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Return of Private Foundation

OMB No 1545-0052

2013

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Department of the Treasury
Internal Revenue ServiceDo 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.

For calendar year 2013 or tax year beginning

, and ending

Name of foundation THE BOGER CHARITABLE TRUST		A Employer identification number 22-2776296
Number and street (or P O box number if mail is not delivered to street address) 29 IRVING STREET	Room/suite	B Telephone number 978-369-1476
City or town, state or province, country, and ZIP or foreign postal code CAMBRIDGE, MA 02138		C If exemption application is pending, check here ☐
G Check all that apply ☐ Initial return ☐ Final return ☐ Address change ☐ Initial return of a former public charity ☐ Amended return ☐ Name change		D 1 Foreign organizations, check here ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ☐
H Check type of organization ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here ☐
I Fair market value of all assets at end of year (from Part II, col (c), line 16) \$ 2,859,413.	J Accounting method ☒ Cash ☐ Accrual ☐ Other (specify) _____	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a).)		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received		51,853.		N/A	
2 Check ☐ if the foundation is not required to attach Sch B					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities		68,741.	68,953.		STATEMENT 2
5a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10		225,372.			STATEMENT 1
b Gross sales price for all assets on line 6a	576,522.				
7 Capital gain net income (from Part IV, line 2)			233,704.		
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)					
11 Other income			600.		STATEMENT 3
12 Total. Add lines 1 through 11		345,966.	303,257.		
13 Compensation of officers, directors, trustees, etc		0.	0.		0.
14 Other employee salaries and wages					
15 Pension plans, employee benefits					
16a Legal fees STMT 4		5,152.	0.		0.
b Accounting fees					
c Other professional fees STMT 5		27,800.	27,800.		0.
17 Interest					
18 Taxes STMT 6		5,683.	913.		0.
19 Depreciation and depletion					
20 Occupancy					
21 Travel, conferences, and meetings		60.	0.		0.
22 Printing and publications					
23 Other expenses STMT 7		99.	0.		0.
24 Total operating and administrative expenses. Add lines 13 through 23		38,794.	28,713.		0.
25 Contributions, gifts, grants paid		180,533.			180,533.
26 Total expenses and disbursements. Add lines 24 and 25		219,327.	28,713.		180,533.
27 Subtract line 26 from line 12		126,639.			
a Excess of revenue over expenses and disbursements			274,544.		
b Net investment income (if negative, enter -0-)					
c Adjusted net income (if negative, enter -0-)				N/A	

Part II Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only

		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing	2,068.	945.	945.
	2 Savings and temporary cash investments	65,363.	92,978.	92,978.
	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			
	7 Other notes and loans receivable ▶			
	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			
	b Investments - corporate stock STMT 10	1,762,074.	1,867,471.	2,763,461.
	c Investments - corporate bonds			
	11 Investments - land, buildings, and equipment basis ▶			
Less accumulated depreciation ▶				
12 Investments - mortgage loans				
13 Investments - other				
14 Land, buildings, and equipment basis ▶				
Less accumulated depreciation ▶				
15 Other assets (describe ▶ <u>DIVIDEND RECEIVABLE</u>)	4,018.	2,029.	2,029.	
16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item 1)	1,833,523.	1,963,423.	2,859,413.	
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			
	22 Other liabilities (describe ▶ <u>UNCLEARED CHECKS</u>)	23,200.	27,800.	
	23 Total liabilities (add lines 17 through 22)	23,200.	27,800.	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ ☐			
	and complete lines 24 through 26 and lines 30 and 31.			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ ☒			
	and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds	1,810,323.	1,935,623.	
	28 Paid-in or capital surplus, or land, bldg, and equipment fund	0.	0.	
29 Retained earnings, accumulated income, endowment, or other funds	0.	0.		
30 Total net assets or fund balances	1,810,323.	1,935,623.		
31 Total liabilities and net assets/fund balances	1,833,523.	1,963,423.		

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	1,810,323.
2 Enter amount from Part I, line 27a	2	126,639.
3 Other increases not included in line 2 (itemize) ▶ SEE STATEMENT 8	3	61.
4 Add lines 1, 2, and 3	4	1,937,023.
5 Decreases not included in line 2 (itemize) ▶ SEE STATEMENT 9	5	1,400.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	1,935,623.

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 SEE ATTACHED STATEMENTS					
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 576,522.		342,818.	233,704.		
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) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any			
a					
b					
c					
d					
e			233,704.		
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	233,704.	
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) If (loss), enter -0- in Part I, line 8			3	N/A	

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))
2012	106,925.	2,369,634.	.045123
2011	95,890.	2,307,929.	.041548
2010	108,852.	2,072,457.	.052523
2009	128,516.	1,737,020.	.073986
2008	136,404.	2,387,623.	.057130
2 Total of line 1, column (d)			2 .270310
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 .054062
4 Enter the net value of noncharitable-use assets for 2013 from Part X, line 5			4 2,651,460.
5 Multiply line 4 by line 3			5 143,343.
6 Enter 1% of net investment income (1% of Part I, line 27b)			6 2,745.
7 Add lines 5 and 6			7 146,088.
8 Enter qualifying distributions from Part XII, line 4			8 180,533.

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate.
See the Part VI instructions

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

1a Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1 Date of ruling or determination letter _____ (attach copy of letter if necessary-see instructions)		1	2,745.
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☒ and enter 1% of Part I, line 27b			
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col (b)			
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		2	0.
3 Add lines 1 and 2		3	2,745.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		4	0.
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-		5	2,745.
6 Credits/Payments			
a 2013 estimated tax payments and 2012 overpayment credited to 2013	6a	3,080.	
b Exempt foreign organizations - tax withheld at source	6b		
c Tax paid with application for extension of time to file (Form 8868)	6c		
d Backup withholding erroneously withheld	6d		
7 Total credits and payments. Add lines 6a through 6d	7	3,080.	
8 Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached	8		
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9		
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	335.	
11 Enter the amount of line 10 to be Credited to 2014 estimated tax ☒ 335. Refunded ☒	11	0.	

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
1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for the definition)? 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.		X
1c 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 ☒ \$ 0. (2) On foundation managers ☒ \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ☒ \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		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? If "Yes," attach the statement required by General Instruction T.		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? If "Yes," complete Part II, col. (c), and Part XV	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ☒ MA		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	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)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		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 ► N/A	13	X	
14	The books are in care of ► THE FOUNDATION Located at ► 29 IRVING STREET, CAMBRIDGE, MA Telephone no ► 978-369-1476 ZIP+4 ► 02138			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year ► 15 N/A			
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? See the instructions for exceptions and filing requirements for Form TD F 90-22.1. If "Yes," enter the name of the foreign country ►	16	Yes	No 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? ☐ Yes ☒ No		
(2)	Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No		
(3)	Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No		
(4)	Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☒ No		
(5)	Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☒ No		
(6)	Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days) ☐ Yes ☒ No		
b	If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here N/A ► ☐	1b	
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 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? If "Yes," list the years ► ☐ Yes ☒ No		
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) N/A	2b	
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ►		
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☒ No		
b	If "Yes," did it have excess business holdings in 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.) N/A	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 2013?	4b	X

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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)?

☐ 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)?

N/A

5b

Organizations relying on a current notice regarding disaster assistance check here

☒

c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?

N/A

☐ Yes ☐ No

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

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?

☐ Yes ☒ No

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

6b

X

If "Yes" to 6b, file Form 8870.

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?

☐ Yes ☒ No

b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?

N/A

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.

(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
WILLIAM P. BOGER, III 29 IRVING STREET CAMBRIDGE, MA 02138	TRUSTEE 0.00	0.	0.	0.
BARBARA C. BOGER 29 IRVING STREET CAMBRIDGE, MA 02138	TRUSTEE 0.00	0.	0.	0.

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

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				

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



0

Part 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	2,578,643.
b	Average of monthly cash balances	1b	113,195.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	2,691,838.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	2,691,838.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	40,378.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	2,651,460.
6	Minimum investment return. Enter 5% of line 5	6	132,573.

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	132,573.
2a	Tax on investment income for 2013 from Part VI, line 5	2a	2,745.
b	Income tax for 2013 (This does not include the tax from Part VI)	2b	
c	Add lines 2a and 2b	2c	2,745.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	129,828.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	129,828.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	129,828.

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	180,533.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	180,533.
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	5	2,745.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	177,788.

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				129,828.
2 Undistributed income, if any, as of the end of 2013				
a Enter amount for 2012 only			87,570.	
b Total for prior years		0.		
3 Excess distributions carryover, if any, to 2013				
a From 2008				
b From 2009				
c From 2010				
d From 2011				
e From 2012				
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2013 from Part XII, line 4 ▶ \$ 180,533.				
a Applied to 2012, but not more than line 2a			87,570.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2013 distributable amount				92,963.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2013 (If an amount appears in column (d), the same amount must be shown in column (a))	0.			0.
6 Enter the net total of each column as indicated below:	0.			
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	0.			
b Prior years' undistributed income Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b Taxable amount - see instructions		0.		
e Undistributed income for 2012 Subtract line 4a from line 2a Taxable amount - see instr			0.	
f Undistributed income for 2013 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2014				36,865.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)	0.			
8 Excess distributions carryover from 2008 not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a	0.			
10 Analysis of line 9				
a Excess from 2009				
b Excess from 2010				
c Excess from 2011				
d Excess from 2012				
e Excess from 2013				

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

N/A

- 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 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	Prior 3 years			(e) Total
	(a) 2013	(b) 2012	(c) 2011	(d) 2010	
2 a 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))

BARBARA C. BOGER

- 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

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

- c Any submission deadlines

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

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year				
ALZHEIMER'S DISEASE RESEARCH - BRIGHT FOCUS FOUNDATION		501(C)(3)	THE PURPOSE OF EACH CONTRIBUTION	150.
AMERICAN INDIAN COLLEGE FUND		501(C)(3)	IS TO PROVIDE SUPPORT FOR THE	500.
AMERICAN REPERTORY THEATER		501(C)(3)		250.
AMHERST COLLEGE		501(C)(3)	RESPECTIVE ORGANIZATION, INCLUDING	250.
BOSTON COLLEGE		501(C)(3)	BENEFIT THOSE IN NEED.	100.
Total	SEE CONTINUATION SHEET(S)			180,533.
b Approved for future payment				
NONE				
Total				0.

Part XVII Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

- | | | Yes | No |
|----------|--|--------------|----|
| 1 | Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations? | | |
| a | Transfers from the reporting foundation to a noncharitable exempt organization of | | |
| | (1) Cash | 1a(1) | X |
| | (2) Other assets | 1a(2) | X |
| b | Other transactions | | |
| | (1) Sales of assets to a noncharitable exempt organization | 1b(1) | X |
| | (2) Purchases of assets from a noncharitable exempt organization | 1b(2) | X |
| | (3) Rental of facilities, equipment, or other assets | 1b(3) | X |
| | (4) Reimbursement arrangements | 1b(4) | X |
| | (5) Loans or loan guarantees | 1b(5) | X |
| | (6) Performance of services or membership or fundraising solicitations | 1b(6) | X |
| c | Sharing of facilities, equipment, mailing lists, other assets, or paid employees | 1c | X |
| d | If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received. | | |

[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
N/A		

**Sign
Here**

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

Signature of officer or trustee Barbara C Boger

Date 5/9/14

TRUSTEE
Title

May the IRS discuss this return with the preparer shown below (see instr)?

☒ Yes ☐ No**Paid
Preparer
Use Only**

Print/Type preparer's name

PETER W. FINK

Preparer's signature

John W. Linn

Date

5/6/14

Check ☐ if
self-employed

PTIN

P00635003

Firm's name ► LYNCH, BREWER, HOFFMAN & FINK, LLP

Firm's EIN ► 04-2619139

Firm's address ► 75 FEDERAL STREET, 7TH FLOOR
BOSTON, MA 02110

Phone no 617-951-0800

Form **990-PF** (2013)

Schedule B(Form 990, 990-EZ,
or 990-PF)Department of the Treasury
Internal Revenue Service**Schedule of Contributors**

▶ Attach to Form 990, Form 990-EZ, or Form 990-PF.

▶ Information about Schedule B (Form 990, 990-EZ, or 990-PF) and
its instructions is at www.irs.gov/form990

OMB No 1545-0047

2013

Name of the organization

THE BOGER CHARITABLE TRUST

Employer identification number

22-2776296

Organization type (check one)

Filers of:

Section:

Form 990 or 990-EZ

☐ 501(c)() (enter number) organization☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation☐ 527 political organization

Form 990-PF

☒ 501(c)(3) exempt private foundation☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation☐ 501(c)(3) taxable private foundationCheck if your organization is covered by the **General Rule** or a **Special Rule**.**Note.** Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.**General Rule**

- ☒ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II.

Special Rules

- ☐ For a section 501(c)(3) organization filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi) and received from any one contributor, during the year, a contribution of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 for use *exclusively* for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals. Complete Parts I, II, and III.
- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions for use *exclusively* for religious, charitable, etc., purposes, but these contributions did not total to more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Do not complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions of \$5,000 or more during the year ▶ \$ _____

Caution. An organization that is not covered by the General Rule and/or the Special Rules does not file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2, of its Form 990; or check the box on line H of its Form 990-EZ or on its Form 990-PF, Part I, line 2, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990, 990-EZ, or 990-PF. Schedule B (Form 990, 990-EZ, or 990-PF) (2013)

Name of organization

Employer identification number

THE BOGER CHARITABLE TRUST

22-2776296

Part I Contributors (see instructions). Use duplicate copies of Part I if additional space is needed.

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	THE CRAWFORD CLUT FOR CHILDREN NORTHERN TRUST, 50 SOUTH LASALLE STREET B-3 CHICAGO, IL 60603	\$ 25,978.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
2	THE CRAWFORD CLUT FOR GRANDCHILDREN NORTHERN TRUST, 50 SOUTH LASALLE STREET B-3 CHICAGO, IL 60603	\$ 25,875.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)

Name of organization

Employer identification number

THE BOGER CHARITABLE TRUST

22-2776296

Part II Noncash Property (see instructions). Use duplicate copies of Part II if additional space is needed.

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	

Name of organization

Employer identification number

THE BOGER CHARITABLE TRUST**22-2776296**

Part III Exclusively religious, charitable, etc., individual contributions to section 501(c)(7), (8), or (10) organizations that total more than \$1,000 for the year. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of exclusively religious, charitable, etc., contributions of \$1,000 or less for the year (Enter this information once.) ▶ \$ _____

Use duplicate copies of Part III if additional space is needed.

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee

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	500 SHARES OF ANALOG DEVICES INC	P	08/29/11	08/13/13
b	200 SHARES OF BARD C R INCORPORATED		04/15/03	12/06/13
c	200 SHARES OF BAXTER INTERNATIONAL INC		08/03/09	12/06/13
d	400 SHARES OF BOEING CO	D	01/01/51	01/16/13
e	100 SHARES OF BOEING CO		06/04/09	01/16/13
f	500 SHARES OF BROADCOM CORP CL A		03/16/11	07/19/13
g	200 SHARES OF CHINA MOBILE LTD ADR		06/04/09	12/06/13
h	100 SHARES OF CORE LABORATORIES N V		05/23/05	11/25/13
i	500 SHARES OF FACTSET RESEARCH SYSTEMS		08/14/02	07/19/13
j	400 SHARES OF FEDEX CORPORATION		07/28/06	10/28/13
k	1000 SHARES OF HCP INC		08/14/02	02/05/13
l	200 SHARES OF INTL BUSINESS MACHINES		07/17/07	11/25/13
m	1000 SHARES OF ISHARES MSCI CDA IDX ETF		09/27/05	05/22/13
n	200 SHARES OF ISHARES S&P US PFD FUND		11/28/08	08/13/13
o	500 SHARES OF ISHARES S&P IS PFD FUND		11/28/08	09/13/13

(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 24,592.		16,378.	8,214.
b 27,473.		6,251.	21,222.
c 13,469.		11,284.	2,185.
d 29,673.		4,743.	24,930.
e 7,418.		4,962.	2,456.
f 16,828.		19,352.	-2,524.
g 10,991.		10,106.	885.
h 18,557.		1,157.	17,400.
i 53,999.		7,394.	46,605.
j 53,251.		42,105.	11,146.
k 46,543.		16,658.	29,885.
l 35,993.		22,050.	13,943.
m 28,513.		21,320.	7,193.
n 7,649.		5,387.	2,262.
o 19,057.		13,467.	5,590.

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	(l) Losses (from col (h)) Gains (excess of col (h) gain over col (k), but not less than "-0-")
a			8,214.
b			21,222.
c			2,185.
d			24,930.
e			2,456.
f			-2,524.
g			885.
h			17,400.
i			46,605.
j			11,146.
k			29,885.
l			13,943.
m			7,193.
n			2,262.
o			5,590.

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)
If (loss), enter "-0-" in Part I, line 8 }

3

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	1000 SHARES OF ISHARES S&P US PFD FUND		12/15/08	10/15/13
b	1000 SHARES OF JPMORGAN CHASE 8.625% PFD		06/19/09	07/19/13
c	200 SHARES OF METHANEX CORP		01/17/12	11/25/13
d	1000 SHARES OF NUVEEN CREDIT STRAT INCM		03/10/10	11/25/13
e	600 SHARES OF SECTOR SPDR MATERIALS FD		04/30/09	07/26/13
f	200 SHARES OF SPDR GOLD TRUST SHARES		03/10/08	11/25/13
g	1000 SHARES OF SUNCOR ENERGY INC		02/22/12	01/16/13
h	100 SHARES OF WALMART STORES INC		10/26/09	11/25/13
i	0.42 SHARES OF ROYCE GLOBAL VALUE TRUST		10/18/13	10/18/13
j	CAPITAL GAINS DIVIDENDS			
k				
l				
m				
n				
o				

(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 37,636.		26,561.	11,075.
b 25,513.		25,382.	131.
c 12,421.		5,328.	7,093.
d 9,382.		8,160.	1,222.
e 24,196.		15,489.	8,707.
f 23,981.		19,025.	4,956.
g 34,145.		35,238.	-1,093.
h 8,032.		5,017.	3,015.
i 4.		4.	0.
j 7,206.			7,206.
k			
l			
m			
n			
o			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	(l) Losses (from col (h)) Gains (excess of col (h) gain over col (k), but not less than "-0-")
a			11,075.
b			131.
c			7,093.
d			1,222.
e			8,707.
f			4,956.
g			-1,093.
h			3,015.
i			0.
j			7,206.
k			
l			
m			
n			
o			

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	233,704.
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) If (loss), enter "-0-" in Part I, line 8 }	3	N/A

Part XV Supplementary Information**3 Grants and Contributions Paid During the Year (Continuation)**

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
BOSTON DEBATE LEAGUE		501(C)(3)		17,140.
BOSTON SYMPHONY ORCHESTRA		501(C)(3)		1,000.
BOSTON UNIVERSITY		501(C)(3)		100.
CAMBRIDGE ELLIS SCHOOL		501(C)(3)		500.
CAMBRIDGE FIREFIGHTERS RELIEF		501(C)(3)		100.
CAMBRIDGE POLICE MUTUAL AID SOCIETY		501(C)(3)		100.
CAMBRIDGE SCHOOL VOLUNTEERS		501(C)(3)		250.
CHESAPEAKE BAY FOUNDATION		501(C)(3)		50.
CHILDREN'S HOSPITAL		501(C)(3)		1,000.
CHILDREN'S NATIONAL MEDICAL CENTER		501(C)(3)		105.
Total from continuation sheets				179,283.

Part XV Supplementary Information**3** Grants and Contributions Paid During the Year (Continuation)

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
CONCORD CARLISLE COMMUNITY CHEST		501(C)(3)		150.
CONCORD LAND CONSERVATION TRUST		501(C)(3)		100.
CRADLES TO CRAYONS		501(C)(3)		500.
DEFENDERS OF WILDLIFE		501(C)(3)		25.
DENNIS CONSERVATION TRUST		501(C)(3)		250.
DICKINSON COLLEGE		501(C)(3)		350.
EL SAVADOR EYE CAMPAIGN		501(C)(3)		100.
EMERSON HOSPITAL		501(C)(3)		6,000.
FENN SCHOOL		501(C)(3)		850.
FRIENDS FOR TOMORROW		501(C)(3)		250.
Total from continuation sheets				

Part XV Supplementary Information**3** Grants and Contributions Paid During the Year (Continuation)

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
FRIENDS OF THE CAMBRIDGE PUBLIC LIBRARY		501(C)(3)		200.
GEORGE WASHINGTON UNIVERSITY		501(C)(3)		100.
GREATER BOSTON FOODBANK		501(C)(3)		250.
HARRIS CENTER		501(C)(3)		200.
HARVARD GRADUATE OF EDUCATION		501(C)(3)		100.
HARVARD MEDICAL SCHOOL		501(C)(3)		500.
HOLLINS UNIVERSITY		501(C)(3)		500.
HUNTINGTON THEATER		501(C)(3)		1,002.
INTERNATIONAL MYELOMA FOUNDATION		501(C)(3)		100.
JEANINE GEIGER CRISIS CENTER		501(C)(3)		200.
Total from continuation sheets				

Part XV Supplementary Information**3 Grants and Contributions Paid During the Year (Continuation)**

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
LAWRENCE ACADEMY		501(C)(3)		400.
LOWER MIDDLESEX VOLUNTEER FIRE DEPARTMENT		501(C)(3)		100.
MCLEAN HOSPITAL		501(C)(3)		129,629.
MEADOWBROOK SCHOOL		501(C)(3)		1,500.
MOUNT AUBURN HOSPITAL		501(C)(3)		50.
MOUNT HOLYOKE COLLEGE		501(C)(3)		250.
NASHOBA BROOKS SCHOOL		501(C)(3)		100.
NATIONAL PARKS CONSERVATION ASSOCIATION		501(C)(3)		50.
NATIONAL WILDLIFE FEDERATION		501(C)(3)		25.
NEW HAMPSHIRE LAKES ASSOCIATION		501(C)(3)		100.
Total from continuation sheets				

Part XV Supplementary Information**3 Grants and Contributions Paid During the Year (Continuation)**

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
NOBLE & GREENOUGH SCHOOL		501(C)(3)		250.
ORGANIZATION FOR ASSABET RIVER		501(C)(3)		100.
PAN MASS CHALLENGE		501(C)(3)		250.
PHOENIX CHARTER ACADEMY		501(C)(3)		2,000.
POSSE FOUNDATION		501(C)(3)		1,000.
PROJECT BREAD		501(C)(3)		100.
RUNWAY FOR RECOVERY		501(C)(3)		1,000.
SHADY HILL		501(C)(3)		150.
SOCIAL VENTURE PARTNERS		501(C)(3)		6,132.
SQUASH HAVEN		501(C)(3)		100.
Total from continuation sheets				

Part XV Supplementary Information**3 Grants and Contributions Paid During the Year (Continuation)**

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
ST. MARK'S		501(C)(3)		250.
SUDBURY VALLEY TRUSTEES		501(C)(3)		100.
THE STEPPINGSTONE FOUNDATION		501(C)(3)		150.
TRINITARIAN CONGREGATIONAL CHURCH		501(C)(3)		3,000.
WESLEYAN UNIVERSITY		501(C)(3)		250.
WILLIAMS COLLEGE		501(C)(3)		100.
WINCHESTER HOSPITAL		501(C)(3)		50.
WORLD WILDLIFE FUND		501(C)(3)		25.
Total from continuation sheets				

FORM 990-PF GAIN OR (LOSS) FROM SALE OF ASSETS STATEMENT 1

(A) DESCRIPTION OF PROPERTY	MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
500 SHARES OF ANALOG DEVICES INC		08/29/11	08/13/13
(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.
24,592.	16,378.	0.	0.
			(F) GAIN OR LOSS 8,214.

(A) DESCRIPTION OF PROPERTY	MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
200 SHARES OF BARD C R INCORPORATED		04/15/03	12/06/13
(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.
27,473.	6,251.	0.	0.
			(F) GAIN OR LOSS 21,222.

(A) DESCRIPTION OF PROPERTY	MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
200 SHARES OF BAXTER INTERNATIONAL INC		08/03/09	12/06/13
(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.
13,469.	11,284.	0.	0.
			(F) GAIN OR LOSS 2,185.

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) VALUE AT TIME OF ACQ.	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD			
400 SHARES OF BOEING CO	01/01/51	01/16/13			
	29,673.	13,120.	0.	0.	16,553.

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD			
100 SHARES OF BOEING CO	06/04/09	01/16/13			
	7,418.	4,962.	0.	0.	2,456.

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD			
500 SHARES OF BROADCOM CORP CL A	03/16/11	07/19/13			
	16,828.	19,307.	0.	0.	-2,479.

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD			
200 SHARES OF CHINA MOBILE LTD ADR	06/04/09	12/06/13			
	10,991.	10,106.	0.	0.	885.

(A) DESCRIPTION OF PROPERTY		MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
100 SHARES OF CORE LABORATORIES N V			05/23/05	11/25/13
(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
18,557.	1,157.	0.	0.	17,400.

(A) DESCRIPTION OF PROPERTY		MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
500 SHARES OF FACTSET RESEARCH SYSTEMS			08/14/02	07/19/13
(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
53,999.	7,394.	0.	0.	46,605.

(A) DESCRIPTION OF PROPERTY		MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
400 SHARES OF FEDEX CORPORATION			07/28/06	10/28/13
(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
53,251.	42,105.	0.	0.	11,146.

(A) DESCRIPTION OF PROPERTY		MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
1000 SHARES OF HCP INC			08/14/02	02/05/13
(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
46,543.	16,658.	0.	0.	29,885.

(A) DESCRIPTION OF PROPERTY		MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
200 SHARES OF INTL BUSINESS MACHINES			07/17/07	11/25/13
(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
35,993.	22,050.	0.	0.	13,943.

(A) DESCRIPTION OF PROPERTY		MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
1000 SHARES OF ISHARES MSCI CDA IDX ETF			09/27/05	05/22/13
(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
28,513.	21,320.	0.	0.	7,193.

(A) DESCRIPTION OF PROPERTY		MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
200 SHARES OF ISHARES S&P US PFD FUND			11/28/08	08/13/13
(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
7,649.	5,387.	0.	0.	2,262.

(A) DESCRIPTION OF PROPERTY		MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
500 SHARES OF ISHARES S&P IS PFD FUND			11/28/08	09/13/13
(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
19,057.	13,467.	0.	0.	5,590.

(A) DESCRIPTION OF PROPERTY	MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD	
1000 SHARES OF ISHARES S&P US PFD FUND		12/15/08	10/15/13	
(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
37,636.	26,561.	0.	0.	11,075.

(A) DESCRIPTION OF PROPERTY	MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD	
1000 SHARES OF JPMORGAN CHASE 8.625% PFD		06/19/09	07/19/13	
(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
25,513.	25,382.	0.	0.	131.

(A) DESCRIPTION OF PROPERTY	MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD	
200 SHARES OF METHANEX CORP		01/17/12	11/25/13	
(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
12,421.	5,328.	0.	0.	7,093.

(A) DESCRIPTION OF PROPERTY	MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD	
1000 SHARES OF NUVEEN CREDIT STRAT INCM		03/10/10	11/25/13	
(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
9,382.	8,160.	0.	0.	1,222.

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
600 SHARES OF SECTOR SPDR MATERIALS FD	24,196.	15,489.	0.	0.	8,707.

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
200 SHARES OF SPDR GOLD TRUST SHARES	23,981.	19,025.	0.	0.	4,956.

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
1000 SHARES OF SUNCOR ENERGY INC	34,145.	35,238.	0.	0.	-1,093.

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
100 SHARES OF WALMART STORES INC	8,032.	5,017.	0.	0.	3,015.

(A) DESCRIPTION OF PROPERTY	MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD	
0.42 SHARES OF ROYCE GLOBAL VALUE TRUST		10/18/13	10/18/13	
(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
4.	4.	0.	0.	0.
CAPITAL GAINS DIVIDENDS FROM PART IV				7,206.
TOTAL TO FORM 990-PF, PART I, LINE 6A				225,372.

FORM 990-PF	DIVIDENDS AND INTEREST FROM SECURITIES	STATEMENT	2
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SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
CHARLES SCHWAB FROM K-1 - BLACKSTONE GROUP L.P.	75,947.	7,206.	68,741.	68,741.	
	0.	0.	0.	212.	
TO PART I, LINE 4	75,947.	7,206.	68,741.	68,953.	

FORM 990-PF	OTHER INCOME	STATEMENT	3
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DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
FROM K-1 - BLACKSTONE GROUP L.P.	0.	600.	
TOTAL TO FORM 990-PF, PART I, LINE 11	0.	600.	

FORM 990-PF	LEGAL FEES			STATEMENT	4
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
LEGAL	5,152.	0.		0.	
TO FM 990-PF, PG 1, LN 16A	5,152.	0.		0.	

FORM 990-PF	OTHER PROFESSIONAL FEES			STATEMENT	5
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
ACCOUNT MANAGEMENT	27,800.	27,800.		0.	
TO FORM 990-PF, PG 1, LN 16C	27,800.	27,800.		0.	

FORM 990-PF	TAXES			STATEMENT	6
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
MASSACHUSETTS - 2012 FORM PC	70.	0.		0.	
CHARLES SCHWAB FOREIGN TAXES	913.	913.		0.	
2012 FEDERAL BALANCE DUE	1,620.	0.		0.	
2013 FEDERAL ESTIMATED TAX PAYMENTS	3,080.	0.		0.	
TO FORM 990-PF, PG 1, LN 18	5,683.	913.		0.	

FORM 990-PF	OTHER EXPENSES			STATEMENT	7
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
CITIBUSINESS CREDIT CARD FEE	75.	0.		0.	
PHOTOCOPYING EXPENSES	24.	0.		0.	
TO FORM 990-PF, PG 1, LN 23	99.	0.		0.	

FORM 990-PF	OTHER INCREASES IN NET ASSETS OR FUND BALANCES			STATEMENT	8
DESCRIPTION	AMOUNT				
ROUNDING ADJUSTMENT	1.				
PRIOR YEAR DIVIDENDS RECEIVED	60.				
TOTAL TO FORM 990-PF, PART III, LINE 3	61.				

FORM 990-PF	OTHER DECREASES IN NET ASSETS OR FUND BALANCES			STATEMENT	9
DESCRIPTION	AMOUNT				
ADJUSTMENT FOR PRIOR YEAR NONDIVIDEND DISTRIBUTIONS	1,400.				
TOTAL TO FORM 990-PF, PART III, LINE 5	1,400.				

FORM 990-PF	CORPORATE STOCK		STATEMENT	10
DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE		
EQUITIES - SEE ATTACHED STATEMENT	1,867,471.	2,763,461.		
TOTAL TO FORM 990-PF, PART II, LINE 10B	1,867,471.	2,763,461.		

Year End 12/31/2013

# of Shares	Description	Date	Book Basis	Tax Basis	FMV
1,000	AFLAC Inc	8/19/02	30,998.89	30,998.89	66,800.00
100	Apple Inc	12/13/06	8,844.32	8,844.32	56,102.00
200	Bard C R Incorporated	4/15/03	6,250.99	6,250.99	26,788.00
600	Baxter International Inc	8/3/09	33,851.78	33,851.78	41,730.00
200	Blackrock Inc.	12/21/11	33,913.35	33,913.35	63,294.00
3,000	Black Rock CP High Yield VI	8/24/10	34,343.05	34,343.05	36,510.00
2,404	Black Rock Cr Allo Inc Tr IV	12/11/12	30,392.20	30,392.20	31,396.24
400	Boeing Co	6/4/09	19,846.76	19,846.76	54,596.00
1,000	Bristol-Myers Squibb Co	2/18/09	20,937.95	20,937.95	53,150.00
900	CSX Corp	4/26/11	22,154.65	22,154.65	25,893.00
1,000	CVS Caremark Corp	5/8/07	36,599.95	36,599.95	71,570.00
900	Caterpillar Inc	06, 07	59,777.40	59,777.40	81,729.00
100	China Mobile LTD ADR	6/4/09	5,052.98	5,052.98	5,229.00
400	China Mobile LTD ADR	9/19/12	21,964.55	21,964.55	20,916.00
1,000	Citigroup Inc New	10/17/12	37,915.95	37,915.95	52,110.00
400	Core Laboratories	5/23/05	4,630.52	4,630.52	76,380.00
400	Deere & Co	1/16/13	35,820.55	35,820.55	36,532.00
500	Du Pont E I De Nemour & Co	9/16/11	22,287.95	22,287.95	32,485.00
1,000	Franklin Electric Co Inc	10/15/13	37,787.35	37,787.35	44,640.00
800	Freeport McMoran Copper	7/26/13	22,862.55	22,862.55	30,192.00
100	Google Inc Class A	5/31/07	50,551.18	50,551.18	112,071.00
1,000	Halliburton Co Hldg Co	8/30/07	34,278.41	34,278.41	50,750.00
1,200	International Paper Co	10/28/13	54,019.65	54,019.65	58,836.00
500	Johnson & Johnson	8/19/02	26,747.01	26,747.01	45,795.00
1,000	JPMorgan Chase & Co	2/7/11	22,868.15	22,868.15	29,240.00
		7/27/12	18,077.45	18,077.45	29,240.00
2,000	Kinder Morgan Inc	12/6/12	33,727.15	33,727.15	36,000.00
		12/6/13	33,567.75	33,567.75	36,000.00
500	Marathon Pete Corp	1/16/13	32,368.15	32,368.15	45,865.00
300	McDonalds Corp	7/27/12	26,621.95	26,621.95	29,109.00
1,800	Methanex Corp	1/17/12	21,310.35	21,310.35	47,392.00
		2/16/12	30,283.45	30,283.45	59,240.00
1,000	MicroChip Technology Inc	8/13/13	39,995.35	39,995.35	44,750.00
1,500	Microsoft Corp	6/19/09	19,352.15	19,352.15	29,928.00
		9/27/11	17,641.95	17,641.95	26,187.00
20	Nortel Networks Cp	1/1/51	1,040.00	7,987.00	0.16
5,000	Nuveen Credit Strat Incm	3/10/10	40,864.75	40,864.75	48,650.00
1,000	Pepsico Incorporated	11/9/01	49,286.00	49,286.00	82,940.00
4,000	Pimco Floating Rate Stra	9/11/09	19,959.88	19,959.88	23,223.30
		4/22/10	14,077.70	14,077.70	16,576.70
1,000	Potash Corp	5/22/13	42,706.95	42,706.95	32,960.00
5,000	Putnam High Income Securities Fund	3/29/11	42,041.47	42,041.47	41,300.00
500	Qualcomm Inc	7/19/13	30,616.95	30,616.95	37,125.00
500	Rockwell Automation Inc	1/1/51	6,274.74	80.92	59,080.00
571	Royce Global Value Trust	10/17/13	5,120.87	5,120.87	5,076.16
4,000	Royce Value Trust Inc	3/10/10	22,791.19	22,791.19	32,020.00
		2/7/11	28,916.62	28,916.62	32,020.00
500	Stryker Corp	3/8/05	24,429.95	24,429.95	37,570.00
1,000	Texas Instruments Inc	10/13/10	28,228.95	28,228.95	43,910.00
700	Wal-mart Stores Inc	10/26/09	35,117.56	35,117.56	55,083.00
2,000	Blackstone Group LP	7/19/13	46,026.15	46,838.15	63,000.00
1,500	Ishares MSCI Aus Idx Fd	10/1/07	48,264.95	48,264.95	36,555.00
900	Ishares MSCI Pac Ex Japn	12/12/06	37,382.45	37,382.45	42,057.00
2,000	Ishares MSCI Singapore Free Index Fund	7/23/09	19,886.95	19,886.95	26,340.00
1,400	Ishares S&P Smallcap 600 Growth	10/4/04	19,505.98	19,505.98	47,444.00
		12/12/06	64,524.25	64,524.25	118,610.00
1,000	Ishares S&P U S PFD Fund	12/15/08	26,564.47	26,564.47	36,830.00
1,000	Ishares Tr S&P Midcap 400 Index	4/17/07	43,681.87	43,681.87	66,905.00
		3/10/10	38,831.17	38,831.17	66,905.00
4,000	Medical Properties Trust	2/5/13	53,501.95	53,501.95	48,880.00
125	Proshs Ultrashort Lehman	3/30/10	24,893.47	24,893.47	9,900.00

The Boger Charitable Trust
EIN 22-2776296
2013 Form 990-PF

500	Vanguard Bond Index Fund	7/13/10	41,598.45	41,598.45	40,850.00
500	SPDR Index Shares Fund S&P Emerging Markets	9/18/13	23,692.00	23,692.00	23,205.00

TOTAL

1,867,471.48 1,869,036.66 2,763,460.56

Purchases

400	Deere & Co	1/16/2013	35,820 55	35,820 55
500	Marathon Pete Corp	1/16/13	32,368 15	32,368 15
4,000	Medical Properties Trust	2/5/13	53,964 64	53,964 64
1,000	Potash Corp	5/22/13	42,706 95	42,706 95
500	Qualcomm Inc	7/19/13	30,616 95	30,616 95
800	Freeport McMoran Copper	7/26/13	22,862 55	22,862 55
2,000	Blackstone Group LP	7/19/13	46,946 15	46,946 15
1,000	MicroChip Technology Inc	8/13/13	40,703 85	40,703 85
500	SPDR Index Shares Fund S&P Emerging Markets	9/18/13	23,692 00	23,692 00
1,300	Franklin Electric Co Inc	10/15/13	37,787 35	37,787 35
1,200	International Paper Co	10/28/13	54,019 65	54,019 65
1,000	Kinder Morgan Inc	12/6/13	33,567 75	33,567 75
571 42	Royce Global Value Trust	10/18/13	5,124 72	5,124 72

460,181.26 460,181.26

Nondividend Distributions

Broadcom Corp CL A	(110 00)	(110 00)
HCP Inc	(33 92)	(33 92)
Medical Properties Trust	(462 69)	(462 69)
Microchip Technology Inc	(708 50)	(708 50)
	(1,315.11)	(1,315.11)