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.
Go to www irs gov/Form990PF for instructions and the latest information

For	calen	dar year 2017 or tax year be	ginnıng	DEC	1,	2017	, and e	nding	NOV	30	, 2018		
Nai	ne of	foundation							A Emplo	oyeri	dentification	number	
<u>M</u>	AR	IGOLD CHARITA	BLE T	RUST					, 20	<u>-6</u>	<u>748222</u>		
		nd street (or P O box number if ma			•			Room/suite	B Telepi				
		ON PEABODY LL							61	<u>7 -</u>	<u>345-10</u>	00	
_		own, state or province, country	-	or foreign p	ostal cod	le			C If exem	ption	application is p	ending, check here	
		TON, MA 0211							1				
G (	heck	··· —	itial return			Initial return of a fo	ormer public o	charity	D 1 For	eign	organizations	, check here	
		= :	nal return			Amended return			2 Fore	eion o	rganizations me	eting the 85% test.	. $\overline{}$
			Idress chan			Name change			che	ck her	e and attach co	eting the 85% test, mputation	
H (	_					vate foundation		04				tus was terminate	ď 🗀
		ction 4947(a)(1) nonexempt c				able private founda	$\neg$					(A), check here	
		irket value of all assets at end	of year   J	Accounti	-		Accr	uai				60-month termina	ition
-	om ⊦ •\$	Part II, col. (c), line 16)	157 /	U ∟ Part L colun	ther (spec	ust be on cash basi	<u> </u>	'	under	secu	ion 507(0)(1)	(B), check here	
_	ırt I	*		urt i, ooiaii				tmont	(2)	A duu	atad nat	(d) Disburser	nents
4.6		(The total of amounts in columns necessarily equal the amounts in	(b), (c), and (	d) may not		Revenue and enses per books		vestment ome	(C)	Haju:	sted net ome	for charitable pu	rposes
	1	Contributions, gifts, grants, e		d d	<b>-</b>	350.		·····	<del>                                     </del>	N/.	Δ	(08311 08313 (	
	2	Check X if the foundation is n				330.				14/.	<u> </u>	<del>.</del>	
	3	Interest on savings and temporary cash investments			1				<del>ľ</del>				
	4	Dividends and interest from s	securities		-	91,571.	9	1,571.	<u> </u>			STATEMEN	<u>ir 1</u>
	l '	Gross rents	0000711100			32,0,20							·
	l	Net rental income or (loss)											
	١.	Net gain or (loss) from sale of asse	ets not on line	10		74,439.							· ·
Je -	b	Gross sales price for all assets on line 6a	865,						1 1		565		$\neg$
Revenue	7	Capital gain net income (from Part					7	4,439.			REC	EIVED	
Œ	8	Net short-term capital gain											ပ္က
	9	Income modifications				·				879	_FFB_1	1 2019	RS-08(
	10a	Gross sales less returns and allowances					•			8			<u> </u>
SCANNED	b	Less Cost of goods sold								•	AANI	- N	=
≥	C	Gross profit or (loss)									OGDI	<u> </u>	
$\leq$	11	Other income							ļ				
	12	Total Add lines 1 through 1	1			166,360.		<u>6,010.</u>					
	13	Compensation of officers, director		tc		32,684.	1	6,342.					342.
MAR	14	Other employee salaries and	-			48,186.		0.	ļ			48,	<u> 186.</u>
Ð	15	Pension plans, employee ber	nefits						-				
က္ကာရွိ		Legal fees	am.	<b></b>		2 000			-				
ည်ရှိ		Accounting fees	STM	T Z		3,000.		0.				3,	000.
5,07 9 5 50 50 Operating and Administrative Expense	l	Other professional fees											
ڇُ مَا	17 18	Interest Taxes	STM	m 2		2,552.		92.	ļ				0.
stra	19	Depreciation and depletion	SIM	1 3	<u> </u>		-	74.					<u></u>
<u>.</u>	20	Occupancy											
Adn	21	Travel, conferences, and mee	etinos						<del> </del>		-		
þ	22	Printing and publications	uniya				<u></u> -						
gal	23	Other expenses	STM	т 4	<b> </b>	12,522.		0.			<u>.</u>	12	522.
atın	l .	Total operating and adminis				,		<u> </u>					
Sera	- '	expenses Add lines 13 throi				98,944.	1	6,434.				80.	050.
ŏ	25	Contributions, gifts, grants pa	-			230,177.		, = = = .				230	177.
		Total expenses and disburs											
_		Add lines 24 and 25				329,121.	1	6,434.				310	227.
	27	Subtract line 26 from line 12:	:										
	a	Excess of revenue over expenses	and disburse	ments		162,761.							
	b	Net investment income (if neg	gative, enter -	-0-)			14	9,576.					
	C	Adjusted net income (if negati	ive, enter -0-)	)	<u></u>		<u> </u>		L	N/	A	<u> </u>	

١ .	990-PF (2017) MARIGOLD CHARITABLE TRUS  til Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only	Beginning of year	End of	5748222 Page year
Pai	t II Balance Sneets column should be for end-of-year amounts only	(a) Book Value	(b) Book Value	(c) Fair Market Value
	Cash - non-interest-bearing	41,074.	50,494.	50,494
1	Savings and temporary cash investments	176,407.	473,779.	473,779
	Accounts receivable ►			
	Less: allowance for doubtful accounts			
Ι.	Pledges receivable ▶			
	Less: allowance for doubtful accounts			
1	Grants receivable			
	Receivables due from officers, directors, trustees, and other			
'	disqualified persons			
.	Other notes and loans receivable			
	Less: allowance for doubtful accounts			•
.	Inventories for sale or use			· · · · · · · · · · · · · · · · · · ·
CIDCCK 1	Prepaid expenses and deferred charges			
ž   1	F	2,408,590.	1,756,774.	1,722,929
` '			2,164,934.	2,969,448
	——————————————————————————————————————	2,060,828. 73,639.	151,796.	150,507
١,		73,033.	131,/30.	130,307
1	Investments - land, buildings, and equipment basis	- •		
١.	Less accumulated depreciation	_		·········
- 1 "	! Investments - mortgage loans			
1:	,			
1				
	Less accumulated depreciation			
1:				
11	Total assets (to be completed by all filers - see the	4 560 500	4 505 555	5 265 455
-	instructions Also, see page 1, item I)	4,760,538.	4,597,777.	5,367,157
1	Accounts payable and accrued expenses			
1	· · · · · · · · · · · · · · · · · · ·			
g   1:	Deferred revenue			
	Loans from officers, directors, trustees, and other disqualified persons			•
2	Mortgages and other notes payable			
2	P Other liabilities (describe ►)			
	•			
2		0.	0.	•
-	Foundations that follow SFAS 117, check here			
,	and complete lines 24 through 26, and lines 30 and 31			
2	Unrestricted			•
2	5 Temporarily restricted			
2	Permanently restricted			
2 2 2	Foundations that do not follow SFAS 117, check here			
	and complete lines 27 through 31			
5 2	Capital stock, trust principal, or current funds	4,760,538.	4,597,777.	
ž 2	Paid-in or capital surplus, or land, bldg , and equipment fund	0.	0.	
2 2 2 3	Retained earnings, accumulated income, endowment, or other funds	0.	0.	
3	Total net assets or fund balances	4,760,538.	4,597,777.	
			$\neg$	
3	Total liabilities and net assets/fund balances	4,760,538.	4,597,777.	

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	4,760,538.
2	Enter amount from Part I, line 27a	2	-162,761.
3	Other increases not included in line 2 (itemize)	3	0.
4	Add lines 1, 2, and 3	4	4,597,777.
5	Decreases not included in line 2 (itemize)	5	0.
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	4,597,777.

_	2015	255,831.	5,068,416.		.050476
	2014	273,107.	5,052,949.		.054049
	2013	279,119.	5,063,286.		.055126
_	2012	197,877.	4,668,001.		.042390
	Total of line 1, column (d)	and doubt the total as her O by 5.0		2	.255662
3	Average distribution ratio for the 5-year bathe foundation has been in existence if less	•	or by the number of years	3	.051132
4	Enter the net value of noncharitable-use as	sets for 2017 from Part X, line 5		4	5,365,444.
5	Multiply line 4 by line 3			5	274,346.
6	Enter 1% of net investment income (1% of	Part I, line 27b)		6	1,496.
7	Add lines 5 and 6			7	275,842.
8	Enter qualifying distributions from Part XII,	, line 4		. 8	310,227.
	If line 8 is equal to or greater than line 7, ch	neck the box in Part VI, line 1b, and comple	te that part using a 1% tax rate.		

See the Part VI instructions

Form 990-F Part VI		<u>()(a) ()</u>	240(b) 4940(e) o	20-	674822	2 ructio	Page 4
	ot operating foundations described in section 4940(d)(2), check here \to \to \text{and and e}			7370	366 11130	uctio	113)
	f ruling or determination letter: (attach copy of letter if nei		I.				1
	stic foundations that meet the section 4940(e) requirements in Part V, check here					1 4	196.
	t I, line 27b		ilu etitet 176	\ <u>'</u>		<u> </u>	<u>: 70 •</u>
	er domestic foundations enter 2% of line 27b. Exempt foreign organizations, enter 4	% of Part i	l line 12 col /h)				
	nder section 511 (domestic section 4947(a)(1) trusts and taxable foundations only, o			2			Ο.
	nes 1 and 2	111013, 01110	J1 0 /	3		1 4	196.
	e A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only; or	others ent	er -0-)	4			0.
	ased on investment income Subtract line 4 from line 3 If zero or less, enter -0-	, , , , , , , , , , , , , , , , , , ,	J. 0 /	5		1.4	196.
	s/Payments.						
	estimated tax payments and 2016 overpayment credited to 2017	6a	4,611	اءا			
	of foreign organizations - tax withheld at source	6b		).			
	ud with application for extension of time to file (Form 8868)	6c		5.			
	p withholding erroneously withheld	6d		5.			
	credits and payments. Add lines 6a through 6d	<u> </u>		7		4.6	<u> 11.</u>
	any <b>penalty</b> for underpayment of estimated tax. Check here X if Form 2220 is atta	ached		8			0.
	e If the total of lines 5 and 8 is more than line 7, enter amount owed		<b>)</b>	▶ 9			
	ayment If line 7 is more than the total of lines 5 and 8, enter the amount overpaid		<u>,</u>	▶ 10		3.1	15.
•	the amount of line 10 to be Credited to 2018 estimated tax	1	.,496. Refunded	► 11			19.
	-A Statements Regarding Activities	<del></del>		•	•		
1a During	the tax year, did the foundation attempt to influence any national, state, or local legis	slation or o	did it participate or intervi	ene in		Yes	No
	olitical campaign?				1a		X
<b>b</b> Did it	spend more than \$100 during the year (either directly or indirectly) for political purpo	ses? See	the instructions for the de	efinition	1b		X
	answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies						
	uted by the foundation in connection with the activities.		·				
c Did th	e foundation file Form 1120-POL for this year?				, 1c	-	x
<b>d</b> Enter	the amount (if any) of tax on political expenditures (section 4955) imposed during the	e year.					
	n the foundation. > \$ 0 . (2) On foundation managers		(	).			1
	the reimbursement (if any) paid by the foundation during the year for political expend	_					
mana	pers. ▶ \$0.						
2 Has th	e foundation engaged in any activities that have not previously been reported to the I	RS?			2		X
If "Yes	," attach a detailed description of the activities.						
3 Has th	e foundation made any changes, not previously reported to the IRS, in its governing	instrumen	it, articles of incorporatio	n, or			
bylaw	s, or other similar instruments? If "Yes," attach a conformed copy of the changes				3		<u>X</u>
4a Did th	e foundation have unrelated business gross income of \$1,000 or more during the yea	ar?			4a		X
b If "Yes	," has it filed a tax return on Form 990-T for this year?			N	[/A <u>4b</u>		<u> </u>
5 Was t	nere a liquidation, termination, dissolution, or substantial contraction during the year	7			5_		<u> </u>
If "Yes	," attach the statement required by General Instruction T						
6 Are th	e requirements of section 508(e) (relating to sections 4941 through 4945) satisfied e	ither.					
-	anguage in the governing instrument, or						
● By s	tate legislation that effectively amends the governing instrument so that no mandator	ry directio	ns that conflict with the s	tate law	-		
remaii	n in the governing instrument?				6	<u> </u>	<del>                                     </del>
7 Did th	e foundation have at least \$5,000 in assets at any time during the year? If "Yes," comp	plete Part	II, col. (c), and Part XV		7	<u> </u>	<del> </del>
	the states to which the foundation reports or with which it is registered. See instruction	ons. 🕨 _					
<u>MA</u>							
	answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the A	Attorney G	eneral (or designate)				
	h state as required by General Instruction G? If "No," attach explanation				<u>8b</u>	<u> </u>	<del> </del>
	foundation claiming status as a private operating foundation within the meaning of se			alendar			•
	017 or the tax year beginning in 2017? See the instructions for Part XIV. If "Yes," com	•			9	+	X
10 Did ar	y persons become substantial contributors during the tax year? if "Yes," attach a schedu	ule listing th	er names and addresses		10	<u></u>	<u>  X</u>
					Form <b>99</b>	ル-PF	(2017)

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Form **990-PF** (2017)

Form	990-PF (2017) MARIGOLD CHARITABLE TRUST	20-6748	222	1	Page 5
Pa	art 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		Х
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory p	orivileges?			
	If "Yes," attach statement. See instructions		12		х
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?		13	Х	
	Website address ► WWW.MARIGOLDCHARITABLETRUST.ORG	,			
14		<b>▶</b> 617-34	5-6	157	
,,	Located at ►C/O NIXON PEABODY LLP, 100 SUMMER STREET, BOSTON,	ZIP+4 ▶02			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - check here			<b></b>	
	and enter the amount of tax-exempt interest received or accrued during the year	15	N	/A	
16	At any time during calendar year 2017, did the foundation have an interest in or a signature or other authority over a bank,			Yes	No
	securities, or other financial account in a foreign country?		16		X
	See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the				
	foreign country				ĺ
Pa	art 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
18	During the year, did the foundation (either directly or indirectly):				
		es X No			ĺ
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from)	`			ł
		es X No	-		ĺ
	<u> </u>	es X No			İ
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?				İ
	(5) Transfer any income or assets to a disqualified person (or make any of either available				İ
		es X No		İ	
	(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				
		es X No			
,	of fany answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations	03 22 110			
	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	▶□			
	E 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 2017?	!	1c		х
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))				
	that the end of tax year 2017, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning	າດ			
•		es X No			
	If "Von " lint the years				
	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	e <b>t</b>			
•	valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attack				
	statement - see instructions )	N/A	2b		
,	: 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	21, 11			
,					ł
3:	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time				1
٠.		es X No			ĺ
H	of "Yes," did it have excess business holdings in 2017 as a result of (1) any purchase by the foundation or disqualified persons al				1
•	May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to (				
	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 2017.)	N/A	3b	-	
4:	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	,	4a		X
	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpos	e that			_ <del></del> _
•	had not been removed from jeopardy before the first day of the tax year beginning in 2017?		4h		x

orm 990-PF (2017) MARIGOLD CHARITABLE TRUS	r		20-67482	22	Page 6
Part VII-B Statements Regarding Activities for Which F	orm 4720 May Be F	Required (continu	ued)	<del></del>	
<ul><li>5a During the year, did the foundation pay or incur any amount to</li><li>(1) Carry on propaganda, or otherwise attempt to influence legislation (section</li></ul>			s X No	Yes	No
(2) Influence the outcome of any specific public election (see section 4955), or any voter registration drive?	to carry on, directly or indire		s X No		;
(3) Provide a grant to an individual for travel, study, or other similar purposes			s X No		,
(4) Provide a grant to an organization other than a charitable, etc., organization					
4945(d)(4)(A)? See instructions			s X No		
(5) Provide for any purpose other than religious, charitable, scientific, literary,	or educational purposes, or t		s X No		
the prevention of cruelty to children or animals? <b>b</b> If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify und	er the excentions described i		ا ۱۸۵ لما ۶		
section 53.4945 or in a current notice regarding disaster assistance? See instru		in riegulations	N/A	5b	
Organizations relying on a current notice regarding disaster assistance, check h					
c If the answer is "Yes" to question 5a(4), does the foundation claim exemption fr	om the tax because it mainta	ıned	_		
expenditure responsibility for the grant?	Ŋ	I/A Ye	s 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 p a personal benefit contract?	ay premiums on		s X No		
b Did the foundation, during the year, pay premiums, directly or indirectly, on a pi	ersonal henefit contract?	Te	-	6ь	x
If "Yes" to 6b, file Form 8870	organiar bonanc contract.		ľ	-	<b> </b>
7a At any time during the tax year, was the foundation a party to a prohibited tax si	netter transaction?	Ye	s X No		
b If "Yes," did the foundation receive any proceeds or have any net income attribu				7b	<u></u>
Part VIII Information About Officers, Directors, Truster Paid Employees, and Contractors	es, Foundation Ma	ınagers, Highly	1		
List all officers, directors, trustees, and foundation managers and the	neir compensation				
List all officers, directors, it distees, and foundation managers and it	(b) Title, and average	(c) Compensation	(d) Contributions to employee benefit plans	(e) Ex accoun	pense
(a) Name and address	hours per week devoted to position	(If not paid, enter -0-)	and deferred compensation		t, other ances
SEE STATEMENT 8		32,684.	0.		0.
1					
	• •			<u> </u>	
Compensation of five highest-paid employees (other than those inc	luded on line 1) If none	enter "NONE "		L	
	(b) Title, and average		(d) Contributions to employee benefit plans	(e) Ex	pense
(a) Name and address of each employee paid more than \$50,000	hours per week devoted to position	(c) Compensation	and deferred compensation	accoun allow	i, other ances
NONE			/		
	<del></del>			ļ <u></u>	
		-			
			`		
			,		
otal number of other employees paid over \$50,000			Form	990-PF	(2017)
			FULI	, JJJ-1	(2017)

Form 990-PF (2017) MARIGOLD CHARITABLE TRUST	^ 20-	6748222 Page 7
Part VIII Information About Officers, Directors, Trustees, Found Paid Employees, and Contractors (continued)		
3 Five highest-paid independent contractors for professional services. If none, ent	ter "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		<b>▶</b> 0
Part IX-A Summary of Direct Charitable Activities		
List the foundation's four largest direct charitable activities during the tax year. Include relevant statenumber of organizations and other beneficiaries served, conferences convened, research papers processes.	tistical information such as the	Expenses
	ouucea, etc.	
1 <u>N/A</u>		
2		
		_
3		
4		
<del> </del>	<del></del>	
Part IX-B Summary of Program-Related Investments		
Describe the two largest program-related investments made by the foundation during the tax year of	on lines 1 and 2.	Amount
1 N/A		
•		
2		
		;
All other program-related investments. See instructions.		
3		
	· · · · · · · · · · · · · · · · · · ·	
	· · · · · · · · · · · · · · · · · · ·	1

Total. Add lines 1 through 3

P	art X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations	ndations,	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	5,400,706.
	Average of monthly cash balances	1b	46,445.
	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	5,447,151.
	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	5,447,151.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	81,707.
5	Net value of noncharitable-use assets Subtract line 4 from line 3. Enter here and on Part V, line 4	5	5,365,444.
6	Minimum investment return Enter 5% of line 5	6	268,272.
P	art XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations are foreign organizations, check here ▶ ☐ and do not complete this part )	nd certain	
1	Minimum investment return from Part X, line 6	1	268,272.
2a	Tax on investment income for 2017 from Part VI, line 5 2a 1,496.		
b	Income tax for 2017 (This does not include the tax from Part VI.)		
C	Add lines 2a and 2b	2c	1,496.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	266,776.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	266,776.
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	266,776.
P	art XII Qualifying Distributions (see instructions)		
1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
а		1a	310,227.
	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:		1
а	Suitability test (prior IRS approval required)	3a	
ь	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	310,227.
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	1,496.
6	Adjusted qualifying distributions Subtract line 5 from line 4	6	308,731.
	Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation of 4940(e) reduction of tax in those years	qualifies fo	

Form **990-PF** (2017)

Part XIII Undistributed Income (see instructions)

Distributible amount for 2017 yorn Part XI, line?		(a) Corpus	(b) Years prior to 2016	(c) 2016	(d) 2017
2. Undestrobuted mozers, fam, as after send at 2017 a. Enter: amount of 2015 b. Total for prior years  3. Excess distributions carryover, it any, to 2017. a. From 2013 c. From 2014 c. From 2015 c. From 2015 c. From 2015 c. From 2016 c. Total of lines Stathrough e  4. Qualifying distributions for 2017 from Part XII, Inst 4 the S. 3.10, 2.27. a. Applied to 2016, but not more than line 2a b. Applied to 2016, but not more than line 2a b. Applied to 2016, but not more than line 2a b. Applied to 2016 for but of compact of the compa	•				266.776.
a Enter amount for 2016 only b Total for pror years:  Sexess distributions carryover, if any, to 2017, a From 2012 b From 2013 c From 2016 f From 2016					20077700
\$ Excess distributions carryover, it any, to 2017.  a From 2013  b From 2014  b From 2015  b From 2015  b From 2015  b From 2015  b From 2016  1 Tratal of lines 3a throughe  0 .  4 Qualifying distributions for 2017 from Part XII, line 6: P \$ 310, 227.  a Applied to 2016, but not more than line 2a  b Applied to undistributed income of prior years (Election required - see instructions)  c Treated as distributions out of corpus  f Elections required - see instructions)  d Applied to 2017 distributiate amount  e Remaining amount distributed out of corpus  f Exercise developed a service septice applied to 2017  must be shown in column as indicated below  178, 463.  6 this first the net foll of each Column as indicated below  178, 463.  6 this first the net foll of each Column as indicated below  178, 463.  6 this first the net foll of each Column as indicated below  178, 463.  6 this first the red foll of each Column as indicated below  178, 463.  6 this first the red foll of each Column as indicated below  178, 463.  6 this first the red foll of each Column as indicated below  178, 463.  6 this first the red foll of each Column as indicated below  178, 463.  6 this first the red foll of each Column as indicated below  178, 463.  6 this first this fi				131.764.	
3. Excess distributions carryover, if any, to 2017. a From 2012 b From 2015 c From 2016 d					
From 2016 From 2017 From 2	3 Excess distributions carryover, if any, to 2017.		U.		1
e From 2014 d From 2015 e From 2015 e From 2015 e From 2016 e From 2016 e From 2016 0 Louallying distributions for 2017 from Part XII, line 4: ▶ \$ 310, 227, a Applied to 2016, but not more than line 2a 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 2017 distributible amount e Remaining amount distributed out of corpus 5 Excess distributions carryover from 2012 into 40 from line 20 c Enter the anit total of each column as indicated bell own a Compar Adultines 3 (e. and ele Sabstrat line 5 b Prior years' undistributed income. Subtract line 40 from line 20 c Enter the annount of prior years' undistributed income for Vinica anotice of deficiency has been asset, or on which it is section 49(2g) but has been in perviously asset, and the section 49(2g) but has been in perviously asset, and the section 49(2g) but has been in perviously asset, and and 5 from line 1. This amount must be distributed in 2018 7 Amounts treated as distributions out of corpus to salisty requirements imposed by section 170(1)(1)(1)(1)(1)(1)(1)(1)(1)(1)(1)(1)(1)(	a From 2012				
From 2015   From 2016	<b>b</b> From 2013				
e From 2016  Trotal of lines 3a throughe  O.  4 Ouallying distributions for 2017 from Part XII, line 4: № \$ 310, 227, 4 Applied to 2016, but not more than line 2a  Applied to 2016, but not more than line 2a  Applied to 2016, but not more than line 2a  Applied to 2016 four through the see instructions)  (Election required - see instructions)  O.  4 Applied to 2017 distributible amount  Remaining amount distributed out of corpus  (Election required - see instructions)  O.  4 Applied to 2017 distributible amount  Remaining amount distributed out of corpus  5 excess distributions carryover applied to 2017  if an excess distributions carryover applied to 2017  if an excess distributions carryover applied to 2017  if an excess distribution and carryous applied to 2017  if an excess distribution and carryous applied to 2017  if an excess distribution and carryous applied to 2017  if an excess distribution and the applied of applied to 2017  if an excess distribution and the applied of applied to 2017  if an excess distribution and the applied of applied to 2017  if an excess distribution and the applied of applied to 2017  if an excess distribution and the applied of applied on the 1. This amount must be distributed income for 2017. Subtract lines 4 from line 2. Taxable amount - see instructions  O.  4 Subtract lines 6 from line 10. This amount must be distributed income for 2016. Subtract lines 4 dand 5 from line 10. This amount must be distributed income for 2017. Subtract lines 4 dand 5 from line 1. This amount must be distributed income for 2017. Subtract lines 4 dand 5 from line 10. This amount must be distributed income for 2017. Subtract lines 4 dand 5 from line 1. This amount must be distributed income for 2017. Subtract lines 4 dand 5 from line 1. This amount must be distributed income for 2017. Subtract lines 4 dand 5 from line 1. This amount must be distributed income for 2017. Subtract lines 4 dand 5 from line 1. This amount must be distributed income for 2017. Subtract lines 4 dand 5 from line 1. This am	c From 2014			1	
Total of lines 3 at brough c   0	d From 2015				
4. Qualitying distributions for 2017 from Part XII, line 4; PS 310, 227. a Applied to 215, but not more than line 23 b Applied to Undistributed income of prior years (Election required - see instructions) c Treated as distributions out of corpus (Election required - see instructions) d Applied to 217 distributable amount e Remaining amount distributed out of corpus c Ecesas deschiolation carpiver applied to 2017 distributable amount e Remaining amount distributed out of corpus 0. d 2017 distributable amount e Remaining amount distributed out of corpus 0. d 2017 distributable amount e Remaining amount distributed out of corpus 0. d 2018 distributed out of corpus 0. d 2018 distributed out of corpus 0. d 2018 distributed out of corpus 0. d 2018 distributed out of corpus 0. d 2018 distributed out of corpus 0. d 2018 distributed out of corpus 0. d 2018 distributed out of corpus 0. d 2018 distributed out of corpus 0. d 2018 distributed out of corpus 0. d 2018 distributed out 0. d 2018 distributed out 0. d 2018 distributed out 0. d 2018 distributed out 0. d 2018 distributed out 0. d 2018 distributed out 0. d 2018 distributed out 0. d 2018	e From 2016	_			
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Subtract lines 7 and 8 from line 6a  10 Analysis of line 9  a Excess from 2013 b Excess from 2014 c Excess from 2015 d Excess from 2016	<ul> <li>not applied on line 5 or line 7</li> </ul>	0.			
10 Analysis of line 9 a Excess from 2013 b Excess from 2014 c Excess from 2015 d Excess from 2016	9 Excess distributions carryover to 2018				
a Excess from 2013 b Excess from 2014 c Excess from 2015 d Excess from 2016	Subtract lines 7 and 8 from line 6a	0.			
b Excess from 2014 c Excess from 2015 d Excess from 2016	10 Analysis of line 9	_			
c Excess from 2015 d Excess from 2016	a Excess from 2013				
d Excess from 2016	b Excess from 2014				
	c Excess from 2015				
e Excess from 2017	d Excess from 2016				
	e Excess from 2017				

	D CHARITABL			20-67	48222 Page 10
Part XIV Private Operating F			·A, question 9)	N/A	
1 a If the foundation has received a ruling of					
foundation, and the ruling is effective fo		=	▶ └─		
<b>b</b> Check box to indicate whether the found		ng foundation described i		4942(j)(3) or 49	42(j)(5)
2 a Enter the lesser of the adjusted net	Tax year		Prior 3 years	10.0044	
income from Part I or the minimum	(a) 2017	<b>(b)</b> 2016	(c) 2015	(d) 2014	(e) Fótal
investment return from Part X for					
each year listed					
<b>b</b> 85% of line 2a					
c Qualifying distributions from Part XII,				/	/
line 4 for each year listed					
d Amounts included in line 2c not	1				
used directly for active conduct of					
exempt activities	ı				
e Qualifying distributions made directly					
for active conduct of exempt activities.					
·					
3 Complete 3a, b, or c for the			-	/	
alternative test relied upon:					
	ubtract line 2d from line 2c omplete 3a, b, or c for the				
•			/		
(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			Y	,	
organizations as provided in section 4942(j)(3)(B)(iii)		<i> </i>			
(3) Largest amount of support from		/			
,,,		•			
an exempt organization					
(4) Gross investment income  Part XV   Supplementary Info	rmation (Comple	te this part only	if the foundation	had \$5,000 or me	ve in accets
at any time during t	•		ii the ioundation	nau \$5,000 or me	ne ili assets
	-	400013.7			
1 Information Regarding Foundation	_				
a List any managers of the foundation wh			ributions received by the	foundation before the clos	se of any tax
year (but only if they have contributed of	nore man \$5,000). (See S	ection 507(a)(2).)			
BEVERLY G MARRAM					
b List any managers of the foundation wh			or an equally large portion	on of the ownership of a pa	artnership or
other entity) of which the foundation ha	s a 10% or greater interes	SI.			
NONE					
2 Information Regarding Contribut	ion, Grant, Gıft, Loan,	Scholarship, etc., Pr	ograms:		
Check here 🕨 🔲 if the foundation of	only makes contributions t	to preselected charitable	organizations and does n	ot accept unsolicited requ	ests for funds If
the foundation makes gifts, grants, etc.,	to individuals or organiza	ations under other condit	ions, complete items 2a,	b, c, and d	
a The name, address, and telephone num	ber or email address of th	ne person to whom applic	ations should be address	sed.	
SEE STATEMENT 9					
b The form in which applications should b	e submitted and information	tion and materials they st	nould include.		
c Any submission deadlines:					
d Any restrictions or limitations on award	s such as hy neographics	al areas, charitable fields	kinds of institutions, or o	ther factors	
W rang restrictions of minitations of award.	o, oddii ao by ycoyrapillo	21 at 603, GHATRADIC 116103,	Kinda of inaditutiona, Of C	Juliot factors,	
			<u> </u>		

3 Grants and Contributions Paid During the Y		Payment		
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		,		
				J
BOSTON CHILDREN'S HOSPITAL	NONE	PUBLIC CHARITY	MENTAL HEALTH	
300 LONGWOOD AVENUE			PROJECT/SOMALI	
BOSTON, MA 02115			ELEMENTARY SCHOOL-AGE	
			CHILDREN	30,017
				,
BOSTON MEDICAL CENTER	NONE	DIIBLIC CHARTTY	SUPPORT OF SPARK	
88 EAST NEWTON STREET	HONE	FORDIC CHARTIT	CENTERS	
BOSTON, MA 02118			NEURODEVELOPMENTAL '	
			SERVICES	46 <sub>.</sub> 1 <u>57</u>
BOSTON MEDICAL CENTER	NONE	DIIDI TO CUARTIV	SUPPORT OF CHILD	
88 EAST NEWTON STREET	NONE	PUBLIC CHARITI	WITNESS TO VIOLENCE	
BOSTON MA 02118			PROJECT	44.744
				J
		,		
CAMP STARFISH	NONE	PUBLIC CHARITY	SCHOLARSHIPS FOR 10	
636 GREAT ROAD SUITE 2			CHILDREN TO ATTEND	
STOW, MA 01775			SUMMER CAMP	10,000
CHILDREN'S ADVOCACY CENTER OF SUFFOLK	NONE	PUBLIC CHARITY	CHILD TRAUMA	
COUNTY			SUPERVISION AND	
989 COMMONWEALTH AVENUE			SERVICE PROVISION AND	
BOSTON, MA 02215-1308			TRANSPORTATION	
•			ASSISTANCE	25,000
	TINUATION SHEE	ET(S)	▶ 3a	230,177
b Approved for future payment				
NONE '				
NONE				
<b>&gt;</b>				
			-	
•				
			[	
Total			<u>▶ 3b</u>	0

## Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated	Unrelate	ed business income	Exclu	ded by section 512, 513, or 514	(e)
<b>3</b>	(a) Business	(b)	(c) Exclu-	(d)	Related or exempt
1 Program service revenue	Business	Amount	sion	Amount	function income
· ·		_	1		
a			<del>  -</del>		
b			-		<del></del>
C			-		
d					
e	<u> </u>			_	
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments	L				
3 Interest on savings and temporary cash					
investments					
4 Dividends and interest from securities			14	91,571.	
5 Net rental income or (loss) from real estate.				72/3/21	
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	1				
than inventory			18	74,439.	
9 Net income or (loss) from special events	į				
10 Gross profit or (loss) from sales of inventory					
11 Other revenue.				·	
a					
b					
_					
e			<u> </u>		
	-	0.	<del> </del>	166,010.	0.
12 Subtotal Add columns (b), (d), and (e)	<u> </u>	0.	J		
13 Total Add line 12, columns (b), (d), and (e)				13	166,010.
(See worksheet in line 13 instructions to verify calculations )		<del></del>			
Part XVI-B Relationship of Activities to	the Acc	omplishment of Ex	cemp	t Purposes	
Explain below how each activity for which inconthe foundation's exempt purposes (other than be			contrib	outed importantly to the accom	plishment of
the foundation's exempt purposes (other than t	y providing id	nos for such purposes).			
		·			

### Form 990-PF (2017) MARIGOLD CHARITABLE TRUST 20-6748222 Page 13 Information Regarding Transfers to and Transactions and Relationships With Noncharitable **Exempt Organizations** Yes No Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) (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 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 (c) Name of noncharitable exempt organization (a) Line no (b) Amount involved (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 Yes X No in section 501(c) (other than section 501(c)(3)) or in section 527? b If "Yes," complete the following schedule. (a) Name of organization (b) Type of organization (c) Description of relationship N/A Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge return with the preparer shown below? See instr Sign Here TRUSTEE X Yes Signature of officer/or trustee Title Date Print/Type preparer's name Date Check Preparer's signature self- employed CHRISTOPHER Paid CALDWELL P00642498 Preparer Firm's EIN $\triangleright 16 - 0764720$ Firm's name ► NIXON PEABODY **Use Only**

Form 990-PF (2017)

(617) 345-1000

Phone no.

Firm's address ► 100 SUMMER STREET

BOSTON, MA 02110

Part IV Capital Gains and Losses for		20-674	10222	AGE I OF I
	or Tax on Investment Income	·	(t) Have an average	,
(a) List and descr 2-story brick wa	P - Purchase D - Donation	(c) Date acquired (d) Date sold (mo, day, yr)		
1a NEWELL BRANDS INC	(600 SHS)	P	10/21/1612/01/17	
b UNITED STATES TRE	P	11/19/1401/19/18		
	P	04/11/1601/29/18		
	.00 SHS)	0 SHŞ)	P	09/30/1307/02/18
d EDWARDS LIFE SCIE				
		<u>/30/11 (50,000)</u>	P	12/04/1407/02/18
	0 SHS)		P	01/26/1507/02/18
g NORTHERN TRUST CO	SUBORDINATED	DTD 08/13/08 (72	2,5 P	VARIOUS   08/15/18
h UNITED STATES TRE	AS NTS DTD 09	/30/11 (150,000)	P	12/04/14/10/02/18
		/31/13 (200,000)	P	03/18/15/10/31/18
CAPITAL GAINS DIV		731713 (20070007		03/13/13/10/31/10
	IDENDS_		<u> </u>	
<u>k</u>				<del> </del>
<u> </u>	· · · · · · · · · · · · · · · · · · ·			
<u>m</u>				
n				
0				
	(f) Depreciation allowed	(g) Cost or other basis		) Gain or (loss)
(e) Gross sales price	(or allowable)	plus expense of sale		plus (f) minus (g)
10 720	(3. 3)		(-)	
a 18,728.		31,437.		-12,709.
b 249,814.		249,542.		272.
c 10,292.		4,305.		<u>5,987.</u>
d 58,195.		13,877.		44,318.
e 49,924.		50,024.		-100.
1 21,407.		18,643.		2,764.
70 500		72,750.	······	-250.
h 150,000.		150,000.		0.
1 200,000.		200,001.		
<u> 34,158.</u>				34,158.
k				
i				
m				
n				
Complete only for assets showing gair	us solume (b) and owned by t	he foundation on 12/21/60		
Complete only for assets showing gain				sses (from col. (h)) of col. (h) gain over col. (k),
(i) F.M.V. as of 12/31/69	(j) Adjusted basis	(k) Excess of col. (i)		not less than "-0-")
(1) 1.11.1.1.1.1.1.1.1.1.1.1.1.1.1.1.1.1.	as of 12/31/69	over col (j), if any		<u> </u>
<u>a</u>				-12,709.
b				272.
c			•	5,987.
d				44,318.
				-100.
e				
1				2,764.
g	<u>-</u> .			-250.
h				0.
1				-1.
				34,158.
k			·-··-	
<u>-</u>				
-				
<u>m</u>				
n				
0				
	141 1	in Doubling 7		
2 Capital gain net income or (net capital le	oss) { If gain, also enter If (loss), enter "-0	In Part I, line / }	2	74,439.
- , , , ,		, I	-	
3 Net short-term capital gain or (loss) as If gain, also enter in Part I, line 8, colum		a (b):		
If gain, also enter in Part I, line 8, column If (loss), enter "-0-" in Part I, line 8	ın (c).	Ϋ́I	,	N/A
in (1000), unter -0- in rait i, line o			3	IN/ A

### MARIGOLD CHARITABLE TRUST

Part XV Supplementary Information Grants and Contributions Paid During the Year (Continuation) If recipient is an individual, Recipient Purpose of grant or Foundation show any relationship to Amount contribution any foundation manager status of Name and address (home or business) recipient or substantial contributor PUBLIC CHARITY FOR TWO CHILDREN TO ELIZABETH STONE HOUSE NONE 8 NOTRE DAME STREET PARTICIPATE IN ROXBURY MA 02119 EXPRESSIVE ART THERAPY 1,992. PUBLIC CHARITY SUPPORT OF HAWC NONE PARENT/CHILD TRAUMA 27 CONGRESS STREET SALEM, MA 01970 RECOVERY PROGRAM 25,000. JEANNE GEIGER CRISIS CENTER NONE PUBLIC CHARITY FOR EIGHT CHILDREN TO 2 HARRIS STREET PARTICIPATE IN THE NEWBURYPORT, MA 01950 JGCC HARRY POTTER REAL MAGIC GROUP (ART 7,000. THERAPY) PUBLIC CHARITY FOR EIGHT CHILDREN TO JEANNE GEIGER CRISIS CENTER NONE PARTICIPATE IN ART 2 HARRIS STREET 8,000. NEWBURYPORT, MA 01950 THERAPY RIVERSIDE COMMUNITY CARE NONE PUBLIC CHARITY FOR CHILD'S 270 BRIDGE STREET SUITE 301 CONTINUATION OF DEDHAM, MA 02026 BRAZILIAN MARTIAL ARTS CLASSES 66. RIVERSIDE COMMUNITY CARE NONE PUBLIC CHARITY EARLY INTERVENTION 270 BRIDGE STREET SUITE 301 PARTNERSHIP PROGRAM DEDHAM, MA 02026 BALANCE OF PROPOSAL 1,500. FOR THERAPEUTIC GROUP RIVERSIDE COMMUNITY CARE NONE PUBLIC CHARITY EARLY INTERVENTION 270 BRIDGE STREET SUITE 301 PARTNERSHIP PROGRAM DEDHAM, MA 02026 INITIAL PAYMENT TOWARD THE GUIDANCE CENTERS THERAPEUTIC GROUP 3,500. THE GUIDANCE CENTER NONE PUBLIC CHARITY REPLENISHMENT OF GUIDANCE CENTER FUND 5 SACRAMENTO STREET FOR MARIGOLD APPROVED CAMBRIDGE, MA 02138 7,500. INDIVIDUAL REQUESTS THE GUIDANCE CENTER NONE PUBLIC CHARITY 2017 EIPP PREVENTION 5 SACRAMENTO STREET COMMUNITY WORK WITH FAMILIES 2,401, CAMBRIDGE MA 02138 NONE PUBLIC CHARITY ADDITIONAL FUNDING TO THE HOME FOR LITTLE WANDERERS 10 GUEST STREET EXPAND SMART TRAINING BOSTON, MA 02135 OF CLINICIANS 3,000. Total from continuation sheets 74,259,

# MARIGOLD CHARITABLE TRUST

	3 Grants and Contributions Paid During the Y	ear (Continuation)	<del>-,</del>	· · · · · · · · · · · · · · · · · · ·	ļ <u> </u>
THE HOME FOR LITTLE WANDERERS NONE PUBLIC CHARITY FOR SMART INITIATIVE SOSTON. MA. 02133 14,300		If recipient is an individual, show any relationship to	Foundation status of	Purpose of grant or	Amount
10 CUEST STREET BOSTON MA 02135  14,300	Name and address (home or business)	or substantial contributor	recipient	Contribution	
10 CUEST STREET BOSTON MA 02135  14,300					
10 CUEST STREET BOSTON MA 02135  14,300	THE HOME FOR LITTLE WANDERERS	NONE	PUBLIC CHARITY	FOR SMART INITIATIVE	
	10 GUEST STREET				
	BOSTON, MA 02135				14,300.
	ı				
					,
			,		
		{			
	•				
Total from continuation sheets					
Total from continuation sheets			1		
Total from continuation sheets					
Total from continuation sheets					
Total from continuation sheets	<del>.</del>				
Total from continuation sheets					
Total from continuation sheets					
Total from continuation sheets					
Total from continuation sheets					
Total from continuation sheets					
Total from continuation sheets					
Total from continuation sheets					
	Total from continuation sheets			J	1

FORM 990-PF	DIVIDEND	S AND INTER	EST FROM SECU	RITIES S'	PATEMENT 1
SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDEND	REVENUE	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
DIVIDENDS INTEREST	89,591 36,138		8. 55,433 0. 36,138		
TO PART I, LINE 4	125,729	. 34,15	8. 91,571	91,571.	
FORM 990-PF		ACCOUNTI	NG FEES	S	ratement 2
DESCRIPTION		(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
TAX PREP FEES		3,000.	0.		3,000.
TO FORM 990-PF, PG	1, LN 16B =	3,000.	0.		3,000.
FORM 990-PF		TAX	ES	S	ratement 3
DESCRIPTION	_	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FEDERAL EXCISE TAX- CURRENT YEAR ESTIMA' FOREIGN TAXES PAID	ГE	2,460. 92.	0. 92.		0.
TO FORM 990-PF, PG	1, LN 18	2,552.	92.		0.

FORM 990-PF	OTHER E	XPENSES			STATEMENT	4	
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME		(C) ADJUSTED NET INCOM		(D) CHARITABLE PURPOSES	
PC FILING FEE EMPLOYMENT TAXES PAYROLL SERVICE FEES CITIZENS BANK FEES WEB FEES PRINT FEES NEW WEBSITE AND RELATED FEES	70. 4,436. 2,984. 36. 1,344. 652. 3,000.		0. 0. 0. 0.		4,43 2,98	4. 6. 4.	
TO FORM 990-PF, PG 1, LN 23	12,522.		0.		12,52	2.	
DESCRIPTION  US GOVT OBLIGATIONS  TOTAL U.S. GOVERNMENT OBLIGAT	U.S GOV' X		1	DK VALUE L,756,774.	FAIR MARKET VALUE 1,722,92	9.	
TOTAL STATE AND MUNICIPAL GOV TOTAL TO FORM 990-PF, PART II		IGATIONS		L,756,774.	1,722,92	9.	
FORM 990-PF	CORPORAT	E STOCK			STATEMENT	6	
					FAIR MARKET	I	
DESCRIPTION			вос	OK VALUE	VALUE	,	
DESCRIPTION  CORPORATE STOCK				2,164,934.	VALUE 2,969,44	8	

FORM 990-PF C	CORPORATE BONDS		STAT	EMENT 7	
DESCRIPTION		BOOK VALU		FAIR MARKET VALUE 150,507.	
CORPORATE BONDS		151,7	96.		
TOTAL TO FORM 990-PF, PART II, LI	151,7	96.	-150,507.		
	T OF OFFICERS, I		STAT	EMENT 8	
NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN CONTRIB		
EVELYN V MORENO (BEGINNING MAY) 100 SUMMER STREET BOSTON, MA 02110	TRUSTEE 1.00	16,196.	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 P.O. BOX 53 HARWICHPORT, MA 02646	TRUSTEE 3.00	0.	0.	0.	
LAWRENCE B COHEN (ENDING APRIL) 100 SUMMER STREET BOSTON, MA 02110	TRUSTEE 1.00	16,488.	0.	0.	
TOTALS INCLUDED ON 990-PF, PAGE 6	, PART VIII	32,684.	0.	0.	

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

STATEMENT

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

BEVERLY G MARRAM C/O NIXON PEABODY LLP, 100 SUMMER STREET 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