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

OMB No 1545-0052

Department of the Treasury
Internal Revenue Service▶ Do not enter Social Security numbers on this form as it may be made public.
▶ Information about Form 990-PF and its separate instructions is at www.irs.gov/form990pf.**2013**

Open to Public Inspection

For calendar year 2013 or tax year beginning

, 2013, and ending

, 20

Name of foundation

Blanche M. Walsh Charity Trust

A Employer identification number

04-6311841

Number and street (or P.O. box number if mail is not delivered to street address)

P.O. Box 9531

Room/suite

B Telephone number (see instructions)

(978) 454-5655

City or town, state or province, country, and ZIP or foreign postal code

Lowell, MA 01853

C If exemption application is pending, check here ▶ ☐G Check all that apply: ☐ Initial return ☐ Initial return of a former public charity
☐ Final return ☐ Amended return
☐ Address change ☐ Name changeD 1. Foreign organizations, check here ▶ ☐2. Foreign organizations meeting the 85% test, check here and attach computation ▶ ☐E If private foundation status was terminated under section 507(b)(1)(A), check here ▶ ☐H Check type of organization: ☐ Section 501(c)(3) exempt private foundation
☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundationF If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ▶ ☐I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ▶ \$ 7,823,206
J Accounting method: ☒ Cash ☐ Accrual
☐ Other (specify) _____
(Part I, column (d) must be on cash basis)

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received (attach schedule)				
	2 Check <input type="checkbox"/> if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments	525	525	525	
	4 Dividends and interest from securities	253,626	253,626	253,626	
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10				
	b Gross sales price for all assets on line 6a				
	7 Capital gain net income (from Part IV, line 2)		44		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
b Less: Cost of goods sold					
c Gross profit or (loss) (attach schedule)					
11 Other income (attach schedule)	5,540	5,540	5,540		
12 Total. Add lines 1 through 11	259,691	259,735	259,691		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc.	55,500	55,500	55,500	55,500
	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				
	18 Taxes (attach schedule) (see instructions)	5,101	5,101	5,101	5,101
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	581	581	581	581
	24 Total operating and administrative expenses. Add lines 13 through 23	61,182	61,182	61,182	61,182
	25 Contributions, gifts, grants paid	199,500			199,500
26 Total expenses and disbursements. Add lines 24 and 25	260,682	61,182	61,182	260,682	
27 Subtract line 26 from line 12					
a Excess of revenue over expenses and disbursements	(991)				
b Net investment income (if negative, enter -0-)		197,953			
c Adjusted net income (if negative, enter -0-)			198,510		

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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	331,079	347,819	347,819
	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 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)	1,039,884	984,457	3,669,472
	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)	3,435,075	3,435,809	3,805,915
	14 Land, buildings, and equipment: basis ▶ Less: accumulated depreciation (attach schedule) ▶			
15 Other assets (describe ▶)				
16 Total assets (to be completed by all filers—see the instructions. Also, see page 1, item I)	4,806,038	4,768,085	7,823,206	
Liabilities	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable (attach schedule)			
	22 Other liabilities (describe ▶)			
23 Total liabilities (add lines 17 through 22)				
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 type="checkbox"/> and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds			
	28 Paid-in or capital surplus, or land, bldg., and equipment fund			
	29 Retained earnings, accumulated income, endowment, or other funds			
	30 Total net assets or fund balances (see instructions)			
	31 Total liabilities and net assets/fund balances (see instructions)	4,806,038	4,768,085	

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	4,806,038
2 Enter amount from Part I, line 27a	2	(991)
3 Other increases not included in line 2 (itemize) ▶	3	725
4 Add lines 1, 2, and 3	4	4,805,772
5 Decreases not included in line 2 (itemize) ▶	5	(37,687)
6 Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	4,768,085

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse, or common stock, 200 shs. MLC Co.)		(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a				
b				
c				
d				
e				
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)	
a				
b				
c				
d				
e				
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69				
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))	
a				
b				
c				
d				
e				
2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }			2	
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c) (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.

(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))
2012	268,287	4,886,600	.05
2011	253,909	4,807,225	.05
2010	259,481	4,071,005	.06
2009	228,069	4,063,125	.06
2008	322,621	5,491,375	.06
2 Total of line 1, column (d)			2 .28
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 .05
4 Enter the net value of noncharitable-use assets for 2013 from Part X, line 5			4 5,304,225
5 Multiply line 4 by line 3			5 265,211
6 Enter 1% of net investment income (1% of Part I, line 27b)			6 1,980
7 Add lines 5 and 6			7 267,191
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			8 258,702

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

1a	Exempt operating foundations described in section 4940(d)(2), check here <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 type="checkbox"/> and enter 1% of Part I, line 27b	1		
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col (b).			
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	2	3,959	
3	Add lines 1 and 2	3	3,959	
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4		
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5	3,959	
6	Credits/Payments.			
a	2013 estimated tax payments and 2012 overpayment credited to 2013	6a	5,665	
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	5,665	
8	Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8		
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9		
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	1,706	
11	Enter the amount of line 10 to be: Credited to 2014 estimated tax 1,706 Refunded	11		

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for the definition)? <i>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.</i>		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. ▶ \$ _____ (2) On foundation managers. ▶ \$ _____		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ \$ _____		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If "Yes," attach a detailed description of the activities</i>		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? <i>If "Yes," attach a conformed copy of the changes</i>		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If "Yes," attach the statement required by General Instruction T.</i>		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col (c), and Part XV</i>	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ▶		
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 <i>General Instruction G</i> ? <i>If "No," attach explanation</i>	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2013 or the taxable year beginning in 2013 (see instructions for Part XIV)? <i>If "Yes," complete Part XIV</i>		X
10 Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses</i>		X

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? Website address ▶	13	X	
14	The books are in care of ▶ <u>Robert F. Murphy, Jr.</u> Telephone no. ▶ <u>(978) 454-5655</u> Located at ▶ <u>321 Central Street, Lowell, MA</u> ZIP+4 ▶ <u>01852</u>			
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 2013, 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
	See the instructions for exceptions and filing requirements for Form TD F 90-22.1. If "Yes," enter the name of the foreign country ▶			X

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 instructions)?	1b	X
Organizations relying on a current notice regarding disaster assistance check here ▶ <input type="checkbox"/>		
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 2013?	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 2013, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2013? <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	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. ▶ 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 2013 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 2013.)	3b	X
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 2013?	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))?	<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 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		X
If "Yes" to 6b, file Form 8870.				
7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	<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
John C Donohoe Marblehead, MA	Trustee 2 week	\$18,500	-0-	-0-
Cynthia Kelleher Chelmsford, MA	Trustee 10 hrs/wk	\$18,500	-0-	-0-
Robert F. Murphy, Jr Lowell, MA	Trustee 11 hrs/wk	\$18,500	-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

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

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

Part IX-A Summary of Direct Charitable Activities

Expenses

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

Amount

Total. Add lines 1 through 3

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	2,500.000
b	Average of monthly cash balances	1b	350,000
c	Fair market value of all other assets (see instructions)	1c	2,535,000
d	Total (add lines 1a, b, and c)	1d	5,385,000
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	
2	Acquisition indebtedness applicable to line 1 assets	2	
3	Subtract line 2 from line 1d	3	5,385,000
4	Cash deemed held for charitable activities. Enter 1 1/2 % of line 3 (for greater amount, see instructions)	4	80,775
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	5,304,225
6	Minimum investment return. Enter 5% of line 5	6	265,211

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	265,211
2a	Tax on investment income for 2013 from Part VI, line 5	2a	3,959
b	Income tax for 2013. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	3,959
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	261,262
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	261,262
6	Deduction from distributable amount (see instructions)	6	
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	261,262

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	260,682
b	Program-related investments—total from Part IX-B	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	260,682
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	1,980
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	258,702

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 2012	(c) 2012	(d) 2013
1 Distributable amount for 2013 from Part XI, line 7				261,262
2 Undistributed income, if any, as of the end of 2013:				
a Enter amount for 2012 only				
b Total for prior years: 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2013:				
a From 2008	35,296			
b From 2009	31,195			
c From 2010	57,469			
d From 2011	21,085			
e From 2012	30,295			
f Total of lines 3a through e	175,340			
4 Qualifying distributions for 2013 from Part XII, line 4: ► \$ _____				
a Applied to 2012, but not more than line 2a			580	
b Applied to undistributed income of prior years (Election required—see instructions)				
c Treated as distributions out of corpus (Election required—see instructions)				
d Applied to 2013 distributable amount				260,682
e Remaining amount distributed out of corpus				
5 Excess distributions carryover applied to 2013 (If an amount appears in column (d), the same amount must be shown in column (a).)				
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5				
b Prior years' undistributed income. Subtract line 4b from line 2b				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed				
d Subtract line 6c from line 6b. Taxable amount—see instructions				
e Undistributed income for 2012. Subtract line 4a from line 2a. Taxable amount—see instructions				
f Undistributed income for 2013. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2014				
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions)				
8 Excess distributions carryover from 2008 not applied on line 5 or line 7 (see instructions)				
9 Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a	140,044			
10 Analysis of line 9:				
a Excess from 2009	31,195			
b Excess from 2010	57,469			
c Excess from 2011	21,085			
d Excess from 2012	30,295			
e Excess from 2013	-0-			

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 2013, enter the date of the ruling
- b** Check box to indicate whether the foundation is a private operating foundation described in section ☐ 4942(j)(3) or ☐ 4942(j)(5)

	Tax year				(e) Total
	(a) 2013	(b) 2012	(c) 2011	(d) 2010	
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon:					
a "Assets" alternative test—enter:					
(1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test—enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed					
c "Support" alternative test—enter:					
(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

Part XV Supplementary Information (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year—see instructions.)**1 Information Regarding Foundation Managers:**

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

NONE

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

NONE

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

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

- a** The name, address, and telephone number or e-mail address of the person to whom applications should be addressed:

Cynthia A. Kelleher, P.O. Box 238, Chelmsford, MA 01824

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

Application and guidelines provided by Trust; write to above address.

- c** Any submission deadlines

Completed apps returned

Request for applications: November of calendar year; by December 1.

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

Roman Catholic charities only

Part XV **Supplementary Information (continued)****3 Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a <i>Paid during the year</i> <u>SEE ATTACHED LIST</u>				
Total			▶	3a
b <i>Approved for future payment</i>				
Total			▶	3b

Enter gross amounts unless otherwise indicated.

		Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions)
		(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1	Program service revenue:					
a						
b						
c						
d						
e						
f						
g	Fees and contracts from government agencies					
2	Membership dues and assessments					
3	Interest on savings and temporary cash investments			14	525	
4	Dividends and interest from securities			14	253,626	
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			14	5,540	
8	Gain or (loss) from sales of assets other than inventory			14	44	
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)				259,735	
13	Total. Add line 12, columns (b), (d), and (e)				13 259,735	

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

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

[illegible]


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?		Yes	No
a	Transfers from the reporting foundation to a noncharitable exempt organization of:		
	(1) Cash	1a(1)	x
	(2) Other assets	1a(2)	x
b	Other transactions:		
	(1) Sales of assets to a noncharitable exempt organization	1b(1)	x
	(2) Purchases of assets from a noncharitable exempt organization	1b(2)	x
	(3) Rental of facilities, equipment, or other assets	1b(3)	x
	(4) Reimbursement arrangements	1b(4)	x
	(5) Loans or loan guarantees	1b(5)	x
	(6) Performance of services or membership or fundraising solicitations	1b(6)	x
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c	x
d	If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received.		

[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) is based on all information of which preparer has any knowledge.		
		5/13/14	Trustee
	Signature of officer or trustee	Date	Title

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

Paid Preparer Use Only	Print/Type preparer's name	Preparer's signature	Date	Check <input type="checkbox"/> if self-employed	PTIN
	Firm's name ▶			Firm's EIN ▶	
	Firm's address ▶			Phone no	

<u>ORGANIZATION</u>	<u>PURPOSE</u>	<u>AMOUNT</u>
1. Franco American School 357 Pawtucket Street Lowell, MA 01854	Reading Program	\$5,000
2. St. John's Prep 72 Spring Street Danvers, MA 01923	Scholarships	10,000
3. Academy of Notre Dame 180 Middlesex Road Tyngsborough, MA 01879	Financial aid	10,000
4. St. Michael's Church 543 Bridge Street Lowell, MA 01850	Handicap ramp	5,000
5. Saint Patrick School 311 Adams Street Lowell, MA 01854	Financial aid	5,000
6. Ste Jeanne D'Arc School 68 Dracut Street Lowell, MA 01854	Purchase of MacBooks	4,500
7. Presentation of Mary Academy 209 Lawrence Street Methuen, MA 01844	Tuition assistance	5,000
8. Salve Regina University 100 Ochre Point Avenue Newport, RI 02840	Student scholarships	2,000
9. College of St Joseph 71 Clement Road Rutland, VT 05701	Financial aid	4,000
10. Blessed Stephen Bellisini Academy 94 Bradford Street Lawrence, MA 01842	Financial aid	11,000
11. St Michael School 21 Sixth Street Lowell, MA 01850	New reading series for kindergarten	5,000
12. St Margaret School 486 Stevens Street Lowell, MA 01851	Purchase of laptops	3,500

13. Immaculate Conception School 218 East Merrimack Street Lowell, MA 01852	Pre kindergarten program	4,000
14. Literacy Connection 637 Cambridge Street Brighton, MA 02135	Program for low income immigrants	3,000
15. Saint Antoine Residence 10 Rhodes Avenue North Smithfield, RI 02896	Purchase of wheelchairs and stand-aid lifts	3,000
16. Merrimack Valley Catholic Charities 70 Lawrence Street Lowell, MA 01852	Operating funds for food pantry	10,000
17. Montague Catholic Social Ministries 41-43 Third Street Turners Falls, MA 01376	Operating for Family Resource Center	3,000
18. D'Youville Senior Care Center 981 Varnum Avenue Lowell, MA 01854	Help funding lap pool	3,000
19. Lawrence Catholic Academy 101 Parker Street Lawrence, MA 01843	Tuition assistance	5,000
20. Cardinal Shehan Center 1494 Main Street Bridgeport, CT 06604	Assistance to summer day camp	4,000
21. Elizabeth Seton Acamdemy 2220 Dorchester Avenue Dorchester, MA 02124	Program activities	1,500
22. Notre Dame Cristo Rey High School 303 Haverhill Street Lawrence, MA 01840	Tuition assistance	4,500
23. Malden Catholic High School 99 Crystal Street Malden, MA 02148	Tuition assistance	4,000
24. Central Catholic High School 300 Hampshire Street Lawrence, MA 01841	Financial aid	5,000
25. Cristo Rey Boston High School 100 Savin Hill Avenue Boston, MA 02125	Scholarship aid	3,000

26. Marian High School 273 Union Avenue Framingham, MA 01702	Financial aid	\$3,000
27. Austin Prep 101 Willow Street Reading, MA 01867	Financial aid	4,000
28. Mercy Center 377 East 145th Street Bronx, NY 10454	Operating costs	2,000
29. Little Sisters of the Poor 140 Shepherd Lane Totowa, NJ 07512	Replacement of HVAC system	3,000
30. Saint Ignatius College Prep 1076 West Roosevelt Road Chicago, IL 60608	Financial aid	2,500
31. Thomas Aquinas College 10,000 Ojai Road Santa Paula, CA 93060	Financial aid	1,000
32. Thomas More College of Liberal Arts 6 Manchester Street Merrimack, NH 03054	Scholarships	3,000
33. Notre Dame School of Manhattan 327 West 13th Street New York, NY 10014	Coordinator's Salary	2,000
34. Queen of Peace High School 7659 S Linder Avenue Burbank, IL 60459	Scholarships	2,500
35. Our Lady of Guadalupe 17 Hawkesbury Drive St Louis, MO 63121	Language, social studies and arts books	3,000
36. Sisters of Charity of Leavenworth 4200 So Fourth Street Leavenworth, KS 66048	Furniture for school in Kenya	1,500
37. Catholic Charities of La Crosse 3710 East Avenue S LaCrosse, WI 54601	Low income families aid to avert life crises	3,000
38. Haitian Health Foundation 97 Sherman Street Norwich, CT 06360	Provide 50 children with a hot meal	2,000

39. Saint Joseph's College 278 Whites Bridge Road Standish, ME 04084	Scholarships	\$3,000
40. Ladies of Charity 120 W Baxter Avenue Knoxville, TN 37917	Underwear for needy	2,000
41. Bernardine Franciscan Sisters 450 St Bernardine Street Reading, PA 19607	Repair homes in Santo Domingo	2,000
42. Saint Patrick School 5900 West Belmont Avenue Chicago, IL 60634	Financial support	2,500
43. Sacred Heart University 5151 Park Avenue Fairfield, CT 06825-1000	Scholarships	2,000
44. Leo High School South Sangamon Street Chicago, IL 60620	Financial aid	2,000
45. Bethlehem Farm P.O. Box 415 Talcott, WV 24981	Improve housing for families in Apalachia	3,000
46. Reicher Catholic High School 2201 N 23rd Street Waco, TX 76708	Tuition assistance	2,500
47. Don Bosco Technical School 1151 S San Gabriel Blvd Rosemead, CA 91770	Tuition aid	2,500
48. Congregation of Sisters of IHM 2300 Adams Avenue Paxton, MA 18509	Reading and vocab materials for tutors	1,500
49. Holy Family Cristo Rey Catholic HS 2001 19th Street Birmingham, AL 35218	Financial Assistance	2,500
50. St Louis Catholic School 2208 North 23rd Street Waco, TX 76708	tuition assistance	2,500
51. Cross Catholic Outreach 2700 N Military Trail Suite 240 Boca Raton, FL 33427	Youth hunger drive for Haiti and Nicaragua	1,000

52. Christian Urban Educational Service 2207 Wirt Street Omaha, NE 67811	Tuition aid	\$2,000
53. St Matthew Catholic School 400 W Sunset Road El Paso, TX 79922	Science equipment	2,000
54. San Juan Diego Academy 1650 Godfrey Avenue SW Wyoming, MI 49509	Tuition aid	2,500
55. Providence Center 2635 North 4th Street Philadelphia, PA 19133	Youth empowerment program for low income youth	2,000
56. St Vincent de Paul P.O. Box 129 Dracut, MA 01826	Operating	2,500
57. Notre Dame Montessori School 265 Mount Vernon Street Dorchester, MA 02125	Operating	2,000

BLANCHE M. WALSH CHARITY TRUST

#04-6311841

Form 990-PF (2013)

EXPLANATION OF XVI-B

The above organizations are all known to the Trustees to be Roman Catholic charities. It is also believed that all the organizations are non-profit tax exempt organizations listed in the Catholic Directory or have submitted tax exempt letters. Foreign Catholic charities have submitted letters attesting to the fact they are Catholic organizations. Since all the organizations are Roman Roman Catholic charities, the donations to them fulfilled the terms of the Trust. None of the organizations are in any related to the original Donor of the Trust. It is the belief of the Trustees that the funds were in fact used for the purposes for which they were donated. The Trustees requested and received from each donee organization a letter stating that they would in fact use the funds for which they were requested.

Blanche M. Walsh Charity Trust
2013 Form 990 PF
ID 04-6311841
Explanation of line 11, Part 1

1. Capital Gain distribution	\$3,168
2. Nondividend income	2,347
3. Unrecaptured gain	<u>25</u>
	\$5,540

Blanche M. Walsh Charity Trust

2013 Form 990 PF

ID 04-6311841

Explanation of Line 18 Taxes

1. Estimated taxes	5,000
2. Foreign taxes paid per UBS	<u>101</u>
	5,101

Blanche M. Walsh Charity Trust
2013 Form 990 PF
ID 04-6311841
Explanation of Line 23, Part 1.

1. Commonwealth of Massachusetts filing fee	\$125
2. Stamps	158
3. Post Office Box	186
4. Copies of the application form and tax returns	77
5. Envelopes	31
6. Bank fees	5
	<hr/> 581

Blanche M. Walsh Charity Trust
#04-63118421
Explanation of Balance Sheet

2013 Form 990PF

<u>CORPORATION</u>	<u>NO. OF SHARES</u>	<u>BEGINNING BALANCE</u>	<u>ENDING BALANCE</u>	<u>NO. OF SHARES</u>
1. Aegon	3,007	15,035.	15,035.	3,007
2. Aetna	3,840	107,520	107,520	3,840
2. Ameriprise Financial	475	3,476.	3,476.	475
3. AT&T	8,975	76,471.	76,153.	9,093
4. Bank of America	2,722	18,356.	18,356.	2,722
5. Centerpoint	5,200	80,000	80,000	5,200
6. Chessie (CSX)	2,400	9,624.	9,624.	14,400
7. Dominion Resources	3,000	22,875.	22,875.	3,000
8. Dow Chemical	2,311	13,676	13,676.	2,328
9.. Duke Power	780	23,000	23,000	780
10. Eastern Utilities	1,000	17,750.	-0-	-0-
11. Eastman Kodak	750	34,887.	-0-	-0-
12. E.I. Dupont	3,600	28,135.	28,135	3,600
13. Exxon Mobil	4,305	22,000	22,000	4,305
14. First Energy	873	35,552.	35,552.	873
15. Frontier	1,281	6,000	6,000	1,281
16. Hartford Financial	40	3,200	3,200	40
17. Host Hotels	1,529	25,000	25,000	1,565
18. Iberdrola	302	15,016	15,016	302
20. Idearc	259	2,800	-0-	-0-
22. JP MorganChase	2,450	33,246	33,246	2,450
23. LSI	63	825	825.	62
24. Lucent Technologies	222	8,408	8,408.	222
25. NCR	104	21,750.	21,750.	104
26. Nextera	600	35,000	35,000	600
27. News Corp	54	839	839	13
29. Northeast Utilities	1,497	20,911	34,311	3,465
30. NRG Energy	498	64,208	64,208	498
31. Pfizer	5000	75,000	75,000	5,000
32. Public Service Enterprise	3,000	45,429.	45,430.	3,000
33. Rayonier	1,485	7,266.	7,266	1,485
34. Raytheon	82	2,050	2,050	82
35. SCANNA	1,200	9,600.	9,600.	1,200
36. Spectra	1,170	20,000.	20,000	1,170
37. Starwood Hotels	2,499	30,375.	30,375.	2,499
38. Terradata	124	2,500	2,500	124
39. Twenty Century Fox	-0-	-0-	690	54
40. Wells Fargo	159	30,017	30,017	159
41. Verizon	5,343	70,273.	70,273.	5,343
42. Vodaphone Airtouch	35	319.	319.	35
43. Xcel	1,549	20,125	20,125	1,549
44. Xerox	2,388	4,715	4,715	2,388

Blanche M. Walsh Charity Trust
 #04-6311841
 Form 990-PF (2013)
 Explanation of Balance Sheet
 Lines 19(c)

	<u>Beginning Balance</u>	<u>Ending Balance</u>
<u>MUTUAL FUNDS</u>		
1. ACM Government Income	69,942.	69,942.
2. Alliance Bernstein Mortgage	31,529	31,529
3. American Funds Capital	1,130,849.	1,130,849
4. Blackrock	18,399	18,399
5. Boulder	15,000.	15,000
4 Fidelity Daily Income Trust	113,292.	113,303
5. Franklin Government Sec	447,282	447,282.
6. Franklin Income A	1,059,973	1,059,973.
7. Hancock	72,411	72,411
8. MFS Charter	18,238	18,238
9. MFS Government	36,000	36,000.
10. Pimco	352,447.	352,447.
11. MFS Income Fund	27,000	27,000
12. UBS Cashfund	-0-	723
13. Zweig	<u>42,713</u>	<u>42,713</u>
	3,435,075	3,435,809
<u>CASH ACCOUNTS</u>		
1. Eastern Bank	6,600	6,800
2. Enterprise Bank	50,000	50,000
3. TD Bank	40,000	40,000
4. TD Bank	10,000	10,000
5. TD Bank checking	34,506	61,235
6. Lowell Cooperative Bank	40,000	40,000
7. Lowell Five Cent Savings	40,000	40,000
8. Lowell Five Cent Savings	10,000	10,000
9. Lowell Five Cent Savings	540	540
10. Peoples United Bank	10,000	-0-
11. Peoples United Bank	960	960
12. Jeanne D'Arc Credit Union	62,779.	62,700
13. Washington Savings Bank	<u>25,494.</u>	<u>25,494</u>
	331,079	347,819

BLANCHE M. WALSH CHARITY TRUST

#04-6311841

Form 990-PF (2013)

Fair Market Value of Stock

1. Aegon	31,303.00
2. Aetna	263,386.00
3. Airtouch/Vodafone	1,376.00
4. Ameriprise Financial	54,648.00
5. AT&T	319,710.00
6. Bank of America	42,382.00
7. Centerpoint Energy	120,536.00
8. Chessie	414,288.00
9. Dominion Resources	194,070.00
10. Dow Chemical	103,363.00
11. Dupont	233,892.00
12. Duke Power	53,828.00
13. Exxon	425,666.00
14. First Energy	28,792.00
15. Frontier Communications	5,957.00
16. Hartford Financial	1,449.00
17. Host Hotels & Resorts	30,424.00
18. Iberdola	7,716.00
19. LSI	684.00
20. Lucent	976.00
21. JP Morgan Chase	143,276.00
22. NCR	3,542.00
23. News Corp	234.00
24. Nextera	51,372.00
25. Northeast Utilities	146,881.00
26. NRG Energy	14,302.00
27. Pfizer	153,150.00
28. Public Serv Enterprise	96,120.00
29. Rayonier	62,518.00
30. Raytheon	7,437.00
31. SCANA	56,316.00
32. Spectra Energy	41,675.00
33. Starwood Hotels	198,546.00
34. Teradata	5,641.00
35. Twenty First Century Fox	1,899.00
36. Verizon	262,255.00
37. Wells Fargo	7,219.00
38. Xcel Energy	43,279.00
39. Xerox	<u>29,062.00</u>
	3,669,472.00

Blanche M. Walsh Charity Trust
2013 Form 990-PF
04-6311841
Explanation of Fair Market Value
Mutual Funds

1. Alliance Bernstein Income	41,226
2. Alliance Bernstein Bond Fund	83,124
3. American Funds Capital Income	1,359,454
4. Blackrock Core Bond	23,940
5. Boulder Growth and income	15,027
6. Fidelity Daily Income	113,303
7. Franklin Income A	1,210,490
8. Franklin US Govt Sec A	457,561
9. Hancock	80,080
10. MFS Charter	13,575
11. MFS Govt	20,628
12. MFS Intermediate Income	13,986
13. Pimco	357,918
14. Zweig	<u>15,603</u>
	3,805,915.

Blanche M. Walsh Charity Trust
#04-6311841
2013 Form 990 PF
Explanation of Part 111, Lines 3 and 5

Line 3

Carryover from 2012 as per UBS	\$725
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Line 5

Eastman Kodak no value per UBS	34,887
Ideac no value per UBS	<u>2,800</u>
	37,687

BLANCHE M. WALSH CHARITY TRUST

#04-6311841

2013 Form 990-PF

Explanation of Part IX-A

The Trust has donated funds to 57 Roman Catholic charities. It would be impossible for the Trustees to determine exactly how many individuals were served by these organizations on an individual basis. The Trust does not deal with individuals directly. The Trustees (nor the Trust) do not produce any papers nor do they convene any conferences on their own. The Trustees have no direct knowledge as to whether or not any of the 57 organizations themselves published any papers or convened any conferences outside of those organizations which asked for funding specifically for that purpose. Those organizations have been so identified in Part XV, section 3.