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## Return of Private Foundation

Department of the Treasury  
Internal Revenue Service

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

2015

Open to Public Inspection

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► Information about Form 990-PF and its separate instructions is at [www.irs.gov/form990pf](http://www.irs.gov/form990pf).

For calendar year 2015 or tax year beginning

, 2015, and ending

, 20

Name of foundation

The Beagary Charitable Trust

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

49 Westview Drive

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

Brooklyn, CT 06234

G Check all that apply:

Initial return       Initial return of a former public charity  
 Final return       Amended return  
 Address change       Name change

H Check type of organization:  Section 501(c)(3) exempt private foundation Section 4947(a)(1) nonexempt charitable trust  Other taxable private foundationI Fair market value of all assets at  
end of year (from Part II, col. (c),  
line 16) ► \$ 9,039,878J Accounting method:  Cash  Accrual  
 Other (specify) \_\_\_\_\_

A Employer identification number

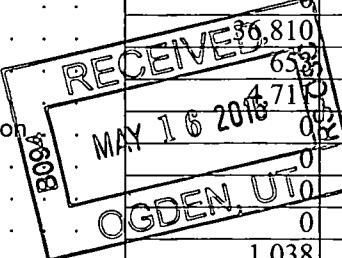
06-6419011

B Telephone number (see instructions)

860-779-0428

C If exemption application is pending, check here ► D 1. Foreign organizations, check here ► 2. Foreign organizations meeting the 85% test,  
check here and attach computation ► E If private foundation status was terminated under  
section 507(b)(1)(A), check here ► 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) (see instructions))

		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1	Contributions, gifts, grants, etc., received (attach schedule)	0			
2	Check ► <input type="checkbox"/> if the foundation is not required to attach Sch. B				
3	Interest on savings and temporary cash investments	13	13	0	
4	Dividends and interest from securities	203,984	203,984	0	
5a	Gross rents	0	0	0	
b	Net rental income or (loss)	0			
6a	Net gain or (loss) from sale of assets not on line 10	6,225			
b	Gross sales price for all assets on line 6a	1,565,454			
7	Capital gain net income (from Part IV, line 2)		6,225		
8	Net short-term capital gain			0	
9	Income modifications			0	
10a	Gross sales less returns and allowances	0			
b	Less: Cost of goods sold	0			
c	Gross profit or (loss) (attach schedule)	0		0	
11	Other income (attach schedule)	0	0	0	
12	<b>Total.</b> Add lines 1 through 11	210,222	210,222	0	
13	Compensation of officers, directors, trustees, etc.	130,000	32,500	0	97,500
14	Other employee salaries and wages	0	0	0	0
15	Pension plans, employee benefits	0	0	0	0
16a	Legal fees (attach schedule)	5,124	0	0	5,124
b	Accounting fees (attach schedule)	0	0	0	0
c	Other professional fees (attach schedule)	36,810	36,810	0	0
17	Interest	653	653	0	0
18	Taxes (attach schedule) (see instructions)	4,710	1,282	0	0
19	Depreciation (attach schedule) and depletion	0	0	0	0
20	Occupancy	0	0	0	0
21	Travel, conferences, and meetings	0	0	0	0
22	Printing and publications	0	0	0	0
23	Other expenses (attach schedule)	1,038	0	0	1,038
24	<b>Total operating and administrative expenses.</b>	178,336	71,245	0	103,662
	Add lines 13 through 23				
25	Contributions, gifts, grants paid	704,816			704,816
26	<b>Total expenses and disbursements.</b> Add lines 24 and 25	883,152	71,245	0	808,478
27	Subtract line 26 from line 12:				
a	Excess of revenue over expenses and disbursements	(672,930)			
b	Net investment income (if negative, enter -0-)		138,977		
c	Adjusted net income (if negative, enter -0-)			0	



<b>Part II</b> <b>Balance Sheets</b>		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)	<b>Beginning of year</b>	<b>End of year</b>	
			<b>(a) Book Value</b>	<b>(b) Book Value</b>	<b>(c) Fair Market Value</b>
<b>Assets</b>	1	Cash—non-interest-bearing	1,196	1,047	1,047
	2	Savings and temporary cash investments	286,544	421,983	421,983
	3	Accounts receivable ►			
		Less: allowance for doubtful accounts ►	0	0	0
	4	Pledges receivable ►			
		Less: allowance for doubtful accounts ►	0	0	0
	5	Grants receivable	0	0	0
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)	0	0	0
	7	Other notes and loans receivable (attach schedule) ►			
		Less: allowance for doubtful accounts ►	0	0	0
	8	Inventories for sale or use	0	0	0
	9	Prepaid expenses and deferred charges	0	0	0
	10a	Investments—U.S. and state government obligations (attach schedule)	0	0	0
	b	Investments—corporate stock (attach schedule)	9,762,176	8,616,848	8,616,848
	c	Investments—corporate bonds (attach schedule)	0	0	0
<b>Liabilities</b>	11	Investments—land, buildings, and equipment basis ►			
		Less accumulated depreciation (attach schedule) ►	0	0	0
	12	Investments—mortgage loans	0	0	0
	13	Investments—other (attach schedule)	0	0	0
	14	Land, buildings, and equipment: basis ►			
		Less accumulated depreciation (attach schedule) ►	0	0	0
	15	Other assets (describe ► )	0	0	0
	16	<b>Total assets</b> (to be completed by all filers—see the instructions. Also, see page 1, item I)	10,049,916	9,039,878	9,039,878
	17	Accounts payable and accrued expenses	0	0	
	18	Grants payable	0	0	
<b>Net Assets or Fund Balances</b>	19	Deferred revenue	0	0	
	20	Loans from officers, directors, trustees, and other disqualified persons	0	0	
	21	Mortgages and other notes payable (attach schedule)	0	0	
	22	Other liabilities (describe ► )	0	0	
	23	<b>Total liabilities</b> (add lines 17 through 22)	0	0	
	Foundations that follow SFAS 117, check here ► <input type="checkbox"/>				
	and complete lines 24 through 26 and lines 30 and 31.				
	24	Unrestricted			
	25	Temporarily restricted			
	26	Permanently restricted			
<b>Net Assets or Fund Balances</b>	Foundations that do not follow SFAS 117, check here ► <input checked="" type="checkbox"/>				
	and complete lines 27 through 31.				
	27	Capital stock, trust principal, or current funds	10,049,916	9,039,878	
	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	<b>Total net assets or fund balances</b> (see instructions)	10,049,916	9,039,878	
	31	<b>Total liabilities and net assets/fund balances</b> (see instructions)	10,049,916	9,039,878	

**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	10,049,916
2	Enter amount from Part I, line 27a	2	(672,930)
3	Other increases not included in line 2 (itemize) ►	3	0
4	Add lines 1, 2, and 3	4	9,376,986
5	Decreases not included in line 2 (itemize) ► decrease in unrealized gains	5	337,108
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	9,039,878

**Part IV Capital Gains and Losses for Tax on Investment Income**

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co.)		(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo., day, yr)	(d) Date sold (mo., day, yr)
<b>1a</b> Publicly Traded Securities (Fidelity account #673-816485)		P		
<b>b</b>				
<b>c</b>				
<b>d</b>				
<b>e</b>				
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)	
<b>a</b> 1,565,454	0	1,559,233	6,221	
<b>b</b>				
<b>c</b>				
<b>d</b>				
<b>e</b>				
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69				
(i) 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))	
<b>a</b> 0	0	0	6,221	
<b>b</b>				
<b>c</b>				
<b>d</b>				
<b>e</b>				
<b>2</b> Capital gain net income or (net capital loss) <span style="float: right;">If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7</span>			<b>2</b>	6,225
<b>3</b> Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c) (see instructions). If (loss), enter -0- in Part I, line 8 . . . . .			<b>3</b>	(19,141)

**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))
2014	1,131,106	9,844,410	0.1149
2013	740,698	9,547,907	0.0776
2012	686,594	9,440,387	0.0727
2011	658,623	8,808,672	0.0748
2010	717,490	8,885,231	0.0808
<b>2</b> Total of line 1, column (d) . . . . .			<b>2</b> 0.4208
<b>3</b> Average distribution ratio for the 5-year base period—divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years . . . . .			<b>3</b> .08416
<b>4</b> Enter the net value of noncharitable-use assets for 2015 from Part X, line 5 . . . . .			<b>4</b> 9,697,504
<b>5</b> Multiply line 4 by line 3 . . . . .			<b>5</b> 816,142
<b>6</b> Enter 1% of net investment income (1% of Part I, line 27b) . . . . .			<b>6</b> 1,390
<b>7</b> Add lines 5 and 6 . . . . .			<b>7</b> 817,532
<b>8</b> Enter qualifying distributions from Part XII, line 4 . . . . . If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions.			<b>8</b> 808,478

**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)

1b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ►  and enter 1% of Part I, line 27b . . . . .

1c 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-)

3 Add lines 1 and 2 . . . . .

4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)

5 **Tax based on investment income.** Subtract line 4 from line 3 If zero or less, enter -0- . . . . .

6 Credits/Payments:

a 2015 estimated tax payments and 2014 overpayment credited to 2015 6a 3,429

b Exempt foreign organizations—tax withheld at source 6b 0

c Tax paid with application for extension of time to file (Form 8868) 6c 0

d Backup withholding erroneously withheld 6d 0

7 Total credits and payments Add lines 6a through 6d 7 3,429

8 Enter any **penalty** for underpayment of estimated tax. Check here  if Form 2220 is attached 8 0

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** ► 10 649

11 Enter the amount of line 10 to be **Credited to 2016 estimated tax** ► 649 Refunded ► 11 0

1	2,780
2	0
3	2,780
4	0
5	2,780

6a	3,429
6b	0
6c	0
6d	0

7	3,429
8	0
9	0
10	649
11	0

**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 X

1b 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.*

1c Did the foundation file **Form 1120-POL** for this year? 1c X

1d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year:  
(1) On the foundation. ► \$ N/A (2) On foundation managers. ► \$ N/A

1e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ► \$ N/A

2 Has the foundation engaged in any activities that have not previously been reported to the IRS? 2 X

*If "Yes," attach a detailed description of the activities.*

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

4b If "Yes," has it filed a tax return on **Form 990-T** for this year? 4b X

5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? 5 X

*If "Yes," attach the statement required by General Instruction T.*

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) ► Connecticut

8b 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 2015 or the taxable year beginning in 2015 (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

**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? Website address ► N/A	13	X
14	The books are in care of ► Patricia A. Morgan Located at ► 49 Westview Drive, Brooklyn, CT	Telephone no. ► 860-774-0428 ZIP+4 ► 06234	
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of <b>Form 1041</b> —Check here. and enter the amount of tax-exempt interest received or accrued during the year ► 15		► <input type="checkbox"/>
16	At any time during calendar year 2015, 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 FinCEN Form 114. If "Yes," enter the name of the foreign country ►	16	Yes X

**Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required****File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.**

		Yes	No
1a	During the year did the foundation (either directly or indirectly): (1) Engage in the sale or exchange, or leasing of property with a disqualified person? (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? (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)? (6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days)	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
1b	If any answer is "Yes" to 1a(1)–(6), did <b>any</b> 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 ► <input type="checkbox"/>		
1c	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 2015?		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 2015, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2015? If "Yes," list the years ► 20____, 20____, 20____, 20____ <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
2b	Are there any years listed in 2a for which the foundation is <b>not</b> 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 <b>all</b> years listed, answer "No" and attach statement—see instructions.)		X
3a	If the provisions of section 4942(a)(2) are being applied to <b>any</b> of the years listed in 2a, list the years here ► 20____, 20____, 20____, 20____		
3b	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
4a	If "Yes," did it have excess business holdings in 2015 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 2015.)		
4b	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 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 2015?		X

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

<b>5a</b>	During the year did the foundation pay or incur any amount to:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(1)	Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(2)	Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(3)	Provide a grant to an individual for travel, study, or other similar purposes?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(4)	Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? (see instructions)	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(5)	Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
<b>b</b>	If any answer is "Yes" to 5a(1)–(5), did <b>any</b> 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)?			<b>5b</b>
	Organizations relying on a current notice regarding disaster assistance check here ► <input type="checkbox"/>			
<b>c</b>	If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
	<i>If "Yes," attach the statement required by Regulations section 53.4945–5(d).</i>			
<b>6a</b>	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
<b>b</b>	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?			<b>6b</b>
	<i>If "Yes" to 6b, file Form 8870.</i>			X
<b>7a</b>	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
<b>b</b>	If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?			<b>7b</b>

**Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors****1 List all officers, directors, trustees, foundation managers and their compensation (see instructions).**

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
Patricia A. Morgan 49 Westview Dr, Brooklyn, CT 06234	Trustee 25	130,000	0	0
-----	-----	-----	-----	-----
-----	-----	-----	-----	-----
-----	-----	-----	-----	-----
-----	-----	-----	-----	-----
-----	-----	-----	-----	-----

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

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

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

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

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

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

## **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.

1	NONE	
2		
3		
4		

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

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.

1	NONE	
2		
All other program-related investments See instructions		
3	NONE	
<b>Total.</b> 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	9,648,711
b	Average of monthly cash balances	1b	131,400
c	Fair market value of all other assets (see instructions)	1c	0
d	<b>Total</b> (add lines 1a, b, and c)	1d	9,780,111
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	9,780,111
4	Cash deemed held for charitable activities. Enter 1½% of line 3 (for greater amount, see instructions)	4	146,702
5	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. Enter here and on Part V, line 4	5	9,633,409
6	<b>Minimum investment return.</b> Enter 5% of line 5	6	481,670

**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	481,670
2a	Tax on investment income for 2015 from Part VI, line 5	2a	2,780
b	Income tax for 2015. (This does not include the tax from Part VI)	2b	0
c	Add lines 2a and 2b	2c	2,780
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	478,890
4	Recoveries of amounts treated as qualifying distributions	4	0
5	Add lines 3 and 4	5	478,890
6	Deduction from distributable amount (see instructions)	6	0
7	<b>Distributable amount</b> as adjusted Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	478,890

**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	808,478
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	0
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	0
b	Cash distribution test (attach the required schedule)	3b	0
4	<b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	808,478
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b (see instructions)	5	0
6	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4	6	808,478

**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 2014	(c) 2014	(d) 2015
<b>1</b> Distributable amount for 2015 from Part XI, line 7 . . . . .				478,890
<b>2</b> Undistributed income, if any, as of the end of 2015:				
<b>a</b> Enter amount for 2014 only . . . . .			0	
<b>b</b> Total for prior years: 20 ____,20 ____,20 ____		0		
<b>3</b> Excess distributions carryover, if any, to 2015:				
<b>a</b> From 2010 . . . . .	0			
<b>b</b> From 2011 . . . . .	0			
<b>c</b> From 2012 . . . . .	0			
<b>d</b> From 2013 . . . . .	0			
<b>e</b> From 2014 . . . . .	0			
<b>f</b> <b>Total</b> of lines 3a through e . . . . .	0			
<b>4</b> Qualifying distributions for 2015 from Part XII, line 4: ► \$ ____ 808,478				
<b>a</b> Applied to 2014, but not more than line 2a . . . . .			0	
<b>b</b> Applied to undistributed income of prior years (Election required—see instructions) . . . . .		0		
<b>c</b> Treated as distributions out of corpus (Election required—see instructions) . . . . .	0			
<b>d</b> Applied to 2015 distributable amount . . . . .				478,890
<b>e</b> Remaining amount distributed out of corpus	329,588			
<b>5</b> Excess distributions carryover applied to 2015 (If an amount appears in column (d), the same amount must be shown in column (a).)	0			0
<b>6</b> <b>Enter the net total of each column as indicated below:</b>				
<b>a</b> Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	329,588			
<b>b</b> Prior years' undistributed income. Subtract line 4b from line 2b . . . . .		0		
<b>c</b> Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed . . . . .			0	
<b>d</b> Subtract line 6c from line 6b Taxable amount—see instructions . . . . .			0	
<b>e</b> Undistributed income for 2014. Subtract line 4a from line 2a. Taxable amount—see instructions . . . . .				0
<b>f</b> Undistributed income for 2015. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2016 . . . . .				0
<b>7</b> Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required—see instructions) . . . . .	0			
<b>8</b> Excess distributions carryover from 2010 not applied on line 5 or line 7 (see instructions)	0			
<b>9</b> <b>Excess distributions carryover to 2016.</b> Subtract lines 7 and 8 from line 6a . . . . .	329,588			
<b>10</b> Analysis of line 9:				
<b>a</b> Excess from 2011 . . . . .	0			
<b>b</b> Excess from 2012 . . . . .	0			
<b>c</b> Excess from 2013 . . . . .	0			
<b>d</b> Excess from 2014 . . . . .	0			
<b>e</b> Excess from 2015 . . . . .	329,588			

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

<b>1a</b> If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2015, enter the date of the ruling ►																																								
<b>b</b> Check box to indicate whether the foundation is a private operating foundation described in section <input type="checkbox"/> 4942(j)(3) or <input type="checkbox"/> 4942(j)(5)																																								
<b>2a</b> Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed . . .	<table border="1"> <thead> <tr> <th>Tax year</th> <th colspan="3">Prior 3 years</th> <th>(e) Total</th> </tr> <tr> <th>(a) 2015</th> <th>(b) 2014</th> <th>(c) 2013</th> <th>(d) 2012</th> <th></th> </tr> </thead> <tbody> <tr> <td>0</td> <td>0</td> <td>0</td> <td>0</td> <td>0</td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td>0</td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td>0</td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td>0</td> </tr> <tr> <td>0</td> <td>0</td> <td>0</td> <td>0</td> <td>0</td> </tr> </tbody> </table>					Tax year	Prior 3 years			(e) Total	(a) 2015	(b) 2014	(c) 2013	(d) 2012		0	0	0	0	0					0					0					0	0	0	0	0	0
Tax year	Prior 3 years			(e) Total																																				
(a) 2015	(b) 2014	(c) 2013	(d) 2012																																					
0	0	0	0	0																																				
				0																																				
				0																																				
				0																																				
0	0	0	0	0																																				
<b>b</b> 85% of line 2a . . .																																								
<b>c</b> Qualifying distributions from Part XII, line 4 for each year listed . . .																																								
<b>d</b> Amounts included in line 2c not used directly for active conduct of exempt activities																																								
<b>e</b> Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c . . .																																								
<b>3</b> Complete 3a, b, or c for the alternative test relied upon:																																								
<b>a</b> "Assets" alternative test—enter:																																								
(1) Value of all assets . . .																																								
(2) Value of assets qualifying under section 4942(j)(3)(B)(i) . . .																																								
<b>b</b> "Endowment" alternative test—enter $\frac{2}{3}$ of minimum investment return shown in Part X, line 6 for each year listed . . .																																								
<b>c</b> "Support" alternative test—enter:																																								
(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties) . . .																																								
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii) . . .																																								
(3) Largest amount of support from an exempt organization . . .																																								
(4) Gross investment income . . .																																								

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

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

NONE

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

NONE

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

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

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

Patricia A. Morgan, 49 Westview Drive, Brooklyn, CT 06234 860-779-0429

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

Written request, including amount requested, the purpose of the contributions, and the charitable benefit

**c** Any submission deadlines:

NONE

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

NONE

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

Recipient	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
Name and address (home or business)				
<b>a Paid during the year</b>				704,816
SEE ATTACHED				
<b>Total</b>			► 3a	704,816
<b>b Approved for future payment</b>				
<b>Total</b>			► 3b	0

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.

	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions )
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue:					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities					
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					
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		0	0
13 Total. Add line 12, columns (b), (d), and (e)				13	0

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

**Part XVI-B Relationship of Activities to the Accomplishment of Exempt 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)	
(2) Other assets . . . . .	1a(2)	
b Other transactions:		
(1) Sales of assets to a noncharitable exempt organization . . . . .	1b(1)	
(2) Purchases of assets from a noncharitable exempt organization . . . . .	1b(2)	
(3) Rental of facilities, equipment, or other assets . . . . .	1b(3)	
(4) Reimbursement arrangements . . . . .	1b(4)	
(5) Loans or loan guarantees . . . . .	1b(5)	
(6) Performance of services or membership or fundraising solicitations . . . . .	1b(6)	
c Sharing of facilities, equipment, mailing lists, other assets, or paid employees . . . . .	1c	
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.		

**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

(a) Name of organization	(b) Type of organization	(c) Description of relationship

---

Sign  
Here

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

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

**Paid  
Preparer  
Use Only**

Print/Type preparer's name

Preparer's signature

Date \_\_\_\_\_ Title \_\_\_\_\_  
e's signature Deed P W

11 | Dat

Date

Check  if

PTIN

f | FIN

David F. Winter, Esq.

Firm's name ► Jaconella Buttsnham & Witter, LLC  
2650 Main Street, Cleveland, OH

Firm's address ► 2650 Main Street, Glastonbury, CT

10. *What is the primary purpose of the following statement?*

Firm's EIN ► 20-0802449

Phone no 860-657-8805

Phone: 860-657-8805

57-8805

Beagary Charitable Trust  
Form 990-PF, Part I  
2015

Line 13 - Compensation of Officers, Directors, Trustees, etc	
Patricia Morgan - 2015 Trustee's fee	<u>130,000</u>
	<u><u>130,000</u></u>
Line 16a - Legal Fees	
Jaconetta Burnham & Wimer, LLC	<u>5,124</u>
Line 16c - Other Professional Fees	
Fidelity Investments	<u>36,810</u>
	<u><u>36,810</u></u>
Line 18 - Taxes	
2014 Tax on Investment Income	2,929
2015 Estimated Tax on Investment Income	500
Fidelity Investments - foreign tax	<u>1,282</u>
	<u><u>4,711</u></u>
Line 23 - Other Expenses	
Fatcow - email account	161
The Economist - subscription	127
Exponent Philanthropy	<u>750</u>
	<u><u>1,038</u></u>

Beagary Charitable Trust  
 Form 990-PF, Part II, Line 10(b)  
 2015  
 Investments Based on Market Value

<u>Shares</u>	<u>Fund</u>	<u>Price</u>	Market <u>Value</u>
11,129.61	Frank Value Fund - Institutional	\$ 12.8100	\$ 142,570
10,962.84	Goldman Sachs MLP Energy Infrastructure	\$ 7.5000	\$ 82,221
2,826.00	JPMorgan Emerging Market Equity Inst	\$ 18.7700	\$ 53,044
4,706.41	JPMorgan Intrepid European Fund Inst	\$ 24.0200	\$ 113,048
6,739.84	Mainstay International Opportunities	\$ 8.2700	\$ 55,738
1,351.39	Mainstay Cushing Ren Advantage I	\$ 16.9100	\$ 22,852
2,769.69	T Rowe Price Real Estate Fund	\$ 27.4900	\$ 76,139
3,899.47	Tweedy Browne Global Value Fund	\$ 24.4600	\$ 95,381
7,291.41	Blackrock Global Allocation Fund	\$ 17.9300	\$ 130,735
6,956.31	JPMorgan Income Builders Fund Select	\$ 9.7200	\$ 67,615
3,347.68	Oppenheimer Developing Markets Fund	\$ 29.9900	\$ 100,397
2,577.94	Shenkman Short Duration High Income	\$ 9.7700	\$ 25,186
6,559.61	Blackrock Strategic Income Opprts	\$ 9.7700	\$ 64,087
4,844.04	Columbia Income Opportunities Z	\$ 9.3100	\$ 45,098
8,634.00	Lord Abbett Bond Debenture	\$ 7.3600	\$ 63,546
4,928.10	Pimco Foreign Bond Fund US Hedged	\$ 9.9100	\$ 48,837
8,000.00	Barclays Bank PLC Ipath GS Crude Oil	\$ 6.2300	\$ 49,840
1,000.00	Ishares Global 100 ETF	\$ 72.8300	\$ 72,830
3,500.00	Ishares US Technology ETF	\$ 107.0300	\$ 374,605
800.00	Ishares Europe ETF	\$ 40.1100	\$ 32,088
250.00	Ishares Trust International Developed Real Estate	\$ 27.8850	\$ 6,971
5,500.00	Ishares Trust Core High Dividend	\$ 73.4100	\$ 403,755
200.00	Vanguard Sector Index Funds Consumer Discretionary Vipers	\$ 122.5520	\$ 24,510
400.00	Vanguard Sector Index Fund Health Care Vipers	\$ 132.8800	\$ 53,152
750.00	Vanguard Index Funds Growth Vipers	\$ 106.3900	\$ 79,793
1,000.00	Ishares MSCI Australilia ETF	\$ 18.9600	\$ 18,960
500.00	Ishares Global 100 ETF	\$ 72.8300	\$ 36,415
1,500.00	Ishares Europe ETF	\$ 40.1100	\$ 60,165
250.00	Ishares US Preferred Stock ETF	\$ 38.8500	\$ 9,713
1,000.00	Ishares Trust Core High Dividend	\$ 73.4100	\$ 73,410
500.00	Aetna Inc.	\$ 108.1200	\$ 54,060
1,000.00	Akamai Technologies, Inc.	\$ 52.6300	\$ 52,630
100.00	Alibba Group Holding Ltd	\$ 81.2700	\$ 8,127
200.00	Alphabet Inc. Cl C	\$ 758.8800	\$ 151,776
200.00	Alphabet Inc. Cl A	\$ 778.0100	\$ 155,602
1,000.00	Altria Group Inc.	\$ 58.2100	\$ 58,210

500.00	Amazon.com Inc.	\$ 675.8900	\$ 337,945
23,000.00	Apple Inc.	\$ 105.2600	\$ 2,420,980
500.00	Assurant Inc.	\$ 80.5400	\$ 40,270
250.00	AthenaHealth Inc. Del	\$ 160.9700	\$ 40,243
3,000.00	Berkshire Hathaway Inc. Del	\$ 132.0400	\$ 396,120
500.00	CIGNA Corporation	\$ 146.3300	\$ 73,165
1,000.00	CVS Health Corp	\$ 97.7700	\$ 97,770
1,000.00	Carlyle Group LP	\$ 15.6200	\$ 15,620
500.00	Carmax, Inc.	\$ 53.9700	\$ 26,985
100.00	Chipotle Mexican Grill Inc.	\$ 479.8500	\$ 47,985
500.00	Church & Dwight Inc.	\$ 84.8800	\$ 42,440
750.00	ConocoPhillips	\$ 46.6900	\$ 35,018
1,000.00	Costco Wholesale Corp.	\$ 161.5000	\$ 161,500
500.00	Dunkin Brands Group Inc.	\$ 42.5900	\$ 21,295
1,000.00	Dunkin Brands Group Inc.	\$ 42.5900	\$ 42,590
1,000.00	Generac Holdings Inc.	\$ 29.7700	\$ 29,770
1,000.00	General Electric Co	\$ 31.1500	\$ 31,150
500.00	Gilead Sciences Inc.	\$ 101.1900	\$ 50,595
1,500.00	Hartford Financial Services Group Inc.	\$ 43.4600	\$ 65,190
1,000.00	Home Depot Inc.	\$ 132.2500	\$ 132,250
3,000.00	ING Groep Nv Spons Adr	\$ 13.4600	\$ 40,380
250.00	International Business Machines	\$ 137.6200	\$ 34,405
500.00	Intuitive Surgical Inc	\$ 546.1600	\$ 273,080
1,000.00	JPMorgan Chase & Co.	\$ 66.0300	\$ 66,030
1,000.00	Logmein Inc.	\$ 67.1000	\$ 67,100
500.00	NetFlix Com Inc.	\$ 114.3800	\$ 57,190
3,500.00	Nuveen Energy MLP Total Rtrnfd	\$ 11.1000	\$ 38,850
9,951.00	Opko Health Inc.	\$ 10.0500	\$ 100,008
1,000.00	Proctor & Gamble Co.	\$ 79.4100	\$ 79,410
1,000.00	Purdential Financial Inc.	\$ 81.4100	\$ 81,410
1,000.00	Southern Co.	\$ 46.7900	\$ 46,790
200.00	T Mobile US Inc.	\$ 39.1200	\$ 7,824
500.00	3M Company	\$ 150.6400	\$ 75,320
1,500.00	United Parcel Service Inc.	\$ 96.2300	\$ 144,345
500.00	V F Corp	\$ 62.2500	\$ 31,125
2,250.00	Verizon Communications	\$ 46.2200	\$ 103,995
500.00	Wal-Mart Stores Inc.	\$ 61.3000	\$ 30,650
1,000.00	Walgreens Boots Alliance Inc.	\$ 85.16	\$ 85,155
1,000.00	Xerox Corp	\$ 10.63	\$ 10,630
12,500.00	Corporate Property Assoc 17 Global Inc.	\$ 9.72	\$ 121,500
1,500.00	Northstar Realty Financial Corp	\$ 17.03	\$ 25,545
500.00	Northstar Realty Europe Corp	\$ 11.81	\$ 5,905
	Fidelity Municipal Money Market	\$ 1.00	\$ (164,435)

18,264.84 Corporate Capital Trust \$ 10.00 \$ 182,648

**TOTAL** **\$ 8,616,848**

Beagary Charitable Trust  
 Form 990-PF, Part XV, Line 3a  
 Grants and Contributions Paid  
 2015

<u>Recipient</u>	<u>Relationship</u>	<u>Purpose</u>	<u>Amount</u>
Brooklyn Public Schools	N/A	Student Enrichment	5,000
Brooklyn Public Schools	N/A	Access Writing Program	5,000
Chaplin Elementary School	N/A	I-Pad Technology	20,100
Covenant Preparatory School	N/A	Art Program	10,000
CT Audubon Society	N/A	General Fund	15,000
Fidelity Charitable Gift Funds	N/A	General Fund	20,000
Griffin Youth Hockey	N/A	General Fund	1,000
Griswold High School	N/A	General Fund	5,750
Hanover Theater	N/A	General Fund	4,000
Friends of Killingly Library	N/A	Reading Collaboration / Computeter	2,700
Killingly Public Schools	N/A	General Fund	39,440
Regional Community YMCA	N/A	General Fund	20,000
Martha's Vineyard Museum	N/A	General Fund	55,000
Martha's Vineyard YMCA	N/A	General Fund	25,000
Martha's Vineyard Preservation Trust, Inc	N/A	General Fund	65,125
Mystic Seaport	N/A	Education Outreach Program	33,000
Old Sturbridge Village	N/A	Education Outreach Program	25,000
Ellis Technical School	N/A	Student Enrichment	1,986
Plainfield High School	N/A	General Fund / Equipment	28,940
Pomfret School	N/A	Science Building	100,000
Sail Martha's Vineyard	N/A	General Fund	10,000
St James School	N/A	General Fund	5,000
Guari Children's Scholarship Fund	N/A	General Fund	1,000
Woodstock Academy	N/A	Athletic Department / Hckdy Program	26,775
West Tisbury Library	N/A	Educational Programs	7,500
The Rectory School	N/A	Music Program	35,000
Tower Hill Botanic Garden	N/A	Education Endowment	50,000
Worcester Polytech Institute	N/A	General Fund	85,000
Martha's Vineyard Boys & Girls Club	N/A	Summer Camp	1,500
Hartford Area Habitat for Humanity	N/A	General Fund	1,000
<b>TOTAL</b>			<b><u>704,816</u></b>

NOTE: All Recipients are 501 (c) charitable organizations