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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 BENSON FAMILY CHARITABLE TRUST C/O KATZ NANNIS SOLOMON PC		A Employer identification number 22-5017058	
Number and street (or P O box number if mail is not delivered to street address) 250 FIRST AVENUE NO 101		Room/suite	B Telephone number (see instructions) (781) 453-8700
City or town, state, and ZIP code NEEDHAM, MA 024942805		C If exemption application is pending, check here <input type="checkbox"/>	
G Check all that apply <input type="checkbox"/> Initial return <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Final return <input type="checkbox"/> Amended return <input type="checkbox"/> Address change <input type="checkbox"/> Name change		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>	
H Check type of organization <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/> F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>	
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) <input checked="" type="checkbox"/> \$ 9,351,606		J Accounting method <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) <u> </u> (Part I, column (d) must be on cash basis.)	

Part I Analysis of Revenue and Expenses <small>(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))</small>		(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 <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	18	18		
	4 Dividends and interest from securities.	53,025	53,025		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	2,516,091			
	b Gross sales price for all assets on line 6a <u>11,378,617</u>				
	7 Capital gain net income (from Part IV , line 2)		2,516,091		
	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)				
	12 Total. Add lines 1 through 11	2,569,134	2,569,134		
	13 Compensation of officers, directors, trustees, etc	0	0		0
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)				
	c Other professional fees (attach schedule)				
	17 Interest	91,642	91,642		0
	18 Taxes (attach schedule) (see instructions)				
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	 151,892	151,902		0
	24 Total operating and administrative expenses.				
	Add lines 13 through 23	243,534	243,544		0
	25 Contributions, gifts, grants paid	611,333			611,333
	26 Total expenses and disbursements. Add lines 24 and 25	854,867	243,544		611,333
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	1,714,267			
	b Net investment income (if negative, enter -0-)		2,325,590		
	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	187,781	6,335,319	6,335,319
	2	Savings and temporary cash investments			
	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)			
	b	Investments—corporate stock (attach schedule)	12,023,909	6,652,126	3,016,287
	c	Investments—corporate bonds (attach schedule)			
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)			
	14	Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
Liabilities	15	Other assets (describe ▶ _____)			
	16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	12,211,690	12,987,445	9,351,606
	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)	528,392		
	22	Other liabilities (describe ▶ _____)			
	23	Total liabilities (add lines 17 through 22)	528,392	0	
Net Assets or Fund Balances		Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/> 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 ▶ <input checked="" type="checkbox"/> and complete lines 27 through 31.			
	27	Capital stock, trust principal, or current funds	632	632	
	28	Paid-in or capital surplus, or land, bldg , and equipment fund	0	0	
	29	Retained earnings, accumulated income, endowment, or other funds	11,682,666	12,986,813	
	30	Total net assets or fund balances (see page 17 of the instructions)	11,683,298	12,987,445	
	31	Total liabilities and net assets/fund balances (see page 17 of the instructions)	12,211,690	12,987,445	

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	11,683,298
2	Enter amount from Part I, line 27a	2	1,714,267
3	Other increases not included in line 2 (itemize) ▶ _____	3	0
4	Add lines 1, 2, and 3	4	13,397,565
5	Decreases not included in line 2 (itemize) ▶ _____	5	410,120
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	12,987,445

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			(I) 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	2,516,091
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	746,677	12,719,751	0 058702
2010	645,001	14,731,227	0 043785
2009	502,900	12,537,682	0 040111
2008	318,400	21,512,534	0 014801
2007	1,460,900	28,157,229	0 051884

2	Total of line 1, column (d).	2	0 209283
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 041857
4	Enter the net value of noncharitable-use assets for 2012 from Part X, line 5.	4	10,797,177
5	Multiply line 4 by line 3.	5	451,937
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	23,256
7	Add lines 5 and 6.	7	475,193
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	611,333

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 <input type="checkbox"/> 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 <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b		1	23,256
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	23,256
4		Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		4	0
5		Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0-		5	23,256
6		Credits/Payments			
a	2012 estimated tax payments and 2011 overpayment credited to 2012	6a	3,600		
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	3,600
8		Enter any penalty for underpayment of estimated tax Check here <input checked="" type="checkbox"/> if Form 2220 is attached		8	12
9		Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed		9	19,668
10		Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid.		10	
11		Enter the amount of line 10 to be Credited to 2013 estimated tax 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 \$ 0 (2) On foundation managers \$ 0			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers \$ 0			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS?	2		No
	If "Yes," attach a detailed description of the activities.			
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or 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	Yes	
b	If "Yes," has it filed a tax return on Form 990-T for this year?	4b	Yes	
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year?	5		No
	If "Yes," attach the statement required by General Instruction T.			
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) NH			
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 ▶CRAIG R BENSON Telephone no ▶(781) 453-8700 Located at ▶C/O KNS 250 FIRST AVENUE SUITE 101 NEEDHAM MA ZIP +4 ▶02494			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here ▶ <input type="checkbox"/> 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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?. <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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)?. <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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). <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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. ▶ <input type="checkbox"/>	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?. <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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		
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?. <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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))?		<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?		<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
(3) Provide a grant to an individual for travel, study, or other similar purposes?		<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> 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).		<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> 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?		<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> 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.		<input checked="" type="checkbox"/>		
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?		<input type="checkbox"/> Yes	<input type="checkbox"/> 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?		<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
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?		<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> 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
CRAIG R BENSON C/O KNS 250 FIRST AVENUE SUITE 101 NEEDHAM,MA 024942805	TRUSTEE 0 00	0	0	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 N/A	0
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 N/A	0
2	
All other program-related investments. See page 24 of the instructions.	
3	
Total. Add lines 1 through 3.	0

Part X

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes		
a	Average monthly fair market value of securities.	1a	9,225,880
b	Average of monthly cash balances.	1b	1,735,721
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	10,961,601
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	0
2	Acquisition indebtedness applicable to line 1 assets.	2	0
3	Subtract line 2 from line 1d.	3	10,961,601
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	164,424
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	10,797,177
6	Minimum investment return. Enter 5% of line 5.	6	539,859

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	539,859
2a	Tax on investment income for 2012 from Part VI, line 5.	2a	23,256
b	Income tax for 2012 (This does not include the tax from Part VI).	2b	5,926
c	Add lines 2a and 2b.	2c	29,182
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	510,677
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	510,677
6	Deduction from distributable amount (see instructions).	6	0
7	Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1.	7	510,677

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	611,333
b	Program-related investments—total from Part IX-B.	1b	0
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes.	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required).	3a	
b	Cash distribution test (attach the required schedule).	3b	
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	611,333
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	23,256
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	588,077
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				510,677
2 Undistributed income, if any, as of the end of 2012				
a Enter amount for 2011 only.			484,336	
b Total for prior years 20__, 20__, 20__		0		
3 Excess distributions carryover, if any, to 2012				
a From 2007.				
b From 2008.				
c From 2009.				
d From 2010.				
e From 2011.				
f Total of lines 3a through e.	0			
4 Qualifying distributions for 2012 from Part XII, line 4 ▶ \$ 611,333				
a Applied to 2011, but not more than line 2a			484,336	
b Applied to undistributed income of prior years (Election required—see instructions).		0		
c Treated as distributions out of corpus (Election required—see instructions).	0			
d Applied to 2012 distributable amount.				126,997
e Remaining amount distributed out of corpus	0			
5 Excess distributions carryover applied to 2012 (If an amount appears in column (d), the same amount must be shown in column (a).)	0			0
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	0			
b Prior years' undistributed income Subtract line 4b from line 2b.		0		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.		0		
d Subtract line 6c from line 6b Taxable amount—see instructions		0		
e Undistributed income for 2011 Subtract line 4a from line 2a Taxable amount—see instructions			0	
f Undistributed income for 2012 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2013.				383,680
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions).	0			
8 Excess distributions carryover from 2007 not applied on line 5 or line 7 (see instructions). . . .	0			
9 Excess distributions carryover to 2013. Subtract lines 7 and 8 from line 6a.	0			
10 Analysis of line 9				
a Excess from 2008. . . .				
b Excess from 2009. . . .				
c Excess from 2010. . . .				
d Excess from 2011. . . .				
e Excess from 2012. . . .				

Part XIV

Private 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 XV

Supplementary 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))

CRAIG R BENSON

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

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 Paid during the year See Additional Data Table				
Total			3a	611,333
b Approved for future payment				
Total			3b	0

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	18	
4	Dividends and interest from securities. . . .			14	53,025	
5	Net rental income or (loss) from real estate					
a	Debt-financed property.					
b	Not debt-financed property.					
6	Net rental income or (loss) from personal property					
7	Other investment income.					
8	Gain or (loss) from sales of assets other than inventory			18	2,516,091	
9	Net income or (loss) from special events					
10	Gross profit or (loss) from sales of inventory. .					
11	Other revenue a _____					
b	_____					
c	_____					
d	_____					
e	_____					
12	Subtotal. Add columns (b), (d), and (e). .		0		2,569,134	0
13	Total. Add line 12, columns (b), (d), and (e).			13	2,569,134	2,569,134

[illegible]

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

[illegible]

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 or fiduciary) is based on all information of which preparer has any knowledge

*****	2013-05-10	*****	May the IRS discuss this return with the preparer shown below (see instr)? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Signature of officer or trustee	Date	Title	

Paid Preparer Use Only	Print/Type preparer's name	Preparer's Signature	Date	Check if self-employed <input checked="checked" type="checkbox"/>	PTIN P00039505
	JEFFREY D SOLOMON CPA CVA	JEFFREY D SOLOMON CPA CVA			
	Firm's name <input checked="checked" type="checkbox"/>	KATZ NANNIS SOLOMON PC		Firm's EIN <input checked="checked" type="checkbox"/> 04-2887211	
		250 FIRST AVENUE SUITE 101			
Firm's address <input checked="checked" type="checkbox"/>	NEEDHAM, MA 024942805		Phone no (781) 453-8700		

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)
4413 S R G BARRY CORPORATION	P	2006-02-09	2012-09-20
7501 S R G BARRY CORPORATION	P	2006-02-09	2012-09-24
6000 S R G BARRY CORPORATION	P	2006-02-09	2012-09-25
40000 S R G BARRY CORPORATION	P	2006-02-09	2012-09-26
3500 S R G BARRY CORPORATION	P	2006-02-09	2012-09-27
3291 S R G BARRY CORPORATION	P	2006-02-09	2012-09-28
177510 S WTS CYALUME TECHNOLOGIES	P	2011-02-15	2012-04-12
1790 S ABSOLUTE SOFTWARE CORP	P	2011-12-13	2012-09-21
2765 S ABSOLUTE SOFTWARE CORP	P	2011-12-15	2012-09-21
12275 S ABSOLUTE SOFTWARE CORP	P	2011-12-14	2012-09-21
1060 S ACCELRYINC	P	2011-12-19	2012-09-18
3185 S ACCELRYINC	P	2011-12-14	2012-09-18
8265 S ACCELRYINC	P	2011-12-15	2012-09-18
2535 S ARUBA NETWORKS INC	P	2012-02-17	2012-02-23
2770 S BIOTIME INC	P	2012-09-14	2012-09-19
500 S DATA I/O CORP	P	2012-03-12	2012-09-05
1135 S DATA I/O CORP	P	2012-02-14	2012-09-05
7005 S DATA I/O CORP	P	2011-11-30	2012-09-05
7510 S DATA I/O CORP	P	2012-02-15	2012-09-05
8980 S DATA I/O CORP	P	2011-12-05	2012-09-05
9930 S DATA I/O CORP	P	2011-12-12	2012-09-05
10160 S EXELIS INC	P	2012-02-03	2012-09-14
13905 S EXELIS INC	P	2012-02-07	2012-09-14
495 S INTRALINKS HOLDINGS INC	P	2012-02-17	2012-06-28
2055 S INTRALINKS HOLDINGS INC	P	2012-02-29	2012-06-28
5535 S INTRALINKS HOLDINGS INC	P	2012-02-28	2012-06-28
16740 S INTRALINKS HOLDINGS INC	P	2012-02-07	2012-06-28
17680 S INTRALINKS HOLDINGS INC	P	2012-01-30	2012-06-28
844 S LANTRONIXINC	P	2012-03-13	2012-09-14
525 S LANTRONIXINC	P	2012-03-14	2012-09-17

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(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)
1250 S LANTRONIX INC	P	2012-03-19	2012-09-17
1978 S LANTRONIX INC	P	2012-03-15	2012-09-17
2400 S LANTRONIX INC	P	2012-03-26	2012-09-17
3100 S LANTRONIX INC	P	2012-03-22	2012-09-17
3134 S LANTRONIX INC	P	2012-03-13	2012-09-17
7613 S LANTRONIX INC	P	2012-04-02	2012-09-17
26387 S LANTRONIX INC	P	2012-04-02	2012-09-18
4000 S METROPOLITAN HEALTH NETWORKS	P	2012-05-01	2012-09-21
15000 S METROPOLITAN HEALTH NETWORKS	P	2012-05-02	2012-09-21
500 S MOTORCAR PARTS OF AMERICA INC	P	2012-08-30	2012-09-20
5500 S MOTORCAR PARTS OF AMERICA INC	P	2012-09-04	2012-09-20
8000 S MOTORCAR PARTS OF AMERICA INC	P	2012-08-27	2012-09-20
3872 S MOTORCAR PARTS OF AMERICA INC	P	2012-09-04	2012-09-21
9604 S MOTORCAR PARTS OF AMERICA INC	P	2012-09-13	2012-09-21
1000 S SCHMITT INDUSTRIES INC ORE	P	2012-06-11	2012-09-14
122000 S SCHMITT INDUSTRIES INC ORE	P	2012-06-11	2012-09-14
7500 S WIDEPOINT CORP	P	2012-03-13	2012-10-09
5000 S WIDEPOINT CORP	P	2012-03-13	2012-10-10
9186 S WIDEPOINT CORP	P	2012-03-15	2012-10-10
12000 S WIDEPOINT CORP	P	2012-03-14	2012-10-10
850 S WIDEPOINT CORP	P	2012-03-15	2012-10-16
3000 S WIDEPOINT CORP	P	2012-03-15	2012-10-17
160 S WILLIAMS CONTROLS INC	P	2011-06-13	2012-05-11
500 S WILLIAMS CONTROLS INC	P	2011-05-23	2012-05-11
1500 S WILLIAMS CONTROLS INC	P	2011-05-31	2012-05-11
2500 S WILLIAMS CONTROLS INC	P	2011-05-27	2012-05-11
10500 S WILLIAMS CONTROLS INC	P	2011-06-03	2012-05-11
6000 S ACCELRY S INC	P	2011-06-03	2012-09-18
10000 S ACCELRY S INC	P	2011-06-03	2012-09-18
7040 S R G BARRY CORPORATION	P	2011-06-14	2012-10-02

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)
25000 S DATA I/O CORP	P	2011-06-01	2012-09-05
25000 S DATA I/O CORP	P	2011-06-08	2012-09-05
12500 S ABSOLUTE SOFTWARE CORP	P	2006-11-14	2012-09-17
10000 S ABSOLUTE SOFTWARE CORP	P	2006-11-14	2012-09-18
50000 S ABSOLUTE SOFTWARE CORP	P	2006-11-14	2012-09-20
240 S ABSOLUTE SOFTWARE CORP	P	2006-12-01	2012-09-21
1990 S ABSOLUTE SOFTWARE CORP	P	2010-03-11	2012-09-21
4200 S ABSOLUTE SOFTWARE CORP	P	2006-12-05	2012-09-21
7100 S ABSOLUTE SOFTWARE CORP	P	2006-11-21	2012-09-21
10000 S ABSOLUTE SOFTWARE CORP	P	2007-08-16	2012-09-21
12890 S ABSOLUTE SOFTWARE CORP	P	2009-02-03	2012-09-21
13160 S ABSOLUTE SOFTWARE CORP	P	2006-12-04	2012-09-21
37925 S ABSOLUTE SOFTWARE CORP	P	2008-10-10	2012-09-21
40000 S ABSOLUTE SOFTWARE CORP	P	2006-11-20	2012-09-21
45427 S ABSOLUTE SOFTWARE CORP	P	2006-11-14	2012-09-21
58000 S ABSOLUTE SOFTWARE CORP	P	2006-11-17	2012-09-21
71500 S ABSOLUTE SOFTWARE CORP	P	2006-11-14	2012-09-21
470 S ACCELRY S INC	P	2010-03-03	2012-09-17
1610 S ACCELRY S INC	P	2010-03-01	2012-09-17
1885 S ACCELRY S INC	P	2010-01-11	2012-09-17
2300 S ACCELRY S INC	P	2010-02-08	2012-09-17
2665 S ACCELRY S INC	P	2010-02-23	2012-09-17
3006 S ACCELRY S INC	P	2010-01-08	2012-09-17
3195 S ACCELRY S INC	P	2010-03-12	2012-09-17
3613 S ACCELRY S INC	P	2010-01-07	2012-09-17
3740 S ACCELRY S INC	P	2010-01-12	2012-09-17
3760 S ACCELRY S INC	P	2010-02-24	2012-09-17
5120 S ACCELRY S INC	P	2010-01-14	2012-09-17
6125 S ACCELRY S INC	P	2010-02-25	2012-09-17
6458 S ACCELRY S INC	P	2010-02-26	2012-09-17

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8070 S ACCELRY SINC	P	2010-01-19	2012-09-17
8080 S ACCELRY S INC	P	2010-01-20	2012-09-17
9115 S ACCELRY S INC	P	2010-02-22	2012-09-17
14318 S ACCELRY SINC	P	2010-01-15	2012-09-17
16470 S ACCELRY S INC	P	2010-02-05	2012-09-17
820 S ACCELRY S INC	P	2010-04-21	2012-09-18
975 S ACCELRY SINC	P	2010-03-23	2012-09-18
2740 S ACCELRY S INC	P	2010-03-26	2012-09-18
3800 S ACCELRY S INC	P	2010-03-19	2012-09-18
4030 S ACCELRY SINC	P	2010-03-16	2012-09-18
5120 S ACCELRY SINC	P	2010-03-15	2012-09-18
6270 S ACCELRY SINC	P	2010-03-18	2012-09-18
6550 S ACCELRY S INC	P	2010-03-17	2012-09-18
7655 S ACCELRY S INC	P	2010-03-12	2012-09-18
7740 S ACCELRY SINC	P	2010-04-01	2012-09-18
10125 S ACCELRY S INC	P	2010-03-24	2012-09-18
11090 S ACCELRY S INC	P	2010-03-29	2012-09-18
256 S R G BARRY CORPORATION	P	2006-02-09	2012-09-17
4050 S R G BARRY CORPORATION	P	2006-02-09	2012-09-20
2300 S R G BARRY CORPORATION	P	2006-03-03	2012-09-28
13583 S R G BARRY CORPORATION	P	2006-04-10	2012-09-28
1417 S R G BARRY CORPORATION	P	2006-04-10	2012-10-01
1900 S R G BARRY CORPORATION	P	2006-07-21	2012-10-01
9900 S R G BARRY CORPORATION	P	2006-07-24	2012-10-01
11783 S R G BARRY CORPORATION	P	2007-07-26	2012-10-01
407 S R G BARRY CORPORATION	P	2008-01-07	2012-10-02
470 S R G BARRY CORPORATION	P	2007-12-04	2012-10-02
551 S R G BARRY CORPORATION	P	2008-01-04	2012-10-02
2460 S R G BARRY CORPORATION	P	2007-08-21	2012-10-02
3000 S R G BARRY CORPORATION	P	2008-01-03	2012-10-02

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)
3777 S R G BARRY CORPORATION	P	2007-07-26	2012-10-02
3850 S R G BARRY CORPORATION	P	2007-08-20	2012-10-02
4940 S DATA I/O CORP	P	2009-02-24	2012-02-15
8940 S DATA I/O CORP	P	2009-02-24	2012-02-23
670 S DATA I/O CORP	P	2009-02-24	2012-03-01
2600 S DATA I/O CORP	P	2009-02-26	2012-03-01
3580 S DATA I/O CORP	P	2009-02-27	2012-03-01
1300 S DATA I/O CORP	P	2009-09-09	2012-03-05
3162 S DATA I/O CORP	P	2009-11-24	2012-03-05
4000 S DATA I/O CORP	P	2009-03-06	2012-03-05
5000 S DATA I/O CORP	P	2009-03-03	2012-03-05
5727 S DATA I/O CORP	P	2009-03-04	2012-03-05
6400 S DATA I/O CORP	P	2009-03-05	2012-03-05
7120 S DATA I/O CORP	P	2009-02-27	2012-03-05
10000 S DATA I/O CORP	P	2009-03-02	2012-03-05
11566 S DATA I/O CORP	P	2009-11-04	2012-03-05
30000 S DATA I/O CORP	P	2009-10-27	2012-03-05
1838 S DATA I/O CORP	P	2009-11-24	2012-03-12
9162 S DATA I/O CORP	P	2009-12-09	2012-03-12
50000 S DATA I/O CORP	P	2009-11-25	2012-03-12
838 S DATA I/O CORP	P	2009-12-09	2012-09-04
43162 S DATA I/O CORP	P	2010-08-25	2012-09-04
5393 S DATA I/O CORP	P	2010-08-25	2012-09-05
4740 S *FLYHT AEROSPACE SOLUTIONS	P	2010-02-17	2012-10-01
3500 S *FLYHT AEROSPACE SOLUTIONS	P	2010-02-17	2012-10-02
3000 S ***FLYHT AEROSPACE SOLUTIONS	P	2010-02-17	2012-10-03
3000 S ***FLYHT AEROSPACE SOLUTIONS	P	2010-02-17	2012-10-05
2725 S *FLYHT AEROSPACE SOLUTIONS	P	2010-02-17	2012-10-15
7470 S *FLYHT AEROSPACE SOLUTIONS	P	2010-02-19	2012-10-15
17505 S *FLYHT AEROSPACE SOLUTIONS	P	2010-02-18	2012-10-15

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)
28145 S *FLYHT AEROSPACE SOLUTIONS	P	2010-02-19	2012-10-16
8300 S ***FLYHT AEROSPACE SOLUTIONS	P	2010-02-19	2012-11-02
5600 S ***FLYHT AEROSPACE SOLUTIONS	P	2010-02-19	2012-11-06
7400 S FLYHT AEROSPACE SOLUTIONS	P	2010-02-19	2012-11-08
700 S IMAGE SENSING SYSTEMS INC	P	2006-03-14	2012-11-30
7144 S LANTRONIX INC	P	2010-05-20	2012-09-12
124 S LANTRONIX INC	P	2010-05-21	2012-09-13
44876 S LANTRONIXINC	P	2010-05-20	2012-09-13
580 S LANTRONIXINC	P	2010-05-27	2012-09-14
790 S LANTRONIXINC	P	2010-06-10	2012-09-14
1600 S LANTRONIXINC	P	2010-06-02	2012-09-14
2020 S LANTRONIX INC	P	2010-06-07	2012-09-14
4550 S LANTRONIX INC	P	2010-06-03	2012-09-14
5345 S LANTRONIX INC	P	2010-06-14	2012-09-14
6995 S LANTRONIXINC	P	2010-06-04	2012-09-14
7030 S LANTRONIXINC	P	2010-05-25	2012-09-14
8150 S LANTRONIX INC	P	2010-06-08	2012-09-14
10000 S LANTRONIXINC	P	2010-12-06	2012-09-14
22986 S LANTRONIX INC	P	2010-05-21	2012-09-14
2632 S METROPOLITAN HEALTH NETWORKS	P	2009-02-24	2012-01-09
7923 S METROPOLITAN HEALTH NETWORKS	P	2009-02-25	2012-01-09
2336 S METROPOLITAN HEALTH NETWORKS	P	2009-03-02	2012-01-10
3579 S METROPOLITAN HEALTH NETWORKS	P	2009-02-25	2012-01-10
1700 S METROPOLITAN HEALTH NETWORKS	P	2009-03-02	2012-01-11
1460 S METROPOLITAN HEALTH NETWORKS	P	2009-03-02	2012-01-12
3295 S METROPOLITAN HEALTH NETWORKS	P	2009-03-02	2012-01-13
1025 S METROPOLITAN HEALTH NETWORKS	P	2009-03-02	2012-01-17
3175 S METROPOLITAN HEALTH NETWORKS	P	2009-03-02	2012-02-01
4111 S METROPOLITAN HEALTH NETWORKS	P	2009-03-04	2012-02-02
9909 S METROPOLITAN HEALTH NETWORKS	P	2009-03-02	2012-02-02

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(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)
2324 S METROPOLITAN HEALTH NETWORKS	P	2009-03-04	2012-02-03
5931 S METROPOLITAN HEALTH NETWORKS	P	2009-03-05	2012-02-03
2256 S METROPOLITAN HEALTH NETWORKS	P	2009-03-06	2012-09-14
3444 S METROPOLITAN HEALTH NETWORKS	P	2009-03-05	2012-09-14
990 S METROPOLITAN HEALTH NETWORKS	P	2009-03-09	2012-09-19
1100 S METROPOLITAN HEALTH NETWORKS	P	2009-03-16	2012-09-19
1609 S METROPOLITAN HEALTH NETWORKS	P	2009-03-06	2012-09-19
2175 S METROPOLITAN HEALTH NETWORKS	P	2009-09-11	2012-09-19
2500 S METROPOLITAN HEALTH NETWORKS	P	2009-03-20	2012-09-19
2685 S METROPOLITAN HEALTH NETWORKS	P	2009-03-25	2012-09-19
3191 S METROPOLITAN HEALTH NETWORKS	P	2009-03-23	2012-09-19
3500 S METROPOLITAN HEALTH NETWORKS	P	2009-03-19	2012-09-19
12250 S METROPOLITAN HEALTH NETWORKS	P	2009-03-11	2012-09-19
1970 S METROPOLITAN HEALTH NETWORKS	P	2009-09-11	2012-09-20
9090 S METROPOLITAN HEALTH NETWORKS	P	2009-09-14	2012-09-20
14305 S METROPOLITAN HEALTH NETWORKS	P	2010-01-25	2012-09-20
19635 S METROPOLITAN HEALTH NETWORKS	P	2010-01-26	2012-09-20
2625 S METROPOLITAN HEALTH NETWORKS	P	2010-01-26	2012-09-21
1978 S WILLIAMS CONTROLS INC	P	2008-10-07	2012-02-02
336 S WILLIAMS CONTROLS INC	P	2008-10-08	2012-02-03
1132 S WILLIAMS CONTROLS INC	P	2008-10-07	2012-02-03
85 S WILLIAMS CONTROLS INC	P	2008-10-08	2012-02-07
26435 S WILLIAMS CONTROLS INC	P	2008-10-08	2012-02-15
9680 S WILLIAMS CONTROLS INC	P	2008-10-08	2012-02-28
14370 S WILLIAMS CONTROLS INC	P	2009-02-23	2012-02-28
44000 S WILLIAMS CONTROLS INC	P	2009-02-23	2012-03-13
33780 S WILLIAMS CONTROLS INC	P	2009-02-23	2012-05-11
1 PUT PUT ISHARES RUSSELL 03/30/12	P	2011-04-20	2012-03-30
1 PUT PUT ISHARES RUSSELL 06/29/12	P	2011-07-12	2012-06-29
1 PUT PUT ISHARES RUSSELL 09/28/12	P	2012-01-18	2012-09-28

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)
1 PUT PUT ISHARES RUSSELL 12/31/12	P	2012-01-18	2012-12-31
270 S FIRST SOLAR INC	P	2012-09-14	2009-01-12
336 S FIRST SOLAR INC	P	2012-09-14	2009-12-23
438 S FIRST SOLAR INC	P	2012-09-14	2008-05-27
535 S FIRST SOLAR INC	P	2012-09-14	2008-05-23
1790 S BLUE NILE INC	P	2012-09-14	2009-10-28
2084 S BLUE NILE INC	P	2012-09-14	2009-11-25
2607 S CANADIAN DOLLAR SPOT	P	2012-10-15	2012-10-15
CURRENCY TRANSLATION GAIN - CAD TO USD	P	2006-11-14	2012-09-17

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)
64,785		28,332	36,453
111,227		48,157	63,070
88,958		38,520	50,438
594,152		256,803	337,349
51,854		22,470	29,384
48,871		21,128	27,743
4		52,316	-52,312
8,193		8,239	-46
12,655		12,836	-181
56,180		56,446	-266
8,650		6,856	1,794
25,992		20,837	5,155
67,450		53,435	14,015
62,524		59,695	2,829
15,394		12,111	3,283
1,185		1,959	-774
2,690		4,752	-2,062
16,600		25,933	-9,333
17,797		32,534	-14,737
21,281		37,102	-15,821
23,532		41,026	-17,494
107,987		103,218	4,769
147,791		139,745	8,046
1,866		3,236	-1,370
7,746		12,291	-4,545
20,865		34,558	-13,693
63,102		118,010	-54,908
66,646		120,926	-54,280
1,410		2,518	-1,108
877		1,501	-624

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)
2,088		3,684	-1,596
3,303		5,916	-2,613
4,008		7,114	-3,106
5,177		9,218	-4,041
5,234		9,351	-4,117
12,715		22,198	-9,483
43,269		76,938	-33,669
34,258		30,553	3,705
128,469		112,816	15,653
2,284		2,284	0
25,128		25,277	-149
36,550		36,550	0
17,845		19,490	-1,645
44,263		49,286	-5,023
3,350		3,625	-275
408,645		436,806	-28,161
3,865		6,802	-2,937
2,522		4,535	-2,013
4,634		8,588	-3,954
6,053		11,066	-5,013
414		795	-381
1,501		2,805	-1,304
1,755		1,831	-76
5,485		5,863	-378
16,454		17,504	-1,050
27,424		29,467	-2,043
115,179		117,736	-2,557
48,965		40,215	8,750
81,609		66,830	14,779
104,642		79,092	25,550

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)
59,245		147,920	-88,675
59,245		146,690	-87,445
59,134		58,148	986
46,348		46,275	73
229,818		231,539	-1,721
1,098		938	160
9,108		11,976	-2,868
19,223		16,712	2,511
32,495		27,862	4,633
45,768		113,213	-67,445
58,995		43,246	15,749
60,231		52,277	7,954
173,576		114,890	58,686
183,073		157,307	25,766
207,911		211,221	-3,310
265,456		243,284	22,172
327,243		341,370	-14,127
3,830		2,986	844
13,120		10,141	2,979
15,361		10,767	4,594
18,743		13,683	5,060
21,717		16,772	4,945
24,496		17,193	7,303
26,036		21,543	4,493
29,442		20,576	8,866
30,477		21,371	9,106
30,640		23,688	6,952
41,723		30,047	11,676
49,912		38,448	11,464
52,626		40,629	11,997

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)
65,762		48,154	17,608
65,844		47,635	18,209
74,278		57,351	16,927
116,677		84,107	32,570
134,213		97,626	36,587
6,692		5,980	712
7,957		6,428	1,529
22,361		17,752	4,609
31,011		25,273	5,738
32,888		26,693	6,195
41,784		33,926	7,858
51,169		41,641	9,528
53,454		43,429	10,025
62,471		51,615	10,856
63,165		50,511	12,654
82,629		66,223	16,406
90,504		70,574	19,930
3,792		1,644	2,148
59,456		26,001	33,455
34,155		13,677	20,478
201,706		76,721	124,985
21,087		8,004	13,083
28,275		11,282	16,993
147,328		59,280	88,048
175,349		119,280	56,069
6,050		2,969	3,081
6,986		3,450	3,536
8,190		4,030	4,160
36,565		23,459	13,106
44,592		22,207	22,385

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)
56,141		38,235	17,906
57,226		35,356	21,870
21,078		11,878	9,200
36,191		21,495	14,696
2,618		1,611	1,007
10,160		6,149	4,011
13,990		8,211	5,779
5,031		4,175	856
12,236		12,183	53
15,479		8,415	7,064
19,349		10,795	8,554
22,162		12,546	9,616
24,766		13,615	11,151
27,553		16,330	11,223
38,698		22,275	16,423
44,758		43,734	1,024
116,093		113,715	2,378
7,111		7,082	29
35,449		34,463	986
193,456		194,015	-559
2,070		3,152	-1,082
106,597		169,649	-63,052
12,780		21,197	-8,417
892		2,529	-1,637
651		1,867	-1,216
552		1,598	-1,046
557		1,604	-1,047
500		1,455	-955
1,370		4,142	-2,772
3,211		9,587	-6,376

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)
5,107		15,567	-10,460
1,559		4,582	-3,023
1,048		3,091	-2,043
1,381		4,078	-2,697
3,569		8,469	-4,900
11,952		32,188	-20,236
207		558	-351
74,940		202,191	-127,251
969		2,642	-1,673
1,320		3,610	-2,290
2,673		7,333	-4,660
3,374		9,217	-5,843
7,600		20,817	-13,217
8,928		24,284	-15,356
11,684		31,515	-19,831
11,743		31,777	-20,034
13,613		37,177	-23,564
16,704		30,915	-14,211
38,395		103,358	-64,963
21,217		3,979	17,238
63,870		12,007	51,863
19,462		2,973	16,489
29,818		5,424	24,394
14,226		2,164	12,062
12,256		1,858	10,398
27,714		4,194	23,520
8,600		1,305	7,295
25,639		4,041	21,598
34,930		5,217	29,713
84,193		12,612	71,581

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)
19,936		2,949	16,987
50,877		7,491	43,386
19,221		2,940	16,281
29,343		4,350	24,993
8,237		1,282	6,955
9,152		1,555	7,597
13,388		2,097	11,291
18,097		4,730	13,367
20,801		3,440	17,361
22,340		3,586	18,754
26,550		4,387	22,163
29,121		4,810	24,311
101,925		16,126	85,799
16,440		4,284	12,156
75,859		19,139	56,720
119,379		31,949	87,430
163,860		45,034	118,826
22,482		6,021	16,461
22,206		25,232	-3,026
3,783		4,194	-411
12,746		14,440	-1,694
945		1,061	-116
291,822		329,973	-38,151
105,214		120,830	-15,616
156,190		54,465	101,725
480,896		166,767	314,129
370,548		128,032	242,516
		48,377	-48,377
		43,621	-43,621
		44,745	-44,745

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)
		44,382	-44,382
41,668		6,615	35,053
44,557		8,233	36,324
115,961		10,732	105,229
145,331		13,108	132,223
112,047		76,394	35,653
120,216		88,941	31,275
2,661		2,654	7
249,570			249,570

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	
			36,453
			63,070
			50,438
			337,349
			29,384
			27,743
			-52,312
			-46
			-181
			-266
			1,794
			5,155
			14,015
			2,829
			3,283
			-774
			-2,062
			-9,333
			-14,737
			-15,821
			-17,494
			4,769
			8,046
			-1,370
			-4,545
			-13,693
			-54,908
			-54,280
			-1,108
			-624

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	
			-1,596
			-2,613
			-3,106
			-4,041
			-4,117
			-9,483
			-33,669
			3,705
			15,653
			0
			-149
			0
			-1,645
			-5,023
			-275
			-28,161
			-2,937
			-2,013
			-3,954
			-5,013
			-381
			-1,304
			-76
			-378
			-1,050
			-2,043
			-2,557
			8,750
			14,779
			25,550

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	
			-88,675
			-87,445
			986
			73
			-1,721
			160
			-2,868
			2,511
			4,633
			-67,445
			15,749
			7,954
			58,686
			25,766
			-3,310
			22,172
			-14,127
			844
			2,979
			4,594
			5,060
			4,945
			7,303
			4,493
			8,866
			9,106
			6,952
			11,676
			11,464
			11,997

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	
			17,608
			18,209
			16,927
			32,570
			36,587
			712
			1,529
			4,609
			5,738
			6,195
			7,858
			9,528
			10,025
			10,856
			12,654
			16,406
			19,930
			2,148
			33,455
			20,478
			124,985
			13,083
			16,993
			88,048
			56,069
			3,081
			3,536
			4,160
			13,106
			22,385

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	
			17,906
			21,870
			9,200
			14,696
			1,007
			4,011
			5,779
			856
			53
			7,064
			8,554
			9,616
			11,151
			11,223
			16,423
			1,024
			2,378
			29
			986
			-559
			-1,082
			-63,052
			-8,417
			-1,637
			-1,216
			-1,046
			-1,047
			-955
			-2,772
			-6,376

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	
			-10,460
			-3,023
			-2,043
			-2,697
			-4,900
			-20,236
			-351
			-127,251
			-1,673
			-2,290
			-4,660
			-5,843
			-13,217
			-15,356
			-19,831
			-20,034
			-23,564
			-14,211
			-64,963
			17,238
			51,863
			16,489
			24,394
			12,062
			10,398
			23,520
			7,295
			21,598
			29,713
			71,581


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	
			16,987
			43,386
			16,281
			24,993
			6,955
			7,597
			11,291
			13,367
			17,361
			18,754
			22,163
			24,311
			85,799
			12,156
			56,720
			87,430
			118,826
			16,461
			-3,026
			-411
			-1,694
			-116
			-38,151
			-15,616
			101,725
			314,129
			242,516
			-48,377
			-43,621
			-44,745

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	
			-44,382
			35,053
			36,324
			105,229
			132,223
			35,653
			31,275
			7
			249,570

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>				
CELEBRITIES FOR CHARITY 38 MAIN STREET ANDOVER,MA 01801	NONE	501(C)(3)	FULFILL PURPOSES OF THE ORGANIZATION	50,000
CF FOUNDATION 220 NORTH MAIN STREET SUITE 104 NATICK,MA 01760	NONE	501(C)(3)	FULFILL PURPOSES OF THE ORGANIZATION	26,000
CHILD ADVOCACY CENTER 100 CAMPUS DRIVE SUITE 11 PORTSMOUTH,NH 03801	NONE	501(C)(3)	FULFILL PURPOSES OF THE ORGANIZATION	10,000
COMMUNITY COLLEGE INNOVATION FUND OF NEW HAMPSHIRE 31 COLLEGE DRIVE CONCORD,NH 03301	NONE	501(C)(3)	FULFILL PURPOSES OF THE ORGANIZATION	8,333
FIGHT TO EDUCATE 254 WEBSTER STREET MANCHESTER,NH 03104	NONE	501(C)(3)	FULFILL PURPOSES OF THE ORGANIZATION	5,000
JOSIAH BARTLETT CENTER PO BOX 897 CONCORD,NH 03902	NONE	501(C)(3)	FULFILL PURPOSES OF THE ORGANIZATION	20,000
LAHEY CLINIC 41 MALL ROAD BURLINGTON,MA 01805	NONE	501(C)(3)	FULFILL PURPOSES OF THE ORGANIZATION	400,000
PAN MASS CHALLENGE 77 4TH AVENUE NEEDHAM,MA 02494	NONE	501(C)(3)	FULFILL PURPOSES OF THE ORGANIZATION	10,000
ST CHARLES CHILDREN'S HOME 16 GRANT STREET ROCHESTER,NH 03867	NONE	501(C)(3)	FULFILL PURPOSES OF THE ORGANIZATION	12,000
THE GATEWAY FOR CANCER RESEARCH 1336 BASSWOOD ROAD SCHAUMBURG,IL 601734544	NONE	501(C)(3)	FULFILL PURPOSES OF THE ORGANIZATION	5,000
THE JIMMY FUND 10 BROOKLINE PLACE WEST 6TH FLOOR BROOKLINE,MA 02445	NONE	501(C)(3)	FULFILL PURPOSES OF THE ORGANIZATION	10,000
WARREN RUDMAN CENTER - UNIVERSITY OF NEW HAMPSHIRE SCHOOL OF LAW 2 WHITE STREET CONCORD,NH 03301	NONE	501(C)(3)	FULFILL PURPOSES OF THE ORGANIZATION	50,000
WENTWORTH DOUGLAS HOSPITAL 789 CENTRAL STREET DOVER,NH 03820	NONE	501(C)(3)	FULFILL PURPOSES OF THE ORGANIZATION	5,000
Total  3a				611,333

**TY 2012 Investments Corporate
Stock Schedule**

Name: THE BENSON FAMILY CHARITABLE TRUST
C/O KATZ NANNIS SOLOMON PC

EIN: 22-5017058

Name of Stock	End of Year Book Value	End of Year Fair Market Value
SEE ATTACHMENT #1	0	0
CYALUME TECHNOLOGIES HOLDING	1,060,917	641,540
FLYHT AEROSPACE SOLUTIONS	953,972	541,787
IMAGE SENSING SYSTEMS	2,111,313	829,374
PNI DIGITAL MEDIA INC.	2,262,534	905,537
WIDEPOINT CORP	220,187	93,403
PUT ISHARES RUSSELL 03/16/2013	43,203	4,646

TY 2012 Other Decreases Schedule**Name:** THE BENSON FAMILY CHARITABLE TRUST

C/O KATZ NANNIS SOLOMON PC

EIN: 22-5017058

Description	Amount
FOREIGN CURRENCY TRANSLATION VALUATION ADJUSTMENT	398,900
FEDERAL EXCISE TAX	3,423
FEDERAL UBIT TAX	7,797

TY 2012 Other Expenses Schedule**Name:** THE BENSON FAMILY CHARITABLE TRUST

C/O KATZ NANNIS SOLOMON PC

EIN: 22-5017058

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
BEAR, STEARNS SECURITY CORP SHORT DEBIT FEE	18,890	18,890		0
INVESTMENT MANAGEMENT FEES	132,727	132,737		0
BANK FEES	12	12		0
FILING FEES	75	75		0
MISCELLANEOUS EXPENSES	188	188		0