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**Return of Private Foundation**  
 or Section 4947(a)(1) Nonexempt Charitable Trust  
 Treated as a Private Foundation

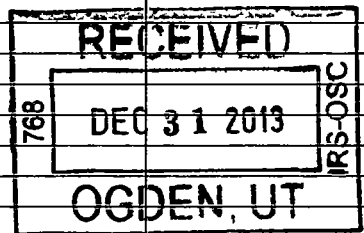
Department of the Treasury  
Internal Revenue Service

Note: The foundation may be able to use a copy of this return to satisfy state reporting requirements.

For calendar year **2012** or tax year beginning 09/01, 2012, and ending 08/31, 2013

Name of foundation <b>JOSEPH O'GORMAN TRUST UNDER WILL C/O</b>		<b>A</b> Employer identification number <b>04-6957171</b>
<b>CAMBRIDGE TRUST COMPANY 1254390</b>		<b>B</b> Telephone number (see instructions) <b>617- 441-1548</b>
Number and street (or P.O. box number if mail is not delivered to street address) <b>75 STATE STREET, 18TH FLOOR</b>		<b>C</b> If exemption application is pending, check here <input type="checkbox"/>
Room/suite		
City or town, state, and ZIP code <b>BOSTON, MA 02109</b>		
<b>G</b> Check all that apply.	<input type="checkbox"/> Initial return <input type="checkbox"/> Final return <input type="checkbox"/> Address change	<input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Amended return <input type="checkbox"/> Name change
<b>H</b> Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation		<b>D</b> 1 Foreign organizations, check here <input type="checkbox"/>
<input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		2 Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
<b>I</b> Fair market value of all assets at end of year (from Part II, col (c), line 16) ▶ \$ <b>1,732,565.</b>		<b>E</b> If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
<b>J</b> Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual		<b>F</b> If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>
<input type="checkbox"/> Other (specify) _____		
<i>(Part I, column (d) must be on cash basis.)</i>		

<b>Part I Analysis of Revenue and Expenses</b> (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)
<b>Revenue</b>	<b>1</b> Contributions, gifts, grants, etc., received (attach schedule)				
	<b>2</b> Check <input type="checkbox"/> if the foundation is not required to attach Sch B				
	<b>3</b> Interest on savings and temporary cash investments				
	<b>4</b> Dividends and interest from securities	38,923.	38,923.		STMT 1
	<b>5a</b> Gross rents				
	<b>b</b> Net rental income or (loss)				
	<b>6a</b> Net gain or (loss) from sale of assets not on line 10	70,217.			
	<b>b</b> Gross sales price for all assets on line 6a <b>487,397.</b>				
	<b>7</b> Capital gain net income (from Part IV, line 2)		70,217.		
	<b>8</b> Net short-term capital gain				
	<b>9</b> Income modifications				
	<b>10a</b> Gross sales less returns and allowances				
<b>b</b> Less Cost of goods sold					
<b>c</b> Gross profit or (loss) (attach schedule)					
<b>11</b> Other income (attach schedule)					
<b>12 Total.</b> Add lines 1 through 11	109,140.	109,140.			
<b>Operating and Administrative Expenses</b>	<b>13</b> Compensation of officers, directors, trustees, etc.	19,095.	19,095.		
	<b>14</b> Other employee salaries and wages				
	<b>15</b> Pension plans, employee benefits				
	<b>16a</b> Legal fees (attach schedule)				
	<b>b</b> Accounting fees (attach schedule) STMT 3	1,250.	NONE	NONE	1,250.
	<b>c</b> Other professional fees (attach schedule)				
	<b>17</b> Interest				
	<b>18</b> Taxes (attach schedule) (see instructions) STMT 4	1,050.	1,050.		
	<b>19</b> Depreciation (attach schedule) and depletion				
	<b>20</b> Occupancy				
<b>21</b> Travel, conferences, and meetings					
<b>22</b> Printing and publications					
<b>23</b> Other expenses (attach schedule) STMT 5	43.	8.		35.	
<b>24 Total operating and administrative expenses.</b> Add lines 13 through 23	21,438.	20,153.	NONE	1,285.	
<b>25</b> Contributions, gifts, grants paid	80,747.			80,747.	
<b>26 Total expenses and disbursements</b> Add lines 24 and 25	102,185.	20,153.	NONE	82,032.	
<b>27</b> Subtract line 26 from line 12					
<b>a</b> Excess of revenue over expenses and disbursements	6,955.				
<b>b</b> Net investment income (if negative, enter -0-)		88,987.			
<b>c</b> Adjusted net income (if negative, enter -0-)					



SCANNED JAN 16 2014

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only. (See instructions.)			
		Beginning of year (a) Book Value	End of year (b) Book Value (c) Fair Market Value		
Assets	1	Cash - non-interest-bearing . . . . .	134.	25,139.	25,139.
	2	Savings and temporary cash investments . . . . .	72,200.	56,607.	56,607.
	3	Accounts receivable ▶ Less allowance for doubtful accounts ▶			
	4	Pledges receivable ▶ Less allowance for doubtful accounts ▶			
	5	Grants receivable . . . . .			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions) . . . . .			
	7	Other notes and loans receivable (attach schedule) ▶ Less: allowance for doubtful accounts ▶			
	8	Inventories for sale or use . . . . .			
	9	Prepaid expenses and deferred charges . . . . .			
	10 a	Investments - U S and state government obligations (attach schedule) . . . . .	149,839.	87,209.	86,364.
	b	Investments - corporate stock (attach schedule) . . . . .	919,264.	944,488.	1,215,146.
	c	Investments - corporate bonds (attach schedule) . . . . .	315,637.	348,393.	349,309.
	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) ▶			
15	Other assets (describe ▶ )				
16	<b>Total assets</b> (to be completed by all filers - see the instructions. Also, see page 1, item I) . . . . .	1,457,074.	1,461,836.	1,732,565.	
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	<b>Total liabilities</b> (add lines 17 through 22) . . . . .			NONE	
Net Assets or Fund Balances	<b>Foundations that follow SFAS 117, check here</b> <input type="checkbox"/>				
	<b>and complete lines 24 through 26 and lines 30 and 31.</b>				
	24	Unrestricted . . . . .			
	25	Temporarily restricted . . . . .			
	26	Permanently restricted . . . . .			
	<b>Foundations that do not follow SFAS 117, check here and complete lines 27 through 31.</b> <input checked="" type="checkbox"/>				
	27	Capital stock, trust principal, or current funds . . . . .	1,457,074.	1,461,836.	
28	Paid-in or capital surplus, or land, bldg, and equipment fund . . . . .				
29	Retained earnings, accumulated income, endowment, or other funds . . . . .				
30	<b>Total net assets or fund balances</b> (see instructions) . . . . .	1,457,074.	1,461,836.		
31	<b>Total liabilities and net assets/fund balances</b> (see instructions) . . . . .	1,457,074.	1,461,836.		

**Part III Analysis of Changes in Net Assets or Fund Balances**

1	Total net assets or fund balances at beginning of year - Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return) . . . . .	1	1,457,074.
2	Enter amount from Part I, line 27a . . . . .	2	6,955.
3	Other increases not included in line 2 (itemize) ▶	3	
4	Add lines 1, 2, and 3 . . . . .	4	1,464,029.
5	Decreases not included in line 2 (itemize) ▶ <b>BOOK TO TAX DIFFERENCE</b>	5	2,193.
6	<b>Total net assets or fund balances at end of year</b> (line 4 minus line 5) - Part II, column (b), line 30 . . . . .	6	1,461,836.

**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.)
<b>1a PUBLICLY TRADED SECURITIES</b>					
<b>b</b>					
<b>c</b>					
<b>d</b>					
<b>e</b>					
(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)		
<b>a</b> 487,397.		417,180.	70,217.		
<b>b</b>					
<b>c</b>					
<b>d</b>					
<b>e</b>					
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			
<b>a</b>			70,217.		
<b>b</b>					
<b>c</b>					
<b>d</b>					
<b>e</b>					
<b>2</b> 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 }			<b>2</b>	70,217.	
<b>3</b> 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			<b>3</b>		

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?  Yes  No  
If "Yes," the foundation does not qualify under section 4940(e). Do not complete this part.

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2011	84,352.	1,613,100.	0.052292
2010	68,898.	1,629,851.	0.042273
2009	86,351.	1,534,140.	0.056286
2008	33,453.	1,438,045.	0.023263
2007	52,760.	1,795,991.	0.029377
<b>2</b> Total of line 1, column (d)			0.203491
<b>3</b> 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			0.040698
<b>4</b> Enter the net value of noncharitable-use assets for 2012 from Part X, line 5			1,671,038.
<b>5</b> Multiply line 4 by line 3			68,008.
<b>6</b> Enter 1% of net investment income (1% of Part I, line 27b)			890.
<b>7</b> Add lines 5 and 6			68,898.
<b>8</b> 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.			82,032.

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

Table with 11 rows for excise tax calculations. Includes items like 'Exempt operating foundations', 'Domestic foundations', 'Tax under section 511', and 'Tax due'. Total tax due is 907.

Part VII-A Statements Regarding Activities

Table with 10 rows for activity statements. Includes questions about political influence, tax on political expenditures, and foundation status. Includes 'Yes' and 'No' columns.

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 X
12 Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions) . . . . . 12 X
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? . . . . . 13 X
Website address N/A
14 The books are in care of Cambridge Trust Company Telephone no. (617) 441-1548
Located at 75 STATE STREET 18TH FLOOR, BOSTON, MA ZIP+4 02109
15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here . . . . . 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 Yes No X
See the instructions for exceptions and filing requirements for Form TD F 90-22.1. If "Yes," enter the name of the foreign country

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

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

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 X
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? Yes No X
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? Yes No X
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? X 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 X
(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 X
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? 1b X
Organizations relying on a current notice regarding disaster assistance check here
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2012? 1c X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))
a At the end of tax year 2012, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2012? Yes No X
If "Yes," list the years
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.) 2b X
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? Yes No X
b If "Yes," did it have excess business holdings in 2012 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2012) 3b
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 4a X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2012? 4b X

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

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)?  Yes  No

Organizations relying on a current notice regarding disaster assistance check here

c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?  Yes  No

If "Yes," attach the statement required by Regulations section 53.4945-5(d)

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?  Yes  No

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?  Yes  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?  Yes  No

b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?  Yes  No

**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
CAMBRIDGE TRUST COMPANY 75 STATE STREET 18TH FLOOR, BOSTON, MA 02109	TRUSTEE	19,095.	-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		NONE	NONE	NONE
-----				
-----				
-----				

Total number of other employees paid over \$50,000  **NONE**

**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		NONE
-----		
-----		
-----		
-----		

Total number of others receiving over \$50,000 for professional services . . . . . **NONE**

**Part IX-A Summary of Direct Charitable Activities**

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc	Expenses
1 NONE	
2	
3	
4	

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

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

Total. Add lines 1 through 3 . . . . .

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

<b>1</b>	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
<b>a</b>	Average monthly fair market value of securities	<b>1a</b>	1,628,085.
<b>b</b>	Average of monthly cash balances	<b>1b</b>	68,400.
<b>c</b>	Fair market value of all other assets (see instructions)	<b>1c</b>	NONE
<b>d</b>	<b>Total</b> (add lines 1a, b, and c)	<b>1d</b>	1,696,485.
<b>e</b>	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	<b>1e</b>	
<b>2</b>	Acquisition indebtedness applicable to line 1 assets	<b>2</b>	NONE
<b>3</b>	Subtract line 2 from line 1d	<b>3</b>	1,696,485.
<b>4</b>	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	<b>4</b>	25,447.
<b>5</b>	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. Enter here and on Part V, line 4	<b>5</b>	1,671,038.
<b>6</b>	<b>Minimum investment return.</b> Enter 5% of line 5	<b>6</b>	83,552.

**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.)

<b>1</b>	Minimum investment return from Part X, line 6	<b>1</b>	83,552.
<b>2a</b>	Tax on investment income for 2012 from Part VI, line 5	<b>2a</b>	890.
<b>b</b>	Income tax for 2012. (This does not include the tax from Part VI.)	<b>2b</b>	
<b>c</b>	Add lines 2a and 2b	<b>2c</b>	890.
<b>3</b>	Distributable amount before adjustments. Subtract line 2c from line 1	<b>3</b>	82,662.
<b>4</b>	Recoveries of amounts treated as qualifying distributions	<b>4</b>	NONE
<b>5</b>	Add lines 3 and 4	<b>5</b>	82,662.
<b>6</b>	Deduction from distributable amount (see instructions)	<b>6</b>	NONE
<b>7</b>	<b>Distributable amount as adjusted.</b> Subtract line 6 from line 5. Enter here and on Part XIII, line 1	<b>7</b>	82,662.

**Part XII Qualifying Distributions** (see instructions)

<b>1</b>	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
<b>a</b>	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	<b>1a</b>	82,032.
<b>b</b>	Program-related investments - total from Part IX-B	<b>1b</b>	
<b>2</b>	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	<b>2</b>	NONE
<b>3</b>	Amounts set aside for specific charitable projects that satisfy the:		
<b>a</b>	Suitability test (prior IRS approval required)	<b>3a</b>	NONE
<b>b</b>	Cash distribution test (attach the required schedule)	<b>3b</b>	NONE
<b>4</b>	<b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	<b>4</b>	82,032.
<b>5</b>	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)	<b>5</b>	890.
<b>6</b>	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4	<b>6</b>	81,142.

**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
<b>1</b> Distributable amount for 2012 from Part XI, line 7 . . . . .				82,662.
<b>2</b> Undistributed income, if any, as of the end of 2012				
<b>a</b> Enter amount for 2011 only . . . . .			49,607.	
<b>b</b> Total for prior years 20 <u>10</u> , 20 <u>  </u> , 20 <u>  </u>		NONE		
<b>3</b> Excess distributions carryover, if any, to 2012				
<b>a</b> From 2007 . . . . .	NONE			
<b>b</b> From 2008 . . . . .	NONE			
<b>c</b> From 2009 . . . . .	NONE			
<b>d</b> From 2010 . . . . .	NONE			
<b>e</b> From 2011 . . . . .	NONE			
<b>f</b> Total of lines 3a through e . . . . .	NONE			
<b>4</b> Qualifying distributions for 2012 from Part XII, line 4 ▶ \$ <u>82,032.</u>				
<b>a</b> Applied to 2011, but not more than line 2a . . . . .			49,607.	
<b>b</b> Applied to undistributed income of prior years (Election required - see instructions) . . . . .		NONE		
<b>c</b> Treated as distributions out of corpus (Election required - see instructions) . . . . .	NONE			
<b>d</b> Applied to 2012 distributable amount . . . . .				32,425.
<b>e</b> Remaining amount distributed out of corpus . . . . .	NONE			
<b>5</b> Excess distributions carryover applied to 2012 . (If an amount appears in column (d), the same amount must be shown in column (a) )	NONE			NONE
<b>6</b> Enter the net total of each column as indicated below:				
<b>a</b> Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	NONE			
<b>b</b> Prior years' undistributed income. Subtract line 4b from line 2b . . . . .		NONE		
<b>c</b> Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed . . . . .		NONE		
<b>d</b> Subtract line 6c from line 6b. Taxable amount - see instructions . . . . .		NONE		
<b>e</b> Undistributed income for 2011. Subtract line 4a from line 2a. Taxable amount - see instructions . . . . .				
<b>f</b> Undistributed income for 2012. Subtract lines 4d and 5 from line 1 This amount must be distributed in 2013 . . . . .				50,237.
<b>7</b> Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions) . . . . .	NONE			
<b>8</b> Excess distributions carryover from 2007 not applied on line 5 or line 7 (see instructions) . . . . .	NONE			
<b>9</b> Excess distributions carryover to 2013. Subtract lines 7 and 8 from line 6a . . . . .	NONE			
<b>10</b> Analysis of line 9				
<b>a</b> Excess from 2008 . . . . .	NONE			
<b>b</b> Excess from 2009 . . . . .	NONE			
<b>c</b> Excess from 2010 . . . . .	NONE			
<b>d</b> Excess from 2011 . . . . .	NONE			
<b>e</b> Excess from 2012 . . . . .	NONE			

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

- 1 a** If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2012, enter the date of the ruling . . . . .  4942(j)(3) or 4942(j)(5)
- b** Check box to indicate whether the foundation is a private operating foundation described in section

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

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

- 1 Information Regarding Foundation Managers:**
- a** List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000). (See section 507(d)(2).)
- N/A

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

- 2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:**
- Check here  if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. (see instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d.

- a** The name, address, and telephone number or e-mail of the person to whom applications should be addressed
- b** The form in which applications should be submitted and information and materials they should include
- c** Any submission deadlines.
- d** Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors:

**Part XV** Supplementary Information (continued)

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
<p><b>a</b> Paid during the year</p> <p>ROMAN CATHOLIC ARCHBISHOP OF BOSTON, A CORPOR 66 BROOKS DRIVE BRAINTREE MA 02184</p>	NONE	N/A	FOR ORGANIZATION'S GENERAL PURPOSES	80,747.
<b>Total</b> . . . . . ▶ <b>3a</b>				80,747.
<b>b</b> Approved for future payment				
<b>Total</b> . . . . . ▶ <b>3b</b>				





ACCT 1254390  
 ASSETS HELD 08/31/2013  
 VALUED AS OF 08/31/2013

CAMBRIDGE TRUST COMPANY  
 SCHEDULE OF INVESTMENTS  
 JOSEPH O'GORMAN TRUST  
 UNDER WILL

UNITS	DESCRIPTION	BOOK VALUE	TAX COST	CURRENT PRICE	MARKET VALUE	ESTCURRENT INC YIELD
U S GOVERNMENT OBLIGATIONS						
=====						
50,000	FEDERAL HOME LN MTG CORP DATED 01/30/2004 CALLABLE 01/30/2007 @ 100 5% 01/30/2014	50,707.27	50,707.27	102.008	51,004.00	4.9
35,567.69	FEDERAL HOME LOAN MORTGAGE CORP PC GOLD POOL #J1-8103 DATED 02/01/2012 2.5% 02/01/2027	36,501.33	36,501.33	99.417	35,360.33	2.5
TOTAL U S GOVERNMENT OBLIGATIONS		87,208.60	87,208.60		86,364.33	3.9
CORPORATE BONDS						
=====						
50,000	PACCAR INC NT DATED 02/13/2009 6.875% 02/15/2014	50,173.57	50,173.57	102.742	51,371.00	6.7
50,000	GENERAL ELECTRIC CAP CORP DATED 09/17/2004 4.75% 09/15/2014	51,540.13	51,540.13	104.411	52,205.50	4.5
50,000	GOLDMAN SACHS GP DATED 08/30/2007 6.25% 09/01/2017	57,897.49	57,897.49	112.986	56,493.00	5.5
50,000	SNAP-ON INC DATED 12/14/2010 4.25% 01/15/2018	50,423.79	50,423.79	104.831	52,415.50	4.1
50,000	MERCK & CO INC DATED 06/25/2009 MAKE WHOLE @ 20 /CALLABLE 5% 06/30/2019	57,391.59	57,391.59	113.068	56,534.00	4.4
25,000	BOEING CO DATED 07/28/2009 4.875% 02/15/2020	28,150.26	28,150.26	112.727	28,181.75	4.3
TOTAL CORPORATE BONDS		295,576.83	295,576.83		297,200.75	5.0
TAXABLE FUNDS						
=====						
4,735.76	FEDERATED INSTL TR HIGH YIELD BOND FUND	47,405.00	47,405.00	10.01	47,405.00	7.1
509.04	FEDERATED EMERGING MARKETS DEBT FUND INSTL SHARES	5,411.10	5,411.10	9.24	4,703.53	5.0

UNITS	DESCRIPTION	BOOK VALUE	TAX COST	CURRENT PRICE	MARKET VALUE	EST CURRENT INC YIELD
	TOTAL TAXABLE FUNDS	52,816.10	52,816.10		52,108.53	3,607 6.9
	COMMON STOCK					
	=====					
470	ADOBE SYSTEMS INC	17,786.86	17,786.86	45.75	21,502.50	12 0.1
650	AMERICAN INTL GROUP INC	27,058.53	27,058.53	46.46	30,199.00	260 0.9
130	ANADARKO PETROLEUM CORPORATION	11,526.79	11,526.79	91.42	11,884.60	94 0.8
90	APPLE INC	33,482.79	33,482.79	487.216	43,849.44	1,098 2.5
315	BED BATH BEYOND INC	21,098.95	21,098.95	73.74	23,228.10	0 0.0
410	BURBERRY GROUP PLC SPONSORED ADR	17,670.79	17,670.79	47.459	19,458.19	349 1.8
415	CVS CAREMARK CORP	18,906.73	18,906.73	58.05	24,090.75	374 1.6
380	CITRIX SYSTEMS INC	20,681.72	20,490.05	70.77	26,892.60	0 0.0
380	COGNIZANT TECHNOLOGY SOLUTIONS CORP CL A	17,600.84	17,446.74	73.30	27,854.00	0 0.0
280	CYTEC INDS INC	18,465.73	18,465.73	74.78	20,938.40	140 0.7
530	WALT DISNEY CO	24,822.43	24,181.39	60.83	32,239.90	398 1.2
260	EOG RESOURCES INC	25,904.93	25,904.93	157.05	40,833.00	195 0.5
290	ECOLAB INC	13,559.71	12,424.93	91.35	26,491.50	267 1.0
620	EXXON MOBIL CORP	44,868.72	43,841.27	87.16	54,039.20	1,562 2.9
420	FMC CORP	17,710.74	17,710.74	66.61	27,976.20	227 0.8
2,535	FORD MOTOR CO NEW	36,000.25	34,291.72	16.19	41,041.65	1,014 2.5
390	FREEPORT-MCMORAN COPPER & GOLD INC CL B	12,044.93	12,044.93	30.22	11,785.80	488 4.1
1,965	GENERAL ELECTRIC CO	33,080.77	33,080.77	23.14	45,470.10	1,493 3.3
55	GOOGLE INC	39,067.15	39,067.15	846.90	46,579.50	0 0.0
3,850	HUNTINGTON BANCSHARES INC	27,765.48	27,765.48	8.24	31,724.00	770 2.4
210	MCKESSON CORP INC	16,432.25	16,432.25	121.41	25,496.10	202 0.8
700	MERCK & CO INC NEW	28,566.97	28,566.97	47.29	33,103.00	1,204 3.6
533	MICROSOFT CORP	10,726.60	9,172.74	33.40	17,802.20	490 2.8
115	O'REILLY AUTOMOTIVE INC NEW	10,088.68	10,088.68	122.71	14,111.65	0 0.0
535	PNC FINANCIAL SERVICES GROUP	31,580.73	31,580.73	72.27	38,664.45	942 2.4
125	PARKER HANNIFIN CORP	12,707.70	12,707.70	99.95	12,493.75	225 1.8
260	PHILLIPS 66	10,446.35	10,446.35	57.10	14,846.00	325 2.2
250	PRAXAIR INC	10,898.59	8,358.25	117.40	29,350.00	600 2.0
245	RANGE RESOURCES CORP	10,942.27	9,234.56	74.98	18,370.10	39 0.2
165	SVB FINANCIAL GROUP	9,489.89	9,181.23	82.80	13,662.00	0 0.0
340	SANOFI AVENTIS ADR	14,910.81	14,910.81	47.78	16,245.20	427 2.6

UNITS	DESCRIPTION	BOOK VALUE	TAX COST	CURRENT PRICE	MARKET VALUE	ESTCURRENT INC YIELD
510	SCHLUMBERGER LTD	36,532.59	36,532.59	80.94	41,279.40	638 1.5
705	TARGET CORP	38,009.09	38,009.09	63.31	44,633.55	1,213 2.7
150	TRAVELERS COS INC	7,857.59	7,563.76	79.90	11,985.00	300 2.5
950	US BANCORP DEL	23,311.75	22,479.39	36.13	34,323.50	874 2.5
495	UNILEVER NV	16,622.85	16,622.85	37.63	18,626.85	565 3.0
80	UNION PACIFIC CORP	6,571.12	6,040.71	153.54	12,283.20	253 2.1
171	WHITEWAVE FOODS CO CL A	2,404.98	2,404.98	19.12	3,269.52	0 0.0
578	WHITEWAVE FOODS CO CL B	9,171.86	9,173.61	18.95	10,953.10	0 0.0
485	ACCENTURE PLC IRELAND SHS CLASS A	14,936.52	14,029.29	72.25	35,041.25	786 2.2
880	CHECK POINT SOFTWARE TECH	33,243.48	33,243.48	56.07	49,341.60	0 0.0
	TOTAL COMMON STOCK	834,557.51	821,027.29		1,103,959.85	17,824 1.6
	EQUITY FUNDS					
	=====					
475	ISHARES MSCI GERMANY INDEX FUND	10,880.30	10,880.30	25.66	12,188.50	207 1.7
800	ISHARES MSCI EMERGING MKT	33,674.18	30,398.50	38.02	30,416.00	615 2.0
1,695.29	SMATTHEWS ASIA DIVIDEND FUND INSTL CLASS	26,243.35	26,243.35	15.07	25,548.10	1,095 4.3
470	VANGUARD HIGH DIVIDEND YIELD ETF	21,277.19	21,277.19	56.59	26,597.30	787 3.0
375	WISDOMTREE JAPAN HEDGED EQUITY ETF	17,855.25	17,855.25	43.83	16,436.25	181 1.1
	TOTAL EQUITY FUNDS	109,930.27	106,654.59		111,186.15	2,885 2.6
	FIXED VALUE MONEY FUNDS					
	=====					
	FEDERATED MONEY MKT OBLIGS GOVT OBLIGS TAX-MGD FD INSTL SHS (FUND #636)	49,230.51	49,230.51		49,230.51	5 0.0
	PRINCIPAL CASH	25,043.11	25,043.11		25,043.11	0.0
	TOTAL FUND	1,454,362.93	1,437,557.03		1,725,093.23	42,492 2.5

ACCT 1254390  
 ASSETS HELD 08/31/2013  
 VALUED AS OF 08/31/2013

CAMBRIDGE TRUST COMPANY  
 SCHEDULE OF INCOME INVESTMENTS  
 JOSEPH O'GORMAN TRUST  
 UNDER WILL

UNITS	DESCRIPTION	BOOK VALUE	TAX COST	CURRENT PRICE	MARKET VALUE	ESTCURRENT INC YIELD
	FIXED VALUE MONEY FUNDS					
	=====					
	FEDERATED MONEY MKT OBLIGS GOVT	7,376.40	7,376.40		7,376.40	1 0.0
	OBLIGS TAX-MGD FD INSTL SHS					
	(FUND #636)					
	INCOME CASH	95.59	95.59		95.59	0.0
	TOTAL FUND	7,471.99	7,471.99		7,471.99	1 0.0

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

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
ANADARKO PETE CO	12.	12.
APPLE COMPUTER INC	1,026.	1,026.
BOEING CO DATED 07/28/2009 4.875% 02/15/	784.	784.
BURBERRY GROUP PLC SPONSORED ADR	262.	262.
CVS CORP	348.	348.
CHEVRON CORP DATED 03/03/2009 3.95% 03/0	1,618.	1,618.
CYTEC INDS INC	140.	140.
DISNEY WALT CO	326.	326.
EOG RESOURCES INC	186.	186.
ECOLAB INC COM	318.	318.
EXXON MOBIL CORP	1,451.	1,451.
FMC CORP	208.	208.
FEDERAL HOME LOAN MORTGAGE CORP PC GOLD	1,024.	1,024.
FEDERAL HOME LN MTG CORP DATED 01/30/200	1,120.	1,120.
FEDERAL NATIONAL MORTGAGE ASSOC DTD 09/2	1,094.	1,094.
FEDERATED INSTL TR HIGH YIELD BOND FUND	236.	236.
FEDERATED EMERGING MARKETS DEBT FUND INS	179.	179.
FOMENTO ECONOMICO MEXICANO S.A.B. DE C.V	73.	73.
FORD MTR CO DEL NEW	614.	614.
GENERAL ELECTRIC CO	1,641.	1,641.
GENERAL ELECTRIC CAP CORP DATED 09/17/20	1,385.	1,385.
GOLDMAN SACHS GP DATED 08/30/2007 6.25%	624.	624.
HUNTINGTON BANCSHARES INC	414.	414.
ISHARES MSCI GERMANY INDEX FUND	207.	207.
ISHARES MSCI EMERGING MKT	641.	641.
MATTHEWS ASIA DIVIDEND FUND INSTL CLASS	384.	384.
MCKESSON HBOC INC	168.	168.
MERCK & CO INC DATED 06/25/2009 MAKE WHO	1,372.	1,372.
MERCK & CO INC NEW	1,197.	1,197.
MICROSOFT CORP	598.	598.
FEDERATED GOVT OBLIG	6.	6.
PNC BANK CORP	755.	755.

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STATEMENT 1

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

DESCRIPTION -----	REVENUE AND EXPENSES PER BOOKS -----	NET INVESTMENT INCOME -----
PACCAR INC NT DATED 02/13/2009 6.875% 02	3,109.	3,109.
PEPSICO INC	323.	323.
PETROBRAS INTL DATED 02/06/2012 3.5% 02	922.	922.
PHILLIPS 66	228.	228.
PRAXAIR INC	575.	575.
PROCTER & GAMBLE CO	287.	287.
RANGE RESOURCES CORP	41.	41.
SPDR SERIES TRUST BARCLAYS HIGH YIELD BO	2,832.	2,832.
SANOFI AVENTIS ADR	609.	609.
SCHLUMBERGER LTD	596.	596.
SNAP-ON INC DATED 12/14/2010 4.25% 01/15	2,041.	2,041.
TARGET CORP	1,015.	1,015.
TRAVELERS COS INC	743.	743.
US BANCORP DEL	954.	954.
UNILEVER NV NEW YORK SHRS NEW	635.	635.
UNION PAC CORP	415.	415.
VANGUARD HIGH DIVIDEND YIELD ETF	1,190.	1,190.
YUM BRANDS	127.	127.
ACCENTURE PLC IRELAND SHS CLASS A	786.	786.
RENAISSANCERE HLDGS LTD	90.	90.
SEADRILL LTD	294.	294.
VALIDUS HOLDINGS LTD	700.	700.
TOTAL	----- 38,923. =====	----- 38,923. =====

JOSEPH O'GORMAN TRUST UNDER WILL C/O

04-6957171

FORM 990PF, PART I - ACCOUNTING FEES  
=====

DESCRIPTION -----	REVENUE AND EXPENSES PER BOOKS -----	NET INVESTMENT INCOME -----	ADJUSTED NET INCOME -----	CHARITABLE PURPOSES -----
TAX PREPARATION FEE (NON-ALLOC	1,250.			1,250.
TOTALS	1,250.	NONE	NONE	1,250.

JOSEPH O'GORMAN TRUST UNDER WILL C/O

04-6957171

FORM 990PF, PART I - TAXES  
=====

DESCRIPTION -----	REVENUE AND EXPENSES PER BOOKS -----	NET INVESTMENT INCOME -----
FOREIGN TAXES	274.	274.
FEDERAL TAX PAYMENT - PRIOR YE	750.	750.
FOREIGN TAXES ON QUALIFIED FOR	20.	20.
FOREIGN TAXES ON NONQUALIFIED	6.	6.
	-----	-----
TOTALS	1,050.	1,050.
	=====	=====

JOSEPH O'GORMAN TRUST UNDER WILL C/O

04-6957171

FORM 990PF, PART I - OTHER EXPENSES

=====

DESCRIPTION -----	REVENUE AND EXPENSES PER BOOKS -----	NET INVESTMENT INCOME -----	CHARITABLE PURPOSES -----
OTHER ALLOCABLE EXPENSE-PRINCI	35.		35.
OTHER NON-ALLOCABLE EXPENSE -	8.	8.	
	-----	-----	-----
TOTALS	43.	8.	35.
	=====	=====	=====

AVERAGE MONTHLY FMV - 990PF, PART X, LINES 1a-1c

MONTH	LINE 1a-FMV SECURITIES	LINE 1b-FMV CASH BALANCES	LINE 1c-FMV OTHER ASSETS
JANUARY	1,584,722.	75,410.	
FEBRUARY	1,601,401.	73,347.	
MARCH	1,625,670.	64,469.	
APRIL	1,624,908.	77,805.	
MAY	1,650,266.	69,932.	
JUNE	1,625,798.	64,124.	
JULY	1,706,620.	88,583.	
AUGUST	1,650,819.	81,746.	
SEPTEMBER	1,645,913.	44,942.	
OCTOBER	1,640,367.	27,915.	
NOVEMBER	1,628,597.	39,993.	
DECEMBER	1,551,933.	112,534.	
TOTAL	19,537,014.	820,800.	
AVERAGE FMV	1,628,085.	68,400.	

**SCHEDULE D  
(Form 1041)**

Department of the Treasury  
Internal Revenue Service

**Capital Gains and Losses**

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

OMB No 1545-0092

**2012**

Name of estate or trust <b>JOSEPH O'GORMAN TRUST UNDER WILL C/O</b>	Employer identification number <b>04-6957171</b>
--	---

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

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

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

b Enter the short-term gain or (loss), if any, from Schedule D-1, line 1b . . . . .	<b>1b</b>	-1,971.
2 Short-term capital gain or (loss) from Forms 4684, 6252, 6781, and 8824 . . . . .	<b>2</b>	
3 Net short-term gain or (loss) from partnerships, S corporations, and other estates or trusts . . . . .	<b>3</b>	
4 Short-term capital loss carryover. Enter the amount, if any, from line 9 of the 2011 Capital Loss Carryover Worksheet . . . . .	<b>4</b>	( )
5 <b>Net short-term gain or (loss).</b> Combine lines 1a through 4 in column (f). Enter here and on line 13, column (3) on the back . . . . . ▶	<b>5</b>	-1,971.

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

(a) Description of property (Example 100 shares 7% preferred of "Z" Co )	(b) Date acquired (mo , day, yr )	(c) Date sold (mo , day, yr )	(d) Sales price	(e) Cost or other basis (see instructions)	(f) Gain or (loss) for the entire year Subtract (e) from (d)
<b>6a</b> LONG-TERM CAPITAL GAIN DIVIDENDS					41.

b Enter the long-term gain or (loss), if any, from Schedule D-1, line 6b . . . . .	<b>6b</b>	72,147.
7 Long-term capital gain or (loss) from Forms 2439, 4684, 6252, 6781, and 8824 . . . . .	<b>7</b>	
8 Net long-term gain or (loss) from partnerships, S corporations, and other estates or trusts . . . . .	<b>8</b>	
9 Capital gain distributions . . . . .	<b>9</b>	
10 Gain from Form 4797, Part I . . . . .	<b>10</b>	
11 Long-term capital loss carryover. Enter the amount, if any, from line 14 of the 2011 Capital Loss Carryover Worksheet . . . . .	<b>11</b>	( )
12 <b>Net long-term gain or (loss).</b> Combine lines 6a through 11 in column (f). Enter here and on line 14a, column (3) on the back . . . . . ▶	<b>12</b>	72,188.

For Paperwork Reduction Act Notice, see the Instructions for Form 1041. Schedule D (Form 1041) 2012

<b>Part III Summary of Parts I and II</b>		(1) Beneficiaries' (see instr.)	(2) Estate's or trust's	(3) Total
<b>Caution: Read the instructions before completing this part.</b>				
<b>13</b>	<b>Net short-term gain or (loss)</b> . . . . .	<b>13</b>		-1,971.
<b>14</b>	<b>Net long-term gain or (loss):</b>			
<b>a</b>	Total for year . . . . .	<b>14a</b>		72,188.
<b>b</b>	Unrecaptured section 1250 gain (see line 18 of the wrkst.) . . . . .	<b>14b</b>		
<b>c</b>	28% rate gain . . . . .	<b>14c</b>		
<b>15</b>	<b>Total net gain or (loss).</b> Combine lines 13 and 14a . . . . . ▶	<b>15</b>		70,217.

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

**Part IV Capital Loss Limitation**

<b>16</b>	Enter here and enter as a (loss) on Form 1041, line 4 (or Form 990-T, Part I, line 4c, if a trust), the <b>smaller</b> of: <b>a</b> The loss on line 15, column (3) or <b>b</b> \$3,000	<b>16</b>	{
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**Note:** If the loss on line 15, column (3), is more than \$3,000, or if Form 1041, page 1, line 22 (or Form 990-T, line 34), is a loss, complete the **Capital Loss Carryover Worksheet** in the instructions to figure your capital loss carryover.

**Part V Tax Computation Using Maximum Capital Gains Rates**

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

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

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

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

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



Name of estate or trust as shown on Form 1041. Do not enter name and employer identification number if shown on the other side.

Employer identification number

JOSEPH O'GORMAN TRUST UNDER WILL C/O

04-6957171

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

(a) Description of property (Example 100 sh. 7% preferred of "Z" Co)	(b) Date acquired (mo., day, yr)	(c) Date sold (mo., day, yr.)	(d) Sales price	(e) Cost or other basis (see instructions)	(f) Gain or (loss) Subtract (e) from (d)
6a 95. APACHE CORP	02/19/2009	09/14/2012	8,790.00	6,354.00	2,436.00
50000. CHEVRON CORP DATED 3.95% 03/0	02/26/2009	12/28/2012	52,050.00	49,908.00	2,142.00
140. ECOLAB INC COM	12/10/2009	01/08/2013	10,210.00	6,385.00	3,825.00
1139.73 FEDERAL HOME LOAN CORP PC GOLD POOL #J1-8103	02/24/2012	03/15/2013	1,140.00	1,170.00	-30.00
505.07 FEDERAL HOME LOAN M PC GOLD POOL #J1-8103 DATED	02/24/2012	04/15/2013	505.00	518.00	-13.00
772.42 FEDERAL HOME LOAN M PC GOLD POOL #J1-8103 DATED	02/24/2012	05/15/2013	772.00	793.00	-21.00
769.94 FEDERAL HOME LOAN M PC GOLD POOL #J1-8103 DATED	02/24/2012	06/17/2013	770.00	790.00	-20.00
824. FEDERAL HOME LOAN MOR PC GOLD POOL #J1-8103 DATED	02/24/2012	07/15/2013	824.00	846.00	-22.00
550.83 FEDERAL HOME LOAN M PC GOLD POOL #J1-8103 DATED	02/24/2012	08/15/2013	551.00	565.00	-14.00
50000. FEDERAL NATIONAL MO DTD 09/23/2002 4.375% 09/15	11/16/2004	09/15/2012	50,000.00	49,945.00	55.00
15. FOMENTO ECONOMICO MEXI DE C.V	03/30/2012	04/16/2013	1,853.00	1,223.00	630.00
90. FOMENTO ECONOMICO MEXI DE C.V	03/30/2012	04/25/2013	10,324.00	7,340.00	2,984.00
340. GENERAL ELECTRIC CO	12/15/2011	04/08/2013	7,799.00	5,724.00	2,075.00
525. MICROSOFT CORP	06/04/2009	09/14/2012	16,328.00	11,141.00	5,187.00
300. PEPSICO INC	01/03/2002	01/24/2013	21,576.00	14,626.00	6,950.00
25000. PETROBRAS INTL DATE 3.5% 02	02/08/2012	08/28/2013	24,956.00	25,066.00	-110.00
255. PROCTER & GAMBLE CO	03/10/2004	01/24/2013	17,904.00	13,632.00	4,272.00
165. QLIK TECHNOLOGIES INC	11/04/2011	11/16/2012	2,925.00	5,073.00	-2,148.00
15. RANGE RESOURCES CORP	08/05/2010	03/26/2013	1,234.00	591.00	643.00
1200. SPDR SERIES TRUST BA YIELD BO	11/28/2011	07/01/2013	47,254.00	45,916.00	1,338.00
95. SVB FINANCIAL GROUP	07/08/2011	04/08/2013	6,435.00	5,773.00	662.00
245. TRAVELERS COS INC	03/15/2010	08/07/2013	20,051.00	12,871.00	7,180.00
570. US BANCORP DEL	11/28/2011	12/17/2012	18,020.00	14,537.00	3,483.00
350. US BANCORP DEL	12/10/2010	12/17/2012	11,065.00	8,871.00	2,194.00
35. UNION PAC CORP	05/13/2010	11/19/2012	4,165.00	2,682.00	1,483.00

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

