Form **990-PF**

Department of the Treasury
Internal Revenue Service

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.*

OMB No 1545-0052

2013

Open to Public Inspection

For calendar year 2013 or tax year beginning DEC 1, 2013 , and ending NOV 30, 2014

Name of foundation: MARIGOLD CHARITABLE TRUST

A Employer identification number: 20-6748222

Number and street (or P O box number if mail is not delivered to street address): NIXON PEABODY LLP, 100 SUMMER ST | Room/suite:

B Telephone number: 617-345-1000

City or town, state or province, country, and ZIP or foreign postal code: BOSTON, MA 02110

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: [X] 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) ▶ $ 5,336,681.

J Accounting method: [X] Cash [ ] Accrual [ ] Other (specify) (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 ▶ [ ]

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	119,374.		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	86,013.	86,013.		STATEMENT 1
5a	Gross rents				
b	Net rental income or (loss)				
6a	Net gain or (loss) from sale of assets not on line 10	236,805.			
b	Gross sales price for all assets on line 6a 967,400.				
7	Capital gain net income (from Part IV, line 2)		236,805.		
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				
12	**Total.** Add lines 1 through 11	442,192.	322,818.		
Operating and Administrative Expenses 13	Compensation of officers, directors, trustees, etc	30,700.	15,350.		15,350.
14	Other employee salaries and wages				
15	Pension plans, employee benefits				
16a	Legal fees				
b	Accounting fees				
c	Other professional fees STMT 2	15,411.	0.		15,411.
17	Interest				
18	Taxes STMT 3	5,892.	996.		0.
19	Depreciation and depletion				
20	Occupancy				
21	Travel, conferences, and meetings				
22	Printing and publications	1,537.	0.		1,537.
23	Other expenses STMT 4	447.	20.		427.
24	**Total operating and administrative expenses.** Add lines 13 through 23	53,987.	16,366.		32,725.
25	Contributions, gifts, grants paid	249,459.			249,459.
26	**Total expenses and disbursements.** Add lines 24 and 25	303,446.	16,366.		282,184.
27	Subtract line 26 from line 12				
a	Excess of revenue over expenses and disbursements	138,746.			
b	**Net investment income** (if negative, enter -0-)		306,452.		
c	**Adjusted net income** (if negative, enter -0-)			N/A	

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

		Beginning of year (a) Book Value	End of year (b) Book Value	End of year (c) Fair Market Value
Assets	1 Cash - non-interest-bearing	400.	10,379.	10,379.
	2 Savings and temporary cash investments	215,389.	227,251.	227,251.
	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 STMT 6	1,808,065.	2,047,104.	2,049,449.
	b Investments - corporate stock STMT 7	1,815,969.	1,653,057.	2,719,033.
	c Investments - corporate bonds STMT 8	285,645.	307,252.	330,569.
	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 I)	4,125,468.	4,245,043.	5,336,681.
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 ▶ [X] **and complete lines 27 through 31.**			
	27 Capital stock, trust principal, or current funds	4,125,468.	4,245,043.	
	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**	4,125,468.	4,245,043.	
	31 **Total liabilities and net assets/fund balances**	4,125,468.	4,245,043.	

Part III Analysis of Changes in Net Assets or Fund Balances

1 Total net assets or fund balances at beginning of year - Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	4,125,468.
2 Enter amount from Part I, line 27a	2	138,746.
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	4,264,214.
5 Decreases not included in line 2 (itemize) ▶ SEE STATEMENT 5	5	19,171.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	4,245,043.

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	967,400.		730,595.	236,805.

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

	(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col (j), if any	(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
a				
b				
c				
d				
e				236,805.

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 — 236,805.

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	197,877.	4,668,001.	.042390
2011	253,959.	4,532,649.	.056029
2010	222,482.	4,577,812.	.048600
2009	191,551.	4,436,120.	.043180
2008	173,295.	4,154,450.	.041713

2	**Total** of line 1, column (d)	2	.231912
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	.046382
4	Enter the net value of noncharitable-use assets for 2013 from Part X, line 5	4	5,063,286.
5	Multiply line 4 by line 3	5	234,845.
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	3,065.
7	Add lines 5 and 6	7	237,910.
8	Enter qualifying distributions from Part XII, line 4	8	282,184.

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)				
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ▶ ☒ and enter 1% of Part I, line 27b			1	3,065.
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	3,065.
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	3,065.
6	Credits/Payments				
a	2013 estimated tax payments and 2012 overpayment credited to 2013	6a	3,280.		
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	3,280.
8	Enter any **penalty** for underpayment of estimated tax Check here ☒ if Form 2220 is attached			8	25.
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	190.
11	Enter the amount of line 10 to be **Credited to 2014 estimated tax** ▶ 190.	**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?	1a		X
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes (see instructions for the definition)?	1b		X
	If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.			
c	Did the foundation file **Form 1120-POL** for this year?	1c		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? N/A	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

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Part VII-A Statements Regarding Activities *(continued)*

			Yes	No
11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	

Website address ▶ WWW.MARIGOLDCHARITABLETRUST.ORG

14 The books are in care of ▶ LAWRENCE B COHEN Telephone no ▶617-345-1268

Located at ▶C/O NIXON PEABODY LLP, 100 SUMMER ST, BOSTON, MA ZIP+4 ▶02110

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

			Yes	No
16	At any time during calendar year 2013, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?	16		X
	See the instructions for exceptions and filing requirements for Form TD F 90-22.1. If "Yes," enter the name of the foreign country ▶			

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

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

			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)?	1b		X
	Organizations relying on a current notice regarding disaster assistance check here ▶ ☐			
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 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? ☐ Yes ☒ No			
	If "Yes," list the years ▶ ____, ____, ____, ____			
b	Are there any years listed in 2a for which the foundation is **not** applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to **all** years listed, answer "No" and attach statement - see instructions) 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

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** No: 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
LAWRENCE B COHEN 100 SUMMER STREET BOSTON, MA 02110	TRUSTEE 1.00	30,700.	0.	0.
BEVERLY G MARRAM 45 TWIN OAKS DRIVE MASHPEE, MA 02649	TRUSTEE 15.00	0.	0.	0.
MERYL RICH 73 MORTON ROAD SWAMPSCOTT, MA 01907	TRUSTEE 3.00	0.	0.	0.
SUSAN SHAMUS 12 JULES TERRACE NEWTON, MA 02459	TRUSTEE 3.00	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 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.

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	5,139,566.
b	Average of monthly cash balances	1b	826.
c	Fair market value of all other assets	1c	
d	**Total** (add lines 1a, b, and c)	1d	5,140,392.
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	5,140,392.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	77,106.
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3. Enter here and on Part V, line 4	5	5,063,286.
6	**Minimum investment return.** Enter 5% of line 5	6	253,164.

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	253,164.
2a	Tax on investment income for 2013 from Part VI, line 5 — 2a: 3,065.		
b	Income tax for 2013 (This does not include the tax from Part VI) — 2b:		
c	Add lines 2a and 2b	2c	3,065.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	250,099.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	250,099.
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	250,099.

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	282,184.
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	282,184.
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	3,065.
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	279,119.

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				250,099.
2 Undistributed income, if any, as of the end of 2013				
a Enter amount for 2012 only			223,959.	
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 ▶ $ 282,184.				
a Applied to 2012, but not more than line 2a			223,959.	
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				58,225.
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:**				
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				191,874.
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			
	(a) 2013	(b) 2012	(c) 2011	(d) 2010	(e) Total
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))

BEVERLY G MARRAM

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 9

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				
BOSTON CHILDREN'S HOSPITAL 300 LONGWOOD AVE BOSTON, MA 02115	NONE	PUBLIC CHARITY	2014 PROJECT SHIFA AWARD INITIATIVE FOR MENTAL HEALTH PROJECT/SOMALI ELEMENTARY SCHOOL	16,967.
BOSTON MEDICAL CENTER 801 MASSACHUSETTS AVENUE BOSTON, MA 02118	NONE	PUBLIC CHARITY	CHILD WITNESS TO VIOLENCE PROJECT/SPARK CENTER AWARD FOR CWVP/SPARK NEUROPSYCHOLOGICAL	30,588.
BRANDON SCHOOL & RESIDENTAL TREATMENT CENTER 27 WINTER STREET NATICK, MA 01760	NONE	PUBLIC CHARITY	COME TO YOUR SENSES PROGRAM INITIATIVE	20,000.
CAMP STARFISH 1121 MAIN STREET LANCASTER, MA 01523	NONE	PUBLIC CHARITY	CAMP MEMBERSHIPS FOR TEN CHILDREN/PROGRAM INITIATIVE	13,500.
CHILDREN'S ADVOCACY CENTER 989 COMMONWEALTH AVENUE BOSTON, MA 02115	NONE	PUBLIC CHARITY	TRAINING/CONSULTING FOR BOSTON PUBLIC SCHOOL PROFESSIONALS	15,000.
Total SEE CONTINUATION SHEET(S)			▶ 3a	249,459.
b Approved for future payment NONE				
Total			▶ 3b	0.

** SEE PURPOSE OF GRANT CONTINUATIONS

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated	Unrelated business income (a) Business code	Unrelated business income (b) Amount	Excluded by section 512, 513, or 514 (c) Exclusion code	Excluded by section 512, 513, or 514 (d) Amount	(e) Related or exempt function income
1 Program service revenue.					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities			14	86,013.	
5 Net rental income or (loss) from real estate					
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal property					
7 Other investment income					
8 Gain or (loss) from sales of assets other than inventory			18	236,805.	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue					
a					
b					
c					
d					
e					
12 Subtotal Add columns (b), (d), and (e)		0.		322,818.	0.

13 Total. Add line 12, columns (b), (d), and (e) 13 322,818.

(See worksheet in line 13 instructions to verify calculations)

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

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes).

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

(a) Line no	(b) Amount involved	(c) Name of noncharitable exempt organization	(d) Description of transfers, transactions, and sharing arrangements
		N/A	

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 11/20/2015 — Title TRUSTEE

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 ☐ if self-employed	PTIN
CHRISTOPHER CALDWELL		1/16/15		P00642498
Firm's name ▶ NIXON PEABODY LLP			Firm's EIN ▶ 16-0764720	
Firm's address ▶ 100 SUMMER STREET BOSTON, MA 02110			Phone no (617) 345-1000	

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	Employer identification number
MARIGOLD CHARITABLE TRUST	20-6748222

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 foundation

Check 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).

Name of organization	Employer identification number
MARIGOLD CHARITABLE TRUST	20-6748222

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	BEVERLY MARRAM 45 TWIN OAKS DRIVE MASHPEE, MA 02649	$ 67,095.	Person [X] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.)
2	BEVERLY MARRAM 45 TWIN OAKS DRIVE MASHPEE, MA 02649	$ 45,414.	Person [X] Payroll [ ] Noncash [X] (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
MARIGOLD CHARITABLE TRUST	20-6748222

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
2	1,160 SHARES ABBOTT LABS	$ 45,414.	01/06/14

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

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

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

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

(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
MARIGOLD CHARITABLE TRUST	20-6748222

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

(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

(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

(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

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 1

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
DIVIDENDS	61,871.	0.	61,871.	61,871.	
INTEREST	24,142.	0.	24,142.	24,142.	
TO PART I, LINE 4	86,013.	0.	86,013.	86,013.	

FORM 990-PF OTHER PROFESSIONAL FEES STATEMENT 2

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
DONALD MOSKOWITZ CONSULTANT	15,231.	0.		15,231.
WEBSITE DESIGN	180.	0.		180.
TO FORM 990-PF, PG 1, LN 16C	15,411.	0.		15,411.

FORM 990-PF TAXES STATEMENT 3

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FOREIGN TAXES	996.	996.		0.
FEDERAL EXCISE TAX- CURRENT YR EST	3,280.	0.		0.
FEDERAL EXCISE TAX- PREVIOUS YR BAL	1,616.	0.		0.
TO FORM 990-PF, PG 1, LN 18	5,892.	996.		0.

FORM 990-PF OTHER EXPENSES STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
PC FILING FEE	35.	0.		35.
ADR FEE	20.	20.		0.
BASEBALL GLOVES	89.	0.		89.
POSTAGE & DUPLICATION	282.	0.		282.
CITIZENS BANK FEES	21.	0.		21.
TO FORM 990-PF, PG 1, LN 23	447.	20.		427.

FORM 990-PF OTHER DECREASES IN NET ASSETS OR FUND BALANCES STATEMENT 5

DESCRIPTION	AMOUNT
DIFFERENCE BETWEEN FMV AND BV OF APPRECIATED STOCK RECEIVED	18,751.
ACCRUED INTEREST PAID ON US GOVT NOTE PURCHASE	420.
TOTAL TO FORM 990-PF, PART III, LINE 5	19,171.

FORM 990-PF U.S. AND STATE/CITY GOVERNMENT OBLIGATIONS STATEMENT 6

DESCRIPTION	U.S. GOV'T	OTHER GOV'T	BOOK VALUE	FAIR MARKET VALUE
US GOVT OBLIGATIONS	X		2,047,104.	2,049,449.
TOTAL U.S. GOVERNMENT OBLIGATIONS			2,047,104.	2,049,449.
TOTAL STATE AND MUNICIPAL GOVERNMENT OBLIGATIONS				
TOTAL TO FORM 990-PF, PART II, LINE 10A			2,047,104.	2,049,449.

FORM 990-PF CORPORATE STOCK STATEMENT 7

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
CORPORATE STOCK	1,653,057.	2,719,033.
TOTAL TO FORM 990-PF, PART II, LINE 10B	1,653,057.	2,719,033.

FORM 990-PF CORPORATE BONDS STATEMENT 8

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
CORPORATE BONDS	307,252.	330,569.
TOTAL TO FORM 990-PF, PART II, LINE 10C	307,252.	330,569.

FORM 990-PF GRANT APPLICATION SUBMISSION INFORMATION STATEMENT 9
PART XV, LINES 2A THROUGH 2D

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

BEVERLY G MARRAM
C/O NIXON PEABODY, 100 SUMMER ST
BOSTON, MA 02110

TELEPHONE NUMBER

617-345-1000

FORM AND CONTENT OF APPLICATIONS

APPLICATION BY LETTER TO INCLUDE GENERAL INFORMATION, AUDIT, BUDGET AND TAX EXEMPT FORM OF ORGANIZATION

ANY SUBMISSION DEADLINES

NONE

RESTRICTIONS AND LIMITATIONS ON AWARDS

NONE

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	US TREAS NOTE DTD 11/30/08	P	06/24/10	12/02/13
b	APPLIED MATERIALS INC (300 SHARES)	P	12/20/07	04/03/14
c	CORNING INC (300 SHARES)	P	02/17/12	04/03/14
d	CORNING INC (400 SHARES)	P	02/17/12	04/03/14
e	MICROSOFT CORP (100 SHARES)	P	06/24/10	04/03/14
f	WALMART STORES INC (100 SHARES)	P	09/30/09	04/03/14
g	WALMART STORES INC (200 SHARES)	P	09/30/09	04/03/14
h	XILINX INC (200 SHARES)	P	11/01/10	04/03/14
i	APPLIED MATERIALS INC (900 SHARES)	P	12/20/07	04/14/14
j	CORNING INC (500 SHARES)	P	02/17/12	04/14/14
k	MICROSOFT CORP (900 SHARES)	P	06/24/10	04/14/14
l	SPDR S&P 500 ETF (500 SHARES)	P	11/02/05	04/14/14
m	WALMART STORES INC (900 SHARES)	P	09/30/09	04/14/14
n	XILINX INC (500 SHARES)	P	11/01/10	04/14/14
o	FOREST LABORATORIES INC (16 SHARES)	P		06/26/14

	(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	200,000.		200,000.	0.
b	6,258.		5,397.	861.
c	6,444.		4,164.	2,280.
d	8,592.		5,552.	3,040.
e	4,082.		2,514.	1,568.
f	7,729.		4,895.	2,834.
g	15,458.		9,790.	5,668.
h	10,936.		5,401.	5,535.
i	17,073.		16,191.	882.
j	10,195.		6,941.	3,254.
k	35,153.		22,626.	12,527.
l	91,198.		60,722.	30,476.
m	69,478.		44,054.	25,424.
n	25,834.		13,502.	12,332.
o	1,389.		1.	1,388.

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

	(i) F.M.V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	(l) Losses (from col (h)) Gains (excess of col (h) gain over col (k), but not less than "-0-")
a				0.
b				861.
c				2,280.
d				3,040.
e				1,568.
f				2,834.
g				5,668.
h				5,535.
i				882.
j				3,254.
k				12,527.
l				30,476.
m				25,424.
n				12,332.
o				1,388.

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	

323591
05-01-13

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	US TREAS NOTE DTD 06/30/09	P	09/30/09	06/30/14
b	MEDTRONIC INC (1,300 SHARES)	P	10/25/07	11/14/14
c	MICROSOFT CORP (1,000 SHARES)	P	05/26/06	11/14/14
d	THERMO FISHER SCIENTIFIC INC (1,000 SHARES)	P	09/30/09	11/14/14
e				
f				
g				
h				
i				
j				
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	200,000.		200,000.	0.
b	89,490.		61,684.	27,806.
c	49,584.		23,850.	25,734.
d	118,507.		43,311.	75,196.
e				
f				
g				
h				
i				
j				
k				
l				
m				
n				
o				

	Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Losses (from col (h)) Gains (excess of col. (h) gain over col (k), but not less than "-0-")
	(i) F M V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
a				0.
b				27,806.
c				25,734.
d				75,196.
e				
f				
g				
h				
i				
j				
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	236,805.
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

323591
05-01-13

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
ELIZABETH STONE HOUSE PO BOX 300039 JAMAICA PLAIN, MA 02130	NONE	PUBLIC CHARITY	ART THERAPY AND EXTRACURRICULAR ACTIVITY FUND	5,905.
HAWC 27 CONGRESS ST SALEM, MA 01970	NONE	PUBLIC CHARITY	BOY SCOUT PROGRAM/DAYCARE PROGRAM/PRE-SCHOOL TUITION/INSTRUMENT RENTALS/DANCE LESSONS	6,979.
HOME FOR LITTLE WANDERERS 271 HUNTINGTON AVENUE BOSTON, MA 02115	NONE	PUBLIC CHARITY	PRE-SCHOOL SMART OUTREACH PROGRAM	11,500.
HYATT PLACE HOTEL- ATLANTIS SPORTS CLUB 575 MEMORIAL DRIVE CAMBRIDGE, MA 02139	NONE	UNKNOWN	SWIMMING LESSONS FOR ONE CHILD	599.
ITALIAN HOME FOR CHILDREN 1125 CENTRE STREET JAMAICA PLAIN, MA 02130	NONE	PUBLIC CHARITY	SUMMER CAMP FOR THREE CHILDREN/CONSULTANT SALARY	64,046.
JEANNE GEIGER CRISIS CENTER 2 HARRIS STREET NEWBURYPORT, MA 01950	NONE	PUBLIC CHARITY	ART THERAPY	10,000.
JOANS OLYMPIC GYM 197 QUINCY AVE BRAINTREE, MA 07184	NONE	UNKNOWN	GYMNASTICS FOR ONE CHILD	1,320.
LEXINGTON MUSIC SCHOOL 1403 MASSACHUSETTS AVE LEXINGTON, MA 02420	NONE	PUBLIC CHARITY	MUSIC LESSONS	1,445.
MASSACHUSETTS CHILDREN'S TRUST FUND 55 COURT STREET, 4TH FLOOR BOSTON, MA 02108	NONE	PUBLIC CHARITY	SEXUAL ABUSE PREVENTION INITIATIVE	7,500.
MUNROE CENTER FOR THE ARTS 1403 MASSACHUSETTS AVE LEXINGTON, MA 02420	NONE	PUBLIC CHARITY	SUMMER ART CAMP FOR ONE CHILD	990.
Total from continuation sheets				153,404.

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
SOUTH SHORE YMCA 79 CODDINGTON STREET QUINCY , MA 02169	NONE	PUBLIC CHARITY	SUMMER CAMP/SWIM LESSONS	1,708.
THE GUIDANCE CENTER 5 SACRAMENTO STREET CAMBRIDGE, MA 02138	NONE	PUBLIC CHARITY	ACCOUNT FOR INDIVIDUAL CHILD REQUESTS	18,885.
THE SECOND STEP INC. PO BOX 600213 NEWTONVILLE, MA 02460	NONE	PUBLIC CHARITY	BOXING LESSONS/SUMMER CAMP/DANCE CLASSES/PIANO LESSONS	7,427.
WARRENDALE LITTLE LEAGUE PO BOX 540392 WALTHAM, MA 02454	NONE	PUBLIC CHARITY	LITTLE LEAGUE REGISTRATION FOR TWO BOYS	100.
WEST END HOUSE CAMP, INC 105 ALLSTON ST ALLSTON, MA 02134	NONE	PUBLIC CHARITY	SUMMER CAMP FOR EIGHT CHILDREN	15,000.
Total from continuation sheets				

Part XV Supplementary Information

3a Grants and Contributions Paid During the Year Continuation of Purpose of Grant or Contribution

NAME OF RECIPIENT - BOSTON CHILDREN'S HOSPITAL

2014 PROJECT SHIFA AWARD INITIATIVE FOR MENTAL HEALTH PROJECT/SOMALI ELEMENTARY SCHOOL CHILDREN

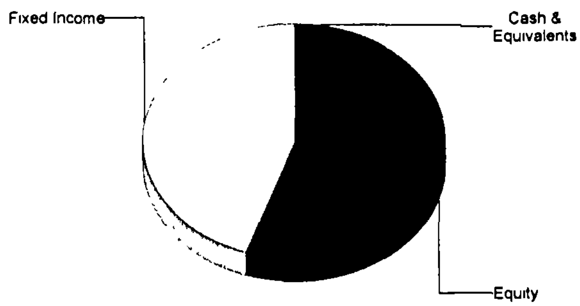
NIXON PEABODY

MARIGOLD CHARITABLE TRUST
LAWRENCE COHEN, BEVERLY MARRAM,
SUSAN SHAMUS & MERYL RICH TRUSTEES

Account:	875322800
Report Period:	From 11/30/2014 To 11/30/2014
Your Contact:	LAWRENCE B COHEN (617) 345-1268
Administrator:	Mary Ellen Dota

Portfolio Summary

	Market Value as of 11/30/14	% of Total	Estimated Income
Cash Equivalents	227,650.85	4.27	22.73
Fixed Income	2,380,017 98	44 68	26,002 50
Equity	2,719,033.34	51.05	55,045.24
Total Assets	5,326,702.17	100.00	81,070.47
Total Assets	**5,326,702.17**	**100.00**	**81,070.47**



Asset Detail Summary

	Cost Basis	% Cost	Market Value	% Mkt	Unrealized Gain/Loss	Estimated Annual Income	Yield At Mkt
CASH & EQUIVALENTS							
MONEY MARKET FUNDS	227,250 85	5.37	227,250 85	4 27	0 00	23.00	0.0
TOTAL CASH & EQUIVALENTS	227,250.85	5 37	227,250.85	4.27	0.00	23.00	0 0
FIXED INCOME							
CORPORATE BONDS	307,252 24	7 26	330,568.83	6 21	23,316 59	12,691.00	3.8
U S. TREASURY NOTES & BONDS	2,047,104 20	48 34	2,049,449 15	38 48	2,344 95	13,313.00	0 6
TOTAL FIXED INCOME	2,354,356 44	55.60	2,380,017.98	44 68	25,661 54	26,004 00	1 1
EQUITY							
COMMON STOCK	1,137,856.37	26 87	2,127,448.60	39 94	989,592 23	38,545.00	1 8
EQUITY FUNDS - ETF	60,479 06	1.43	103,185 60	1 94	42,706 54	1,871 00	1 8
FOREIGN STOCK	165,310 41	3 90	166,712 00	3.13	1,401 59	7,986.00	4 8
INTERNATIONAL EQUITY - ETF	113,064 75	2 67	125,932.32	2 36	12,867.57	4,385.00	3 5
INTERNATIONAL EQUITY MUTUAL FUNDS	176,346 12	4.16	195,754.82	3 67	19,408 70	2,259.00	1.2
TOTAL EQUITY	1,653,056.71	39 04	2,719,033 34	51 05	1,065,976.63	55,046 00	2 0

Cash

Principal Cash			400 00				
Income Cash			0 00				
Total Cash			400.00	0 01			

MARIGOLD CHARITABLE TRUST
LAWRENCE COHEN, BEVERLY MARRAM,
SUSAN SHAMUS & MERYL RICH TRUSTEES

NIXON PEABODY

Account: 875322800
Report Period: From 11/30/2014 To 11/30/2014

Gains and Losses Summary

	Year To Date
Long Term	235,478.95
Short Term	0 00
Total Realized Gain/Loss on Cost	**235,478.95**

MARIGOLD CHARITABLE TRUST
LAWRENCE COHEN, BEVERLY MARRAM,
SUSAN SHAMUS & MERYL RICH TRUSTEES

NIXON PEABODY

Account: 875322800
Report Period: From 11/30/2014 To 11/30/2014

Asset Statement

Units	Description	Cost Basis	Unit Price	Market Value	% Acct	Unrealized Gain/Loss	Estimated Annual Income	Yield At Mkt
CASH & EQUIVALENTS								
Money Markets								
227,250 85	MONEY MKT OBLIGS TR GOVT OBLIGS TAX-MGD FD INSTL SHS - PRINCIPAL	227,250 85	1 00	227,250 85	4 27	0 00	22 73	0 01
TOTAL Money Markets		**227,250.85**		**227,250.85**	**4.27**	**0.00**	**22.73**	**0.01**
Cash								
	Principal Cash	400 00		400 00				
	Income Cash	0.00		0 00				
	Total Cash	400 00		400.00	0.01			
TOTAL CASH & EQUIVALENTS		**227,650.85**		**227,650.85**	**4.27**	**0.00**	**22.73**	**0.01**
FIXED INCOME								
Corporate Obligations								
160,000	HEWLETT-PACKARD CO GLOBAL NOTE DTD 09/13/10 2 125% 09/13/15	160,437 48	101 04	161,664.48	3 03	1,227.00	3,400 00	2.10
55,000	NORTHERN TRUST CO SUBORDINATED DTD 08/13/08 6 5% 08/15/18 MEDIUM TERM NOTE	55,542.02	116.15	63,879 75	1 20	8,337.73	3,575 00	5.60
90,000	VERIZON COMMUNICATIONS INC NOTE DTD 03/27/09 6.35% 04/01/19	91,272.74	116 69	105,024 60	1 97	13,751.86	5,715.00	5.44
TOTAL Corporate Obligations		**307,252.24**		**330,568.83**	**6.21**	**23,316.59**	**12,690.00**	**3.84**
U.S. Gov't Obligations								
200,000	UNITED STATES TREAS NTS DTD 11/30/09 2 125% 11/30/14	201,984 39	100 00	200,000.00	3 75	(1,984 39)	4,250 00	2.13
250,000	UNITED STATES TREAS NTS DTD 02/15/12 0 25% 02/15/15	250,020.08	100 04	250,097.75	4.70	77 67	625 00	0 25
150,000	UNITED STATES TREAS NTS DTD 04/15/12 0 375% 04/15/15	150,017 99	100.13	150,187.50	2.82	169 51	562 50	0 37
200,000	UNITED STATES TREAS NTS DTD 09/15/12 0 25% 09/15/15	199,903 74	100 13	200,250 00	3.76	346 26	500 00	0.25
200,000	UNITED STATES TREAS NTS DTD 11/15/12 0.375% 11/15/15	200,076 14	100 23	200,453 20	3.76	377 06	750 00	0 37
200,000	UNITED STATES TREAS NTS DTD 02/15/13 0 375 02/15/16	199,971 88	100.20	200,406.20	3.76	434 32	750 00	0 37
200,000	UNITED STATES TREAS NTS DTD 11/30/11 0 875% 11/30/16	201,620.51	100.78	201,562.40	3.78	(58.11)	1,750 00	0.87
200,000	UNITED STATES TREAS NTS DTD 02/15/14 0 625% 02/15/17	199,379 49	100 09	200,171 80	3 76	792 31	1,250.00	0 62
200,000	UNITED STATES TREAS NTS DTD 07/31/12 0 5% 07/31/17	197,088 96	99 23	198,468.80	3 73	1,379 84	1,000 00	0.50

Asset Statement(Cont'd)

Units	Description	Cost Basis	Unit Price	Market Value	% Acct	Unrealized Gain/Loss	Estimated Annual Income	Yield At Mkt
250,000	UNITED STATES TREAS NTS DTD 02/28/13 0.75% 02/28/18	247,041.02	99.14	247,851 50	4.65	810.48	1,875.00	0.76
TOTAL U.S. Gov't Obligations		**2,047,104.20**		**2,049,449.15**	**38.48**	**2,344.95**	**13,312.50**	**0.65**
TOTAL FIXED INCOME		**2,354,356.44**		**2,380,017.98**	**44.68**	**25,661.54**	**26,002.50**	**1.09**
EQUITY								
Common Stock								
Consumer Discretionary								
1,200	TJX COMPANIES INC COM	71,070 20	66 16	79,392 00	1 49	8,321 80	840 00	1 06
1,500	TARGET CORP	49,693 80	74 00	111,000 00	2 08	61,306 20	3,120.00	2 81
TOTAL Consumer Discretionary		**120,764.00**		**190,392.00**	**3.57**	**69,628.00**	**3,960.00**	**2.08**
Consumer Staples								
950	CVS HEALTH CORPORATION	69,949 50	91.36	86,792 00	1 63	16,842 50	1,045 00	1 20
1,200	PEPSICO INC	71,783 98	100 10	120,120.00	2.26	48,336 02	3,144.00	2 62
1,200	PROCTER & GAMBLE CO	69,348 00	90.43	108,516.00	2 04	39,168 00	3,089.28	2 85
TOTAL Consumer Staples		**211,081.48**		**315,428.00**	**5.92**	**104,346.52**	**7,278.28**	**2.31**
Energy								
2,400	BAKER HUGHES INC	113,545 32	57.00	136,800 00	2.57	23,254.68	1,632.00	1.19
1,300	ROYAL DUTCH SHELL PLC ADR B SHS	88,433.41	69.44	90,272.00	1 69	1,838 59	4,888.00	5.41
4,000	STATOIL HYDRO ASA SPONSORED ADR	76,877.00	19.11	76,440.00	1.44	(437 00)	3,097.60	4 05
TOTAL Energy		**278,855.73**		**303,512.00**	**5.70**	**24,656.27**	**9,617.60**	**3.17**
Health Care								
2,960	ABBOTT LABS	68,419 61	44 51	131,749 60	2 47	63,329 99	2,604 80	1 98
1,000	EDWARDS LIFESCIENCES CORP	69,386.00	129 68	129,680 00	2 43	60,294 00	0 00	0.00
1,300	MEDTRONIC INC	41,795 00	73.87	96,031.00	1 80	54,236 00	1,586 00	1 65
1,600	STRYKER CORP	67,344 56	92 91	148,656.00	2.79	81,311 44	1,952 00	1 31
1,000	THERMO FISHER SCIENTIFIC INC	43,311 00	129 29	129,290 00	2 43	85,979 00	600 00	0.46
TOTAL Health Care		**290,256.17**		**635,406.60**	**11.93**	**345,150.43**	**6,742.80**	**1.06**
Industrials								
1,200	3M CO	91,411 25	160 09	192,108 00	3 61	100,696.75	4,104 00	2.14
TOTAL Industrials		**91,411.25**		**192,108.00**	**3.61**	**100,696.75**	**4,104.00**	**2.14**
Information Technology								
3,000	APPLIED MATLS INC	42,991 20	24.05	72,150 00	1 35	29,158 80	1,200 00	1.66
2,800	CORNING INC	38,866 80	21 02	58,856 00	1.10	19,989.20	1,120.00	1.90
4,000	INTEL CORP	64,903.74	37 25	149,000 00	2 80	84,096 26	3,600 00	2.42
2,000	MICROSOFT CORP	40,859 85	47 81	95,620 00	1.80	54,760 15	2,480 00	2 59
1,600	QUALCOMM INC	55,995.36	72.90	116,640 00	2.19	60,644 64	2,688.00	2 30

MARIGOLD CHARITABLE TRUST
LAWRENCE COHEN, BEVERLY MARRAM,
SUSAN SHAMUS & MERYL RICH TRUSTEES

NIXON PEABODY

Account: 875322800
Report Period: From 11/30/2014 To 11/30/2014

Asset Statement(Cont'd)

Units	Description	Cost Basis	Unit Price	Market Value	% Acct	Unrealized Gain/Loss	Estimated Annual Income	Yield At Mkt
1,100	XILINX INC	29,704 40	45 44	49,984 00	0.94	20,279 60	1,276 00	2 55
TOTAL Information Technology		**273,321.35**		**542,250.00**	**10.18**	**268,928.65**	**12,364.00**	**2.28**
	Materials							
800	AIR PRODUCTS & CHEMICALS INC	37,476.80	143.83	115,064 00	2.16	77,587.20	2,464.00	2.14
TOTAL Materials		**37,476.80**		**115,064.00**	**2.16**	**77,587.20**	**2,464.00**	**2.14**
TOTAL Common Stock		**1,303,166.78**		**2,294,160.60**	**43.07**	**990,993.82**	**46,530.68**	**2.03**
	Exchange Traded Funds							
	Equity Funds - ETF							
498	SPDR S&P 500 ETF	60,479 06	207.20	103,185.60	1 94	42,706.54	1,870 87	1.81
TOTAL Equity Funds - ETF		**60,479.06**		**103,185.60**	**1.94**	**42,706.54**	**1,870.87**	**1.81**
	International Equity - ETF							
1,968	ISHARES MSCI EAFE INDEX FD	113,064.75	63.99	125,932.32	2.36	12,867.57	4,384.53	3.48
TOTAL International Equity - ETF		**113,064.75**		**125,932.32**	**2.36**	**12,867.57**	**4,384.53**	**3.48**
TOTAL Exchange Traded Funds		**173,543.81**		**229,117.92**	**4.30**	**55,574.11**	**6,255.40**	**2.73**
	Mutual Funds							
	International Equity Mutual Funds							
3,932.399	AMERICAN EUROPACIFIC GROWTH FUND F2	176,346.12	49.78	195,754.82	3.67	19,408 70	2,259.16	1.15
TOTAL International Equity Mutual Funds		**176,346.12**		**195,754.82**	**3.67**	**19,408.70**	**2,259.16**	**1.15**
TOTAL Mutual Funds		**176,346.12**		**195,754.82**	**3.67**	**19,408.70**	**2,259.16**	**1.15**
TOTAL EQUITY		**1,653,056.71**		**2,719,033.34**	**51.05**	**1,065,976.63**	**55,045.24**	**2.02**
GRAND TOTAL ASSETS		**4,235,064.00**		**5,326,702.17**	**100.00**	**1,091,638.17**	**81,070.47**	**1.52**

Citizens Bank

1-800-862-6200

Call Citizens' PhoneBank anytime for account information, current rates and answers to your questions

Commercial Account Statement

Beginning October 29, 2014
through November 30, 2014

USOO2 BR675

MARI GOLD CHARI TABLE TRUST
DTD 12/02/2005
LAWRENCE B COHEN TTEE
NI XON PEABODY LLP 100 SUMMER ST
BOSTON MA 02110

Commercial Checking

MARIGOLD CHARITABLE TRUST
DTD 12/02/2005
LAWRENCE B COHEN TTEE
Business Green Checking
132603-849-1

SUMMARY

Balance Calculation

Previous Balance	.00	
Checks	.00	-
Debits	21.00	-
Deposits & Credits	10,000.01	+
Current Balance	9,979 01	=

You can waive the monthly maintenance fee of $9 99 by maintaining an average daily balance in your account of $2,000 or by making 5 qualifying transactions that post to your account during the statement period.

Your average daily balance used to qualify this statement period is:	$6,321
Your number of qualifying transactions this statement period is:	0

Your next statement period will end on December 31, 2014.

TRANSACTION DETAILS

Previous Balance .00

Debits

Other Debits

Date	Amount	Description
11/12	18.00	Service Charge (1) Wire Transfer Fees
11/28	3 00	Service Charge (1) Statement Delivery With Check Images

Total Debits 21 00

Deposits & Credits

Date	Amount	Description
11/06	01	Deposit
11/12	10,000.00	Incoming Wire Transfer (Mts No 141112011815)

Total Deposits & Credits 10,000.01

Current Balance 9,979.01

Daily Balance

Date	Balance	Date	Balance	Date	Balance
11/06	01	11/12	9,982 01	11/28	9,979.01