	Texas Instruments Inc	10/13/10	28,228 95	28,228 95	29,110 00
	Wal-mart Stores Inc	10/26/09	40,134 36	40,134 36	47,808 00
	HCP Inc	8/19/02	18,579 95	18,579 95	41,430 00
1,500	Ishares MSCI Aus Idx Fd	10/1/07	48,264 95	48,264 95	32,160 00
•	Ishares MSCI CDA Idx Fd	9/27/05	21,319 95	21,319 95	26,600 00
	Ishares MSCI Pac Ex Japn	12/12/06	37,382 45	37,382 45	35,037 00
	Ishares MSCI Singapore Free Index Fund	7/23/09	19,886 95	19,886 95	21,660 00
1,700	Ishares S&P Smallcap 600 Growth	10/4/04	34,135 46	34,135 46	52,129 00
		12/12/06	64,524 25	64,524 25	74,470 00
2,700	Ishares S&P U S PFD Fund	11/28/08	18,854 13	18,854 13	24,934 00
		12/15/08	53,125 95	53,125 95	71,240 00
1,000	Ishares Tr S&P Midcap 400 Index	4/17/07	43,681 87	43,681 87	43,805 00
		3/10/10	38,831 17	38,831 17	43,805 00
	Proshs Ultrashort Lehman	3/30/10	24,893 47	24,893 47	9,035 00
600	Sector SPDR Materials Fd	4/30/09	15,488 95	15,488 95	20,100 00

The Boger Chantable Trust EIN 22-2776296 2011 Form 990-PF

200 SPDR Gold Trust500 Vanguard Bond Index Fund

3/10/08 7/13/10 19,024 75 41,598 45 19,024 75 41,598 45 30,398 00 43,485 00

TOTAL

1,738,302.64 1,721,579.93 2,144,355.33