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Form **990-PF****Return of Private Foundation**

OMB No 1545-0052

2014Department of the Treasury
Internal Revenue Serviceor Section 4947(a)(1) Trust Treated as Private Foundation
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Open to Public Inspection

For calendar year 2014 or tax year beginning

03/17, 2014, and ending

12/31, 2014

Name of foundation

SORG-VOGT CHARITABLE FOUNDATION TRUST 3844

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

Room/suite

A Employer identification number

46-7372122

B Telephone number (see instructions)

P O BOX 1280

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

BRATTLEBORO, VT 05302

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 foundation

I Fair market value of all assets at
end of year (from Part II, col. (c), line
16) \$ 512,167.J Accounting method: ☒ Cash ☐ Accrual☐ Other (specify) _____

(Part I, column (d) must be on cash basis)

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)
2 Check ☐ if the foundation is not required to
attach Sch B

116,987.

3 Interest on savings and temporary cash investments

5,271.

5,271.

STMT 1

5a Gross rents

b Net rental income or (loss)

6a Net gain or (loss) from sale of assets not on line 10

435,567.

b Gross sales price for all
assets on line 6a 623,733

435,567.

7 Capital gain net income (from Part IV, line 2)

8 Net short-term capital gain

9 Income modifications

10a Gross sales less returns
and allowances

b Less Cost of goods sold

c Gross profit or (loss) (attach schedule)

11 Other income (attach schedule)

12 Total. Add lines 1 through 11

557,825.

440,838.

13 Compensation of officers, directors, trustees, etc.

1,828.

1,828.

14 Other employee salaries and wages

NONE

NONE

15 Pension plans, employee benefits

NONE

NONE

16a Legal fees (attach schedule)

b Accounting fees (attach schedule)

c Other professional fees (attach schedule) STMT 3

5,086.

5,086.

17 Interest

18 Taxes (attach schedule) (see instructions)

19 Depreciation (attach schedule) and depletion

20 Occupancy

21 Travel, conferences, and meetings

NONE

NONE

22 Printing and publications

NONE

NONE

23 Other expenses (attach schedule) STMT 4

2,362.

2,362.

24 Total operating and administrative expenses.

Add lines 13 through 23

9,276.

4,190.

NONE

5,086.

25 Contributions, gifts, grants paid

25,580.

25,580.

26 Total expenses and disbursements. Add lines 24 and 25

34,856.

4,190.

NONE

30,666.

27 Subtract line 26 from line 12

a Excess of revenue over expenses and disbursements

522,969.

b Net investment income (if negative, enter -0-)

436,648.

c Adjusted net income (if negative, enter -0-)

20me 4

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)		Beginning of year	End of year	
				(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash - non-interest-bearing				
	2	Savings and temporary cash investments			16,414.	16,414.
	3	Accounts receivable ▶				
		Less: allowance for doubtful accounts ▶				
	4	Pledges receivable ▶				
		Less: allowance for doubtful accounts ▶				
	5	Grants receivable				
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)				
	7	Other notes and loans receivable (attach schedule) ▶				
		Less: allowance for doubtful accounts ▶	NONE			
	8	Inventories for sale or use				
	9	Prepaid expenses and deferred charges				
	10a	Investments - U S and state government obligations (attach schedule)				
	b	Investments - corporate stock (attach schedule)			506,554.	495,753.
	c	Investments - corporate bonds (attach schedule)				
	Liabilities	11	Investments - land, buildings, and equipment: basis ▶			
		Less: accumulated depreciation ▶ (attach schedule)				
12		Investments - mortgage loans				
13		Investments - other (attach schedule)				
14		Land, buildings, and equipment: basis ▶				
		Less: accumulated depreciation ▶ (attach schedule)				
15		Other assets (describe ▶)				
16		Total assets (to be completed by all filers - see the instructions. Also, see page 1, item I)			522,968.	512,167.
17		Accounts payable and accrued expenses				
18		Grants payable				
Net Assets or Fund Balances	19	Deferred revenue				
	20	Loans from officers, directors, trustees, and other disqualified persons				
	21	Mortgages and other notes payable (attach schedule)				
	22	Other liabilities (describe ▶)				
23	Total liabilities (add lines 17 through 22)			NONE		
Net Assets or Fund Balances	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				
	Foundations that do not follow SFAS 117, . . . ▶ <input checked="" type="checkbox"/> check here and complete lines 27 through 31.					
	27	Capital stock, trust principal, or current funds			522,968.	
	28	Paid-in or capital surplus, or land, bldg, and equipment fund				
	29	Retained earnings, accumulated income, endowment, or other funds				
	30	Total net assets or fund balances (see instructions)			522,968.	
31	Total liabilities and net assets/fund balances (see instructions)			522,968.		

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	
2	Enter amount from Part I, line 27a	2	522,969.
3	Other increases not included in line 2 (itemize) ▶	3	
4	Add lines 1, 2, and 3	4	522,969.
5	Decreases not included in line 2 (itemize) ▶ ROUNDING	5	1.
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	522,968.

Form 990-PF (2014)

Part IV Capital Gains and Losses for Tax on Investment Income(a) List and describe the kind(s) of property sold (e.g., real estate,
2-story brick warehouse; or common stock, 200 shs MLC Co.)(b) How
acquired
P - Purchase
D - Donation(c) Date
acquired
(mo., day, yr.)(d) Date sold
(mo., day, yr.)**1a PUBLICLY TRADED SECURITIES**

b			
c			
d			
e			

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 623,733.		188,166.	435,567.
b			
c			
d			
e			

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

(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a			435,567.
b			
c			
d			
e			

2 Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	435,567.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c) (see instructions). If (loss), enter -0- in Part I, line 8	{ }	3	

Part V Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income

N/A

(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))
2013			
2012			
2011			
2010			
2009			

2 Total of line 1, column (d)	2	
3 Average distribution ratio for the 5-year base period - divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	
4 Enter the net value of noncharitable-use assets for 2014 from Part X, line 5	4	
5 Multiply line 4 by line 3	5	
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	
7 Add lines 5 and 6	7	
8 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.	8	

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 <input type="checkbox"/> and enter "N/A" on line 1 Date of ruling or determination letter: _____ (attach copy of letter if necessary - see instructions)	1	8,733.
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b		
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col (b).		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	2	
3	Add lines 1 and 2	3	8,733.
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	NONE
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5	8,733.
6	Credits/Payments.		
a	2014 estimated tax payments and 2013 overpayment credited to 2014	6a	
b	Exempt foreign organizations - tax withheld at source	6b	NONE
c	Tax paid with application for extension of time to file (Form 8868)	6c	NONE
d	Backup withholding erroneously withheld	6d	
7	Total credits and payments. Add lines 6a through 6d	7	NONE
8	Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8	
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	8,733.
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	
11	Enter the amount of line 10 to be Credited to 2015 estimated tax <input type="checkbox"/> NONE Refunded <input type="checkbox"/>	11	

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for the definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year. (1) On the foundation <input type="checkbox"/> \$ _____ (2) On foundation managers <input type="checkbox"/> \$ _____		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input type="checkbox"/> \$ _____		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?		X
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) <input type="checkbox"/> VT		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2014 or the taxable year beginning in 2014 (see instructions for Part XIV)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses STMT 5	X	

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address <u>N/A</u>	13	X	
14	The books are in care of <u>Trust Company of Vermont</u> Telephone no <u>(802) 254-9400</u> Located at <u>86 LINDEN STREET, BRATTLEBORO, VT</u> ZIP+4 <u>05301</u>			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here <input type="checkbox"/> and enter the amount of tax-exempt interest received or accrued during the year <u>15</u>			
16	At any time during calendar year 2014, 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, (formerly TD F 90-22.1) If "Yes," enter the name of the foreign country <u></u>	16	Yes	No X

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

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

	Yes	No
1a During the year did the foundation (either directly or indirectly):		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? <input type="checkbox"/> Organizations relying on a current notice regarding disaster assistance check here <input type="checkbox"/>	1b	
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2014? <input type="checkbox"/>	1c	X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):		
a At the end of tax year 2014, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2014? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years <u></u>		
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.) <input type="checkbox"/>	2b	X
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here <u></u>		
3a 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		
b If "Yes," did it have excess business holdings in 2014 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 2014) <input type="checkbox"/>	3b	
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2014? <input type="checkbox"/>	4b	X

Form 990-PF (2014)

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required (continued)**5a** During the year did the foundation pay or incur any amount to(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☒ No(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☒ No(3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☒ No(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? (see instructions). ☐ Yes ☒ No(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☒ No**b** If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)? ☐ Yes ☒ NoOrganizations relying on a current notice regarding disaster assistance check here ☐**c** If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? ☐ Yes ☐ No

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

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? ☐ Yes ☒ No**b** Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? ☐ Yes ☒ No

If "Yes" to 6b, file Form 8870

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☒ No**b** If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction? ☐ Yes ☒ No**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
Trust Company of VT 86 Linden Street, Brattleboro, VT 05302	Trustee 1	1,828.	-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		NONE	NONE	NONE

Total number of other employees paid over \$50,000 ☒ NONE

Form 990-PF (2014)

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		NONE
Total number of others receiving over \$50,000 for professional services		NONE

Part IX-A Summary of Direct Charitable Activities

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

Expenses

1 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

Amount

1 NONE

2

All other program-related investments See instructions

3 NONE

Total. Add lines 1 through 3

Form 990-PF (2014)

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	536,398.
b	Average of monthly cash balances	1b	NONE
c	Fair market value of all other assets (see instructions).	1c	NONE
d	Total (add lines 1a, b, and c)	1d	536,398.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation) 1e		
2	Acquisition indebtedness applicable to line 1 assets	2	NONE
3	Subtract line 2 from line 1d	3	536,398.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	8,046.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	528,352.
6	Minimum investment return. Enter 5% of line 5	6	20,989.

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	20,989.
2a	Tax on investment income for 2014 from Part VI, line 5 2a		8,733.
b	Income tax for 2014. (This does not include the tax from Part VI.) 2b		
c	Add lines 2a and 2b	2c	8,733.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	12,256.
4	Recoveries of amounts treated as qualifying distributions	4	NONE
5	Add lines 3 and 4	5	12,256.
6	Deduction from distributable amount (see instructions).	6	NONE
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	12,256.

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	25,580.
b	Program-related investments - total from Part IX-B	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	NONE
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	NONE
b	Cash distribution test (attach the required schedule)	3b	NONE
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	25,580.
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	
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	25,580.

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 2013	(c) 2013	(d) 2014
1 Distributable amount for 2014 from Part XI, line 7				12,256.
2 Undistributed income, if any, as of the end of 2014				
a Enter amount for 2013 only			NONE	
b Total for prior years. 20____, 20____, 20____		NONE		
3 Excess distributions carryover, if any, to 2014:				
a From 2009	NONE			
b From 2010	NONE			
c From 2011	NONE			
d From 2012	NONE			
e From 2013	NONE			
f Total of lines 3a through e	NONE			
4 Qualifying distributions for 2014 from Part XII, line 4: ► \$ 25,580.				
a Applied to 2013, but not more than line 2a			NONE	
b Applied to undistributed income of prior years (Election required - see instructions)		NONE		
c Treated as distributions out of corpus (Election required - see instructions)	NONE			
d Applied to 2014 distributable amount				12,256.
e Remaining amount distributed out of corpus	13,324.			
5 Excess distributions carryover applied to 2014 (If an amount appears in column (d), the same amount must be shown in column (a))	NONE			NONE
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	13,324.			
b Prior years' undistributed income. Subtract line 4b from line 2b		NONE		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		NONE		
d Subtract line 6c from line 6b. Taxable amount - see instructions		NONE		
e Undistributed income for 2013. Subtract line 4a from line 2a. Taxable amount - see instructions			NONE	
f Undistributed income for 2014. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2015				NONE
7 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)	NONE			
8 Excess distributions carryover from 2009 not applied on line 5 or line 7 (see instructions)	NONE			
9 Excess distributions carryover to 2015. Subtract lines 7 and 8 from line 6a	13,324.			
10 Analysis of line 9:				
a Excess from 2010	NONE			
b Excess from 2011	NONE			
c Excess from 2012	NONE			
d Excess from 2013	NONE			
e Excess from 2014	13,324.			

Part XIV Private Operating Foundations (see instructions and Part VII-A, question 9)**NOT APPLICABLE**

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2014, enter the date of the ruling

b Check box to indicate whether the foundation is a private operating foundation described in section 4942(j)(3) or 4942(j)(5)

	Tax year	Prior 3 years			(e) Total
	(a) 2014	(b) 2013	(c) 2012	(d) 2011	
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon					
a "Assets" alternative test - enter					
(1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i).					
b "Endowment" alternative test - enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed					
c "Support" alternative test - enter					
(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties).					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii).					
(3) Largest amount of support from an exempt organization.					
(4) Gross investment income					

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

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

N/A

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.

N/A

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

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

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

SEE STATEMENT 6

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

SEE ATTACHED STATEMENT FOR LINE 2

c Any submission deadlines:

SEE ATTACHED STATEMENT FOR LINE 2

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

SEE ATTACHED STATEMENT FOR LINE 2

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
<i>a Paid during the year</i>				
<i>see attached list</i>				
Total				3a
<i>b Approved for future payment</i>				
Total				3b

Schedule of Contributors

OMB No 1545-0047

2014

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

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

Name of the organization

Employer identification number

SORG-VOGT CHARITABLE FOUNDATION TRUST 3844

46-7372122

Organization type (check one):

Filers of:

Section:

Form 990 or 990-EZ

☐ 501(c)() (enter number) organization

☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation

☐ 527 political organization

Form 990-PF

☒ 501(c)(3) exempt private foundation

☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation

☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.

Note. Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

General Rule

- ☒ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions.

Special Rules

- ☐ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33 1/3 % support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals. Complete Parts I, II, and III
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Do not complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling \$5,000 or more during the year ▶ \$ _____

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

Name of organization
SORG-VOGT CHARITABLE FOUNDATION TRUST 3844

Employer identification number
46-7372122

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

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	Winifred Vogt 65 Harris Ave Brattleboro, VT 05301	\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II for noncash contributions.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)

Employer identification number

46-7372122

Part II

[illegible]

FORM 990PF, PART I - DIVIDENDS AND INTEREST FROM SECURITIES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
AIR PRODUCTS & CHEMICAL INC	27.	27.
AMERICAN TOWER REIT	18.	18.
APACHE CORP	16.	16.
BHP BILLITON LIMITED SPONSORED ADR	81.	81.
CHEVRONTXACO CORP	75.	75.
COSTCO WHOLESALE CORPORATION	14.	14.
DIAGEO PLC ADR	72.	72.
DODGE & COX INTERNATIONAL STOCK FUND	114.	114.
DODGE & COX INCOME FUND #147	672.	672.
EMERSON ELECTRIC CO	59.	59.
EXXON MOBIL CORP	55.	55.
FRANKLIN RESOURCES	12.	12.
GENERAL ELECTRIC CO	33.	33.
GLAXO WELLCOME PLC SPS ADR	52.	52.
HCP INC	123.	123.
INTL BUSINESS MACHINES	61.	61.
JOHNSON CONTROLS INC	22.	22.
LOWES COMPANIES INC	20.	20.
NORTHERN TRUST GOVT SELECT SHARE CL #84	1.	1.
NUCOR CORP	28.	28.
ORACLE CORPORATION	12.	12.
PIMCO SHORT TERM INSTITUTIONAL #37	1,970.	1,970.
PEPSICO INC	33.	33.
PROCTER & GAMBLE CO	51.	51.
QUALCOMM INC	50.	50.
SCHLUMBERGER LTD	20.	20.
SOUTHERN CO	105.	105.
SPECTRA ENERGY CORP	71.	71.
US BANCORP DEP PFD H SHS 3.5% FLOOR	112.	112.
UNITED TECHNOLOGIES CORP	41.	41.
VANGUARD FTSE DEV MKTS ETF	64.	64.
VANG SHORT TERM INVESTMENT GRADE FD ADM	1,060.	1,060.
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		STATEMENT 1

FORM 990PF, PART I - DIVIDENDS AND INTEREST FROM SECURITIES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
-----	-----	-----
INCOME MONEY MARKET FUND	7.	7.
ACCENTURE PLC IRELAND	51.	51.
EATON CORP PLC	69.	69.
	-----	-----
TOTAL	5,271.	5,271.
	=====	=====

FORM 990PF, PART I - OTHER PROFESSIONAL FEES

=====

DESCRIPTION -----	REVENUE AND EXPENSES PER BOOKS -----	CHARITABLE PURPOSES -----
NON-ALLOCABLE LEGAL FEES	5,086.	5,086.
	-----	-----
TOTALS	5,086.	5,086.
	=====	=====

FORM 990PF, PART I - OTHER EXPENSES
=====

DESCRIPTION -----	REVENUE AND EXPENSES PER BOOKS -----	NET INVESTMENT INCOME -----
OTHER NON-ALLOCABLE EXPENSE -	2,350.	2,350.
FOREIGN TAXES ON QUALIFIED FOR	11.	11.
FOREIGN TAXES ON NONQUALIFIED	1.	1.
TOTALS	----- 2,362. =====	----- 2,362. =====

SORG-VOGT CHARITABLE FOUNDATION TRUST 3844

46-7372122

FORM 990PF, PART VII-A - NEW SUBSTANTIAL CONTRIBUTORS
=====

NAME AND ADDRESS

Winifred Vogt
65 Harris Ave
Brattleboro, VT 05301

STATEMENT 5

SORG-VOGT CHARITABLE FOUNDATION TRUST 3844
FORM 990PF, PART XV - LINES 2a - 2d
=====

46-7372122

RECIPIENT NAME:

Christopher Chapman

ADDRESS:

PO Box 1280

Brattleboro, VT 05302

RECIPIENT'S PHONE NUMBER: 802-2312766

E-MAIL ADDRESS: chris@tcvermont.com

FORM, INFORMATION AND MATERIALS:

letter

SUBMISSION DEADLINES:

none

RESTRICTIONS OR LIMITATIONS ON AWARDS:

none

STATEMENT 6

SCHEDULE D
(Form 1041)

Department of the Treasury
Internal Revenue Service

Capital Gains and Losses

► Attach to Form 1041, Form 5227, or Form 990-T.
► Use Form 8949 to list your transactions for lines 1b, 2, 3, 8b, 9 and 10.
► Information about Schedule D and its separate instructions is at www.irs.gov/form1041

OMB No 1545-0092

2014

Name of estate or trust

SORG-VOGT CHARITABLE FOUNDATION TRUST 3844

Employer identification number

46-7372122

Note: Form 5227 filers need to complete *only* Parts I and II.

Part I Short-Term Capital Gains and Losses - Assets Held One Year or Less

See instructions for how to figure the amounts to enter on the lines below.

This form may be easier to complete if you round off cents to whole dollars.

	(d) Proceeds (sales price)	(e) Cost (or other basis)	(g) Adjustments to gain or loss from Form(s) 8949, Part I, line 2, column (g)	(h) Gain or (loss) Subtract column (e) from column (d) and combine the result with column (g)
1a Totals for all short-term transactions reported on Form 1099-B for which basis was reported to the IRS and for which you have no adjustments (see instructions). However, if you choose to report all these transactions on Form 8949, leave this line blank and go to line 1b.				
1b Totals for all transactions reported on Form(s) 8949 with Box A checked				
2 Totals for all transactions reported on Form(s) 8949 with Box B checked				
3 Totals for all transactions reported on Form(s) 8949 with Box C checked	71,011.	71,179.		-168.
4 Short-term capital gain or (loss) from Forms 4684, 6252, 6781, and 8824			4	
5 Net short-term gain or (loss) from partnerships, S corporations, and other estates or trusts			5	
6 Short-term capital loss carryover. Enter the amount, if any, from line 9 of the 2013 Capital Loss Carryover Worksheet			6 ()
7 Net short-term capital gain or (loss). Combine lines 1a through 6 in column (h). Enter here and on line 17, column (3) on the back ►			7	-168.

Part II Long-Term Capital Gains and Losses - Assets Held More Than One Year

See instructions for how to figure the amounts to enter on the lines below.

This form may be easier to complete if you round off cents to whole dollars.

	(d) Proceeds (sales price)	(e) Cost (or other basis)	(g) Adjustments to gain or loss from Form(s) 8949, Part II, line 2, column (g)	(h) Gain or (loss) Subtract column (e) from column (d) and combine the result with column (g)
8a Totals for all long-term transactions reported on Form 1099-B for which basis was reported to the IRS and for which you have no adjustments (see instructions). However, if you choose to report all these transactions on Form 8949, leave this line blank and go to line 8b.				
8b Totals for all transactions reported on Form(s) 8949 with Box D checked				
9 Totals for all transactions reported on Form(s) 8949 with Box E checked				
10 Totals for all transactions reported on Form(s) 8949 with Box F checked	552,130.	116,987.		435,143.
11 Long-term capital gain or (loss) from Forms 2439, 4684, 6252, 6781, and 8824			11	
12 Net long-term gain or (loss) from partnerships, S corporations, and other estates or trusts			12	
13 Capital gain distributions.			13	592.
14 Gain from Form 4797, Part I.			14	
15 Long-term capital loss carryover. Enter the amount, if any, from line 14 of the 2013 Capital Loss Carryover Worksheet			15 ()
16 Net long-term capital gain or (loss). Combine lines 8a through 15 in column (h). Enter here and on line 18a, column (3) on the back ►			16	435,735.

For Paperwork Reduction Act Notice, see the Instructions for Form 1041.

Schedule D (Form 1041) 2014

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26

-

Part III Summary of Parts I and II**Caution: Read the instructions before completing this part.**

	(1) Beneficiaries' (see instr.)	(2) Estate's or trust's	(3) Total
17 Net short-term gain or (loss)	17		-168.
18 Net long-term gain or (loss):			
a Total for year	18a		435,735.
b Unrecaptured section 1250 gain (see line 18 of the wrksh.)	18b		
c 28% rate gain	18c		
19 Total net gain or (loss). Combine lines 17 and 18a ▶	19		435,567.

Note: If line 19, column (3), is a net gain, enter the gain on Form 1041, line 4 (or Form 990-T, Part I, line 4a). If lines 18a and 19, column (2), are net gains, go to Part V, and do not complete Part IV. If line 19, column (3), is a net loss, complete Part IV and the **Capital Loss Carryover Worksheet**, as necessary.

Part IV Capital Loss Limitation

20 Enter here and enter as a (loss) on Form 1041, line 4 (or Form 990-T, Part I, line 4c, if a trust), the smaller of:

a The loss on line 19, column (3) or **b** \$3,000 **20** ()

Note: If the loss on line 19, column (3), is more than \$3,000, or if Form 1041, page 1, line 22 (or Form 990-T, line 34), is a loss, complete the **Capital Loss Carryover Worksheet** in the instructions to figure your capital loss carryover.

Part V Tax Computation Using Maximum Capital Gains Rates

Form 1041 filers. Complete this part only if both lines 18a and 19 in column (2) are gains, or an amount is entered in Part I or Part II and there is an entry on Form 1041, line 2b(2), and Form 1041, line 22, is more than zero.

Caution: Skip this part and complete the **Schedule D Tax Worksheet** in the instructions if:

- Either line 18b, col. (2) or line 18c, col. (2) is more than zero, or
- Both Form 1041, line 2b(1), and Form 4952, line 4g are more than zero.

Form 990-T trusts. Complete this part only if both lines 18a and 19 are gains, or qualified dividends are included in income in Part I of Form 990-T, and Form 990-T, line 34, is more than zero. Skip this part and complete the **Schedule D Tax Worksheet** in the instructions if either line 18b, col. (2) or line 18c, col. (2) is more than zero.

21 Enter taxable income from Form 1041, line 22 (or Form 990-T, line 34).	21		
22 Enter the smaller of line 18a or 19 in column (2) but not less than zero	22		
23 Enter the estate's or trust's qualified dividends from Form 1041, line 2b(2) (or enter the qualified dividends included in income in Part I of Form 990-T)	23		
24 Add lines 22 and 23	24		
25 If the estate or trust is filing Form 4952, enter the amount from line 4g; otherwise, enter -0- ▶	25		
26 Subtract line 25 from line 24. If zero or less, enter -0-	26		
27 Subtract line 26 from line 21. If zero or less, enter -0-	27		
28 Enter the smaller of the amount on line 21 or \$2,500	28		
29 Enter the smaller of the amount on line 27 or line 28	29		
30 Subtract line 29 from line 28. If zero or less, enter -0-. This amount is taxed at 0% ▶	30		
31 Enter the smaller of line 21 or line 26	31		
32 Subtract line 30 from line 26	32		
33 Enter the smaller of line 21 or \$12,150	33		
34 Add lines 27 and 30	34		
35 Subtract line 34 from line 33. If zero or less, enter -0-	35		
36 Enter the smaller of line 32 or line 35	36		
37 Multiply line 36 by 15% ▶	37		
38 Enter the amount from line 31	38		
39 Add lines 30 and 36	39		
40 Subtract line 39 from line 38. If zero or less, enter -0-	40		
41 Multiply line 40 by 20% ▶	41		
42 Figure the tax on the amount on line 27. Use the 2014 Tax Rate Schedule for Estates and Trusts (see the Schedule G instructions in the instructions for Form 1041)	42		
43 Add lines 37, 41, and 42	43		
44 Figure the tax on the amount on line 21. Use the 2014 Tax Rate Schedule for Estates and Trusts (see the Schedule G instructions in the instructions for Form 1041)	44		
45 Tax on all taxable income. Enter the smaller of line 43 or line 44 here and on Form 1041, Schedule G, line 1a (or Form 990-T, line 36) ▶	45		

Schedule D (Form 1041) 2014

Sales and Other Dispositions of Capital Assets

OMB No 1545-0074

2014Attachment
Sequence No **12A**Department of the Treasury
Internal Revenue Service► Information about Form 8949 and its separate instructions is at www.irs.gov/form8949.

► File with your Schedule D to list your transactions for lines 1b, 2, 3, 8b, 9, and 10 of Schedule D.

Name(s) shown on return

SORG-VOGT CHARITABLE FOUNDATION TRUST 3844

Social security number or taxpayer identification number

46-7372122

Before you check Box A, B, or C below, see whether you received any Form(s) 1099-B or substitute statement(s) from your broker. A substitute statement will have the same information as Form 1099-B. Either may show your basis (usually your cost) even if your broker did not report it to the IRS. Brokers must report basis to the IRS for most stock you bought in 2011 or later (and for certain debt instruments you bought in 2014 or later).

Part I **Short-Term.** Transactions involving capital assets you held 1 year or less are short-term. For long-term transactions, see page 2.

Note. You may aggregate all short-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS and for which no adjustments or codes are required. Enter the total directly on Schedule D, line 1a; you are not required to report these transactions on Form 8949 (see instructions).

You must check Box A, B, or C below. Check only one box. If more than one box applies for your short-term transactions, complete a separate Form 8949, page 1, for each applicable box. If you have more short-term transactions than will fit on this page for one or more of the boxes, complete as many forms with the same box checked as you need.

- ☐ (A) Short-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS (see Note above)
- ☐ (B) Short-term transactions reported on Form(s) 1099-B showing basis was not reported to the IRS
- ☒ (C) Short-term transactions not reported to you on Form 1099-B

1	(a) Description of property (Example: 100 sh XYZ Co.)	(b) Date acquired (Mo., day, yr.)	(c) Date sold or disposed (Mo., day, yr.)	(d) Proceeds (sales price) (see instructions)	(e) Cost or other basis. See the Note below and see Column (e) in the separate instructions	Adjustment, if any, to gain or loss. If you enter an amount in column (g), enter a code in column (f). See the separate instructions.		(h) Gain or (loss). Subtract column (e) from column (d) and combine the result with column (g)
						(f) Code(s) from instructions	(g) Amount of adjustment	
	1108.871 PIMCO SHORT TERM L #37	07/23/2014	09/19/2014	11,011.00	10,978.00			33.00
	2801.12 VANG SHORT TERM IN GRADE FD ADM	07/23/2014	09/19/2014	30,000.00	30,140.00			-140.00
	3036.437 PIMCO SHORT TERM L #37	07/23/2014	12/03/2014	30,000.00	30,061.00			-61.00
2 Totals. Add the amounts in columns (d), (e), (g), and (h) (subtract negative amounts). Enter each total here and include on your Schedule D, line 1b (if Box A above is checked), line 2 (if Box B above is checked), or line 3 (if Box C above is checked) ►				71,011.	71,179.			-168.

Note. If you checked Box A above but the basis reported to the IRS was incorrect, enter in column (e) the basis as reported to the IRS, and enter an adjustment in column (g) to correct the basis. See Column (g) in the separate instructions for how to figure the amount of the adjustment.

For Paperwork Reduction Act Notice, see your tax return instructions.

Form **8949** (2014)

Name(s) shown on return Name and SSN or taxpayer identification no. not required if shown on other side

Social security number or taxpayer identification number

SORG-VOGT CHARITABLE FOUNDATION TRUST 3844

46-7372122

Before you check Box D, E, or F below, see whether you received any Form(s) 1099-B or substitute statement(s) from your broker. A substitute statement will have the same information as Form 1099-B. Either may show your basis (usually your cost) even if your broker did not report it to the IRS. Brokers must report basis to the IRS for most stock you bought in 2011 or later (and for certain debt instruments you bought in 2014 or later).

Part II **Long-Term.** Transactions involving capital assets you held more than 1 year are long term. For short-term transactions, see page 1.

Note. You may aggregate all long-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS and for which no adjustments or codes are required. Enter the total directly on Schedule D, line 8a; you are not required to report these transactions on Form 8949 (see instructions).

You must check Box D, E, or F below. Check only one box. If more than one box applies for your long-term transactions, complete a separate Form 8949, page 2, for each applicable box. If you have more long-term transactions than will fit on this page for one or more of the boxes, complete as many forms with the same box checked as you need.

- ☐ (D) Long-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS (see **Note** above)
- ☐ (E) Long-term transactions reported on Form(s) 1099-B showing basis was **not** reported to the IRS
- ☒ (F) Long-term transactions not reported to you on Form 1099-B

1	(a) Description of property (Example 100 sh. XYZ Co.)	(b) Date acquired (Mo., day, yr.)	(c) Date sold or disposed (Mo., day, yr.)	(d) Proceeds (sales price) (see instructions)	(e) Cost or other basis. See the Note below and see <i>Column (e)</i> in the separate instructions	Adjustment, if any, to gain or loss. If you enter an amount in column (g), enter a code in column (f). See the separate instructions.		(h) Gain or (loss) Subtract column (a) from column (d) and combine the result with column (g)
						(f) Code(s) from instructions	(g) Amount of adjustment	
	27. SILVER BARS	05/25/1999	07/10/2014	56,690.00	13,757.00			42,933.00
	370. 1-OUNCE GOLD KRUGERRA	05/25/1999	07/10/2014	495,440.00	103,230.00			392,210.00
2 Totals. Add the amounts in columns (d), (e), (g), and (h) (subtract negative amounts). Enter each total here and include on your Schedule D, line 8b (if Box D above is checked), line 9 (if Box E above is checked), or line 10 (if Box F above is checked) ▶				552,130.	116,987.			435,143.

Note. If you checked Box D above but the basis reported to the IRS was incorrect, enter in column (e) the basis as reported to the IRS, and enter an adjustment in column (g) to correct the basis. See *Column (g)* in the separate instructions for how to figure the amount of the adjustment.

FORM 990PF, PART XII- QUALIFYING DISTRIBUTIONS

Recipient Name	Address	EIN	Relationship	Purpose of Grant	Foundation Status of Recipient	Amount Paid
Dummerston Congregational Church	125 E Orchard Road, Dummerston, VT 05301	22-2512563	None	Religious	Exempt	\$4,400
AIDS Project of Southern Vermont	15 Grove Street, Brattleboro, VT 05302	22-2950456	None	Charitable	Exempt	\$100
Alzheimer's Association	225 North Michigan Ave, Fl #17, Chicago, IL 60601	13-3039601	None	Medical	Exempt	\$100
American Institute for Cancer Research	1759 R St NW, PO Box 97167, Washington, DC 20090-7167	52-1238026	None	Medical	Exempt	\$100
American Red Cross, Green Mountain Chapter	81 High Street, Brattleboro, VT 05301	53-0196605	None	Charitable	Exempt	\$200
Boys and Girls Club of Brattleboro	17 Flat Street, Brattleboro, VT 05301	03-0309528	None	Charitable	Exempt	\$500
Bradley House	65 Harris Avenue, Brattleboro, VT 05301	52-2371132	None	Charitable	Exempt	\$250
Brattleboro Area Affordable Housing	PO Box 1284, Brattleboro, VT 05302	03-0347917	None	Charitable	Exempt	\$500
Brattleboro Area Drop-In Center	60 South Main Street, Brattleboro, VT 05302	03-0323807	None	Charitable	Exempt	\$350
Brattleboro Area Hospice	191 Canal Street, Brattleboro, VT 05301	03-0274862	None	Medical	Exempt	\$100
Brattleboro Memorial Hospital	Belmont Ave, Brattleboro, VT 05301	03-0107300	None	Medical	Exempt	\$2,425
Brattleboro Museum & Art Center	10 Vernon Street, Brattleboro, VT 05301	03-6016116	None	Charitable	Exempt	\$400
Brattleboro Music Center, Friends of	38 Walnut Street, Brattleboro, VT 05301	03-6009983	None	Educational	Exempt	\$200
Brattleboro Pastoral Counseling Center	190 Main Street, Brattleboro, VT 05301	22-2498991	None	Charitable	Exempt	\$100
Brattleboro Reformer Christmas Stocking	PO Box 703, Brattleboro, VT 05302-0703	03-6010733	None	Charitable	Exempt	\$250
Brattleboro Senior Meals, Inc.	207 Main Street, Brattleboro, VT 05301	05-0587278	None	Charitable	Exempt	\$250
Center for Woodlands Education	PO Box 471, Corinth, VT 05039	02-0507029	None	Charitable	Exempt	\$350
Christopher & Dana Reeve Foundation	636 Morris Turnpike, Ste 3A, Short Hills, NJ 07078	22-2939536	None	Medical	Exempt	\$200
Council on Aging for SE VT (Senior Solutions)	56 Main Street, Ste 202, Springfield, VT 05156	22-2738766	None	Charitable	Exempt	\$250
Dummerston Cares - Emergency Fuel Fund	c/o Jean Momany, 1324 Rice Farm Road, Dummerston, VT 05301	03-0317654	None	Charitable	Exempt	\$200
Dummerston Historical Society	PO Box 8064, Brattleboro, VT 05304	03-0262398	None	Charitable	Exempt	\$100
Dummerston School Endowment Fund	52 School House Road, East Dummerston, VT 05346	27-1003062	None	Educational	Exempt	\$100
Earthwatch Institute	114 Western Avenue, Boston, MA 02134	23-7168440	None	Charitable	Exempt	\$100
Elderhostel Inc.	11 Avenue DE Lafayette, Boston, MA 02111-1883	04-2632526	None	Charitable	Exempt	\$135
Friends of Music at Guilford	37 Bee Barn Road, Guilford, VT 05301	23-7083723	None	Educational	Exempt	\$200
Friends of the Brooks Memorial Library	224 Main Street, Brattleboro, VT 05301	03-0328068	None	Charitable	Exempt	\$150
Green Mountain Club	4711 Waterbury-Stowe Road, Waterbury Center, VT 05677	03-0162865	None	Charitable	Exempt	\$100
Holton Home	158 Western Avenue, Brattleboro, VT 05301	03-0179416	None	Charitable	Exempt	\$350
Home at Last	PO Box 6104, Brattleboro, VT 05302	26-2037694	None	Charitable	Exempt	\$500
Human Rights Watch	350 Fifth Avenue, 34th Floor, New York, NY 10118-3299	13-2875808	None	Charitable	Exempt	\$50
Hunterdon County Historical Society NJ	114 Main Street, Flemington, NJ 08822	22-1964000	None	Charitable	Exempt	\$50
Kent Place School	42 Norwood Ave, Summit, NJ 07901-1913	22-1487233	None	Educational	Exempt	\$1,100
Kids Wish Network	4060 Louis Avenue, Holiday, FL 34691	31-1579097	None	Charitable	Exempt	\$100
Lupus Foundation of America	PO Box 96864, Washington, DC 20090-6864	43-1131436	None	Medical	Exempt	\$40
Lydia Taft Pratt Library	150 West Street, PO Box 70, West Dummerston, VT 05357-0070	03-6000451	None	Educational	Exempt	\$500
March of Dimes	1275 Mamaroneck Ave, White Plains, NY 10605	13-1846366	None	Charitable	Exempt	\$100
Memorial Sloan Kettering Cancer Center	PO Box 27106, New York, NY 10087-7106	13-1924236	None	Medical	Exempt	\$100
Mothers Against Drunk Driving	511 East John Carpenter Freeway, Ste 700, Irving, TX 75062	94-2707273	None	Charitable	Exempt	\$100
Parks Place Community Center	44 School Street Exn, Bellows Falls, VT 05101	03-0350907	None	Community	Exempt	\$150
Planned Parenthood Federation of America	434 West 33rd Street, New York, NY 10001	13-1644147	None	Charitable	Exempt	\$175
Planned Parenthood of Northern New England	128 Lakeside Avenue, Ste 301, Burlington, VT 05401	03-0326364	None	Charitable	Exempt	\$200
Princeton Day School	PO Box 75, Princeton, NJ 08542-0075	21-0727645	None	Educational	Exempt	\$100
Putney Historical Society	15 Kimball Hill Rd, Putney, VT 05346	03-0301185	None	Charitable	Exempt	\$100
Reading is Fundamental	Attn Development Dept, PO Box 96897, Washington, DC 20090	52-0976257	None	Educational	Exempt	\$150
Save the Children Federation	PO Box 9160, Chelsea, MA 02150-9160	06-0726487	None	Charitable	Exempt	\$100
Southeastern Vermont Watershed Alliance	PO Box 402, Brattleboro, Vt 05302	06-1673331	None	Charitable	Exempt	\$100

FORM 990PF, PART XII- QUALIFYING DISTRIBUTIONS

Recipient Name	Address	EIN	Relationship	Purpose of Grant	Foundation Status of Recipient	Amount Paid
St Jude's Children's Research Hospital	501 St Jude Place, Memphis, TN 38105	62-0646012	None	Medical	Exempt	\$105
United Way of Windham County	28 Vernon Street, Brattleboro, VT 05301	03-6003074	None	Charitable	Exempt	\$2,000
Vermont Center for the Book	136 Main Street, Chester, VT 05143	03-0340584	None	Educational	Exempt	\$100
Vermont Council of World Affairs	60 Main Street, Burlington, VT 05401	03-6010787	None	Educational	Exempt	\$175
Vermont Folklife Center	88 Main Street, Middlebury, VT 05753	22-2550951	None	Charitable	Exempt	\$100
Vermont Food Bank	c/o Melissa Baptiewright, 33 Parker Rd, Barre, VT 05641	22-3021942	None	Charitable	Exempt	\$500
Vermont Historical Society	60 Washington Street, Barre, VT 05641	03-0179602	None	Charitable	Exempt	\$350
Vermont VNA & Hospice	PO Box 976, White River Junction, VT 05001-0976	03-6006494	None	Medical	Exempt	\$125
Vermont Woodlands Association	PO Box 6004, Rutland, VT 05702	03-0342303	None	Charitable	Exempt	\$200
Vermont Youth Conservation Corps	1949 East Main Street, Richmond, VT 05477	03-0328834	None	Educational	Exempt	\$200
Vt. Public Interest Research Educational Fund	141 Main Street, Ste 6, Montpelier, VT 05602	03-0228267	None	Charitable	Exempt	\$1,500
Wellesley College	Development Services, 106 Central Street, Wellesley, MA 02481-8203	04-2103637	None	Educational	Exempt	\$1,600
West Brookfield Village Trust	103 Roxbury Line Road, West Brookfield, VT 05060	27-2915053	None	Community Prevention of	Exempt	\$250
Windham County Humane Society	916 West River Rd, Brattleboro, VT 05302	03-6016140	None	Cruelty of Animals	Exempt	\$100
Windham Union Association	36 North Main Street, Randolph, VT 05060	03-0179604	None	Religious	Exempt	\$200
World Learning	PO Box 676, Brattleboro, VT 05302-0676	03-0179592	None	Educational	Exempt	\$250
Youth Services	32 Walnut Street, PO Box 6008, Brattleboro, VT 05302-6008	03-0287694	None	Charitable	Exempt	\$1,000
Vermont Independent Media	139 Main Street, Brattleboro, VT 05301	20-2140604	None	Charitable	Exempt	\$100
Natural Resources Defense Council	40 West 20th Street, New York, NY 10011	13-2654926	None	Charitable	Exempt	\$100
Marine Corps League - Toys for Kids	C/O Scott Larabee, 60 Crestwood Est, Vernon, VT 05354	03-0334960	None	Charitable	Exempt	\$350
Esty Organ Museum	108 Birge Street, Brattleboro, VT 05301	01-0602627	None	Charitable	Exempt	\$100
					TOTALS	<u>\$25,580</u>

Account Holdings As Of

Filtered By : Account = 3844 Sorg-Vogt Charitable Foundation Trust

Sorted By Account Number

Date Run : 04/29/2015

Account Name : Sorg-Vogt Charitable Foundation Trust

Time Printed 3:28:25 PM

As Of: 12/31/2014

Account Number : 3844

Shares	Asset Description	Cost	Market	Unr Gain Loss	Est Ann Income	Yield
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Prices As Of: 12/31/2014

Cash Equivalent - Taxable

4,612 63	BSL Money Market	4,612.63	4,612.63	0.00	23.06	0.50%
316 65 *	BSL Money Market	316.65	316.65	0.00	1.58	0.50%
10,991 89	Northern Trust Govt Select Share Cl #848	10,991.89	10,991.89	0.00	1.10	0.01%
493 07 *	Northern Trust Govt Select Share Cl #848	493.07	493.07	0.00	0.05	0.01%

Sub Total

\$	16,414.24	16,414.24	0.00	25.79	0.16%
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Mutual Fund - Fix Inc Taxable

3,611 5	Dodge & Cox Income Fund	50,197.84	49,766.47	-431.37	1,444.60	2.90%
16,135 035	PIMCO Short Term Institutional #37	159,730.58	157,316.59	-2,413.99	1,583.27	1.01%
11,163 381	Vang Short Term Investment Grade Fd Adm	120,115.35	119,001.64	-1,113.71	2,394.23	2.01%

Sub Total

\$	330,043.77	326,084.70	-3,959.07	5,422.10	1.66%
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Preferred Stock

500	US Bancorp Dep PFD H Shs 3 5% Floor	11,154.95	11,080.00	-74.95	447.22	4.04%
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Sub Total

\$	11,154.95	11,080.00	-74.95	447.22	4.04%
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Common Stocks

35	Air Products & Chemical Inc	4,554.20	5,048.05	493.85	107.80	2.14%
50	American Tower REIT	4,799.49	4,942.50	143.01	76.00	1.54%
65	Apache Corp	6,390.30	4,073.55	-2,316.75	65.00	1.60%
35	Berkshire Hathaway Inc Del Cl B New	4,506.25	5,255.25	749.00	0.00	0.00%
35	Chevron Corporation	4,595.15	3,926.30	-668.85	149.80	3.82%
40	Costco Wholesale Corporation	4,686.00	5,670.00	984.00	56.80	1.00%
65	Emerson Electric Co	4,382.29	4,012.45	-369.84	122.20	3.05%
40	Exxon Mobil Corp	4,129.40	3,698.00	-431.40	110.40	2.99%
100	Franklin Resource Inc	5,721.74	5,537.00	-184.74	60.00	1.08%
200	General Electric Co	5,222.50	5,054.00	-168.50	184.00	3.64%
135	HCP Inc	5,622.50	5,944.05	321.55	294.30	4.95%
30	Intl Business Machines	5,737.05	4,813.20	-923.85	132.00	2.74%

Account Holdings As Of

Filtered By : Account = 3844:Sorg-Vogt Charitable Foundation Trust

Sorted By : Account Number

Date Run 04/29/2015

Account Name : Sorg-Vogt Charitable Foundation Trust

Time Printed : 3:28:25 PM

As Of : 12/31/2014

Account Number : 3844

Shares	Asset Description	Cost	Market	Unr Gain Loss	Est Ann Income	Yield
Prices As Of: 12/31/2014						
125	Johnson Controls Inc	6,143.48	6,042.50	-100.98	130.00	2.15%
85	Lowes Companies Inc	4,047.70	5,848.00	1,800.30	78.20	1.34%
100	Now Inc	3,170.90	2,573.00	-597.90	0.00	0.00%
75	Nucor Corp	3,788.25	3,678.75	-109.50	111.75	3.04%
100	Oracle Corporation	4,009.99	4,497.00	487.01	48.00	1.07%
50	Pepsico Inc	4,500.49	4,728.00	227.51	131.00	2.77%
80	Procter & Gamble Co	6,508.80	7,287.20	778.40	205.95	2.83%
70	Qualcomm Inc	5,517.19	5,203.10	-314.09	117.60	2.26%
100	Southern Co	4,498.99	4,911.00	412.01	210.00	4.28%
100	Spectra Energy Corp	4,250.99	3,630.00	-620.99	148.00	4.08%
35	United Technologies Corp	3,953.25	4,025.00	71.75	82.60	2.05%

Sub Total

Foreign Equities

250	ABB Ltd ADR	5,732.70	5,287.50	-445.20	192.16	3.63%
50	Accenture PLC Ireland	3,996.50	4,465.50	469.00	102.00	2.28%
85	BHP Billiton Limited ADR	5,974.35	4,022.20	-1,952.15	205.70	5.11%
35	Diageo PLC Spons ADR New	4,333.70	3,993.15	-340.55	117.94	2.95%
80	Eaton Corp PLC	6,011.80	5,436.80	-575.00	156.80	2.88%
110	Glaxo Smithkline PLC ADR	5,696.20	4,701.40	-994.80	291.60	6.20%
65	Schlumberger Ltd	7,228.62	5,551.65	-1,676.97	104.00	1.87%
150	Vodafone Group PLC New ADR	4,978.00	5,125.50	147.50	270.37	5.27%

Sub Total

ETF - International

135	Vanguard FTSE Dev Mkts ETF	5,666.02	5,113.80	-552.22	188.19	3.68%
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Sub Total

Mutual Fund - International

106.701	Dodge & Cox International Stock Fund	5,000.00	4,493.18	-506.82	0.00	0.00%
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Account Holdings As Of

Filtered By Account = 3844 Sorg-Vogt Charitable Foundation Trust

Sorted By Account Number

Date Run : 04/29/2015

Account Name : Sorg-Vogt Charitable Foundation Trust

As Of : 12/31/2014

Time Printed : 3 28.25 PM

Account Number : 3844

Shares	Asset Description	Cost	Market	Unr Gain Loss	Est Ann Income	Yield
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Prices As Of : 12/31/2014

<i>Sub Total</i>		\$	5,000.00	4,493.18	-506.82	0.00	0.00%
<i>Grand Total</i>		\$	522,967.75	512,167.52	-10,800.23	10,145.27	1.98%

Principal Cash: 0.00

Income Cash: 809.72

Invested Income: -809.72