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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

For calendar year 2012, or tax year beginning 01-01-2012 , and ending 12-31-2012

Name of foundation THE BIRCHWOOD CHARITABLE TRUST		A Employer identification number 04-3541255	
Number and street (or P O box number if mail is not delivered to street address) 18 NORWOOD STREET		B Telephone number (see instructions) (781) 729-2482	
City or town, state, and ZIP code WINCHESTER, MA 01890		C If exemption application is pending, check here ☐	
G Check all that apply ☐ Initial return ☐ Final return ☐ Address change ☐ Initial return of a former public charity ☐ Amended return ☐ 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 ☒ 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 ☐ F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐	
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 340,433		J Accounting method ☒ Cash ☐ Accrual ☐ Other (specify) _____ (Part I, column (d) must be on cash basis.)	

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))		(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	6,174	6,174	
	4	Dividends and interest from securities.	5,424	5,424	
	5a	Gross rents			
	b	Net rental income or (loss) _____			
	6a	Net gain or (loss) from sale of assets not on line 10			
	b	Gross sales price for all assets on line 6a _____			
	7	Capital gain net income (from Part IV , line 2)		0	
	8	Net short-term capital gain			
	9	Income modifications			
	10a	Gross sales less returns and allowances			
Operating and Administrative Expenses	b	Less Cost of goods sold			
	c	Gross profit or (loss) (attach schedule)			
	11	Other income (attach schedule)	-301	-301	
	12	Total. Add lines 1 through 11	11,297	11,297	
	13	Compensation of officers, directors, trustees, etc			
	14	Other employee salaries and wages			
	15	Pension plans, employee benefits			
	16a	Legal fees (attach schedule)			
	b	Accounting fees (attach schedule)	850		850
	c	Other professional fees (attach schedule)	1,425		1,425
	17	Interest			
	18	Taxes (attach schedule) (see instructions)	913	913	
	19	Depreciation (attach schedule) and depletion			
	20	Occupancy			
	21	Travel, conferences, and meetings			
	22	Printing and publications			
	23	Other expenses (attach schedule)	106	7	99
	24	Total operating and administrative expenses. Add lines 13 through 23	3,294	920	2,374
	25	Contributions, gifts, grants paid	20,000		20,000
	26	Total expenses and disbursements. Add lines 24 and 25	23,294	920	22,374
	27	Subtract line 26 from line 12			
	a	Excess of revenue over expenses and disbursements	-11,997		
	b	Net investment income (if negative, enter -0-)		10,377	
	c	Adjusted net income (if negative, enter -0-)			

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	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing	44	32	32
	2	Savings and temporary cash investments	13,931	14,717	14,717
	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 page 15 of the 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			
	10a	Investments—U S and state government obligations (attach schedule)	41,055	40,646	40,943
	b	Investments—corporate stock (attach schedule)	149,750	138,018	183,698
	c	Investments—corporate bonds (attach schedule).	87,793	82,960	90,657
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)	10,001	10,001	10,386
	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)	302,574	286,374	340,433

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)		0	

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			
	28	Paid-in or capital surplus, or land, bldg , and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds	302,574	286,374	
	30	Total net assets or fund balances (see page 17 of the instructions)	302,574	286,374	
	31	Total liabilities and net assets/fund balances (see page 17 of the instructions)	302,574	286,374	

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	302,574
2	Enter amount from Part I, line 27a	2	-11,997
3	Other increases not included in line 2 (itemize) ▶ _____	3	179
4	Add lines 1, 2, and 3	4	290,756
5	Decreases not included in line 2 (itemize) ▶ _____	5	4,382
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	286,374

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	See Additional Data Table			
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 See Additional Data Table			
b			
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
a See Additional Data Table			
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	-3,833
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 page 18 of 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	20,061	351,714	0 057038
2010	5,695	341,082	0 016697
2009	41,855	299,598	0 139704
2008	18,365	364,799	0 050343
2007	16,216	380,555	0 042611

2	Total of line 1, column (d).	2	0 306393
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 061279
4	Enter the net value of noncharitable-use assets for 2012 from Part X, line 5.	4	340,963
5	Multiply line 4 by line 3.	5	20,894
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	104
7	Add lines 5 and 6.	7	20,998
8	Enter qualifying distributions from Part XII, line 4. 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	8	22,374

Part VIExcise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the 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	104	
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	104	
4		Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		4		
5		Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-		5	104	
6		Credits/Payments				
a		2012 estimated tax payments and 2011 overpayment credited to 2012	6a	260		
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	260	
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	156	
11		Enter the amount of line 10 to be Credited to 2013 estimated tax ☒	156	Refunded ☒	11	

Part VII-AStatements Regarding Activities

1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		Yes	No
		1a		No
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)?			No
	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		No
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		No
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		No
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a		No
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		No
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	Yes	
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	Yes	
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	Yes	
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		No
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10		No

Part VII-A

Statements Regarding Activities *(continued)*

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions).	11		No
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		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Yes	
Website address ▶N/A				
14	The books are in care of ▶LUCILLE CESARI Telephone no ▶(781) 729-2482 Located at ▶18 NORWOOD STREET WINCHESTER MA ZIP +4 ▶018902625			
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		No
See 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 page 20 of the instructions)?. Organizations relying on a current notice regarding disaster assistance check here. ▶ ☐	1b		
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		No
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 ▶ 20____, 20____, 20____, 20____			
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		No
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ▶ 20____, 20____, 20____, 20____			
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? (<i>Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2012.</i>).	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
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		No

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)? (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?			
	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?			
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?	6b		No
	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?			
	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
LUCILLE CESARI	Trustee	0	0	0
18 NORWOOD STREET WINCHESTER, MA 01890	0			
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
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 (see instructions). 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	
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	
2	
All other program-related investments. See page 24 of the instructions.	
3	
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	331,793
b	Average of monthly cash balances.	1b	14,362
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	346,155
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	
3	Subtract line 2 from line 1d.	3	346,155
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	5,192
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	340,963
6	Minimum investment return. Enter 5% of line 5.	6	17,048

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	17,048
2a	Tax on investment income for 2012 from Part VI, line 5.	2a	104
b	Income tax for 2012 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	104
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	16,944
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	16,944
6	Deduction from distributable amount (see instructions).	6	
7	Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1.	7	16,944

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	22,374
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	
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	22,374
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	104
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	22,270
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				16,944
2 Undistributed income, if any, as of the end of 2012				
a Enter amount for 2011 only.				
b Total for prior years 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2012				
a From 2007.				
b From 2008.				
c From 2009.				
d From 2010.				
e From 2011. 710				
f Total of lines 3a through e.	710			
4 Qualifying distributions for 2012 from Part XII, line 4 ▶ \$ 22,374				
a Applied to 2011, but not more than line 2a				
b Applied to undistributed income of prior years (Election required—see instructions).				
c Treated as distributions out of corpus (Election required—see instructions).				
d Applied to 2012 distributable amount.				16,944
e Remaining amount distributed out of corpus	5,430			
5 Excess distributions carryover applied to 2012 (If an amount appears in column (d), the same amount must be shown in column (a).)				
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	6,140			
b Prior years' undistributed income Subtract line 4b from line 2b.				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.				
d Subtract line 6c from line 6b Taxable amount—see instructions				
e Undistributed income for 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.				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions).				
8 Excess distributions carryover from 2007 not applied on line 5 or line 7 (see instructions). . .				
9 Excess distributions carryover to 2013. Subtract lines 7 and 8 from line 6a.	6,140			
10 Analysis of line 9				
a Excess from 2008. . . .				
b Excess from 2009. . . .				
c Excess from 2010. . . .				
d Excess from 2011. . . . 710				
e Excess from 2012. . . . 5,430				

Part XIVPrivate Operating Foundations (see instructions and Part VII-A, question 9)

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 organization is a private operating foundation described in section 4942(j)(3) or 4942(j)(5)

☐ 4942(j)(3) or ☐ 4942(j)(5)

2a	Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed.	Tax year	Prior 3 years			(e) Total
		(a) 2012	(b) 2011	(c) 2010	(d) 2009	
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 XVSupplementary Information (Complete this part only if the organization 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))

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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 ☒ 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	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
Name and address (home or business)				
a <i>Paid during the year</i> See Additional Data Table				
Total			3a	20,000
b <i>Approved for future payment</i>				
Total			3b	

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			14	6,174	
4	Dividends and interest from securities. . . .			14	5,424	
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					
9	Net income or (loss) from special events					
10	Gross profit or (loss) from sales of inventory. .					
11	Other revenue a Royalty income _____			15	248	
b	Other income per K-1 _____			15	-549	
c	_____					
d	_____					
e	_____					
12	Subtotal Add columns (b), (d), and (e). .				11,297	
13	Total. Add line 12, columns (b), (d), and (e).					11,297

[illegible]

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?		Yes	No
a Transfers from the reporting foundation to a noncharitable exempt organization of			
(1) Cash.			No
(2) Other assets.			No
b Other transactions			
(1) Sales of assets to a noncharitable exempt organization.			No
(2) Purchases of assets from a noncharitable exempt organization.			No
(3) Rental of facilities, equipment, or other assets.			No
(4) Reimbursement arrangements.			No
(5) Loans or loan guarantees.			No
(6) Performance of services or membership or fundraising solicitations.			No
c Sharing of facilities, equipment, mailing lists, other assets, or paid employees.			No
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			

[illegible]

b If "Yes," complete the following schedule

(a) Name of organization	(b) Type of organization	(c) Description of relationship

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

*****	2013-04-30	*****	May the IRS discuss this return with the preparer shown below (see instr.)? ☒ Yes ☐ No
Signature of officer or trustee	Date	Title	

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

Print/Type preparer's name	Preparer's Signature	Date	Check if self-employed ☒	PTIN
PHILLIP S MCCOY CPA	PHILLIP S MCCOY CPA	2013-05-09		
Firm's name ☐	MACARTHUR & MCCOY PC		Firm's EIN ☐	
	600 MAIN STREET SUITE 3			
Firm's address ☐	WINCHESTER, MA 018904304		Phone no (781) 721-1234	

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(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)
100s Novozymes	P	2003-04-03	2012-03-06
100s TEVA Pharmaceuticals	P	2010-02-26	2012-03-06
30s Johnson & Johnson	P	2005-12-12	2012-03-06
66 Asciano Group	P	2007-03-30	2012-03-06
100s Encana Corp	P	2009-02-27	2012-05-29
100s Sanofi Aventis ADR	P	2008-01-02	2012-05-29
100s Newcrest Mining LTD	P	2004-12-20	2012-05-29
10000s Canadian Gov Note 3 61%	P	2011-01-19	2012-06-01
300s Hugoton Rty Tr	P	2010-06-02	2012-06-07
300s Hugoton Rty Tr	P	2010-02-26	2012-06-07
100s ABB LTD Spon Adr	P	2008-07-07	2012-08-21
300s ABB LTD Spon Adr	P	2009-07-09	2012-08-21
100s GDF SUEZ Spon Adr	P	2010-02-26	2012-08-21
100s Goldcorp Inc	P	2006-06-26	2012-08-21
25s Mettler Toledo Intl	P	2006-10-02	2012-08-21
100s Novozymes	P	2003-04-03	2012-08-21
200s Virgin Australia Hldgs LTD	P	2007-03-30	2012-08-21
Other Gains per K-1	P	2011-01-02	2012-12-31

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
2,732	0	377	2,355
4,456	0	6,004	-1,548
1,916	0	1,828	88
319	0	1,449	-1,130
2,059	0	2,023	36
3,423	0	4,587	-1,164
2,458	0	1,354	1,104
9,567	0	10,403	-836
2,050	0	5,607	-3,557
2,050	0	5,354	-3,304
1,770	0	2,780	-1,010
5,311	0	4,638	673
2,482	0	3,708	-1,226
3,904	0	2,835	1,069
4,105	0	1,661	2,444
2,662	0	377	2,285
79	0	185	-106
0	0	6	-6

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
0	0	0	2,355
0	0	0	-1,548
0	0	0	88
0	0	0	-1,130
0	0	0	36
0	0	0	-1,164
0	0	0	1,104
0	0	0	-836
0	0	0	-3,557
0	0	0	-3,304
0	0	0	-1,010
0	0	0	673
0	0	0	-1,226
0	0	0	1,069
0	0	0	2,444
0	0	0	2,285
0	0	0	-106
0	0	0	-6

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	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
Name and address (home or business)				
a <i>Paid during the year</i>				
OXFAM 226 CAUSEWAY ST 5 BOSTON,MA 02114		Exempt	Humanitarian	250
NEIGHBORHOOD HOUSE CHARTER SCHOOL 21 QUEEN STREET DORCHESTER,MA 02122		Exempt	Educational	1,000
TRUSTEES OF TUFTS UNIVERSITY 80 GEORGE STREET MEDFORD,MA 02155		Exempt	Educational	2,000
THE CATHOLIC APPEAL 66 BROOKS DRIVE BRAINTREE,MA 02184		Exempt	Humanitarian	1,000
THE HOME FOR LITTLE WANDERERS 271 HUNTINGTON AVENUE BOSTON,MA 02115		Exempt	Humanitarian	2,000
DOCTORS WITHOUT BORDERS PO BOX 5030 HAGERSTOWN,MD 21741		Exempt	Humanitarian	2,000
ST FRANCIS HOUSE 39 BOYLSTON STREET BOSTON,MA 02116		Exempt	Humanitarian	1,500
MIT 600 MEMORIAL DRIVE CAMBRIDGE,MA 02139		Exempt	Educational	2,000
GREATER BOSTON FOOD BANK 70 S BAY AVE BOSTON,MA 02118		Exempt	Humanitarian	250
BOYS TOWN PO BOX 6000 BOYS TOWN,NE 68010		Exempt	Humanitarian	2,000
SALVATION ARMY 402 MASSACHUSETTS AVE CAMBRIDGE,MA 02139		Exempt	Humanitarian	2,000
RANGELEY REGION HEALTH & WELLNESS DALLAS HILL ROAD RANGELEY,ME 04970		Exempt	Humanitarian	500
MGH 165 CAMBRIDGE STREET BOSTON,MA 02114		Exempt	Humanitarian	1,000
THE SMILE TRAIN 41 MADISON AVE NEW YORK,NY 10010		Exempt	Humanitarian	1,000
ANGEL FLIGHT 492 SUTTON STREET NORTH ANDOVER,MA 01845		Exempt	Humanitarian	500

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	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
Name and address (home or business)				
a <i>Paid during the year</i>				
MSPCC 99 SUMMER STREET BOSTON, MA 02110		Exempt	Humanitarian	1,000
Total  3a				20,000

TY 2012 Accounting Fees Schedule

Name: THE BIRCHWOOD CHARITABLE TRUST

EIN: 04-3541255

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
MacArthur & McCoy PC Tax preparation	850			850

**TY 2012 Investments Corporate
Bonds Schedule****Name:** THE BIRCHWOOD CHARITABLE TRUST**EIN:** 04-3541255

Name of Bond	End of Year Book Value	End of Year Fair Market Value
Kingdom of Denmark Euro Bd 5%	10,477	9,232
Australia Govt Bond 6.25%	9,695	11,195
New Zealand Govt Bonds 6%	7,669	8,875
Brazil Federative Rep Gbl Brl Notes 12.5%	10,959	15,303
Australia Notes 4.75%	5,630	5,535
Norwegian Government Nts 4.25%	9,806	10,015
Zimmer Hldgs Inc Fixed Rt 4.625%	10,245	11,344
CA Inc Sr Fixed Rt 5.375%	10,255	11,388
40M Koenigreich Norwegen 5.00% 05/15/15	8,224	7,770

TY 2012 Investments Corporate

Stock Schedule

Name: THE BIRCHWOOD CHARITABLE TRUST

EIN: 04-3541255

Name of Stock	End of Year Book Value	End of Year Fair Market Value
50s Akamai Technologies Inc	1,842	2,046
50s Barrick Gold Corp	1,397	1,751
200s Baytex Energy Tr Unit	3,443	8,648
100s Baytex Energy Tr Unit	1,813	4,324
100s Canadian Natl Ry Co Com	3,877	9,101
50s CITRIX Systems Inc	3,590	3,281
100s Emerson Electric Co	4,608	5,296
100s Enterprise Prods Partners LP	4,989	5,008
50s Exxon Mobil Corp	4,395	4,328
100s Genuine Parts Co	4,802	6,358
50s Intel Corp	1,579	1,031
50s Intel Corp	1,537	1,031
50s Intel Corp	1,405	1,031
50s Intel Corp	1,403	1,031
50s Intel Corp	1,259	1,031
100s Intel Corp	1,408	2,062
20s Johnson & Johnson	955	1,402
20s Johnson & Johnson	930	1,402
100s McDonalds Corp	5,768	8,821
50s McDonalds Corp	4,577	4,411
50s Mettler-Toledo Intl Inc	3,043	9,665
124.5s Nestle Sa Sponsored Adrs Registered	3,232	8,106
62.5s Nestle Sa Sponsored Adrs Registered	1,881	4,070
100s Novartis Ag	4,936	6,330
100s Novartis Ag	5,399	6,330
50s NOVO Nordisk AS	6,322	8,161
200s Novozymes A/S	942	5,560
100s Pepsico Inc	7,542	6,843
50s Pepsico Inc	3,638	3,422
75s Procter & Gamble Co	4,835	5,092

Name of Stock	End of Year Book Value	End of Year Fair Market Value
75s Procter & Gamble Co	5,035	5,092
800 Rogers Sugar Income Fd Tr Unit	4,038	4,814
800 Rogers Sugar Income Fd Tr Unit	5,157	4,814
100s Sanofi Aventis	3,773	4,738
50s Siemens A G Spon ADR	4,331	5,474
100s Unilever Plc	3,058	3,872
100s Unilever Plc	3,340	3,872
100s Western Gas Partners LP	4,689	4,763
50s 3M Co	3,714	4,643
50s 3M Co	3,536	4,643

**TY 2012 Investments Government
Obligations Schedule**

Name: THE BIRCHWOOD CHARITABLE TRUST
EIN: 04-3541255

**US Government Securities - End of
Year Book Value:**

**US Government Securities - End of
Year Fair Market Value:**

**State & Local Government
Securities - End of Year Book
Value:** 40,646

**State & Local Government
Securities - End of Year Fair
Market Value:** 40,943

TY 2012 Investments - Other Schedule

Name: THE BIRCHWOOD CHARITABLE TRUST

EIN: 04-3541255

Category / Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
Discover Bk Greenwood Del CD		10,001	10,386

TY 2012 Other Decreases Schedule**Name:** THE BIRCHWOOD CHARITABLE TRUST**EIN:** 04-3541255

Description	Amount
Accrued interest paid	49
Realized loss on securities	3,833
Uncleared check	500

TY 2012 Other Expenses Schedule

Name: THE BIRCHWOOD CHARITABLE TRUST

EIN: 04-3541255

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Massachusetts Filing Fee	35			35
Office expense	20			20
Administration expense	7	7		
Miscellaneous expense	44			44

TY 2012 Other Income Schedule

Name: THE BIRCHWOOD CHARITABLE TRUST

EIN: 04-3541255

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
Royalty income	248	248	
Other income per K-1	-549	-549	

TY 2012 Other Increases Schedule

Name: THE BIRCHWOOD CHARITABLE TRUST

EIN: 04-3541255

Description	Amount
Distributions per K-1	179

TY 2012 Other Professional Fees Schedule

Name: THE BIRCHWOOD CHARITABLE TRUST

EIN: 04-3541255

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Lowell, Blake & Associates Portfolio Mngt Fee	1,425			1,425

TY 2012 Taxes Schedule**Name:** THE BIRCHWOOD CHARITABLE TRUST**EIN:** 04-3541255

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Foreign tax withheld	608	608		
Federal tax	279	279		
Severance tax	26	26		