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91 OD

Form **990-PF** 

## Return of Private Foundation or Section 4947(a)(1) Nonexempt Charitable Trust Treated as a Private Foundation

OMB No 1545 0052

2009

-				Service	Note: 7he	e foundation in	nay be able to use a copy of the	s return to satisfy state rep	ortin	ng requirements			
	For c	alenc	lar	year 2009, or	tax year begir			, and ending		,			
:	G C	heck	all	that apply.	Initial retur	n Init	al Return of a former p	ublic charity			Fina	al return	
					Amended		Address		ne c	change			
, '	l lee	the	Т						A	Employer identification	on nu	mber	
	IRS	abel.	13	The Caitl	in F. Lon	g & Fai	nily Foundation			20-0309469	)		
		wise,			Wood Driv		•	<b> -</b>	В	Telephone number (se		instructions)	
		iπt ype.	10	Greenwich	, CT 0683	0				203-625-76	553		
	See S	pecific						ľ	c	If exemption applicat		pending, check here	e ►
	Instru	ctions	·						D	1 Foreign organizations			·⊢⊟
		Chec	k I	type of organia	zation. X S	Section 50	(c)(3) exempt private f			2 Foreign organizations	meet	ting the 85% test, cl	heck
	32		ec	tion 4947(a)(1	i) nonexempt o		trus [ ] Other taxable	private foundation		here and attach comp	outatio	on	▶∐
		Fair m	ark	et value of all ass	sets at end of year ine 16)	J Acc	conting method:	ash Accrual	Ε	If private foundation under section 507(b)	status	s was terminated	▶ □
. '	X Q	(trom	Pai	rt II, column (c), li	ine 16)		Other (specify)	_	F	If the foundation is in		•	٠ ٦
					433.		, column (d) must be or			under section 507(b)	(1)(B)	), check here	▶ □
į	<b>Part</b>		_	_	levenue and		(a) Revenue and	(b) Net investmen	nt	(c) Adjusted ne	>t	(d) Disburser	ments
	77				e total of amou		expenses per books	income		income		for charita	ble
			sai	rily equal the i	, and (d) may i amounts in col	umn (a)	LUCK BIKAINCH					purpose: (cash basis	
	<del>=</del>		(SE	ee the instruct	ions) )		OGDEN					(casii basis	Offig)
	<u> </u>	- 1	1		s, grants, etc, recei		5,000.						
		- 1		Ck ► X if the	foundn is <b>not</b> req t	o att Sch B				10000	5 n	<del></del>	
Ċ	.201K		3	cash investm	avings and tem	porary				I _HEC	E	VFD I	
;	<b>55</b>	1.	4		terest from securiti	es				70		70	
		-   - !		Gross rents						FED 6		200 0	
-			D	Net rental income or (loss)	·					Ш , со 4	. 0	CU14 191	
701	R	- 1 '			om sale of assets no	ot on line 10				<u> </u>		8	
<b>~</b>	V		D	Gross sales price assets on line 6a	for all					I OGDE	M	117	
2	Ē		7		ncome (from Part IV	/, line 2)					41	harley I	
	N		B 9		m capital gain								
MAK	Ĕ			Income modi Gross sales less returns and	l l							<del>                                     </del>	
≥		Ι.	-	returns and allowances									
			b	Less Cost of goods sold									
Щ			С	Gross profit/(los	s) (att sch)								
$\leq$	;	1			(attach sched	ule)							
₹	;	1											
SCANNED		1.	_		nes 1 through 1		5,000.		0.		0.		
(C)	;	1		•	officers, directors, t	rustees, etc.	0.	-		<del></del> -			
		1			salaries and wages								
				-	s, employee be	enetits				-		ļ	
	í	ĎΙ		Legal fees (attac Accounting fees	•							<del></del>	
	ı	M		Other prof fees (								<del>                                     </del>	
		N   1   1	7 7	Interest	attach schi			-		<del> </del>		<del>  - ·                                    </del>	
		s I'	_	Taxes (attach schedule	Vena usetr \		<del></del>					<del> </del>	
		D I		Depreciation						<del></del>		+	
*		<u> </u>		sch) and dep									
		ž I		Occupancy									
		~			rences, and me	eetings		ļ <u>-</u>				<b>_</b>	
	Ñ D			Other expens	ses (attach sch	edule)				<u></u>	_	<del> </del>	
		E	,	Other expens	See State		234.	l					
			4	Total operati			231.					<del> </del>	
		5   -	•	expenses. A	i <b>ng and admini</b> dd lines 13 thro	ough 23	234.			<u> </u>			
				. •	fts, grants paid. ${\sf S}$		5,000.					5	,000.
		2	6	Total expens	es and disbur	sements.	F 004		^		^	_	000
		<del>                                     </del>	7	Add lines 24	and 25 26 from line 12	<b>)</b> .	5,234.		0.	<del> </del>	0.	5	<u>,000.</u>
		~			venue over ex								
			-	and disburse	ements		-234.			<u></u>			
			b	Net investment i	ncome (if negative,	enter -0-)			0.				
			_		ome (if negative, en						0.		
	BΔΔ	For	Pri	ivacy Act and	Panerwork Re	duction A	ct Notice, see the instr	uctions	TEE	A0504I 02/02/10		Form 990-P	E (2009)



Part	II I	Balance Sheets	Attached schedules and amounts in the description column should be for end-of-year amounts only	Beginning of year	End o	
			(See instructions )	(a) Book Value	(b) Book Value	(c) Fair Market Value
	1	Cash - non-interest	, , , , , , , , , , , , , , , , , , ,	666.	433.	
	2	Savings and tempor	ary cash investments.			
	3	Accounts receivable	<b></b>			لــــــــــــــــــــــــــــــــــــ
	1	Less: allowance for	doubtful accounts			
	4	Pledges receivable	·			
	_	Less allowance for	doubtful accounts ▶			
	5	Grants receivable				
	6	disqualified persons (attac	ers, directors, trustees, and other ch schedule) (see the instructions)	<u></u> .		
	7	Other notes and loans rec	eivable (attach sch)			
Ŝ		Less. allowance for	doubtful accounts ►			
A S E T	8	Inventories for sale	•			
	9	Prepaid expenses a	nd deferred charges			
S		obligations (attach s	· · · · · · · · · · · · · · · · · · ·			
	l t	Investments — corporate	stock (attach schedule)			
	•	: Investments - corporate	bonds (attach schedule)			
	11	Investments – land, equipment basis.	buildings, and			! ! !!
		Less: accumulated deprec (attach schedule)	iation •			
	12	Investments - mort	gage loans			
	13	Investments - other	` '			
	14	Land, buildings, and e				
		Less accumulated deprec (attach schedule)	<b>•</b>			
	15 16	Other assets (descri <b>Total assets</b> (to be see instructions. Als	be) completed by all filers — o, see page 1, item I)	666.	433.	433.
Ļ	17					
I A	18	Grants payable	·			]
A B	19	Deferred revenue		3		]
L	20	Loans from officers, direc	tors, trustees, & other disqualified persons			
1	21	Mortgages and other note	s payable (attach schedule)			
l	22	Other liabilities (descri	ribe ►)			
E S	23	Total liabilities (add	lines 17 through 22)	0.	0.	
	<u> </u>	Foundations that fo	llow SFAS 117, check here 24 through 26 and lines 30 and 31.	<u> </u>	<u> </u>	
ŅF	24	Unrestricted				
EU	25	Temporarily restricte	ed			
מ	26	Permanently restrict				ļ
A B A L A S L A S N		Foundations that de and complete lines	o not follow SFAS 117, check here X 27 through 31.			
EL	27	Capital stock, trust	principal, or current funds	666.	433.	
SÑ	28	Paid-in or capital surplus	, or land, building, and equipment fund			] .
O E	29	Retained earnings, accum	ulated income, endowment, or other funds.			
RS	30	Total net assets or	fund balances (see the instructions)	666.	433.	]
	31	(see the instructions		666.	433.	
Par			iges in Net Assets or Fund Balanc	es		
1	Tota	I net assets or fund b	alances at beginning of year — Part II, colu d on prior year's return)	ımn (a), line 30 (must a	igree with	666.
2		er amount from Part I			2	-234.
3		increases not included in I			3	254.
4		lines 1, 2, and 3	ino e (nomineo)			432.
5		ases not included in line 2	(itemize).		5	152.
6			alances at end of year (line 4 minus line 5)	– Part II, column (b).		432.
						<u> </u>

Form 990-PF (2009) The Caitlin F. Long & Family Foundation

20-0309469

Page 2

-10-1	TIV图 Capital Gains and	Losses for Tax on Investmen	t Income				Page :
		e the kınd(s) of property sold (e g , r se; or common stock, 200 shares ML		(b) How acc P — Purch D — Dona	nase	(C) Date acquired (month, day, year)	(d) Date sold (month, day, year)
1	N/A		<del></del>				
_ <u>ı</u>							
	<u> </u>		<u>-</u>				
	<del></del>		<del></del>	_			<del></del>
	(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other ba plus expense of sa			(h) Gain or (e) plus (f) m	(loss) inus (g)
6	·		<u>-</u>				
_!	<del></del>	<u> </u>					
9			·				
		<del> </del>					
	<del></del>		H- (				<del></del>
_	(i) Fair Market Value	ving gain in column (h) and owned by (i) Adjusted basis				(I) Gains (Coli ain minus column (I	
	as of 12/31/69	as of 12/31/69	(k) Excess of column over column (j), if a	any	th:	an -0-) or Losses (fr	om column (h))
!			···				
		<del> </del>					<del></del> -
_							
9	<u> </u>	<u> </u>					
2	Capital gain net income or (ne	et capital loss).     If gain, also   If (loss), en	enter in Part I, line 7 ter -0- in Part I, line 7	-	2		
3	Net short-term capital dain or	(loss) as defined in sections 1222(5)	_			<del></del>	
,	. 5	` '	```				
	If gain, also enter in Part I, Iir in Part I, Iir	ne 8, column (c) (see the instructions	). If (loss), enter -0-	-	3		
22		_ <del></del>					
	<u> </u>	er Section 4940(e) for Reduce	d Tax on Net Investm	ent Inco		ł	
		er Section 4940(e) for Reduce te foundations subject to the section			me	<u> </u>	
For	optional use by domestic priva	te foundations subject to the section			me		
or		te foundations subject to the section			me		
or se	optional use by domestic priva ction 4940(d)(2) applies, leave	te foundations subject to the section this part blank.	4940(a) tax on net investm	nent income	me ∋)	∏Yes	X No
or se	optional use by domestic priva ction 4940(d)(2) applies, leave the foundation liable for the se	te foundations subject to the section this part blank.  ction 4942 tax on the distributable ar	4940(a) tax on net investm	nent income	me ∋)	Yes	X No
or se	optional use by domestic priva ction 4940(d)(2) applies, leave the foundation liable for the se es,' the foundation does not qua	te foundations subject to the section this part blank.	4940(a) tax on net investmenount of any year in the bath	nent income ise period?	me ∍)	Yes	X No
For se Vas	optional use by domestic priva ction 4940(d)(2) applies, leave the foundation liable for the sees, the foundation does not quality the appropriate amount (a)	te foundations subject to the section this part blank.  ction 4942 tax on the distributable are alify under section 4940(e). Do not co	4940(a) tax on net investmenount of any year in the bath	nent income ise period?	me ∍)	(d)	
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2 3 4 5	ction 4940(d)(2) applies, leave the foundation liable for the sees, the foundation does not quare the appropriate amount  Base period years Calendar year (or tax year beginning in)  2008 2007 2006 2005 2004  Total of line 1, column (d)  Average distribution ratio for the number of years the foundation of the period years the foundation of years the foundation of the period years the foundation of years the years the foundation of years the years th	this part blank.  ction 4942 tax on the distributable are alify under section 4940(e). Do not come each column for each year; see the harmonic of the section 4940(e). Adjusted qualifying distributions  5,000.  10,000.  5,000.  10,000.  10,000.  the 5-year base period — divide the teach has been in existence if less than a critable-use assets for 2009 from Part	nount of any year in the batter in this part.  It is instructions before making (c)  Net value of noncharitable-use as a second on line 2 by 5, or by the 5 years	nent income use period? ng any entr ssets 656. 879. 992. 992.	me (col	(d) Distribution	7.62195 11.37656 5.04032 5.04032 10.08064 39.15980 7.83196 427 3,344
2 3 4 5	ction 4940(d)(2) applies, leave the foundation liable for the sees, the foundation liable for the sees, the foundation does not quate the appropriate amount (a)  Base period years Calendar year (or tax year beginning in)  2008  2007  2006  2005  2004  Total of line 1, column (d)  Average distribution ratio for the number of years the foundation.  Enter the net value of nonchation.  Multiply line 4 by line 3  Enter 1% of net investment in	this part blank.  ction 4942 tax on the distributable are alify under section 4940(e). Do not come each column for each year; see the harmonic of the section 4940(e). Adjusted qualifying distributions  5,000.  10,000.  5,000.  10,000.  10,000.  the 5-year base period — divide the teach has been in existence if less than a critable-use assets for 2009 from Part	nount of any year in the batter in this part.  It is instructions before making (c)  Net value of noncharitable-use as a second on line 2 by 5, or by the 5 years	nent income use period? ng any entr ssets 656. 879. 992. 992.	me (col	(d) Distribution	7.62195 11.37656 5.04032 5.04032 10.08064 39.15980 7.83196 427 3,344
2 3 4 5 6	ction 4940(d)(2) applies, leave the foundation liable for the sees, the foundation does not quate the foundation does not quate the appropriate amount (a)  Base period years Calendar year (or tax year beginning in)  2008  2007  2006  2005  2004  Total of line 1, column (d)  Average distribution ratio for the number of years the foundation.  Enter the net value of nonchation.  Multiply line 4 by line 3  Enter 1% of net investment in	this part blank.  ction 4942 tax on the distributable are alify under section 4940(e). Do not come each column for each year; see the harmonic of the section 4940(e). Adjusted qualifying distributions  5,000.  10,000.  5,000.  10,000.  10,000.  the 5-year base period — divide the teach has been in existence if less than a critable-use assets for 2009 from Part	nount of any year in the batter in this part.  It is instructions before making (c)  Net value of noncharitable-use as a second on line 2 by 5, or by the 5 years	nent income use period? ng any entr ssets 656. 879. 992. 992.	me (col	(d) Distribution	7.62195 11.376564 5.04032 5.04032 10.080649 39.159806 7.83196 427 3,344
For f see Wass f 'Y' 1 2 3 4 5 6 7	ction 4940(d)(2) applies, leave the foundation liable for the sees, the foundation does not quate the foundation does not quate the appropriate amount (a)  Base period years Calendar year (or tax year beginning in)  2008  2007  2006  2005  2004  Total of line 1, column (d)  Average distribution ratio for the number of years the foundation.  Enter the net value of nonchation.  Multiply line 4 by line 3  Enter 1% of net investment in	the foundations subject to the section this part blank.  In this part bl	nount of any year in the batter in this part.  It is instructions before making (c)  Net value of noncharitable-use as a second on line 2 by 5, or by the 5 years	nent income use period? ng any entr ssets 656. 879. 992. 992.	me (col	(d) Distribution	7.62195 11.37656 5.04032 5.04032 10.08064 39.15980 7.83196 427 3,344

Form **990-PF** (2009)

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	990-PF (2009) The Caitlin F. Long & Family Foundation			0-0309			F	age 4
Parl		(b), 4940(e),	or 4948 – s	see the ir	ıstructio	ns)		
1 a	Exempt operating foundations described in section 4940(d)(2), check here and enter 'N/A		٦		l			
	Date of ruling or determination letter: (attach copy of letter if necessary	- see instr.)	)					
b	Domestic foundations that meet the section 4940(e) requirements in Part V,		-	1				0.
	check here ► X and enter 1% of Part I, line 27b							[
С	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line	: 12, column (b)			ļ			
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable							
2	foundations only. Others enter -0-) Add lines 1 and 2			3	├──			$\frac{0.}{0.}$
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations	conty Othor	c ontor 0 )					0.
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter	-	3 CINCI -0-)	5	<u> </u>			0.
6	Credits/Payments:			<u> </u>				<del></del> _
_		6a		-				ļ
		6Ь		┥				i
	_ `	6c						ŀ
	'	6d		$\dashv$				[
7	Total credits and payments. Add lines 6a through 6d	<u> </u>		7				0.
8	Enter any <b>penalty</b> for underpayment of estimated tax. Check here  if Form 2220	0 is attached	f	8	<del>                                     </del>			<del></del>
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	• 15 attachet	-	▶ 9				0.
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid			▶ 10	<del> </del>			<u> </u>
11	Enter the amount of line 10 to be. Credited to 2010 estimated tax	Refu	nded	<b>▶</b> 11				
Parl	VII-A Statements Regarding Activities							
	During the tax year, did the foundation attempt to influence any national, state, or I	local legiclat	ion or did i	,			Yes	No
	participate or intervene in any political campaign?	iocai iegisiai	ion or did i			1a		Х
b	Did it spend more than \$100 during the year (either directly or indirectly) for political (see the instructions for definition)?	al purposes				16		x
	If the answer is 'Yes' to 1a or 1b, attach a detailed description of the activities and or distributed by the foundation in connection with the activities.	copies of ar	y materials	publishe	1			
С	Did the foundation file Form 1120-POL for this year?				1-	1 c		X
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed di		ar:			Ť		
	(1) On the foundation $\ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \$		* \$		0.			1
е	Enter the reimbursement (if any) paid by the foundation during the year for political foundation managers $\triangleright$ \$ 0.	il expenditur	e tax impos	ed on	1			li
2	Has the foundation engaged in any activities that have not previously been reported	d to the IDS	2		-	-		X
_	If 'Yes,' attach a detailed description of the activities	u to the iks	•			2		
3	Has the foundation made any changes, not previously reported to the IRS, in its go of incorporation, or bylaws, or other similar instruments? If 'Yes,' attach a conformation of the instruments of the ins	overning inst led copy of t	rument, art he changes	icles		3	_	X
4 a	Did the foundation have unrelated business gross income of \$1,000 or more during					4a		X
b	If 'Yes,' has it filed a tax return on Form 990-T for this year?				L	4b	N	/A
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year?				L	5		<u>X</u>
	If 'Yes,' attach the statement required by General Instruction T.							l i
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfies a By language in the governing instrument, or	tisfied either						
	By state legislation that effectively amends the governing instrument so that no management is a state of the state o	nandatory di	rections the	at conflict	,			
_	with the state law remain in the governing instrument?	_		20 001111101	·	6	X	
	Did the foundation have at least \$5,000 in assets at any time during the year? If 'Yes,' complete Part II, colu	*				7		X
Вa	Enter the states to which the foundation reports or with which it is registered (see the CT	the instruction	ns)		_			
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	al			_	8b	N	/A
9	Is the foundation claiming status as a private operating foundation within the mean for calendar year 2009 or the taxable year beginning in 2009 (see instructions for P	ning of section	n 4942(j)(3 'Yes,' com	) or 4942 plete Par	!()(5) t XIV	9		X
10	Did any persons become substantial contributors during the tax year? If 'Yes,' attacand addresses				s [	10		х
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	990-PF (2009) The Caitlin F. Long & Family Foundation	20-	030 <u>946</u>	9	Р	age <b>5</b>
Par	t 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 acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?			12		x
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption Website address.	n applica	tion?	13	Х	
14	The books are in care of ► Caitlyn F. Long Telephone			25-7	53_	 
15	Located at ► 3 Meadow Wood Drive Greenwich CT ZIP + 4 ► Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 — Check here	· _0 <u>68</u>	30	N/A		ГТ -
	and enter the amount of tax-exempt interest received or accrued during the year	▶[	15	,		N/A
Par	t 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)					
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	Yes	XNo			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	Yes	XNo			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	Yes	X No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	Yes	X No			<u> </u>
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	Yes	XNo	·		!
	(6) Agree to pay money or property to a government official? (Exception. Check 'No' if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days)	Yes	XNo			
ĺ	o If any answer is 'Yes' to 1a(1)-(6), did <b>any</b> of the acts fail to qualify under the exceptions described in Regulations section 53 4941(d)-3 or in a current notice regarding disaster assistance (see the instruct	ions)?	_	 1 b	- <b>N</b>	/A
	Organizations relying on a current notice regarding disaster assistance check here .	•				
•	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 2009?	,		_ 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)):					
i	At the end of tax year 2009, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2009?	Yes	X No			
	If 'Yes,' list the years ▶ 20 , 20 , 20					i
(	Are there any years listed in 2a for which the foundation is <b>not</b> applying the provisions of section 4942 (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942 all years listed, answer 'No' and attach statement — see the instructions)	2(a)(2) (a)(2) to		2b	N	/A
(	If the provisions of section 4942(a)(2) are being applied to <b>any</b> of the years listed in 2a, list the years $20_{0}$ , $20_{0}$ , $20_{0}$ , $20_{0}$ .	here.				
3	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	Yes	X No			
1	of If 'Yes,' did it have excess business holdings in 2009 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 approve 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 2009)	n ed		3b	N	 /A
4	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?			4a		Х_
	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 2009?			4b		X
BA/			Fo	rm <b>99</b>	0-PF	(2009)

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Part VII-B   Statements Regarding Activiti		1 4720 May Be Req	uired (continued)		
5a During the year did the foundation pay or incu	r any amount to			1 1	
(1) Carry on propaganda, or otherwise attempt	t to influence legislatio	n (section 4945(e))?	Yes X	No	
(2) Influence the outcome of any specific pub on, directly or indirectly, any voter registra	lic election (see sectior tion drive?	1 4955); or to carry	Yes X	No	
(3) Provide a grant to an individual for travel,	study, or other similar	purposes?	Yes X	No	
(4) Provide a grant to an organization other the in section 509(a)(1), (2), or (3), or section	nan a charitable, etc, oi 4940(d)(2)? (see instri	rganization described uctions)	Yes X	No	
(5) Provide for any purpose other than religion educational purposes, or for the prevention	us, charitable, scientific n of cruelty to children	c, literary, or or animals?	☐ Yes X	No	
b If any answer is 'Yes' to 5a(1)-(5), did any of described in Regulations section 53 4945 or in (see instructions)?	the transactions fail to a current notice regard	qualify under the except ding disaster assistance	tions	5b	N/Ã
Organizations relying on a current notice rega	rding disaster assistani	ce check here	▶ 🗌		
c If the answer is 'Yes' to question 5a(4), does tax because it maintained expenditure response of 'Yes,' attach the statement required by Regional Technology.	sibility for the grant?	•	N/A Yes	No	
6a Did the foundation, during the year, receive aron a personal benefit contract?			∐Yes X	1 1	
<b>b</b> Did the foundation, during the year, pay prem If 'Yes' to 6b, file Form 8870	iums, directly or indirec	ctly, on a personal bene	fit contract?	6ь	<u> </u>
7a At any time during the tax year, was the found	lation a party to a proh	ibited tax shelter transa	ction? Yes X	No	
<b>b</b> If yes, did the foundation receive any proceed				7b	N/A
Part VIII Information About Officers, D	rectors, Trustees,	Foundation Manag	gers, Highly Paid E	mployees	5,
and Contractors					·
1 List all officers, directors, trustees, foundation				T	<del></del>
(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) Expens other allo	e account, owances
_Caitlin_FLong	President &	0.	0.		0.
3 Meadow Wood Drive Greenwich, CT 06830	2.00				
Ann Brett O'Donnell	Trustee	0.	0.		0.
c/o 3 Meadow Wood Drive	0.50	Ŭ.	0.		0.
Greenwich, CT 06830	Comment				
Mary Browyn Long c/o 3 Meadow Wood Drive	Secretary 0.50	0.	0.		0.
Greenwich, CT 06830			<u> </u>		
2 Compensation of five highest-paid employee	s (other than those in	cluded on line 1— see in	nstructions). If none, e	nter '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) Expens other allo	e account, owances
None					
Total number of other analysis and are \$50.000	<u> </u>	<u> </u>			
Total number of other employees paid over \$50,000	TEEA03061	07/06/00	<u> </u>	Form 99	0-PF (2009)

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Par	t VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid and Contractors (continued)	Employees,	
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	<u> </u>
Nor			_
			_
Tota	number of others receiving over \$50,000 for professional services	<b>&gt;</b>	0
Par	t IX-A Summary of Direct Charitable Activities		
List th	ne foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of zations and other beneficiaries served, conferences convened, research papers produced, etc	Expenses	
	Please note, the Foundation is not involved in any direct charitable	_	
	activities. Its primary purpose is to support, by contributions, other	-	
2	organizations exempt under IRC 501(c)(3)	<del></del>	
_		- -	
3			
		_	
4		_	
		_	
Paı	t IX-B Summary of Program-Related Investments (see instructions)		
	cribe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount	
1	<u>N/A</u>	_	
2			
_		- -	
All 6	other program-related investments. See instructions.		
3		- -	
Tota	I Add tines 1 through 3	<u> </u>	n

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Minimum Investment Return (All domestic foundations must complete this part. For see instructions.)	oreign foundat	ions,
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	1 a	-
<b>b</b> Average of monthly cash balances	1 b	433.
c Fair market value of all other assets (see instructions)	1c	-
d Total (add lines 1a, b, and c)	1 d	433.
e Reduction claimed for blockage or other factors reported on lines 1a and 1c		
(attach detailed explanation) . 1e 0.		
2 Acquisition indebtedness applicable to line 1 assets	7 2	0.
3 Subtract line 2 from line 1d	3	433.
4 Cash deemed held for charitable activities. Enter 1-1/2% of line 3		
(for greater amount, see instructions).	4	6.
Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	427.
6 Minimum investment return. Enter 5% of line 5	6	21.
PartXII Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private oper and certain foreign organizations check here ► ☐ and do not complete this part of the part of		ons
1 Minimum investment return from Part X, line 6	11	21.
2a Tax on investment income for 2009 from Part VI, line 5		
b Income tax for 2009. (This does not include the tax from Part VI)		
c Add lines 2a and 2b	2c	
3 Distributable amount before adjustments. Subtract line 2c from line 1	3	21.
4 Recoveries of amounts treated as qualifying distributions .	4	
5 Add lines 3 and 4	5	21.
6 Deduction from distributable amount (see instructions)	6	
7 Distributable amount as adjusted Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	21.
PartXIII 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	1 a	5,000.
b Program-related investments — total from Part IX-B	1b	3,000.
2 Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc, purposes.	2	
<ul> <li>Amounts set aside for specific charitable projects that satisfy the.</li> <li>a Suitability test (prior IRS approval required)</li> </ul>	3a	
<b>b</b> Cash distribution test (attach the required schedule)	3 b	
4 Qualifying distributions Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	5,000.
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	5.000

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.

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Part XIII Undistributed Income (see instructions)

	<b>(a)</b> Corpus	(b) Years prior to 2008	<b>(c)</b> 2008	<b>(d)</b> 2009
Distributable amount for 2009 from Part XI, line 7				21.
2 Undistributed income, if any, as of the end of 2009				
a Enter amount for 2008 only			0.	
<b>b</b> Total for prior years: 20, 20, 20		0.		
3 Excess distributions carryover, if any, to 2009.				
a From 2004				
<b>b</b> From 2005				
<b>c</b> From 2006				
<b>d</b> From 2007 9, 957.				
<b>e</b> From 2008 4,967.				
f Total of lines 3a through e	14,924.			
4 Qualifying distributions for 2009 from Part				
XII, line 4: ► \$ 5,000.				
a Applied to 2008, but not more than line 2a			0.	
<b>b</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.			
<b>d</b> Applied to 2009 distributable amount				21.
e Remaining amount distributed out of corpus	4,979.			<u></u>
5 Excess distributions carryover applied to 2009	0.			0.
(If an amount appears in column (d), the same amount must be shown in column (a) )				
• • • • • • • • • • • • • • • • • • • •				
6 Enter the net total of each column as				
indicated below:	10.000			
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	19,903.			
<b>b</b> Prior years' undistributed income Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistribut-				
ed income for which a notice of deficiency has been issued, or on which the section				
4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable				
amount - see instructions		0.		
e Undistributed income for 2008 Subtract line 4a from				
line 2a Taxable amount — see instructions			0.	
£ I land obtain, and all appears for 2000. Continue & I are				
f Undistributed income for 2009. Subtract lines 4d and 5 from line 1. This amount must be				
distributed in 2010				0.
7 Amounts treated as distributions out of				
corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)				
(see instructions)	0.			
8 Excess distributions carryover from 2004 not applied on line 5 or line 7 (see instructions)	0.			
9 Excess distributions carryover to 2010.	10.000			
Subtract lines 7 and 8 from line 6a	19,903.			
10 Analysis of line 9:				
a Excess from 2005	-	1		
b Excess from 2006	-			
c Excess from 2007 9, 957.	4			
d Excess from 2008 4, 967.	4			
<b>e</b> Excess from 2009 4, 979.	1	L		

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	XIV Private Operating Foundation					N/A
	If the foundation has received a ruling or d is effective for 2009, enter the date of the	ruling	•		<u></u>	7
	Check box to indicate whether the foundat		erating foundation de		4942(j)(3) or	4942(j)(5)
2 a	Enter the lesser of the adjusted net income from Part I or the minimum	Tax year	4. 3515	Prior 3 years		–
	investment return from Part X for each year listed	(a) 2009	<b>(b)</b> 2008	(c) 2007	(d) 2006	(e) Total
b	85% of line 2a					
C	Qualifying distributions from Part XII, line 4 for each year listed					
d	Amounts included in line 2c not used directly for active conduct of exempt activities			<u> </u>		
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:					
а	'Assets' alternative test – enter				<u> </u>	
	(1) Value of all assets					
	(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
t	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					
Par	<b>LXV</b> Supplementary Information assets at any time during th	(Complete this e vear – see in	part only if the	organization h	ad \$5,000 or mo	re in N/A
1	Information Regarding Foundation Manage	_				,
a	List any managers of the foundation who leads to close of any tax year (but only if they have	nave contributed me e contributed more	ore than 2% of the than \$5,000). (See	total contributions section 507(d)(2).)	received by the foun	dation before the
	List any managers of the foundation who	own 10% or more o	of the stock of a core	noration (or an equ	ally large portion of	the ownership of
_	a partnership or other entity) of which the	foundation has a 1	0% or greater intere	est.	any large pertients.	and difficulting of
	Information Regarding Contribution, Gran	nt Gift Loan Scho	larchin etc Proces	ıms.		
_	Check here I if the foundation only requests for funds If the foundation make	nakes contributions	to preselected cha	ritable organization	ns and does not acce panizations under oth	ept unsolicited ner conditions,
	complete items 2a, b, c, and d.  The name, address, and telephone number	er of the person to	whom applications of	should be addresse	·d·	
•	The hame, address, and telephone humbe	or the person to	whom applications s	silvaia be addresse	.u	
ı	The form in which applications should be	submitted and info	rmation and materia	ils they should incl	ude:	
_	: Any submission deadlines.		<del></del>			
	Any restrictions or limitations on awards,	such as by geograp	phical areas, charita	ble fields, kinds of	institutions, or other	factors.

TEEA0310L 07/06/09

Form 990-PF (2009)

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Rant XV Supplementary Information	(continued)			
3 Grants and Contributions Paid During the	If recognities an individual	ure Payment	<u> </u>	
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)	substantial contributor	recipient		<del></del>
a Paid during the year				
Total		,	► 3a	
<b>b</b> Approved for future payment				
Total			► 3b	

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

Enter	gross amounts unless otherwise indicated	Unrelate	ed business income	Excluded	by section 512, 513, or 514	
1	Program service revenue	(a) Business code	<b>(b)</b> Amount	(c) Exclu- sion code	(d) Amount	(e) Related or exempt function income (see the instructions)
а						
b						
C				ļ		
d						
е			<u>-</u>			ļ <u>.</u>
f				<u> </u>	. –	
_	Fees and contracts from government agencies			ļ		
	Membership dues and assessments			-		
	Interest on savings and temporary cash investments	-		1		<u> </u>
	Dividends and interest from securities  Net rental income or (loss) from real estate	-		-		<u> </u>
	Debt-financed property	-		<del> </del>		
	Not debt-financed property			1		
	Net rental income or (loss) from personal property	-		1		
	Other investment income			<del>                                     </del>		
	Gain or (loss) from sales of assets other than inventory			1		
	Net income or (loss) from special events			İ		·
	Gross profit or (loss) from sales of inventory			<b>†</b>		
11	Other revenue:					
а						
b						
C						
d				ļ . <u></u>		
е						
				1		
	Subtotal Add columns (b), (d), and (e)					
13	Total. Add line 12, columns (b), (d), and (e)			. <b>I</b>	13	0.
13 (See	<b>Total.</b> Add line 12, columns (b), (d), and (e) worksheet in the instructions for line 13 to verify			· <b>L</b>		0.
13 (See	Total. Add line 12, columns (b), (d), and (e)		ishment of Exemp	t Purp		0.
13 (See Part	Total. Add line 12, columns (b), (d), and (e) worksheet in the instructions for line 13 to verify  XVI-B Relationship of Activities to the	ne Accomp			oses	
13 (See Part	<b>Total.</b> Add line 12, columns (b), (d), and (e) worksheet in the instructions for line 13 to verify	ne Accomp			oses	
13 (See Part	Total. Add line 12, columns (b), (d), and (e) worksheet in the instructions for line 13 to verify  XVI-B Relationship of Activities to the	ne Accomp			oses	
13 (See Part	Total. Add line 12, columns (b), (d), and (e) worksheet in the instructions for line 13 to verify  XVI-B Relationship of Activities to the Relationship of Activities to the Relationship of Activity for which accomplishment of the foundation's exem	ne Accomp			oses	
13 (See Part	Total. Add line 12, columns (b), (d), and (e) worksheet in the instructions for line 13 to verify  XVI-B Relationship of Activities to the Relationship of Activities to the Relationship of Activity for which accomplishment of the foundation's exem	ne Accomp			oses	
13 (See Part	Total. Add line 12, columns (b), (d), and (e) worksheet in the instructions for line 13 to verify  XVI-B Relationship of Activities to the Relationship of Activities to the Relationship of Activity for which accomplishment of the foundation's exem	ne Accomp			oses	
13 (See Part	Total. Add line 12, columns (b), (d), and (e) worksheet in the instructions for line 13 to verify  XVI-B Relationship of Activities to the Relationship of Activities to the Relationship of Activity for which accomplishment of the foundation's exem	ne Accomp			oses	
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13 (See Part	Total. Add line 12, columns (b), (d), and (e) worksheet in the instructions for line 13 to verify  XVI-B Relationship of Activities to the Relationship of Activities to the Relationship of Activity for which accomplishment of the foundation's exem	ne Accomp			oses	
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13 (See Part	Total. Add line 12, columns (b), (d), and (e) worksheet in the instructions for line 13 to verify  XVI-B Relationship of Activities to the Relationship of Activities to the Relationship of Activity for which accomplishment of the foundation's exem	ne Accomp			oses	
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13 (See Part	Total. Add line 12, columns (b), (d), and (e) worksheet in the instructions for line 13 to verify  XVI-B Relationship of Activities to the Relationship of Activities to the Relationship of Activity for which accomplishment of the foundation's exem	ne Accomp			oses	

Form 990-PF (2009) The Caitlin F. Long & Family Foundation 20-0309469

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

									Yes	No
	desci	he organization directly or indirectly engage in any of the following with any other organization ribed in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, and to political organizations?								
	a Transfers from the reporting foundation to a noncharitable exempt organization of									
	(1) Cash							1a (1)		X
(2) Other assets								1a (2)		X
b Other transactions.								1.4 (4)		
(1) Sales of assets to a noncharitable exempt organization								1b (1)	[	X
(2) Purchases of assets from a noncharitable exempt organization								1b (2)		X
	(3) Rental of facilities, equipment, or other assets									X
(4) Reimbursement arrangements								1 b (3) 1 b (4)		X
(5) Loans or loan quarantees .								1b (5)		X
(6) Performance of services or membership or fundraising solicitations								1b (6)		X
c Sharing of facilities, equipment, mailing lists, other assets, or paid employees.								1c		X
								<b></b>		
	the a	loods, other assets, or s	ervices given	complete the following schedule by the reporting foundation. If t how in column (d) the value of t	he found	lation received le	ess than fair mai	rket value ın	ue of	
(z	) Line no	(b) Amount involved		of noncharitable exempt organization	T		sfers, transactions, a		ngement	:s
	/A									
			_							
						· <del>-</del>				
		1								
							· · · · · · · · · · · · · · · · · · ·			
							-			
								_		
	desc	ribed in section 501(c) o	of the Code (of	ated with, or related to, one or ther than section 501(c)(3)) or i	more tax n section	exempt organiz n 527?	zations	Ye	s X	No
<b>b</b> If 'Yes,' complete the following schedule.				ANT of a second and a						
(a) Name of organization			(b) Type of organization	(0	) Description of i	relationship				
N	/ A						<del></del>	-		
_						·				
_		-				<del> </del>	·			
_	Under nor	rather of persons I declare that I	baye examined th	Tip robust upolisting accompanying schools	los and sta	tomoste, and to the h	act of my knowledge :	and holiof it is to		oct and
	Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and complete. Declaration of preparer (other than taxpayer or fiduciary) is based on all information of which preparer has any knowledge.							and bener, it is to	ue, com	ect, and
	ļ	/ W								
s	▶	2/12/14 ▶ Preside						nt & CEC	)	
GN	Sigi	Signature of officer or trustee Date Title								
N		Preparer's signature  MICHAEL WEINBERG, CPA  Firm's name (or yours if self-employed), address and addr							ring num	nber
H E R	Paid								the inst	u\$)
R E	Pre- parer's									
	Use									
	Only								-701	7
	 AA	ZIP code <b>Rye</b>		. 20070		·-· ·-· ·	Phone no (	212) 701 Form <b>9</b> 5		
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2009 **Federal Statements** Page 1 20-0309469 The Caitlin F. Long & Family Foundation Statement 1 Form 990-PF, Part I, Line 23 Other Expenses (b) Net (d) (a) (c) Charitable Expenses Investment Adjusted per Books Net Income Income Purposes 234. 234. Bank Charges Total \$ Statement 2 Form 990-PF, Part I, Line 25 Contributions, Gifts, and Grants Cash Grants and Allocations Class of Activity: Donee's Name: Donee's Address: University of Wyoming Foundation 1200 E Ivinson Ave Laramie, WY 82072 Relationship of Donee: None Organizational Status of Donee: Public Charity Amount Given: \$ 5,000. 5,000. Total 🕏