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 | **2012** | **Open to Public Inspection**

MAY 0 2 2013

ENVELOPE POSTMARK

For calendar year 2012 or tax year beginning , 2012, and ending , 20

Name of foundation: ANTHONY MARRO MEMORIAL TUW 31V052010

A Employer identification number: 03-6056812

Number and street (or P O box number if mail is not delivered to street address): 850 MAIN STREET, RC 13-505 | Room/suite

B Telephone number (see instructions): 802- 660-2153

City or town, state, and ZIP code: BRIDGEPORT, CT 06604-4913

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)* ▶ $ 274,050.

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) (see instructions).)*

	Line	Description	(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 (attach schedule)				
	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	1,505.	1,505.		STMT 1
	5a	Gross rents	8,400.	8,400.	8,400.	
	b	Net rental income or (loss) -9,014				
	6a	Net gain or (loss) from sale of assets not on line 10	9,934.			
	b	Gross sales price for all assets on line 6a 91,009.				
	7	Capital gain net income (from Part IV, line 2)		9,934.		
	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) (attach schedule)				
	11	Other income (attach schedule)	13.			STMT 2
	12	Total. Add lines 1 through 11	19,852.	19,839.	8,400.	
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc	7,761.	6,985.		776.
	14	Other employee salaries and wages				
	15	Pension plans, employee benefits				
	16a	Legal fees (attach schedule)				
	b	Accounting fees (attach schedule) STMT 3	900.	NONE	NONE	NONE
	c	Other professional fees (attach schedule)				
	17	Interest				
	18	Taxes (attach schedule) (see instructions) STMT 4	151.	7.		
	19	Depreciation (attach schedule) and depletion				
	20	Occupancy				
	21	Travel, conferences, and meetings				
	22	Printing and publications				
	23	Other expenses (attach schedule) STMT 5	17,886.	472.		
	24	**Total operating and administrative expenses.** Add lines 13 through 23	26,698.	7,464.	NONE	776.
	25	Contributions, gifts, grants paid	14,700.			14,700.
	26	**Total expenses and disbursements** Add lines 24 and 25	41,398.	7,464.	NONE	15,476.
	27	Subtract line 26 from line 12				
	a	**Excess of revenue over expenses and disbursements**	-21,546.			
	b	**Net investment income** (if negative, enter -0-)		12,375.		
	c	**Adjusted net income** (if negative, enter -0-)			8,400.	

RECEIVED MAY 0 6 2013 OGDEN, UT IRS-OSC

SCANNED MAY 0 9 2013

JSA **For Paperwork Reduction Act Notice, see instructions.** Form **990-PF** (2012)
2E1410 1 000

KF0757 L690 04/22/2013 08:47:08 31V052010

12

Part II Balance Sheets

Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)

		Beginning of year (a) Book Value	End of year (b) Book Value	End of year (c) Fair Market Value
Assets 1	Cash - non-interest-bearing			
2	Savings and temporary cash investments	466.	6,340.	6,340.
3	Accounts receivable ▶			
	Less allowance for doubtful accounts ▶			
4	Pledges receivable ▶			
	Less allowance for doubtful accounts ▶			
5	Grants receivable			
6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
7	Other notes and loans receivable (attach schedule) ▶			
	Less allowance for doubtful accounts ▶			
8	Inventories for sale or use			
9	Prepaid expenses and deferred charges			
10 a	Investments - U S and state government obligations (attach schedule) STMT 6			
b	Investments - corporate stock (attach schedule)			
c	Investments - corporate bonds (attach schedule)			
11	Investments - land, buildings, and equipment basis ▶ 87,772. Less accumulated depreciation (attach schedule) ▶	87,772.	87,772.	225,000.
12	Investments - mortgage loans			
13	Investments - other (attach schedule) STMT 7	68,857.	41,336.	42,710.
14	Land, buildings, and equipment basis ▶ Less accumulated depreciation (attach schedule) ▶			
15	Other assets (describe ▶)			
16	**Total assets** (to be completed by all filers - see the instructions Also, see page 1, item I)	157,095.	135,448.	274,050.
Liabilities 17	Accounts payable and accrued expenses			
18	Grants payable			
19	Deferred revenue			
20	Loans from officers, directors, trustees, and other disqualified persons			
21	Mortgages and other notes payable (attach schedule)			
22	Other liabilities (describe ▶)			
23	**Total liabilities** (add lines 17 through 22)		NONE	
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 and complete lines 27 through 31. ▶ ☒			
27	Capital stock, trust principal, or current funds	157,095.	135,448.	
28	Paid-in or capital surplus, or land, bldg, and equipment fund			
29	Retained earnings, accumulated income, endowment, or other funds			
30	**Total net assets or fund balances** (see instructions)	157,095.	135,448.	
31	**Total liabilities and net assets/fund balances** (see instructions)	157,095.	135,448.	

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	157,095.
2	Enter amount from Part I, line 27a	2	-21,546.
3	Other increases not included in line 2 (itemize) ▶	3	
4	Add lines 1, 2, and 3	4	135,549.
5	Decreases not included in line 2 (itemize) ▶ POSTING ADJUSTMENT	5	101.
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	135,448.

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	PUBLICLY TRADED SECURITIES			
b				
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	91,009.		81,075.	9,934.
b				
c				
d				
e				

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				9,934.
b				
c				
d				
e				

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 9,934.

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) (see instructions). If (loss), enter -0- in Part I, line 8 . . . 3

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 the 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))
2011	8,728.	309,486.	0.028202
2010	695.	316,705.	0.002194
2009	769.	319,168.	0.002409
2008	19,216.	450,313.	0.042673
2007	27,014.	508,054.	0.053172

2	**Total** of line 1, column (d)	2	0.128650
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	0.025730
4	Enter the net value of noncharitable-use assets for 2012 from Part X, line 5	4	289,751.
5	Multiply line 4 by line 3	5	7,455.
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	124.
7	Add lines 5 and 6	7	7,579.
8	Enter qualifying distributions from Part XII, line 4	8	15,476.

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 ▶ [X] and enter 1% of Part I, line 27b	1	124.
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	
3	Add lines 1 and 2	3	124.
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	NONE
5	**Tax based on investment income.** Subtract line 4 from line 3 If zero or less, enter -0-	5	124.
6	Credits/Payments		
a	2012 estimated tax payments and 2011 overpayment credited to 2012 — 6a: 144.		
b	Exempt foreign organizations - tax withheld at source — 6b: NONE		
c	Tax paid with application for extension of time to file (Form 8868) — 6c: NONE		
d	Backup withholding erroneously withheld — 6d:		
7	Total credits and payments Add lines 6a through 6d	7	144.
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	20.
11	Enter the amount of line 10 to be **Credited to 2013 estimated tax** ▶ **Refunded** ▶	11	20.

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 the definition)?	1b		X
	If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.			
c	Did the foundation file **Form 1120-POL** for this year?	1c		X
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation ▶ $ ______ (2) On foundation managers ▶ $ ______			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ▶ $ ______			
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?	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) ▶ VT			
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 2012 or the taxable year beginning in 2012 (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 ▶ SEE STATEMENT 8 Telephone no ▶			
	Located at ▶ ZIP+4 ▶			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of **Form 1041** - Check here ▶ ☐ and enter the amount of tax-exempt interest received or accrued during the year ▶ 15			
16	At any time during calendar year 2012, 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)?	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 2012?	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 2012, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2012? ☐ 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)	2b		X
c	If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here ▶ ____ , ____ , ____ , ____			
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 2012 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 2012)*	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 2012?	4b		X

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

		Yes	No
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)? (see instructions) . . . ☐ Yes ☒ No			
(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? . . . ☐ Yes ☒ No			
b If any answer is "Yes" to 5a(1)-(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53 4945 or in a current notice regarding disaster assistance (see instructions)? . . .	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? . . . ☐ 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? . . .	7b		

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

1 List all officers, directors, trustees, foundation managers and their compensation (see instructions).

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
PEOPLES UNITED BANK 2 BURLINGTON SQUARE, BURLINGTON, VT 05401	CO-TRUSTEE	4,761.		-0-
DONALD LAUNDRY 5 LAWBRIDGE HEIGHTS, LUDLOW, VT 05149	CO-TRUSTEE	1,500.		
KIMBERLY LAMPERT 1798 ROUTE 100 NORTH, LUDLOW, VT 05149	CO-TRUSTEE	1,500		

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

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

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

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

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

(a) Name and address of each person paid more than $50,000	(b) Type of service	(c) Compensation
Total number of others receiving over $50,000 for professional services ▶		NONE

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 DISTRIBUTION OF ANNUAL INCOME PER TRUST DOCUMENT	14,700.
2	
3	
4	

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

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

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	66,064.
b	Average of monthly cash balances	1b	3,099.
c	Fair market value of all other assets (see instructions)	1c	225,000.
d	**Total** (add lines 1a, b, and c)	1d	294,163.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation) — 1e		
2	Acquisition indebtedness applicable to line 1 assets	2	NONE
3	Subtract line 2 from line 1d	3	294,163.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	4,412.
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3. Enter here and on Part V, line 4	5	289,751.
6	**Minimum investment return.** Enter 5% of line 5	6	14,488.

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	14,488.
2a	Tax on investment income for 2012 from Part VI, line 5	2a	124.		
b	Income tax for 2012. (This does not include the tax from Part VI.)	2b			
c	Add lines 2a and 2b			2c	124.
3	Distributable amount before adjustments. Subtract line 2c from line 1			3	14,364.
4	Recoveries of amounts treated as qualifying distributions			4	NONE
5	Add lines 3 and 4			5	14,364.
6	Deduction from distributable amount (see instructions)			6	NONE
7	**Distributable amount** as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1			7	14,364.

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	15,476.
b	Program-related investments - total from Part IX-B	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	NONE
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	NONE
b	Cash distribution test (attach the required schedule)	3b	NONE
4	**Qualifying distributions.** Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	15,476.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b (see instructions)	5	124.
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	15,352.

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 2011	(c) 2011	(d) 2012
1	Distributable amount for 2012 from Part XI, line 7				14,364.
2	Undistributed income, if any, as of the end of 2012				
a	Enter amount for 2011 only			14,689.	
b	Total for prior years 20 10 ,20 ___ ,20 ___		NONE		
3	Excess distributions carryover, if any, to 2012				
a	From 2007 ...... NONE				
b	From 2008 ...... NONE				
c	From 2009 ...... NONE				
d	From 2010 ...... NONE				
e	From 2011 ...... NONE				
f	**Total** of lines 3a through e	NONE			
4	Qualifying distributions for 2012 from Part XII, line 4 ▶ $ 15,476.				
a	Applied to 2011, but not more than line 2a			14,689.	
b	Applied to undistributed income of prior years (Election required - see instructions)		NONE		
c	Treated as distributions out of corpus (Election required - see instructions)	NONE			
d	Applied to 2012 distributable amount				787.
e	Remaining amount distributed out of corpus	NONE			
5	Excess distributions carryover applied to 2012 *(If an amount appears in column (d), the same amount must be shown in column (a).)*	NONE			NONE
6	**Enter the net total of each column as indicated below:**				
a	Corpus Add lines 3f, 4c, and 4e Subtract line 5	NONE			
b	Prior years' undistributed income Subtract line 4b from line 2b		NONE		
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		NONE		
d	Subtract line 6c from line 6b Taxable amount - see instructions		NONE		
e	Undistributed income for 2011 Subtract line 4a from line 2a Taxable amount - see instructions				
f	Undistributed income for 2012. Subtract lines 4d and 5 from line 1 This amount must be distributed in 2013				13,577.
7	Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions)	NONE			
8	Excess distributions carryover from 2007 not applied on line 5 or line 7 (see instructions)	NONE			
9	**Excess distributions carryover to 2013.** Subtract lines 7 and 8 from line 6a	NONE			
10	Analysis of line 9:				
a	Excess from 2008 ... NONE				
b	Excess from 2009 ... NONE				
c	Excess from 2010 ... NONE				
d	Excess from 2011 ... NONE				
e	Excess from 2012 ... NONE				

Part XIV Private Operating Foundations (see instructions and Part VII-A, question 9) NOT APPLICABLE

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2012, 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) 2012	(b) 2011	(c) 2010	(d) 2009	(e) Total
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon					
a "Assets" alternative test - enter					
(1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test- enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed					
c "Support" alternative test - enter					
(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942 (j)(3)(B)(iii)					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

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).)*

N/A

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.

N/A

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 or e-mail 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*				
SPRINGFIELD AREA HOSPICE SPRINGFIELD VT	NO RELATIONSHIP	EXEMPT	GENERAL SUPPORT	
VISITING NURSE ALLIANCE DARTMOUTH NH	NO RELATIONSHIP	EXEMPT	GENERAL SUPPORT	1,500.
BLACK RIVER GOOD NEIGHBOR LUDLOW VT	NO RELATIONSHIP	EXEMPT	GENERAL SUPPORT	3,500.
PROCTORSVILLE FIRE DEPT CHIEF ROBT GLIDDEN PO BOX 81 PROCTORSVILLE VT 05153	NO RELATIONSHIP	EXEMPT	GENERAL SUPPORT	1,000.
BLACK RIVER VALLEY SENIOR DANIEL CHURCHILL 10 HIGH STREET LUDLOW VT 05149	NO RELATIONSHIP	EXEMPT	GENERAL SUPPORT	1,600.
WINDSOR COUNTY YOUTH SERVCIES VT	NO RELATIONSHIP	EXEMPT	GENERAL	4,500.
LUDLOW ROTARY CLUB PO BOX 616 LUDLOW VT 05149	NONE	EXEMPT	GENERAAL SUPPORT	1,000.
Turning Point Recovery Center of Springfield 7 MORGAN STREET Springfield VT 05156	NONE	EXEMPT	GENERAL SUPPORT	1,600.
Total . . . . ▶ **3a**				14,700.
b *Approved for future payment*				
Total . . . . ▶ **3b**				

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 (See instructions.)
	(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	1,505.	
5 Net rental income or (loss) from real estate					
a Debt-financed property					
b Not debt-financed property				-9,014.	
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	9,934.	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue: a					
b			1	13.	
c					
d					
e					
12 Subtotal. Add columns (b), (d), and (e)				2,438.	

13 Total. Add line 12, columns (b), (d), and (e) . . . 13 2,438.

(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). (See instructions.)
	NOT APPLICABLE

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

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

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

Signature of officer or trustee | Date 04/22/2013 | Title

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

Paid Preparer Use Only

Print/Type preparer's name	Preparer's signature	Date	Check ☐ if self-employed	PTIN
GORDON POWERS		04/22/2013		P00260194

Firm's name ▶ THOMSON REUTERS (TAX & ACCOUNTING) — Firm's EIN ▶ 75-1297386

Firm's address ▶ 22 THOMSON PLACE; M/S 36T1 BOSTON, MA 02210 — Phone no 617-856-2811

RENT AND ROYALTY INCOME

Taxpayer's Name ANTHONY MARRO MEMORIAL TUW 31V052010

Identifying Number 03-6056812

DESCRIPTION OF PROPERTY
226-228 MAIN STREET LUDLOW VT LUDLOW MD

[ ] Yes [ ] No Did you actively participate in the operation of the activity during the tax year?

TYPE OF PROPERTY: 4 - COMMERCIAL

RENTAL INCOME	8,400.	
OTHER INCOME:		
TOTAL GROSS INCOME		8,400.
OTHER EXPENSES:		
TAXES	5,421.	
OTHER EXPENSES	11,993.	
DEPRECIATION (SHOWN BELOW)		
LESS: Beneficiary's Portion		
AMORTIZATION		
LESS: Beneficiary's Portion		
DEPLETION		
LESS. Beneficiary's Portion		
TOTAL EXPENSES		17,414.
TOTAL RENT OR ROYALTY INCOME (LOSS)		-9,014.

Less Amount to		
Rent or Royalty		
Depreciation		
Depletion		
Investment Interest Expense		
Other Expenses		
Net Income (Loss) to Others		
Net Rent or Royalty Income (Loss)		-9,014.
Deductible Rental Loss (if Applicable)		

SCHEDULE FOR DEPRECIATION CLAIMED

(a) Description of property	(b) Cost or unadjusted basis	(c) Date acquired	(d) ACRS des	(e) Bus %	(f) Basis for depreciation	(g) Depreciation in prior years	(h) Method	(i) Life or rate	(j) Depreciation for this year
Totals									

SUPPLEMENT TO RENT AND ROYALTY SCHEDULE
==

OTHER DEDUCTIONS

OTHER RENTAL EXPENSES	11,993.

	11,993.
	==========

FORM 990PF, PART I - DIVIDENDS AND INTEREST FROM SECURITIES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
AMERICAN CENTURY SMALL CAP VALUE INSTL #	6.	6.
COLUMBIA CONTRARIAN CORE Z #801	31.	31.
DREYFUS INST CASH MGT FD #288	3.	3.
AMERICAN EUROPACIFIC GROWTH F2 #616	39.	39.
FIDELITY SMALL CAP DISCOVERY #384	10.	10.
FIDELITY FLOATING RATE HIGH INC #814	11.	11.
FIDELITY FINL TR CONVERT SECS	32.	32.
MFS VALUE FUND CL I #893 (CLOSED TO 401K	98.	98.
NUVEEN DIVIDEND VALUE I #6756	59.	59.
OPPENHEIMER DEVELOPING MKTS Y #788	25.	25.
PIMCO FUNDS LOW DURATION FUND	199.	199.
PIMCO TOTAL RETURN PORTFOLIO	484.	484.
PIMCO HIGH YIELD	235.	235.
PIMCO EMERGING MKTS BOND INSTL #137	12.	12.
PARNASSUS EQUITY INCOME INSTL	43.	43.
PIMCO COMMODITY REAL RETURN STRATEGY INS	2.	2.
PIMCO INVESTMENT GRADE CORP BD INSTL #5	151.	151.
PRINCIPAL MIDCAP INSTL #4749	58.	58.
VANGUARD REIT ETF	7.	7.
TOTAL	1,505.	1,505.

FORM 990PF, PART I - OTHER INCOME

DESCRIPTION		REVENUE AND EXPENSES PER BOOKS
	TOTALS	13.

STATEMENT 2

FORM 990PF, PART I - ACCOUNTING FEES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME	ADJUSTED NET INCOME	CHARITABLE PURPOSES
TAX PREPARATION FEE (NON-ALLOC	900.			
TOTALS	900.	NONE	NONE	NONE

FORM 990PF, PART I - TAXES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
FEDERAL ESTIMATES - PRINCIPAL	144.	
FOREIGN TAXES ON QUALIFIED FOR	7.	7.
TOTALS	151.	7.

FORM 990PF, PART I - OTHER EXPENSES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
RENT AND ROYALTY EXPENSES	17,414.	
OTHER ALLOCABLE EXPENSE-PRINCI	440.	440.
OTHER NON-ALLOCABLE EXPENSE -	32.	32.
TOTALS	17,886.	472.

ANTHONY MARRO MEMORIAL TUW 31V052010 03-6056812

FORM 990PF, PART II - U.S. AND STATE OBLIGATIONS

DESCRIPTION
U.S. OBLIGATIONS - SEE ATTACHE
TOTALS

FORM 990PF, PART II - OTHER INVESTMENTS

DESCRIPTION	COST/ FMV C OR F	ENDING BOOK VALUE	ENDING FMV
MUTUAL FUNDS - SEE ATTACHED	C	41,336.	42,710.
TOTALS		41,336.	42,710.

FORM 990PF, PART VII-A, LINE 14 - BOOKS ARE IN THE CARE OF
==

NAME: PEOPLES UNITED BANK
ATTN: STEPHANIE WHIT
ADDRESS: 87 WEST STREET
RUTLAND, VT 05701

TELEPHONE NUMBER: (802)660-2153

RENT AND ROYALTY SUMMARY

PROPERTY	TOTAL INCOME	DEPLETION/ DEPRECIATION	OTHER EXPENSES	ALLOWABLE NET INCOME
226-228 MAIN STREET	8,400.		17,414.	-9,014.
TOTALS	8,400.		17,414.	-9,014.

STATEMENT 9

SCHEDULE D (Form 1041)

Department of the Treasury
Internal Revenue Service

Capital Gains and Losses

▶ Attach to Form 1041, Form 5227, or Form 990-T.
▶ Information about Schedule D (Form 1041) and its separate instructions is at *www.irs.gov/form1041*.

OMB No 1545-0092

2012

Name of estate or trust: ANTHONY MARRO MEMORIAL TUW 31V052010

Employer identification number: 03-6056812

Note: *Form 5227 filers need to complete only Parts I and II.*

Part I Short-Term Capital Gains and Losses - Assets Held One Year or Less

(a) Description of property (Example 100 shares 7% preferred of "Z" Co)	(b) Date acquired (mo , day, yr)	(c) Date sold (mo , day, yr)	(d) Sales price	(e) Cost or other basis (see instructions)	(f) Gain or (loss) for the entire year Subtract (e) from (d)
1a SHORT-TERM CAPITAL GAIN DIVIDENDS					159.

b Enter the short-term gain or (loss), if any, from Schedule D-1, line 1b	1b	365.
2 Short-term capital gain or (loss) from Forms 4684, 6252, 6781, and 8824	2	
3 Net short-term gain or (loss) from partnerships, S corporations, and other estates or trusts	3	
4 Short-term capital loss carryover. Enter the amount, if any, from line 9 of the 2011 Capital Loss Carryover Worksheet	4	( )
5 **Net short-term gain or (loss).** Combine lines 1a through 4 in column (f). Enter here and on line 13, column (3) on the back ▶	5	524.

Part II Long-Term Capital Gains and Losses - Assets Held More Than One Year

(a) Description of property (Example 100 shares 7% preferred of "Z" Co)	(b) Date acquired (mo , day, yr)	(c) Date sold (mo , day, yr)	(d) Sales price	(e) Cost or other basis (see instructions)	(f) Gain or (loss) for the entire year Subtract (e) from (d)
6a LONG-TERM CAPITAL GAIN DIVIDENDS					278.

b Enter the long-term gain or (loss), if any, from Schedule D-1, line 6b	6b	9,132.
7 Long-term capital gain or (loss) from Forms 2439, 4684, 6252, 6781, and 8824	7	
8 Net long-term gain or (loss) from partnerships, S corporations, and other estates or trusts	8	
9 Capital gain distributions	9	
10 Gain from Form 4797, Part I	10	
11 Long-term capital loss carryover. Enter the amount, if any, from line 14 of the 2011 Capital Loss Carryover Worksheet	11	( )
12 **Net long-term gain or (loss).** Combine lines 6a through 11 in column (f). Enter here and on line 14a, column (3) on the back ▶	12	9,410.

Part III Summary of Parts I and II
Caution: *Read the instructions* ***before*** *completing this part.*

			(1) Beneficiaries' (see instr.)	(2) Estate's or trust's	(3) Total
13	**Net short-term gain or (loss)**	13			524.
14	**Net long-term gain or (loss):**				
a	Total for year	14a			9,410.
b	Unrecaptured section 1250 gain (see line 18 of the wrksht.)	14b			
c	28% rate gain	14c			
15	**Total net gain or (loss).** Combine lines 13 and 14a ▶	15			9,934.

Note: *If line 15, column (3), is a net gain, enter the gain on Form 1041, line 4 (or Form 990-T, Part I, line 4a). If lines 14a and 15, column (2), are net gains, go to Part V, and* ***do not*** *complete Part IV If line 15, column (3), is a net loss, complete Part IV and the* ***Capital Loss Carryover Worksheet,*** *as necessary*

Part IV Capital Loss Limitation

16 Enter here and enter as a (loss) on Form 1041, line 4 (or Form 990-T, Part I, line 4c, if a trust), the **smaller** of:
a The loss on line 15, column (3) **or** b $3,000 . . . 16 ( )

Note: *If the loss on line 15, column (3), is more than $3,000,* ***or*** *if Form 1041, page 1, line 22 (or Form 990-T, line 34), is a loss, complete the* ***Capital Loss Carryover Worksheet*** *in the instructions to figure your capital loss carryover*

Part V Tax Computation Using Maximum Capital Gains Rates

Form 1041 filers. Complete this part **only** if both lines 14a and 15 in column (2) are gains, or an amount is entered in Part I or Part II and there is an entry on Form 1041, line 2b(2), **and** Form 1041, line 22, is more than zero

Caution: *Skip this part and complete the* ***Schedule D Tax Worksheet*** *in the instructions if.*

- *Either line 14b, col. (2) or line 14c, col. (2) is more than zero, or*
- *Both Form 1041, line 2b(1), and Form 4952, line 4g are more than zero.*

Form 990-T trusts. Complete this part **only** if both lines 14a and 15 are gains, or qualified dividends are included in income in Part I of Form 990-T, **and** Form 990-T, line 34, is more than zero. Skip this part and complete the **Schedule D Tax Worksheet** in the instructions if either line 14b, col. (2) or line 14c, col. (2) is more than zero.

17	Enter taxable income from Form 1041, line 22 (or Form 990-T, line 34)			17			
18	Enter the **smaller** of line 14a or 15 in column (2) but not less than zero	18					
19	Enter the estate's or trust's qualified dividends from Form 1041, line 2b(2) (or enter the qualified dividends included in income in Part I of Form 990-T)	19					
20	Add lines 18 and 19	20					
21	If the estate or trust is filing Form 4952, enter the amount from line 4g; otherwise, enter -0- ▶	21					
22	Subtract line 21 from line 20. If zero or less, enter -0-			22			
23	Subtract line 22 from line 17. If zero or less, enter -0-			23			
24	Enter the **smaller** of the amount on line 17 or $2,400			24			
25	Is the amount on line 23 equal to or more than the amount on line 24? ☐ **Yes.** Skip lines 25 and 26, go to line 27 and check the "No" box. ☐ **No.** Enter the amount from line 23			25			
26	Subtract line 25 from line 24			26			
27	Are the amounts on lines 22 and 26 the same? ☐ **Yes.** Skip lines 27 thru 30, go to line 31 ☐ **No.** Enter the smaller of line 17 or line 22			27			
28	Enter the amount from line 26 (If line 26 is blank, enter -0-)			28			
29	Subtract line 28 from line 27			29			
30	Multiply line 29 by 15% (.15)					30	
31	Figure the tax on the amount on line 23. Use the 2012 Tax Rate Schedule for Estates and Trusts (see the Schedule G instructions in the instructions for Form 1041)					31	
32	Add lines 30 and 31					32	
33	Figure the tax on the amount on line 17. Use the 2012 Tax Rate Schedule for Estates and Trusts (see the Schedule G instructions in the instructions for Form 1041)					33	
34	**Tax on all taxable income.** Enter the **smaller** of line 32 or line 33 here and on Form 1041, Schedule G, line 1a (or Form 990-T, line 36)					34	

SCHEDULE D-1 (Form 1041)

Department of the Treasury Internal Revenue Service

Continuation Sheet for Schedule D (Form 1041)

▶ Attach to Schedule D to list additional transactions for lines 1a and 6a.

▶ Information about Schedule D (Form 1041) and its separate instructions is at www.irs.gov/form1041

OMB No 1545-0092

2012

Name of estate or trust: ANTHONY MARRO MEMORIAL TUW 31V052010

Employer identification number: 03-6056812

Part I Short-Term Capital Gains and Losses - Assets Held One Year or Less

(a) Description of property (Example 100 sh 7% preferred of "Z" Co)	(b) Date acquired (mo, day, yr)	(c) Date sold (mo, day, yr)	(d) Sales price	(e) Cost or other basis (see instructions)	(f) Gain or (loss) Subtract (e) from (d)
1a 22.125 PIMCO HIGH YIELD	04/25/2011	01/05/2012	200.00	210.00	-10.00
48.449 PIMCO INVESTMENT GR INSTL #56	04/25/2011	01/05/2012	500.00	518.00	-18.00
8.647 FIDELITY FINL TR CON	10/18/2011	04/19/2012	215.00	201.00	14.00
122.312 PIMCO INVESTMENT G INSTL #56	04/25/2011	04/19/2012	1,309.00	1,308.00	1.00
9.021 AMERICAN CENTURY SMA INSTL #486	10/18/2011	08/10/2012	76.00	72.00	4.00
4.941 GOLDMAN SACHS GROWTH #1132	10/18/2011	08/10/2012	124.00	111.00	13.00
3.028 MFS VALUE FUND CL I TO 401K)	10/18/2011	08/10/2012	76.00	66.00	10.00
63.533 VANGUARD DEVELOPED FUND #227	04/19/2012	08/10/2012	580.00	579.00	1.00
15.944 VANGUARD DEVELOPED FUND #227	10/18/2011	08/10/2012	146.00	145.00	1.00
784.006 COLUMBIA CONTRARIA #801	08/10/2012	11/07/2012	12,419.00	12,317.00	102.00
3.831 AMERICAN EUROPACIFIC #616	08/10/2012	11/07/2012	152.00	147.00	5.00
16.101 PRINCIPAL MIDCAP IN	08/10/2012	11/07/2012	252.00	243.00	9.00
102.228 COLUMBIA CONTRARIA #801	08/10/2012	12/04/2012	1,641.00	1,606.00	35.00
20.935 AMERICAN EUROPACIFI #616	08/10/2012	12/04/2012	857.00	805.00	52.00
32.18 FIDELITY SMALL CAP D #384	08/10/2012	12/04/2012	756.00	706.00	50.00
90.543 FIDELITY FLOATING R #814	11/05/2012	12/04/2012	891.00	900.00	-9.00
24. ISHARES GOLD TRUST	11/07/2012	12/04/2012	395.00	403.00	-8.00
225.001 NUVEEN DIVIDEND VA	08/10/2012	12/04/2012	3,296.00	3,285.00	11.00
36.829 PIMCO EMERGING MKTS #137	11/05/2012	12/04/2012	460.00	456.00	4.00
63.712 PIMCO COMMODITY REA STRATEGY INSTL #45	11/07/2012	12/04/2012	440.00	433.00	7.00
74.765 PRINCIPAL MIDCAP IN	08/10/2012	12/04/2012	1,177.00	1,127.00	50.00
6. VANGUARD REIT ETF	11/07/2012	12/04/2012	388.00	389.00	-1.00
324.576 WELLS FARGO PREMIE GROWTH I #4123	08/10/2012	12/04/2012	3,473.00	3,431.00	42.00
1b **Total.** Combine the amounts in column (f). Enter here and on Schedule D, line 1b					365.00

Name of estate or trust as shown on Form 1041. Do not enter name and employer identification number if shown on the other side: ANTHONY MARRO MEMORIAL TUW 31V052010

Employer identification number: 03-6056812

Part II Long-Term Capital Gains and Losses - Assets Held More Than One Year

(a) Description of property (Example 100 sh 7% preferred of "Z" Co)	(b) Date acquired (mo, day, yr)	(c) Date sold (mo, day, yr)	(d) Sales price	(e) Cost or other basis (see instructions)	(f) Gain or (loss) Subtract (e) from (d)
6a 48.14 MFS VALUE FUND CL I TO 401K)	08/13/2009	01/05/2012	1,100.00	930.00	170.00
48.544 PIMCO FUNDS LOW DUR	09/17/2010	01/05/2012	500.00	514.00	-14.00
91.996 PIMCO TOTAL RETURN	08/30/2010	01/05/2012	1,000.00	1,060.00	-60.00
22.599 PARNASSUS EQUITY IN	08/13/2009	01/05/2012	600.00	493.00	107.00
18.564 T ROWE PRICE NEW AM #60	08/13/2009	01/05/2012	600.00	470.00	130.00
12.764 AMERICAN CENTURY SM VALUE INSTL #486	09/17/2010	04/19/2012	107.00	95.00	12.00
13.016 GOLDMAN SACHS GROWT #1132	08/30/2010	04/19/2012	329.00	263.00	66.00
9.698 JANUS TRITON I #1174	08/30/2010	04/19/2012	176.00	127.00	49.00
42.632 MFS VALUE FUND CL I (CLOSED TO 401K)	08/13/2009	04/19/2012	1,051.00	824.00	227.00
16.577 OPPENHEIMER DEVELOP #788	08/30/2010	04/19/2012	545.00	487.00	58.00
9.369 PIMCO FUNDS LOW DURA	09/17/2010	04/19/2012	98.00	99.00	-1.00
30.755 PIMCO TOTAL RETURN	08/30/2010	04/19/2012	344.00	354.00	-10.00
53.084 PARNASSUS EQUITY IN	08/13/2009	04/19/2012	1,495.00	1,158.00	337.00
32.675 T ROWE PRICE NEW AM #60	08/13/2009	04/19/2012	1,146.00	827.00	319.00
16.705 VANGUARD SELECTED V	08/30/2010	04/19/2012	333.00	262.00	71.00
104.989 AMERICAN CENTURY S VALUE INSTL #486	08/13/2009	08/10/2012	880.00	693.00	187.00
70.844 GOLDMAN SACHS GROWT #1132	08/30/2010	08/10/2012	1,779.00	1,310.00	469.00
52.842 JANUS TRITON I #117	08/30/2010	08/10/2012	946.00	692.00	254.00
416.025 MFS VALUE FUND CL (CLOSED TO 401K)	04/25/2011	08/10/2012	10,438.00	8,830.00	1,608.00
184.502 PARNASSUS EQUITY I	08/13/2009	08/10/2012	5,380.00	4,024.00	1,356.00
294.749 T ROWE PRICE NEW A GROWTH #60	08/13/2009	08/10/2012	10,260.00	7,457.00	2,803.00
339.942 VANGUARD DEVELOPED INDEX FUND #227	12/03/2009	08/10/2012	3,104.00	3,082.00	22.00
96.232 VANGUARD SELECTED V	08/30/2010	08/10/2012	1,938.00	1,477.00	461.00
59.502 FIDELITY FINL TR CO	10/18/2011	11/05/2012	1,488.00	1,380.00	108.00
95.973 PIMCO FUNDS LOW DUR	09/17/2010	11/05/2012	1,022.00	1,016.00	6.00

6b Total. Combine the amounts in column (f). Enter here and on Schedule D, line 6b . . . .

Name of estate or trust as shown on Form 1041 Do not enter name and employer identification number if shown on the other side	Employer identification number
ANTHONY MARRO MEMORIAL TUW 31V052010	03-6056812

Part II Long-Term Capital Gains and Losses - Assets Held More Than One Year

(a) Description of property (Example 100 sh 7% preferred of "Z" Co)	(b) Date acquired (mo , day, yr)	(c) Date sold (mo , day, yr)	(d) Sales price	(e) Cost or other basis (see instructions)	(f) Gain or (loss) Subtract (e) from (d)
6a 291.005 PIMCO TOTAL RETURN	09/17/2010	11/05/2012	3,373.00	3,343.00	30.00
208.428 PIMCO HIGH YIELD	10/18/2011	11/05/2012	1,993.00	1,937.00	56.00
46.659 PIMCO INVESTMENT GR INSTL #56	04/25/2011	11/05/2012	529.00	499.00	30.00
13.734 OPPENHEIMER DEVELOP #788	12/03/2009	11/07/2012	465.00	389.00	76.00
212.008 PIMCO FUNDS LOW DU	09/17/2010	12/04/2012	2,260.00	2,242.00	18.00
312.715 PIMCO TOTAL RETURN	09/17/2010	12/04/2012	3,640.00	3,590.00	50.00
94.693 PIMCO HIGH YIELD	10/18/2011	12/04/2012	910.00	831.00	79.00
80.631 PIMCO INVESTMENT GR INSTL #56	04/25/2011	12/04/2012	920.00	862.00	58.00

6b Total. Combine the amounts in column (f) Enter here and on Schedule D, line 6b 9,132.00

31-V052-01-0 ANTHONY MARRO MEMORIAL TUW AS OF DATE: 12/31/12

CUSIP NUMBER	SECURITY DESCRIPTION	UNITS	CARRYING VALUE	PRICE PRICE DATE	MARKET VALUE
RE5237-01-2	226-228 MAIN STREET LUDLOW VT LUDLOW MD CENTER (M)	1.000	87,772.00	225,000.000 12/03/2008	225,000.00
19765P-40-6	COLUMBIA CONTRARIAN CORE Z #801	189.832	2,982.26	16.170 12/31/2012	3,069.58
26188J-20-6	DREYFUS INST CASH MGT FD #288	6,339.920	6,339.92	1.000 12/31/2012	6,339.92
29875E-10-0	AMERICAN EUROPACIFIC GROWTH F2 #616	42.529	1,635.25	41.150 12/31/2012	1,750.07
315912-60-0	FIDELITY SMALL CAP DISCOVERY #384	46.444	1,018.98	24.070 12/31/2012	1,117.91
315916-78-3	FIDELITY FLOATING RATE HIGH INC #814	173.038	1,720.00	9.920 12/31/2012	1,716.54
464285-10-5	ISHARES GOLD TRUST ISHARES	54.000	906.63	16.279 12/31/2012	879.08
670678-87-9	NUVEEN DIVIDEND VALUE I #6756	415.896	6,087.80	14.510 12/31/2012	6,034.65
683974-50-5	OPPENHEIMER DEVELOPING MKTS Y #788	85.284	2,497.64	34.880 12/31/2012	2,974.71
693390-30-4	PIMCO LOW DURATION FUND INSTL #36	402.546	4,250.88	10.510 12/31/2012	4,230.76
693390-70-0	PIMCO TOTAL RETURN INSTL #35	590.650	6,369.65	11.240 12/31/2012	6,638.91
693390-84-1	PIMCO HIGH YIELD #108 INSTL	178.861	1,640.43	9.640 12/31/2012	1,724.22
693391-55-9	PIMCO EMERGING MKTS BOND INSTL #137	68.987	854.06	12.500 12/31/2012	862.34
722005-66-7	PIMCO COMMODITY REAL RETURN STRATEGY INSTL #45	126.971	862.13	6.640 12/31/2012	843.09
722005-81-6	PIMCO INVESTMENT GRADE CORP BD INSTL #56	150.654	1,610.49	11.120 12/31/2012	1,675.27
74253Q-74-7	PRINCIPAL MIDCAP BLEND INSTL #4749	138.066	2,080.65	15.700 12/31/2012	2,167.64
922908-55-3	VANGUARD REIT ETF	13.000	842.26	65.800 12/31/2012	855.40

31-V052-01-0 ANTHONY MARRO MEMORIAL TUW AS OF DATE: 12/31/12

CUSIP NUMBER	SECURITY DESCRIPTION	UNITS	CARRYING VALUE	PRICE PRICE DATE	MARKET VALUE
94984B-45-4	WELLS FARGO PREMIER LG CO GROWTH I #4123	568.081	5,977.12	10.860 12/31/2012	6,169.36
		TOTAL HOLDINGS	135,448.15		274,049.45
		TOTAL INCOME CASH	.00		.00
		TOTAL PRINCIPAL CASH	.00		.00
		TOTAL ACCOUNT	135,448.15		274,049.45