



See a Social Security Number? Say Something!
Report Privacy Problems to <https://public.resource.org/privacy>
Or call the IRS Identity Theft Hotline at 1-800-908-4490



Return of Private Foundation

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

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 APR 1, 2013, and ending MAR 31, 2014

Name of foundation THE DEVEREAUX CHARITABLE FOUNDATION TRUST		A Employer identification number 22-2708298
Number and street (or P.O. box number if mail is not delivered to street address) 10 EMERSON PLACE CHARLES RIVER PARK		B Telephone number (617) 742-3830
City or town, state or province, country, and ZIP or foreign postal code BOSTON, MA 02114		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 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) \$ 406,323. (Part I, column (d) must be on cash basis.)		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐
J Accounting method: ☐ Cash ☒ Accrual ☐ Other (specify) _____		

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)
Revenue	1 Contributions, gifts, grants, etc., received	300,000.		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				
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10				
	b Gross sales price for all assets on line 6a				
	7 Capital gain net income (from Part IV, line 2)	0.			
	8 Net short-term capital gain				
Operating and Administrative Expenses	9 Income modifications				
	10a Gross sales, less returns and allowances				
	b Less Cost of goods sold				
	c Gross profit or (loss)				
	11 Other income				
	12 Total. Add lines 1 through 11	300,000.	0.		
	13 Compensation of officers, directors, trustees, etc	0.	0.		0.
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees				
b Accounting fees					
c Other professional fees					
17 Interest					
18 Taxes	STMT 1	35.	0.		35.
19 Depreciation and depletion					
20 Occupancy					
21 Travel, conferences, and meetings					
22 Printing and publications					
23 Other expenses	STMT 2	36.	0.		36.
24 Total operating and administrative expenses. Add lines 13 through 23		71.	0.		71.
25 Contributions, gifts, grants paid		97,420.			97,420.
26 Total expenses and disbursements. Add lines 24 and 25		97,491.	0.		97,491.
27 Subtract line 26 from line 12		202,509.			
a Excess of revenue over expenses and disbursements					
b Net investment income (if negative, enter -0-)			0.		
c Adjusted net income (if negative, enter -0-)				N/A	

SCANNED AUG 18 2014

THE DEVEREAUX CHARITABLE FOUNDATION
TRUST

Form 990-PF (2013)

22-2708298 Page 2

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 Savings and temporary cash investments	203,814.	406,323.	406,323.
	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			
	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 ☐)				
16 Total assets (to be completed by all filers - see the instructions Also, see page 1, item 1)	203,814.	406,323.	406,323.	
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 ☐)			
23 Total liabilities (add lines 17 through 22)	0.	0.		
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ☐ and complete lines 24 through 26 and lines 30 and 31.			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ☒ and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds	0.	0.	
	28 Paid-in or capital surplus, or land, bldg, and equipment fund	0.	0.	
	29 Retained earnings, accumulated income, endowment, or other funds	203,814.	406,323.	
	30 Total net assets or fund balances	203,814.	406,323.	
31 Total liabilities and net assets/fund balances	203,814.	406,323.		

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	203,814.
2 Enter amount from Part I, line 27a	2	202,509.
3 Other increases not included in line 2 (itemize) ☐	3	0.
4 Add lines 1, 2, and 3	4	406,323.
5 Decreases not included in line 2 (itemize) ☐	5	0.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	406,323.

Form 990-PF (2013)

**THE DEVEREAUX CHARITABLE FOUNDATION
TRUST**

Form 990-PF (2013)

22-2708298 Page 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			
b NONE			
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) 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) 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)	2	
{ If gain, also enter in Part I, line 7 { If (loss), enter -0- in Part I, line 7		
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6)	3	
{ If gain, also enter in Part I, line 8, column (c) { If (loss), enter -0- in Part I, line 8		

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	100,006.	192,591.	.519266
2011	64,594.	44,053.	1.466279
2010	52,535.	65,933.	.796794
2009	28,385.	31,340.	.905712
2008	6,545.	8,629.	.758489

2 Total of line 1, column (d)	2	4.446540
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	.889308
4 Enter the net value of noncharitable-use assets for 2013 from Part X, line 5	4	169,677.
5 Multiply line 4 by line 3	5	150,895.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	0.
7 Add lines 5 and 6	7	150,895.
8 Enter qualifying distributions from Part XII, line 4	8	97,491.

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.

THE DEVEREAUX CHARITABLE FOUNDATION
TRUST

Form 990-PF (2013)

22-2708298 Page 4

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)			
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☐ and enter 1% of Part I, line 27b		1	0.
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	0.
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	0.
6 Credits/Payments			
a 2013 estimated tax payments and 2012 overpayment credited to 2013	6a		
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		0.
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		0.
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10		
11 Enter the amount of line 10 to be Credited to 2014 estimated tax ☐ Refunded ☐	11		

Part VII-A Statements Regarding Activities

1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a	Yes	No
b 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.	1b		X
c Did the foundation file Form 1120-POL for this year?	1c		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.	2		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	3		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a		X
b If "Yes," has it filed a tax return on Form 990-T for this year?	4b		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.	5		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?	6	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	7	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	8b	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	9		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10	X	

N/A

STMT 3

Form 990-PF (2013)

**THE DEVEREAUX CHARITABLE FOUNDATION
TRUST**

Form 990-PF (2013)

22-2708298

Page 5

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 ► <u>N/A</u>	13	X	
14 The books are in care of ► <u>ROBERT J. DEVEREAUX CORP.</u> Telephone no ► <u>(617) 742-3830</u> Located at ► <u>10 EMERSON PLACE, CHARLES RIVER PARKWAY, BOSTON,</u> ZIP+4 ► <u>02114</u>			
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

		Yes	No
File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			
1a During the year did the foundation (either directly or indirectly) (1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☒ No (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	1b	N/A	
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 ►	2a	N/A	
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	N/A	
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?	3a	☐ 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.)	3b	N/A	
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

Form 990-PF (2013)

**THE DEVEREAUX CHARITABLE FOUNDATION
TRUST**

Form 990-PF (2013)

22-2708298

Page **6**

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			
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
ROBERT J. DEVEREAUX	TRUSTEE			
10 EMERSON PLACE				
BOSTON, MA 02114	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**

Form **990-PF** (2013)

THE DEVEREAUX CHARITABLE FOUNDATION
TRUST

Form 990-PF (2013)

22-2708298

Page 7

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)

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

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		

Total number of others receiving over \$50,000 for professional services

0

Part IX-A Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1 N/A	
2	
3	
4	

Part IX-B Summary of Program-Related Investments

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1 N/A	
2	
All other program-related investments See instructions	
3	
Total. Add lines 1 through 3	0.

Form 990-PF (2013)

**THE DEVEREAUX CHARITABLE FOUNDATION
TRUST**

Form 990-PF (2013)

22-2708298 Page 8

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	0.
b	Average of monthly cash balances	1b	172,261.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	172,261.
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	172,261.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	2,584.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	169,677.
6	Minimum investment return. Enter 5% of line 5	6	8,484.

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	8,484.
2a	Tax on investment income for 2013 from Part VI, line 5	2a	
b	Income tax for 2013 (This does not include the tax from Part VI)	2b	
c	Add lines 2a and 2b	2c	0.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	8,484.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	8,484.
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	8,484.

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	97,491.
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	97,491.
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	0.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	97,491.

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.

Form 990-PF (2013)

THE DEVEREAUX CHARITABLE FOUNDATION
TRUST

Form 990-PF (2013)

22-2708298

Page 9

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				8,484.
2 Undistributed income, if any, as of the end of 2013				
a Enter amount for 2012 only			0.	
b Total for prior years		0.		
3 Excess distributions carryover, if any, to 2013				
a From 2008	6,114.			
b From 2009	26,818.			
c From 2010	49,238.			
d From 2011	62,391.			
e From 2012	90,376.			
f Total of lines 3a through e	234,937.			
4 Qualifying distributions for 2013 from Part XII, line 4 ▶ \$	97,491.			
a Applied to 2012, but not more than line 2a			0.	
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				8,484.
e Remaining amount distributed out of corpus	89,007.			
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:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	323,944.			
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				0.
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	6,114.			
9 Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a	317,830.			
10 Analysis of line 9				
a Excess from 2009	26,818.			
b Excess from 2010	49,238.			
c Excess from 2011	62,391.			
d Excess from 2012	90,376.			
e Excess from 2013	89,007.			

THE DEVEREAUX CHARITABLE FOUNDATION

Form 990-PF (2013)

TRUST

22-2708298

Page 10

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)

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

Tax year

Prior 3 years

(a) 2013

(b) 2012

(c) 2011

(d) 2010

(e) Total

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))

ROBERT J. DEVEREAUX

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

SEE STATEMENT 4

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

THE DEVEREAUX CHARITABLE FOUNDATION
TRUST

Form 990-PF (2013)

22-2708298 Page 11

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				
AVON WALK PO BOX 742509 CINCINNATI, OH 45274	N/A	PUBLIC	UNRESTRICTED / GENERAL	100.
SCITECH ACADEMY 820 JACKSON AVE NEW ORLEANS, LA 70130	N/A	PUBLIC	UNRESTRICTED / GENERAL	500.
AMERICAN LIVER FOUNDATION 88 WINCHESTER STREET NEWTON, MA 02461	N/A	PUBLIC	UNRESTRICTED / GENERAL	250.
JARED COPPOLA FUND 170 PARK STREET NORTH READING, MA 01964	N/A	PUBLIC	UNRESTRICTED / GENERAL	2,000.
BILLY WEBBER GOLF TOURNAMENT PO BOX 269 MILFORD, MA 01757	N/A	PUBLIC	UNRESTRICTED / GENERAL	500.
Total	SEE CONTINUATION SHEET(S)			97,420.
b Approved for future payment				
NONE				
Total				0.

Part XVII

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

- | | | | | |
|---|--|-------|-----|----|
| 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
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

Date _____

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

Preparer's signature

Date _____

Check ☐ self-employed

PTIN

ROBERT J. BOYLE

W. J. Boyle
MERLINO & CO., LLP

7-30-14

P00176973

Firm's name ► **DARMODY, MERLINO & CO., LLP**

Firm's EIN ► 04-2273266

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

Phone no 617-426-7300

Form **990-PF** (2013)

**THE DEVEREAUX CHARITABLE FOUNDATION
TRUST**

22-2708298

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
SCLERODERMA FOUNDATION 462 BOSTON STREET TOPSFIELD, MA 01983	N/A	PUBLIC	UNRESTRICTED / GENERAL	250.
COLLEGE BOUND DORCHESTER 18 SAMOSET STREET DORCHESTER, MA 02124	N/A	PUBLIC	UNRESTRICTED / GENERAL	2,500.
ST. MARY'S HIGH SCHOOL 35 TREMONT STREET LYNN, MA 01902	N/A	PUBLIC	UNRESTRICTED / GENERAL	22,250.
PAN MASS CHALLENGE 77 4TH AVE NEEDHAM, MA 02494	N/A	PUBLIC	UNRESTRICTED / GENERAL	1,750.
SWAMPSCOTT YOUTH BASEBALL 9 SUMNER STREET SWAMPSCOTT, MA 01907	N/A	PUBLIC	UNRESTRICTED / GENERAL	1,500.
GREATER LYNN BABE RUTH PO BOX 501 LYNN, MA 01905	N/A	PUBLIC	UNRESTRICTED / GENERAL	3,500.
FAMILY OF SHAWN CLARK 5 WINSLOW STREET EVERETT, MA 02149	N/A	PUBLIC	UNRESTRICTED / GENERAL	500.
NERVES OF STEEL 125 NASHUA STREET BOSTON, MA 02114	N/A	PUBLIC	UNRESTRICTED / GENERAL	1,500.
ARCHDIOCESE OF BOSTON 66 BROOKS DRIVE BRAINTREE, MA 02184	N/A	PUBLIC	UNRESTRICTED / GENERAL	1,000.
GLEN PETERSON SCHOLARSHIP FUND 11 GRANT ROAD SWAMPSCOTT, MA 01907	N/A	PUBLIC	UNRESTRICTED / GENERAL	3,500.
Total from continuation sheets				94,070.

THE DEVEREAUX CHARITABLE FOUNDATION
TRUST

22-2708298

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
JIMMY FUND WALK PO BOX 3595 BOSTON, MA 02241	N/A	PUBLIC	UNRESTRICTED / GENERAL	1,000.
SABRINA'S SHOOTOUT 64 CHRISTOPHER ROAD NORWELL, MA 02061	N/A	PUBLIC	UNRESTRICTED / GENERAL	500.
YMCA MARBLEHEAD 40 LEGGS HILL ROAD MARBLEHEAD, MA 01945	N/A	PUBLIC	UNRESTRICTED / GENERAL	2,000.
NAHANT VETERAN'S ASSOC. PO BOX 82 NAHANT, MA 01908	N/A	PUBLIC	UNRESTRICTED / GENERAL	500.
BOSTON IRISH CURRACH CLUB 88 GODDARD STREET QUINCY, MA 02169	N/A	PUBLIC	UNRESTRICTED / GENERAL	1,000.
EVERETT POLICE BETTERMENT ASSOC. PO BOX 490821 EVERETT, MA 02149	N/A	PUBLIC	UNRESTRICTED / GENERAL	225.
ST. CATHERINE OF SIENA SCHOOL 249 NAHATAN STREET NORWOOD, MA 02062	N/A	PUBLIC	UNRESTRICTED / GENERAL	500.
YOUCARING LEUKEMIA FUNDRAISING REBEKAH JORDAN YOUCARING.COM SALEM, MA 01971	N/A	PUBLIC	UNRESTRICTED / GENERAL	1,000.
IRISH CULTURAL CENTRE OF NE 200 NEW BOSTON DRIVE CANTON, MA 02021	N/A	PUBLIC	UNRESTRICTED / GENERAL	1,500.
ST. JOHN'S PREPATATORY SCHOOL 72 SPRING STREET DANVERS, MA 01923	N/A	PUBLIC	UNRESTRICTED / GENERAL	7,500.
Total from continuation sheets				

THE DEVEREAUX CHARITABLE FOUNDATION
TRUST

22-2708298

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
ALZHEIMER'S ASSOC. 480 PLEASANT STREET WATERTOWN, MA 02472	N/A	PUBLIC	UNRESTRICTED / GENERAL	500.
MONTACHUSETT AREA ROTARY CLUB PO BOX 1683 FITCHBURG, MA 01420	N/A	PUBLIC	UNRESTRICTED / GENERAL	1,000.
SISTERS OF ST. JOSEPH OF BOSTON 637 CAMBRIDGE STREET BRIGHTON, MA 02135	N/A	PUBLIC	UNRESTRICTED / GENERAL	300.
MARCH OF DIMES PO BOX 146730 BOSTON, MA 02114	N/A	PUBLIC	UNRESTRICTED / GENERAL	250.
PENTUCKET YOUTH FOOTBALL CLUB 89 WEST MAIN STREET MERRIMAC, MA 01860	N/A	PUBLIC	UNRESTRICTED / GENERAL	2,000.
BISHOP FENWICK HIGH SCHOOL 99 MARGIN STREET PEABODY, MA 01960	N/A	PUBLIC	UNRESTRICTED / GENERAL	2,000.
ROXBURY YOUTHWORKS 841 PARKER STREET SUITE 104-106 ROXBURY, MA 02120	N/A	PUBLIC	UNRESTRICTED / GENERAL	250.
BETHANY HEALTH CARE CENTER 97 BETHANY ROAD FRAMINGHAM, MA 01702	N/A	PUBLIC	UNRESTRICTED / GENERAL	5,000.
JOHN D. STOECKLE CENTER FOR PRIMARY CARE INNOVATION 50 STANIFORD ST 9TH FL BOSTON, MA 02114	N/A	PUBLIC	UNRESTRICTED / GENERAL	1,000.
PLAINVILLE POLICE ASSOCIATION 157 SOUTH STREET PLAINVILLE, MA 02762	N/A	PUBLIC	UNRESTRICTED / GENERAL	250.
Total from continuation sheets				

THE DEVEREAUX CHARITABLE FOUNDATION
TRUST

22-2708298

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
GREATER BOSTON FOOD BANK - GBFB PO BOX 55860 BOSTON, MA 02205	N/A	PUBLIC	UNRESTRICTED / GENERAL	100.
MASS HOUSING AND SHELTER ALLIANCE PO BOX 120070 BOSTON, MA 02112	N/A	PUBLIC	UNRESTRICTED / GENERAL	100.
AMERICAN LUNG ASSOC. PO BOX 7000 ALBERT LEA, MN 56007	N/A	PUBLIC	UNRESTRICTED / GENERAL	100.
DEERFIELD VALLEY RESCUE SQUAD PO BOX 854 WILMINGTON, VT 05363	N/A	PUBLIC	UNRESTRICTED / GENERAL	150.
MSPCA - ANGELL 350 HUNTINGTON AVE BOSTON, MA 02130	N/A	PUBLIC	UNRESTRICTED / GENERAL	500.
NATIONAL MS SOCIETY 101A FIRST AVE WALTHAM, MA 02451	N/A	PUBLIC	UNRESTRICTED / GENERAL	250.
PINE STREET INN 444 HARRISON AVE BOSTON, MA 02118	N/A	PUBLIC	UNRESTRICTED / GENERAL	250.
INNER-CITY SCHOLARSHIP FUND 260 FRANKLIN STREET BOSTON, MA 02110	N/A	PUBLIC	UNRESTRICTED / GENERAL	3,000.
CATHOLIC CHARITIES NORTH 117 N COMMON STREET LYNN, MA 01902	N/A	PUBLIC	UNRESTRICTED / GENERAL	1,000.
BOYS & GIRLS CLUB OF LYNN 25 NORTH COMMON STREET LYNN, MA 01902	N/A	PUBLIC	UNRESTRICTED / GENERAL	2,000.
Total from continuation sheets				

**THE DEVEREAUX CHARITABLE FOUNDATION
TRUST**

22-2708298

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
BOYS & GIRLS CLUB OF DORCHESTER 1135 DORCHESTER AVE DORCHESTER, MA 02125	N/A	PUBLIC	UNRESTRICTED / GENERAL	1,000.
EVERETT CRIMSON TIDE POP WARNER 21 WINTHROP ST EVERETT, MA 02149	N/A	PUBLIC	UNRESTRICTED / GENERAL	500.
CROTCHED MOUNTAIN - CMARS 1 VERNEY DRIVE GREENFIELD, NH 03047	N/A	PUBLIC	UNRESTRICTED / GENERAL	500.
CATHOLIC UNIVERSITY OF AMER. PO BOX 91481 WASHINGTON, DC 20077-7699	N/A	PUBLIC	UNRESTRICTED / GENERAL	1,000.
COLLEGE OF HOLY CROSS ONE COLLEGE STREET WORCESTER, MA 01610	N/A	PUBLIC	UNRESTRICTED / GENERAL	3,000.
SAINT JOSEPH'S COLLEGE 278 WHITES BRIDGE ROAD STANDISH, ME 04084	N/A	PUBLIC	UNRESTRICTED / GENERAL	500.
HULL LIFESAVING MUSEUM PO BOX 221 HULL, MA 02045	N/A	PUBLIC	UNRESTRICTED / GENERAL	250.
TAUNTON FIRE FIGHTERS LOCAL 1391 49 NORTH WALKER STREET TAUNTON, MA 02780	N/A	PUBLIC	UNRESTRICTED / GENERAL	100.
NAHANT LITTLE LEAGUE 19 VERNON STREET NAHANT, MA 01908	N/A	PUBLIC	UNRESTRICTED / GENERAL	1,000.
NEAAU - NEW ENGLAND AMATEUR ATHLETIC UNION 37 THURBER BLVD SMITHFIELD, RI 02917	N/A	PUBLIC	UNRESTRICTED / GENERAL	495.
Total from continuation sheets				

**THE DEVEREAUX CHARITABLE FOUNDATION
TRUST**

22-2708298

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 NHL PRO-AM HOCKEY TOURNAMENT 121 DONALD LYNCH BLVD MARLBOROUGH, MA 01752	N/A	PUBLIC	UNRESTRICTED / GENERAL	500.
MALDEN POLICE PATROLMANS ASSOC. 200 PLEASANT STREET MALDEN, MA 02148	N/A	PUBLIC	UNRESTRICTED / GENERAL	375.
CATHOLIC CHARITIES 51 SLEEPER STREET BOSTON, MA 02210	N/A	PUBLIC	UNRESTRICTED / GENERAL	5,000.
XAVERIAN BROTHERS GENERALATE 4409 FREDERICK AVE BALTIMORE, MD 21229	N/A	PUBLIC	UNRESTRICTED / GENERAL	100.
REV. ALFRED E. MORRIS, S.J. SCHOLARSHIP FUND 1073 NORTH BENSON STREET FAIRFIELD, CT 06824	N/A	PUBLIC	UNRESTRICTED / GENERAL	250.
KATIE O'HALLORAN BENEFIT 256 FREEPORT STREET BOSTON, MA 02122	N/A	PUBLIC	UNRESTRICTED / GENERAL	1,000.
MARBLEHEAD FESTIVAL OF ARTS PO BOX 331 MARBLEHEAD, MA 01945	N/A	PUBLIC	UNRESTRICTED / GENERAL	525.
THE CATHOLIC APPEAL PO BOX 9226 CHELSEA, MA 02150	N/A	PUBLIC	UNRESTRICTED / GENERAL	500.
THE JESUITS PO BOX 9199 WATERTOWN, MA 02471	N/A	PUBLIC	UNRESTRICTED / GENERAL	3,000.
NAHANT HISTORICAL SOCIETY 41 VALLEY ROAD NAHANT, MA 01908	N/A	PUBLIC	UNRESTRICTED / GENERAL	500.
Total from continuation sheets				

FORM 990-PF	TAXES	STATEMENT	1
-------------	-------	-----------	---

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
COMMONWEALTH OF MASSACHUSETTS - ANNUAL REPORT	35.	0.		35.
TO FORM 990-PF, PG 1, LN 18	35.	0.		35.

FORM 990-PF	OTHER EXPENSES	STATEMENT	2
-------------	----------------	-----------	---

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
BANK FEES	36.	0.		36.
TO FORM 990-PF, PG 1, LN 23	36.	0.		36.

FORM 990-PF	LIST OF SUBSTANTIAL CONTRIBUTORS PART VII-A, LINE 10	STATEMENT	3
-------------	---	-----------	---

NAME OF CONTRIBUTOR	ADDRESS
ROBERT J DEVEREAUX CORPORATION	10 EMERSON PLACE, CHARLES RIVER PARK BOSTON, MA 02114

FORM 990-PF

GRANT APPLICATION SUBMISSION INFORMATION
PART XV, LINES 2A THROUGH 2D

STATEMENT 4

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

MR. ROBERT J. DEVEREAUX, TRUSTEE OF THE DEVEREAUX C. F.
10 EMERSON PLACE, CHARLES RIVER PARK
BOSTON, MA 02114

TELEPHONE NUMBER

(617) 742-3830

FORM AND CONTENT OF APPLICATIONS

A DESCRIPTION AND PURPOSE OF ORGANIZATION AND INTENDED USE OF REQUESTED
GIFT

ANY SUBMISSION DEADLINES

NONE

RESTRICTIONS AND LIMITATIONS ON AWARDS

NONE