Form **990-PF**

Department of the Treasury
Internal Revenue Service

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

2011

For calendar year 2011 or tax year beginning , and ending

Name of foundation: THE BOGER CHARITABLE TRUST

A Employer identification number: 22-2776296

Number and street (or P O box number if mail is not delivered to street address): 29 IRVING STREET | Room/suite

B Telephone number: 978-369-1476

City or town, state, and ZIP code: CAMBRIDGE, MA 02138

C If exemption application is pending, check here ▶ ☐

G Check all that apply: ☐ Initial return ☐ Initial return of a former public charity ☐ Final return ☐ Amended return ☐ Address change ☐ Name change

D 1. Foreign organizations, check here ▶ ☐
2. Foreign organizations meeting the 85% test, check here and attach computation ▶ ☐

H Check type of organization: [X] Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation

E If private foundation status was terminated under section 507(b)(1)(A), check here ▶ ☐

I Fair market value of all assets at end of year (from Part II, col (c), line 16) ▶$ 2,182,350.

J Accounting method [X] Cash ☐ Accrual ☐ Other (specify) (Part I, column (d) must be on cash basis.)

F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ▶ ☐

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

		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received	53,431.		N/A	
	2 Check ▶ ☐ if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities	59,625.	59,625.		STATEMENT 1
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	34,927.			
	b Gross sales price for all assets on line 6a 285,672.				
	7 Capital gain net income (from Part IV, line 2)		34,927.		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
	b Less Cost of goods sold				
	c Gross profit or (loss)				
	11 Other income				
	12 **Total.** Add lines 1 through 11	147,983.	94,552.		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	0.	0.		0.
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees STMT 2	4,470.	0.		0.
	b Accounting fees				
	c Other professional fees STMT 3	22,300.	22,300.		0.
	17 Interest				
	18 Taxes STMT 4	605.	535.		0.
	19 Depreciation and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings	27.	0.		0.
	22 Printing and publications				
	23 Other expenses STMT 5	96.	0.		0.
	24 **Total operating and administrative expenses.** Add lines 13 through 23	27,498.	22,835.		0.
	25 Contributions, gifts, grants paid	95,890.			95,890.
	26 **Total expenses and disbursements.** Add lines 24 and 25	123,388.	22,835.		95,890.
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	24,595.			
	b **Net investment income** (if negative, enter -0-)		71,717.		
	c **Adjusted net income** (if negative, enter -0-)			N/A	

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Part II Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only

		Beginning of year (a) Book Value	End of year (b) Book Value	End of year (c) Fair Market Value
Assets	1 Cash - non-interest-bearing	1,592.	2,356.	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 ▶			
	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 ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments - U S and state government obligations			
	b Investments - corporate stock STMT 6	1,708,205.	1,738,303.	2,144,355.
	c Investments - corporate bonds			
	11 Investments - land, buildings, and equipment basis ▶			
	Less accumulated depreciation ▶			
	12 Investments - mortgage loans			
	13 Investments - other			
	14 Land, buildings, and equipment: basis ▶			
	Less accumulated depreciation ▶			
	15 Other assets (describe ▶ STATEMENT 7)	2,214.	1,475.	1,475.
	16 **Total assets** (to be completed by all filers)	1,758,590.	1,776,298.	2,182,350.
Liabilities	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe ▶)	29,187.	22,300.	
	23 **Total liabilities** (add lines 17 through 22)	29,187.	22,300.	
Net Assets or Fund Balances	**Foundations that follow SFAS 117, check here ▶ ☐ and complete lines 24 through 26 and lines 30 and 31.**			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ [X] and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds	1,729,403.	1,753,998.	
	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.	
	30 **Total net assets or fund balances**	1,729,403.	1,753,998.	
	31 **Total liabilities and net assets/fund balances**	1,758,590.	1,776,298.	

Part III Analysis of Changes in Net Assets or Fund Balances

1 Total net assets or fund balances at beginning of year - Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	1,729,403.
2 Enter amount from Part I, line 27a	2	24,595.
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	1,753,998.
5 Decreases not included in line 2 (itemize) ▶	5	0.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	1,753,998.

Part IV Capital Gains and Losses for Tax on Investment Income

	(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
1a				
b	SEE ATTACHED STATEMENTS			
c				
d				
e				

	(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a				
b				
c				
d				
e	285,672.		250,745.	34,927.

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

	(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
a				
b				
c				
d				
e				34,927.

2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7; If (loss), enter -0- in Part I, line 7 }	2	34,927.
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	3	N/A

Part V Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income)

If section 4940(d)(2) applies, leave this part blank

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☒ No

If "Yes," the foundation does not qualify under section 4940(e) Do not complete this part

1 Enter the appropriate amount in each column for each year; see instructions before making any entries

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2010	108,852.	2,072,457.	.052523
2009	128,516.	1,737,020.	.073986
2008	136,404.	2,387,623.	.057130
2007	108,493.	2,724,596.	.039820
2006	105,014.	2,448,265.	.042893

2 Total of line 1, column (d)	2	.266352
3 Average distribution ratio for the 5-year base period - divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	.053270
4 Enter the net value of noncharitable-use assets for 2011 from Part X, line 5	4	2,307,929.
5 Multiply line 4 by line 3	5	122,943.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	717.
7 Add lines 5 and 6	7	123,660.
8 Enter qualifying distributions from Part XII, line 4	8	95,890.

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate See the Part VI instructions

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

1a	Exempt operating foundations described in section 4940(d)(2), check here ▶ ☐ and enter "N/A" on line 1 Date of ruling or determination letter _______ (attach copy of letter if necessary-see instructions)			
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ▶ ☐ and enter 1% of Part I, line 27b		1	1,434.
c	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	1,434.
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	1,434.
6	Credits/Payments			
a	2011 estimated tax payments and 2010 overpayment credited to 2011	6a 1,987.		
b	Exempt foreign organizations - tax withheld at source	6b		
c	Tax paid with application for extension of time to file (Form 8868)	6c		
d	Backup withholding erroneously withheld	6d		
7	Total credits and payments Add lines 6a through 6d		7	1,987.
8	Enter any **penalty** for underpayment of estimated tax Check here ☐ if Form 2220 is attached		8	
9	**Tax due.** If the total of lines 5 and 8 is more than line 7, enter **amount owed** ▶		9	
10	**Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶		10	553.
11	Enter the amount of line 10 to be **Credited to 2012 estimated tax** ▶	553. Refunded ▶	11	0.

Part VII-A Statements Regarding Activities

			Yes	No
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a		X
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? *If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.*	1b		X
c	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 ▶ $ 0. (2) On foundation managers ▶ $ 0.			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ▶ $ 0.			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? *If "Yes," attach a detailed description of the activities*	2		X
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? *If "Yes," attach a conformed copy of the changes*	3		X
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		X
b	If "Yes," has it filed a tax return on **Form 990-T** for this year? N/A	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? *If "Yes," attach the statement required by General Instruction T*	5		X
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	X	
7	Did the foundation have at least $5,000 in assets at any time during the year? *If "Yes," complete Part II, col. (c), and Part XV.*	7	X	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ MA			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by *General Instruction G? If "No," attach explanation*	8b	X	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2011 or the taxable year beginning in 2011 (see instructions for Part XIV)? *If "Yes," complete Part XIV*	9		X
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10		X

Part VII-A Statements Regarding Activities *(continued)*

			Yes	No
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 ▶978-369-1476

Located at ▶29 IRVING STREET, CAMBRIDGE, MA ZIP+4 ▶02138

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of **Form 1041** - Check here ▶ ☐

and enter the amount of tax-exempt interest received or accrued during the year ▶ 15 N/A

			Yes	No
16	At any time during calendar year 2011, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?	16		X
	See the instructions for exceptions and filing requirements for Form TD F 90-22 1 If "Yes," enter the name of the foreign country ▶			

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

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

			Yes	No
1a	During the year did the foundation (either directly or indirectly)			
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☒ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☒ No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☒ No			
	(6) Agree to pay money or property to a government official? (**Exception**. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days) ☐ Yes ☒ No			
b	If any answer is "Yes" to 1a(1)-(6), did **any** of the acts fail to qualify under the exceptions described in Regulations section 53 4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? N/A	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?	1c		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))			
a	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? ☐ Yes ☒ No			
	If "Yes," list the years ▶ ______, ______, ______, ______			
b	Are there any years listed in 2a for which the foundation is **not** applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to **all** years listed, answer "No" and attach statement - see instructions) N/A	2b		
c	If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here ▶ ______, ______, ______, ______			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☒ No			
b	If "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	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		X
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2011?	4b		X

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

5a During the year did the foundation pay or incur any amount to				
(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	☐ Yes ☒ No			
(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?	☐ Yes ☒ No			
(3) Provide a grant to an individual for travel, study, or other similar purposes?	☐ Yes ☒ No			
(4) Provide a grant to an organization other than a charitable, etc , organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)?	☐ Yes ☒ No			
(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?	☐ Yes ☒ No			
b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53 4945 or in a current notice regarding disaster assistance (see instructions)?	N/A	5b		
Organizations relying on a current notice regarding disaster assistance check here	▶ ☐			
c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? N/A	☐ Yes ☐ No			
If "Yes," attach the statement required by Regulations section 53 4945-5(d)				
6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	☐ Yes ☒ No			
b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?		6b		X
If "Yes" to 6b, file Form 8870.				
7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	☐ Yes ☒ No			
b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?	N/A	7b		

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors

1 List all officers, directors, trustees, foundation managers and their compensation.

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
WILLIAM P. BOGER, III 29 IRVING STREET CAMBRIDGE, MA 02138	TRUSTEE 0.00	0.	0.	0.
BARBARA C. BOGER 29 IRVING STREET CAMBRIDGE, MA 02138	TRUSTEE 0.00	0.	0.	0.

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

(a) Name and address of each employee paid more than $50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				

Total number of other employees paid over $50,000 ▶ 0

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors *(continued)*

3 Five highest-paid independent contractors for professional services. If none, enter "NONE."

(a) Name and address of each person paid more than $50,000	(b) Type of service	(c) Compensation
NONE		

Total number of others receiving over $50,000 for professional services ▶ 0

Part IX-A Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc	Expenses
1 N/A	
2	
3	
4	

Part IX-B Summary of Program-Related Investments

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1 N/A	
2	
All other program-related investments See instructions 3	
Total. Add lines 1 through 3 ▶	0.

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes		
a	Average monthly fair market value of securities	1a	2,270,993.
b	Average of monthly cash balances	1b	72,082.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	2,343,075.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation) — 1e: 0.		
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	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.

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

1	Minimum investment return from Part X, line 6	1	115,396.
2a	Tax on investment income for 2011 from Part VI, line 5 — 2a: 1,434.		
b	Income tax for 2011 (This does not include the tax from Part VI) — 2b:		
c	Add lines 2a and 2b	2c	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.

Part XII Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc , purposes		
a	Expenses, contributions, gifts, etc - total from Part I, column (d), line 26	1a	95,890.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	95,890.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b	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 qualifies for the section 4940(e) reduction of tax in those years

Part XIII **Undistributed Income** (see instructions)

	(a) Corpus	(b) Years prior to 2010	(c) 2010	(d) 2011
1 Distributable amount for 2011 from Part XI, line 7				113,962.
2 Undistributed income, if any, as of the end of 2011				
a Enter amount for 2010 only			61,001.	
b Total for prior years ______ , ______ , ______		0.		
3 Excess distributions carryover, if any, to 2011				
a From 2006				
b From 2007				
c From 2008				
d From 2009				
e From 2010				
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2011 from Part XII, line 4 ▶ $ 95,890.				
a Applied to 2010, but not more than line 2a			61,001.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2011 distributable amount				34,889.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2011 (If an amount appears in column (d), the same amount must be shown in column (a))	0.			0.
6 **Enter the net total of each column as indicated below:**				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	0.			
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b Taxable amount - see instructions		0.		
e Undistributed income for 2010 Subtract line 4a from line 2a Taxable amount - see instr			0.	
f Undistributed income for 2011 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2012				79,073.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)	0.			
8 Excess distributions carryover from 2006 not applied on line 5 or line 7	0.			
9 **Excess distributions carryover to 2012.** Subtract lines 7 and 8 from line 6a	0.			
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				

Part XIV Private Operating Foundations (see instructions and Part VII-A, question 9) N/A

1 a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2011, enter the date of the ruling ▶

b Check box to indicate whether the foundation is a private operating foundation described in section ☐ 4942(j)(3) or ☐ 4942(j)(5)

	Tax year	Prior 3 years			
	(a) 2011	(b) 2010	(c) 2009	(d) 2008	(e) Total
2 a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon a "Assets" alternative test - enter (1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test - enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed					
c "Support" alternative test - enter (1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

Part XV Supplementary Information (Complete this part only if the foundation had $5,000 or more in assets at any time during the year-see instructions.)

1 **Information Regarding Foundation Managers:**

a List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than $5,000) (See section 507(d)(2))

BARBARA C. BOGER

b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest

NONE

2 **Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:**

Check here ▶ [X] if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds If the foundation makes gifts, grants, etc (see instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d

a The name, address, and telephone number of the person to whom applications should be addressed

b The form in which applications should be submitted and information and materials they should include

c Any submission deadlines

d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors

Part XV Supplementary Information (continued)

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year				
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.
Total SEE CONTINUATION SHEET(S)			▶ 3a	95,890.
b Approved for future payment				
NONE				
Total			▶ 3b	0.

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue					
a					
b					
c					
d					
e					
f					
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					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue					
a					
b					
c					
d					
e					
12 Subtotal. Add columns (b), (d), and (e)		0.		94,552.	0.

13 Total. Add line 12, columns (b), (d), and (e) 13 94,552.

(See worksheet in line 13 instructions to verify calculations.)

Part XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes

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)

Part XVII Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

			Yes	No
1	Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?			
a	Transfers from the reporting foundation to a noncharitable exempt organization of			
	(1) Cash	1a(1)		X
	(2) Other assets	1a(2)		X
b	Other transactions			
	(1) Sales of assets to a noncharitable exempt organization	1b(1)		X
	(2) Purchases of assets from a noncharitable exempt organization	1b(2)		X
	(3) Rental of facilities, equipment, or other assets	1b(3)		X
	(4) Reimbursement arrangements	1b(4)		X
	(5) Loans or loan guarantees	1b(5)		X
	(6) Performance of services or membership or fundraising solicitations	1b(6)		X
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c		X

d If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received

(a) Line no	(b) Amount involved	(c) Name of noncharitable exempt organization	(d) Description of transfers, transactions, and sharing arrangements
		N/A	

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? ☐ Yes ☒ No

b If "Yes," complete the following schedule

(a) Name of organization	(b) Type of organization	(c) Description of relationship
N/A		

Sign Here

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge

Barbara C Boger 5/8/12 ▶ TRUSTEE

Signature of officer or trustee Date Title

May the IRS discuss this return with the preparer shown below (see instr)? ☒ Yes ☐ No

Paid Preparer Use Only

Print/Type preparer's name	Preparer's signature	Date	Check ☐ if self- employed	PTIN
PETER W. FINK	Peter W Fink	5/2/12		P00635003

Firm's name ▶ LYNCH, BREWER, HOFFMAN & FINK, LLP Firm's EIN ▶ 04-2619139

Firm's address ▶ 75 FEDERAL STREET, 7TH FLOOR BOSTON, MA 02110 Phone no 617-951-0800

Form **990-PF** (2011)

123622
12-02-11

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	☒ 501(c)(3) exempt private foundation
	☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation
	☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule.**
Note. Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule See instructions.

General Rule

☒ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, $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, 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 religious, charitable, etc , contributions of $5,000 or more 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).

Name of organization	Employer identification number
THE BOGER CHARITABLE TRUST	22-2776296

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

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	THE CRAWFORD CLUT FOR CHILDREN NORTHERN TRUST, 50 SOUTH LASALLE STREET B-3 CHICAGO, IL 60603	$ 26,743.	Person [X] Payroll [ ] Noncash [ ] (Complete Part II if there is a noncash 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.)
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II if there is a noncash contribution.)
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II if there is a noncash contribution.)
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II if there is a noncash contribution.)
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II if there is a noncash contribution.)

Name of organization: THE BOGER CHARITABLE TRUST

Employer identification number: 22-2776296

Part II **Noncash Property** (see instructions). Use duplicate copies of Part II if additional space is needed.

(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
		$	

(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
		$	

(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
		$	

Name of organization: THE BOGER CHARITABLE TRUST

Employer identification number: 22-2776296

Part III *Exclusively* religious, charitable, etc., individual contributions to section 501(c)(7), (8), or (10) organizations that total more than $1,000 for the year. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of *exclusively* religious, charitable, etc., contributions of $1,000 or less for the year (Enter this information once.) ▶ $
Use duplicate copies of Part III if additional space is needed.

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
AVON WALK FOR BREAST CANCER		501(C)(3)	BENEFIT THOSE IN NEED.	100.
BOSTON COLLEGE		501(C)(3)		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)		150.
CONCORD LAND CONSERVATION TRUST		501(C)(3)		50.
DANA FARBER JIMMY FUND WALK		501(C)(3)		50.
Total from continuation sheets				95,165.

Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
DEFENDERS OF WILDLIFE		501(C)(3)		25.
DICKINSON COLLEGE		501(C)(3)		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 Information

3 Grants and Contributions Paid During the Year (Continuation)

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
HUNGTINGTON THEATER		501(C)(3)		640.
HUNTINGTON THEATER EDUCATIONAL PROGRAM		501(C)(3)		5,000.
LAWRENCE ACADEMY		501(C)(3)		450.
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.
MISCELLANEOUS CHARITIES		501(C)(3)		50.
MOUNT AUBURN HOSPITAL		501(C)(3)		50.
Total from continuation sheets				

Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
MOUNT HOLYHOKE COLLEGE		501(C)(3)		250.
NATIONAL PARKS CONSERVATION ASSOCIATION		501(C)(3)		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 HUNGER)		501(C)(3)		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 Year (Continuation)

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
SUDBURY VALLEY TRUSTEES		501(C)(3)		100.
THE STEPPINGSTONE 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.
Total from continuation sheets				

Part IV Capital Gains and Losses for Tax on Investment Income

	(a) List and describe the kind(s) of property sold, e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
1a	1,000 SH. INTEL CORP.	P	12/13/10	03/16/11
b	100 SH. POWERSHARES INDIA ETF	P	12/13/10	11/01/11
c	100 SH. POWERSHARES INDIA ETF	P	12/13/10	11/01/11
d	100 SH. POWERSHARES INDIA ETF	P	12/13/10	11/01/11
e	100 SH. POWERSHARES INDIA ETF	P	12/13/10	11/01/11
f	300 SH. POWERSHARES INDIA ETF	P	12/13/10	11/01/11
g	300 SH. POWERSHARES INDIA ETF	P	12/13/10	11/01/11
h	100 SH. APPLE INC	P	12/13/06	02/18/11
i	0.80 SH. ARCHER-DANIELS-MDLND CO	P	07/02/09	06/02/11
j	216 SH. ARCHER-DANIELS-MDLND CO	P	07/02/09	12/16/11
k	100 SH. BAIDU INC ADR	P	09/01/10	09/22/11
l	100 SH. BAIDU INC ADR	P	09/01/10	09/22/11
m	100 SH. BAXTER INTERNATIONAL INC	P	08/03/09	08/29/11
n	200 SH. BAXTER INTERNATIONAL INC	P	08/03/09	08/29/11
o	500 SH. BEST BUY INC	P	03/07/08	03/24/11

	(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a	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.	-1,531.
h	35,025.		8,844.	26,181.
i	25.		23.	2.
j	7,310.		7,527.	-217.
k	12,848.		8,202.	4,646.
l	12,848.		8,202.	4,646.
m	5,514.		5,642.	-128.
n	11,028.		11,284.	-256.
o	16,187.		19,826.	-3,639.

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

	(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	(l) Losses (from col (h)) Gains (excess of col (h) gain over col (k), but not less than "-0-")
a				-1,854.
b				-511.
c				-511.
d				-510.
e				-510.
f				-1,531.
g				-1,531.
h				26,181.
i				2.
j				-217.
k				4,646.
l				4,646.
m				-128.
n				-256.
o				-3,639.

2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter "-0-" in Part I, line 7 }	2	
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	3	

123591
05-01-11

Part IV Capital Gains and Losses for Tax on Investment Income

	(a) List and describe the kind(s) of property sold, e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
1a	100 SH. CISCO SYSTEMS INC	P	04/17/07	07/27/11
b	100 SH. CISCO SYSTEMS INC	P	04/17/07	07/27/11
c	100 SH. CISCO SYSTEMS INC	P	04/17/07	07/27/11
d	200 SH. CISCO SYSTEMS INC	P	04/17/07	07/27/11
e	500 SH. CISCO SYSTEMS INC	P	05/10/07	07/27/11
f	100 SH. CORE LABORATORIES NVF	P	05/23/05	12/16/11
g	50 SH. FACTSET RESEARCH SYSTEMS	P	03/18/03	04/20/11
h	100 SH. ISHARES FTSE CHINA 25	P	11/22/06	08/29/11
i	600 SH. ISHARES FTSE CHINA 25	P	11/22/06	08/29/11
j	100 SH. ISHARES MSCI BRAZIL INDX	P	04/28/08	09/13/11
k	100 SH. ISHARES MSCI BRAZIL INDX	P	04/28/08	09/13/11
l	200 SH. ISHARES MSCI BRAZIL INDX	P	04/28/08	09/13/11
m	300 SH. ISHARES S&P US PFD FUND	P	11/28/08	12/16/11
n	100 SH. JPMORGAN CHASE 8.625% PFD DEP SHS	P	06/19/09	02/02/11
o	900 SH. JPMORGAN CHASE 8.625% PFD DEP SHS	P	06/19/09	02/02/11

	(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a	1,566.		2,680.	-1,114.
b	1,566.		2,680.	-1,114.
c	1,566.		2,680.	-1,114.
d	3,132.		5,360.	-2,228.
e	7,831.		13,219.	-5,388.
f	11,372.		1,158.	10,214.
g	5,215.		740.	4,475.
h	3,750.		3,186.	564.
i	22,499.		19,117.	3,382.
j	5,951.		8,784.	-2,833.
k	5,951.		8,784.	-2,833.
l	11,902.		17,568.	-5,666.
m	10,743.		8,080.	2,663.
n	2,728.		2,538.	190.
o	24,552.		22,844.	1,708.

	Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Losses (from col (h)) Gains (excess of col (h) gain over col (k), but not less than "-0-")
	(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	
a				-1,114.
b				-1,114.
c				-1,114.
d				-2,228.
e				-5,388.
f				10,214.
g				4,475.
h				564.
i				3,382.
j				-2,833.
k				-2,833.
l				-5,666.
m				2,663.
n				190.
o				1,708.

2	Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7; If (loss), enter "-0-" in Part I, line 7 }	2	
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	3	

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Part IV Capital Gains and Losses for Tax on Investment Income

	(a) List and describe the kind(s) of property sold, e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
1a	100 SH. SOHU.COM INC	P	11/06/08	08/22/11
b	200 SH. SOHU.COM INC	P	11/06/08	08/22/11
c	CAPITAL GAINS DIVIDENDS			
d				
e				
f				
g				
h				
i				
j				
k				
l				
m				
n				
o				

	(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a	6,966.		5,167.	1,799.
b	13,932.		10,334.	3,598.
c	4,347.			4,347.
d				
e				
f				
g				
h				
i				
j				
k				
l				
m				
n				
o				

	Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Losses (from col (h)) Gains (excess of col (h) gain over col (k), but not less than "-0-")
	(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	
a				1,799.
b				3,598.
c				4,347.
d				
e				
f				
g				
h				
i				
j				
k				
l				
m				
n				
o				

2	Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 / If (loss), enter "-0-" in Part I, line 7 }	2	34,927.
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	3	N/A

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FORM 990-PF | DIVIDENDS AND INTEREST FROM SECURITIES | STATEMENT 1

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
CHARLES SCHWAB	63,972.	4,347.	59,625.
TOTAL TO FM 990-PF, PART I, LN 4	63,972.	4,347.	59,625.

FORM 990-PF | LEGAL FEES | STATEMENT 2

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
LEGAL	4,470.	0.		0.
TO FM 990-PF, PG 1, LN 16A	4,470.	0.		0.

FORM 990-PF | OTHER PROFESSIONAL FEES | STATEMENT 3

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNT MANAGEMENT	22,300.	22,300.		0.
TO FORM 990-PF, PG 1, LN 16C	22,300.	22,300.		0.

FORM 990-PF | TAXES | STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
MASSACHUSETTS - 2009 FORM PC	70.	0.		0.
CHARLES SCHWAB FOREIGN 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 INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
CITIBUSINESS CREDIT CARD FEE	75.	0.		0.
PHOTOCOPYING EXPENSES	21.	0.		0.
TO FORM 990-PF, PG 1, LN 23	96.	0.		0.

FORM 990-PF CORPORATE STOCK STATEMENT 6

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
EQUITIES - SEE ATTACHED STATEMENT	1,738,303.	2,144,355.
TOTAL TO FORM 990-PF, PART II, LINE 10B	1,738,303.	2,144,355.

FORM 990-PF OTHER ASSETS STATEMENT 7

DESCRIPTION	BEGINNING OF YR BOOK VALUE	END OF YEAR BOOK VALUE	FAIR MARKET VALUE
DIVIDEND RECEIVABLE	714.	1,475.	1,475.
CAPITAL GAIN DISTRIBUTION RECEIVABLE	94.	0.	0.
NONDIVIDEND DISTRIBUTIONS RECEIVABLE	1,406.	0.	0.
TO FORM 990-PF, PART II, LINE 15	2,214.	1,475.	1,475.

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
3,000	Black Rock Cr Allo Inc Tr II	8/2/10	30,487 60	30,487 60	29,490 00
3,000	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
1,000	Bristol-Myers Squibb Co	2/18/09	20,937 95	20,937 95	35,240 00
500	Broadcom Corp Class A	3/21/11	19,417 45	19,417 45	14,680 00
300	CSX Corp	4/26/11	22,154 65	22,154 65	18,954 00
1,000	CVS Caremark Corp	5/8/07	36,599 95	36,599 95	40,780 00
900	Caterpillar Inc	06, 07	59,777 40	59,777 40	81,540 00
1,200	Chesapeake Energy Corp	07	42,102 70	42,102 70	26,748 00
300	China Mobile LTD ADR	6/4/09	15,158 95	15,158 95	14,547 00
700	Core Laboratories	5/23/05	8,102 01	8,102 01	79,765 00
500	Du Pont E I De Nemour & Co	9/16/11	22,287 95	22,287 95	22,890 00
600	Factset Research Systems	8/19/02	8,872 33	8,872 33	52,368 00
400	Fedex Corporation	7/28/06	42,104 95	42,104 95	33,404 00
100	Google Inc Class A	5/31/07	50,551 18	50,551 18	64,590 00
1,000	Halliburton Co Hldg Co	8/30/07	34,278 41	34,278 41	34,510 00
300	Intl Business Machines	7/17/07	33,075 35	33,075 35	55,164 00
500	Johnson & Johnson	8/19/02	26,747 01	26,747 01	32,790 00
500	JPMorgan Chase & Co	2/7/11	22,868 15	22,868 15	16,625 00
1,000	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
		9/27/11	17,641 95	17,641 95	18,172 00
20	Nortel Networks Cp	1/1/51	1,040 00	7,987 00	0 33
6,000	Nuveen Multi Strat Incm	3/10/10	49,024 25	49,024 25	48,300 00
1,800	Oracle Corporation	4/14/10	31,531 75	31,531 75	30,780 00
		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
4,000	Pimco Floating Rate Stra	9/11/09	19,959 88	19,959 88	21,356 10
		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
500	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
800	Wal-mart Stores Inc	10/26/09	40,134 36	40,134 36	47,808 00
1,000	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
1,000	Ishares MSCI CDA Idx Fd	9/27/05	21,319 95	21,319 95	26,600 00
900	Ishares MSCI Pac Ex Japn	12/12/06	37,382 45	37,382 45	35,037 00
2,000	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
500	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 Charitable Trust
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200	SPDR Gold Trust	3/10/08	19,024 75	19,024 75	30,398 00
500	Vanguard Bond Index Fund	7/13/10	41,598 45	41,598 45	43,485 00
TOTAL			**1,738,302.64**	**1,721,579.93**	**2,144,355.33**