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## Form 990-PF

## **Return of Private Foundation**

or Section 4947(a)(1) Nonexempt Charitable Trust

2010 Treated as a Private Foundation

OMB No 1545-0052

Department of the Treasury Note. The foundation may be able to use a copy of this return to satisfy state reporting requirements. 2010 , and ending JUN 30, For calendar year 2010, or tax year beginning JUL 1, Initial return of a former public charity Final return G Check all that apply: l Initial return Address change Amended return Name change A Employer identification number Name of foundation THE ROBERT & MARGARET PATRICELLI FAMILY FOUNDATION 06-1487230 Number and street (or P O box number if mail is not delivered to street address) B Telephone number 860-678-3401 77 HARTFORD ROAD City or town, state, and ZIP code C If exemption application is pending, check here 06076 D 1. Foreign organizations, check here SIMSBURY, CT 2. Foreign organizations meeting the 85% test, check here and attach computation X Section 501(c)(3) exempt private foundation H Check type of organization: Section 4947(a)(1) nonexempt charitable trust \_\_\_\_\_ Other taxable private foundation E If private foundation status was terminated I Fair market value of all assets at end of year | J Accounting method: X Cash Accrual under section 507(b)(1)(A), check here Other (specify) (from Part II, col (c), line 16) If the foundation is in a 60-month termination 3,397,270 . (Part I, column (d) must be on cash basis.) under section 507(b)(1)(B), check here ▶\$ Part | Analysis of Revenue and Expenses (d) Disbursements (c) Adjusted net (a) Revenue and (b) Net investment (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a)) for charitable purposes (cash basis only) expenses per books ıncome income N/A 5,000. Contributions, gifts, grants, etc., received 2 Check I if the foundation is not required to attach Sch B Interest on savings and temporary cash investments 7,387. STATEMENT 7,387. 32,268. 32,268. STATEMENT 4 Dividends and interest from securities 5a Gross rents D Net rental income or (loss) SCANNED DEC 0 8 2011 2,404,881 6a Net gain or (loss) from sale of assets not on line 10 b Gross sales price for all assets on line 6a 2,889,455. 2,404,881 7 Capital gain net income (from Part IV, line 2) 8 Net short-term capital gain Income modifications 10a Gross sales less returns and allowances b Less Cost of goods sold c Gross profit or (loss) 1,089. 1,089. STATEMENT 11 Other income 2,445,625. 2.450.625. 12 Total. Add lines 1 through 11 0. 0. 0. 13 Compensation of officers, directors, trustees, etc 0. 17,611. 17,611. 14 Other employee salaries and wages 15 Pension plans, employee benefits 16a Legal fees 4,000. 2,000. 2,000. STMT 4 **b** Accounting fees c Other professional fees 17 Interest STMT 5 7.361. Ō. 7,361. 18 Taxes 19 Depreciation and depletion 20 Occupancy 21 Travel, conferences, and meetings 22 Printing and publications RE 23 EQiner expenses 695. 23,282. 22,587. STMT 6 E 24 Total operating and administrative expenses, Add lines 13 through 23 52,254 24,587 27,667. 581,822 581,822. 26 Total expenses and disbursements. 634,076 24,587 609,489. Add lines 24 and 25 Subtract line 26 from line 12: 1,816,549 2 Excess of revenue over expenses and disbursements 2,421,038 b Net investment income (if negative, enter -0-) N/A C Adjusted net income (if negative, enter -0-)

LHA For Paperwork Reduction Act Notice, see the instructions.

Form **990-PF** (2010)

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Part II Balance Sheets Attached schedules and amounts in the description			Beginning of year	End of	<u> </u>
Ļ	Part II Balance Sheets Attached scriedules and amounts in the description column should be for end-of-year amounts only		(a) Book Value	(b) Book Value	(c) Fair Market Value
	1	Cash - non-interest-bearing	79,623.	2,039,770.	2,039,770.
	2	- <u>-</u>	33,104.	87,983.	87,983.
		Accounts receivable ▶			
	ľ	Less; allowance for doubtful accounts		-	;
	۱,	Pledges receivable	-	<u> </u>	<del></del>
	<b>"</b>			-	
		Less: allowance for doubtful accounts			
	5	Grants receivable			<del>.</del>
	6	Receivables due from officers, directors, trustees, and other			
		disqualified persons			····-
	7	Other notes and loans receivable	a 41-400	montra una ran on agrapo en a mande	
		Less: allowance for doubtful accounts			
2	8	Inventories for sale or use			
Assets	9	Prepaid expenses and deferred charges			
Ą		Investments - U.S. and state government obligations			_
	l	Investments - corporate stock STMT 7	600,786.	670,995.	801,068.
	l	Investments - corporate bonds STMT 8	710,649.	441,963.	468,449.
	l	· • • • • • • • • • • • • • • • • • • •	720,0150	111,500.	100,1151
	11	Investments - land, buildings, and equipment basis			
	۱.,	Less accumulated depreciation			<del></del>
	1	Investments - mortgage loans			
	13	Investments - other			
	14	Land, buildings, and equipment: basis			<u></u> . J
		Less accumulated depreciation			
	15	Other assets (describe ► )			
	16	Total assets (to be completed by all filers)	1,424,162.	3,240,711.	3,397,270.
	17	Accounts payable and accrued expenses			-
	18	Grants payable			
	19	Deferred revenue			· I
Liabilities	20	-			ļ
≣	۱	Loans from officers, directors, trustees, and other disqualified persons			t
Ľ.	21	Mortgages and other notes payable	···		
	22	Other liabilities (describe		···	ţ
			,	•	·
_	23	Total liabilities (add lines 17 through 22)	0.	0.	
		Foundations that follow SFAS 117, check here			
<b>,</b>		and complete lines 24 through 26 and lines 30 and 31.			ı
ances	24	Unrestricted			ŀ
lan	25	Temporarily restricted			
Ва	26	Permanently restricted			
Б		Foundations that do not follow SFAS 117, check here			1 1
Ţ		and complete lines 27 through 31.			r I
Net Assets or Fund Bal	27	Capital stock, trust principal, or current funds	1,424,162.	3,240,711.	
ets	28	Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
Ass	29	Retained earnings, accumulated income, endowment, or other funds	0.	0.	ı
t e	١	Total net assets or fund balances	1,424,162.	3,240,711.	
Ž	30	Total het assets of fully balances	1,323,1024	3,240,711.	
	١,,	Tablitishilling and ask acceptified belongs	1,424,162.	3,240,711.	
_	31	Total liabilities and net assets/fund balances		3,240,711.	<del></del>
P	art	III Analysis of Changes in Net Assets or Fund Ba	alances		
		<del></del>	<u></u>		<del> </del>
1		I net assets or fund balances at beginning of year - Part II, column (a), line	30		4 404 460
	•	st agree with end-of-year figure reported on prior year's return)	-	1	1,424,162. 1,816,549.
2	Ente	r amount from Part I, line 27a		2	1,816,549.
3	Othe	r increases not included in line 2 (itemize)		3	0.
4	Add	lines 1, 2, and 3		4	3,240,711.
		eases not included in line 2 (itemize)		5	0.
		net assets or fund balances at end of year (line 4 minus line 5) - Part II, co	lumn (b), line 30	6	3,240,711.
_			· · · · · · · · · · · · · · · · · · ·		Form <b>990-PF</b> (2010)

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

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(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.)				ľΡ	- Purc		(c) Date (mo., d		(d) Date sold (mo., day, yr.)		
			ט	- Dona			0/10	07/28/10			
1a EVOLUTION BENEFITS b VARIOUS SECURITIES - UBS 12229							VARI		VARIOUS		
c VARIOUS SECURI		- UBS 12228			$\vdash$			VARI		VARIOUS	
d VARIOUS SECURI		- UBS 12228			_			VARI		VARIOUS	
e d AMITOD DECOKI	TIES	- ODS_12220			├─		-	AWIT	005	VARIOUS	
(e) Gross sales price	(f) [	Depreciation allowed (or allowable)		st or other basis			-: <b>!</b>		ain or (loss s (f) minus		
a 2,563,246.		<u> </u>	<u>                                      </u>	178,54	2.				• • • • • • • • • • • • • • • • • • • •	2,384,704.	
b 300,000.				283,83						16,161.	
c 20,503.				17,23					-	3,269.	
d 5,706.				4,95						747.	
е		·									
Complete only for assets showing	ig gain in	column (h) and owned by t	the foundation	on 12/31/69			(1	) Gains (C	ol. (h) gain	minus	
(i) F.M.V. as of 12/31/69	(	(j) Adjusted basis as of 12/31/69		cess of col. (ı) col. (ı), if any			col		not less tha (from col. (		
a										2,384,704.	
b										16,161.	
С										3,269.	
d										747.	
е			<u> </u>								
2 Capital gain net income or (net ca	ipital loss)	If gain, also enter If (loss), enter -0-	r in Part I, line - in Part I, line	7 7	}	2				2,404,881.	
3 Net short-term capital gain or (los			nd (6):		)						
If gain, also enter in Part I, line 8, If (loss), enter -0- in Part I, line 8					}	3			N/A	Δ.	
Part V Qualification U	nder S	ection 4940(e) for	Reduced	Tax on Net	Inv	estn	nent Inc	ome			
(For optional use by domestic private	e foundation	ons subject to the section 4	4940(a) tax on	net investment in	com	e.)					
If section 4940(d)(2) applies, leave the	hie nart hi	ank									
ii section 4540(u)(2) applies, leave ti	ilis pai i bi	alik.									
Was the foundation liable for the sec	tion 4942	tax on the distributable am	nount of any ye	ear in the base per	iod?					Yes X No	
If "Yes," the foundation does not qual											
1 Enter the appropriate amount in (a)	each colui		uctions before	making any entrie				1		(4)	
Base period years Calendar year (or tax year beginni	ng in)	(b) Adjusted qualifying dis		Net value of no		ritable-			(d) Distribution ratio (col. (b) divided by col. (c))		
2009			9,806.				3,534			.140999	
2008			5,468.				4,072			.224752	
2007			1,663.				4,357			.122708	
2006			2,196.				4,260			.088069	
2005		34	1,538.			, 20	1,698	+	ı	.100427	
A T A I (I ) of out out (I)										.676955	
2 Total of line 1, column (d)	C b.s.		l O b.  5		-4			2	<del>                                     </del>	•0/0955	
3 Average distribution ratio for the	•	•	on line 2 by 5,	or by the number	or ye	ars				.135391	
the foundation has been in existe	nce ii iess	man 5 years						3	<del> </del>	•133331	
4 Enter the net value of noncharitat	ole-use as:	sets for 2010 from Part X	line 5					4		2,542,147.	
4 Enter the net value of hereinands	310 000 00	5010 101 20 10 Hom 1 21171,									
5 Multiply line 4 by line 3								5		344,184.	
Thirtipy into 15, into 5					<u></u>						
6 Enter 1% of net investment income (1% of Part I, line 27b)			6		24,210.						
7 Add lines 5 and 6		_						7		368,394.	
	D V//										
8 Enter qualifying distributions from	-		41			• .		8	L	609,489.	
If line 8 is equal to or greater than See the Part VI instructions.	n line 7, ch	reck the box in Part VI, line	t 1b, and comp	piete that part usin	ga 1	% tax	rate.				
023521 12-07-10		· · · · · · · · · · · · · · · · · · ·							F	orm <b>990-PF</b> (2010)	
02002   12-01-10											

### THE ROBERT & MARGARET PATRICELLI FAMILY

Form 990-PF (2010) FOUNDATION 06-1487230 Part VI | Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see instructions \_\_\_\_ and enter "N/A" on line 1. (attach copy of letter if necessary-see instructions) Date of ruling or determination letter: b Domestic foundations that meet the section 4940(e) requirements in Part V, check here X and enter 1% 24,210 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-) Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) 4 5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-6 Credits/Payments: a 2010 estimated tax payments and 2009 overpayment credited to 2010 6b b Exempt foreign organizations - tax withheld at source c Tax paid with application for extension of time to file (Form 8868) 6с d Backup withholding erroneously withheld 7 Total credits and payments. Add lines 6a through 6d Enter any penalty for underpayment of estimated tax. Check here \_\_\_\_\_ if Form 2220 is attached 9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed 9 10 10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid 11 Enter the amount of line 10 to be; Credited to 2011 estimated tax Refunded > 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 X any political campaign? 1a X b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? 1b 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? 1c d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: 0 . (2) On foundation managers. ▶ \$ e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation 2 X 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. 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 4a Did the foundation have unrelated business gross income of \$1,000 or more during the year? 4a N/A b If "Yes," has it filed a tax return on Form 990-T for this year? 4b 5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T. 6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: · By language in the governing instrument, or By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law X 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. 8a Enter the states to which the foundation reports or with which it is registered (see instructions) CT 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) X of each state as required by General Instruction G? If "No," attach explanation 8b 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 2010 or the taxable year beginning in 2010 (see instructions for Part XIV)? If "Yes," complete Part XIV 10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses

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11 Al any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section \$120(1)(9)(19) 11 */ss. a flash cachedule (see net incurtos).  12 Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?  13 I X I No bline bload and acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?  14 The books are in care of ■ ROBERT E. PATRICELLI Telephone no. ■ 860 – 678 – 3401 Located at ■ 77 HARTFORD ROAD, SIMSBURY, CT Telephone and enter the amount of lix-exempt chartable trusts filing form 990 PF in lieu of Form 1041 - Chick there and enter the amount of lix-exempt interest received or accrued during the year and enter the amount of lix-exempt interest received or accrued during the year and enter the amount of lix-exempt interest received or accrued during the year and enter the amount of lix-exempt interest received or accrued during the year of the financial account in a foreign country?  See page 20 of the instructions for exceptions and filing requirements for form 10 F 90-22.1. If Yes, enter the name of the foreign country?  Part VII-B   Statements Regarding Activities for Which Form 4720 May Be Required  File Form 4720 if any Item is checked in the "Yes" column, unless an exception applies.  1 Juring the year did the foundation (either directly or indirectly):  (1) Engage in the sale or exchange, or leasing of property with a disqualified person?  (2) Borrow money from, leaf money to, or otherwise exend credit to (or accept it from) a disqualified person?  (3) Firmship dods, services, or facilities to (or accept them from) a disqualified person?  (4) Pay compensation to, or pay or remburse the expenses of, a dequalified person?  (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person?  (6) Agree to pay money or property to a government fistical? (Exception, Check 'No' if th	Pa	rt VII-A Statements Regarding Activities (continued)			
12 Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?  13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application?  Website address ▶ N/A  15 The books are in care of ▶ ROBERT E. PATRICELLI  Telephone no. ▶ 860 – 678 – 3401  Located at ▶ 77 HARTFORD ROAD, SIMSBURY, CT  15 Section 4947(a)(1) nonexempt chartable trusts filing Form 990-PF in lieu of Form 1041 – Check here and enter the amount of tax-exempt linterest received or accrued dumy the year and enter the amount of tax-exempt linterest received or accrued dumy the year  16 Al any time during calendar year 2010, did the foundation have an interest in or a signature or other authority over a bank, some or other financial account in a foreign country?  16 Al any time during calendar year 2010, did the foundation have an interest in or a signature or other authority over a bank, some or other financial account in a foreign country?  18 Form 4720 if any titlen is checked in the "Yes" column, unless an exception applies.  19 During the year did the foundation (either directly or indirectly):  19 Engage in the sale or exchange, or leasing of property with a disqualified person?  20 Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?  21 Formish poods, services, or facilities to (or accept them from) a disqualified person?  22 Formish poods, services, or facilities to (or accept them from) a disqualified person?  23 Formish poods, services, or facilities to (or accept them from) a disqualified person?  24 Formish poods, services, or facilities to (or accept them from) a disqualified person?  25 Formish poods, services, or facilities to (or accept them from) a disqualified person?  26 Formish poods, services, or facilities to or to employ the offician of the person of the formish or the person of the complex to offician available for the person of the core of the person of the formish o	11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of			
August 17, 2008?  Website address > N/A  15 The books are in care of P ROBERT E. PATRICELLI Located at P 77 HARTFORD ROAD, SIMSBURY, CT  15 Section 4947(a)(1) nonexempt chardable trisis filing Form 800-PF in teu of Form 1041 - Check here and either the amount of tax-exempt interest received or accured during the year and either the amount of tax-exempt interest received or accured during the year and either the amount of tax-exempt interest received or accured during the year and either the amount of tax-exempt interest received or accured during the year and either the amount of tax-exempt interest received or accured during the year and either the amount of tax-exempt interest received or accured during the year and either the amount of tax-exempt interest received or accured during the year of the received or accured during the year of the foundation favored in the form 1041 - Check here and either the amount of tax-exempt interest received or accured during the year of the foundation favored in the received or accured during the year of the foundation favored in the section of the control of the responsive of the received for indicating the year of the foundation (either directly or indirectly):  10 Jamps the year did the foundation (either directly or indirectly):  11 Section 4720 if any item is checked in the "Yes" column, unless an exception applies.  12 Jamps the year did the foundation (either directly or indirectly):  13 Furnish poods, services, or facilities to (or accept them from) a disqualified person?  14 Jamps the year did the foundation (either directly or indirectly):  15 Section 4720 if any item is checked in the "Yes" column, unless an exception applies.  16 Jamps the year in the sale or exchange, or feasing the opportry with a disqualified person?  17 Yes No  18 Jamps the sale or exchange, or feasing the property with a disqualified person?  19 Yes No  19 Jamps the year in the sale or exchange, or feasing the property or given and the disqualified person?  19 Jamps the year in the sale or e		section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		Х
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application?   13 X	12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before			
Website address ▶ N/A  14 The books are in care of ▶ ROBERT E. PATRICELLI 15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here and either the amount of tax-exempt interest recovered or accured during the year and either the amount of tax-exempt interest recovered or accured during the year 15 N/A  16 At any time during calendar year 2010, did the foundation have an interest in or a signature or other authority over a bank, securities, or other hinancial account in a foreign country ▶  16 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.  1 During the year did the foundation (either directly or indirectly):  (1) Engage in the sale or exchange, or lessing of property with a disqualified person?  (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?  (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?  (4) Pay compensation to, or pay or remburse the expenses of, a disqualified person?  (5) Transfer any income or assets to a disqualified person or make any of either available for the benefit or use of a disqualified person)?  (6) Agree to pay money or property to a government official? (Exception, Check 'No' if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, it terminating within 90 days.)  10 If any answers is 'Yes' to 'Alfo', 6i, dut any of the acts date to duality under the exceptions described in Regulations section 53.4941(g)-30 in a current notice regarding disaster assistance (see page 20 if the instructions)?  10 Granizations relying on a current notice regarding disaster assistance (see page 20 if the instructions)?  10 If yes is 'Yes is 'Alfo, 6i, dut any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the fave in a 2 f		August 17, 2008?	12		Х
14. The books are in care of	13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	
Located at ▶ 77 HARTFORD ROAD, SIMSBURRY, CT  1 Section 4947(a)(1) nonexempt charable trusts filing Form 990-FF in leu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year and enter the amount of tax-exempt interest received or accrued during the year    15 At any time during calendar year 2010, 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 page 20 to the instructions for exceptions and filing requirements for Form TD F 90-22.1. It "Yes," enter the name of the foreign country⟩  Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required  File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.  1 buring the year did the foundation (either directly or indirectly):  (1) Engage in the sale or exchange, or leasing of property with a disqualified person?  (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from)  a disqualified person?  (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?  (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?  (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?  (6) Agree to pay money or property to a government official? (Exception, Check 'No' if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)  3 bif largy answer is Yes's to 1a(1)-(6), did any of the accis fail to qualify under the exceptions described in Regulations section 34941(0)-3 or in a current notice regarding dissater assistance (see page 22 of the instructions)?  Organizations relying on a current notice regarding dissater assistance (see page 22 of the instructions)?  Organizations relying on a current notice regarding dissate					
15 Section 4947(a)(1) nonexempt charitable trusts fining Form 990-PF in lieu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year  16 At any time during calendar year 2010, 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 page 20 of the instructions for exceptions and filing requirements for Form TD F 90-22.1. If "Yes," enter the name of the foreign country.  Part VII-B   Statements Regarding Activities for Which Form 4720 May Be Required  File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.  1a During the year did the foundation (either directly or indirectly):  (1) Engage in the sale or exchange, or leasing of property with a disqualified person?  (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?  (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?  (4) Pay compensation to, or pay or rembures the expenses of, a disqualified person?  (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?  (6) Agree to pay money or property to a government official? (Exception, Check 'No' if the foundation agreed to make a grant to or to employ the othical for a period after termination of government service, it terminating within 90 days.)  b If any answer is "es" to 1a(1)-(6), did any of the acts fat to qualify under the exceptions described in Regulations section 34.941(d)-3 or in a current notice regarding disaster assistance (see page 20 if the instructions)?  Organizations relying on a current notice regarding disaster assistance (see page 20 if the instructions)?  1b Are there any years lested in 2a for which the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 20 10?  1i "es," list the years begi	14				
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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.  1a During the year did the foundation (either directly or indirectly);  (1) Engage in the sale or exchange, or leasing of property with a disqualified person?   Yes   X   No    (2) Borrow money from, lend money to, or otherwise extend credit to (or accept time from) a disqualified person?   Yes   X   No    (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    (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   X   No    (6) Agree to pay money or property to a government official? (Exception. Check 'No' if the foundation argued to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)   Yes   X   No    1b 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 check here   No    1c Different the first day of the tax year beginning in 20 10?   X    2 Taxes on failure to distribute microme (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 2010, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2010?   Yes, itsi the years   No   No   Yes, itsi the years   No   No   Yes, itsi the years   No   Yes, itsi the		securities, or other financial account in a foreign country?	16		X
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(3) Furmish goods, services, or facilities to (or accept them from) a disqualified person?  (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?  (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?  (6) Agree to pay money or property to a government official? (Exception. Check 'No if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)  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 page 22 of the instructions)?  Organizations relying on a current notice regarding disaster assistance check here  c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2010?  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(i)(3) or 4942(i)(5)):  a At the end of tax year 2010, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2010?  If 'Yes,' list the years b  b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (if applying section 4942(a)(2) to all years listed, answer 'No' and attach statement - see instructions.)  N/A  2b  If 'Yes,' did it have excess business holdings in 2010 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					
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(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.)  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 page 22 of the instructions)?  Organizations relying on a current notice regarding disaster assistance check here  c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2010?  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 2010, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2010?  If "Yes," list the years   Yes   X No    If "Yes," list the years   Yes   X No    If "Yes," list the year's undistributed income? (if applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.)  C If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.    Yes   X No    If "Yes," did it have excess business holdings in 2010 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			1		
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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		during the year?		ĺ	
	b	If "Yes," did it have excess business holdings in 2010 as a result of (1) any purchase by the foundation or disqualified persons after			
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,		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			
Form 4720, to determine if the foundation had excess business holdings in 2010)  N/A  3b		Form 4720, to determine if the foundation had excess business holdings in 2010) N/A	3b		
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?  4a X	<b>4</b> a	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	t				l `
had not been removed from jeopardy before the first day of the tax year beginning in 2010?  4b X  Form 990-PF (2010)				<u> </u>	

Part VII-B S	Statements Regarding Activities for Which I	Form 4720 May Be F	Required (contin	ued)			
5a During the year	ar did the foundation pay or incur any amount to:						
. (1) Carry on	propaganda, or otherwise attempt to influence legislation (section	n 4945(e))?	Ye	s X No		l	i
(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly,							1
any voter registration drive?							!
(3) Provide a grant to an individual for travel, study, or other similar purposes?							
• •	grant to an organization other than a charitable, etc., organizatio					ŀ	
	), (2), or (3), or section 4940(d)(2)?		Ye	s X No			
	or any purpose other than religious, charitable, scientific, literary,	or educational purposes, or fe					
	ntion of cruelty to children or animals?	or oddodinar parposos, or v		s X No			i
•	is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify und	 der the excentions described i					i
	45 or in a current notice regarding disaster assistance (see instru		a riogulationo	N/A	5b		-
	relying on a current notice regarding disaster assistance check h				+		
•	is "Yes" to question 5a(4), does the foundation claim exemption fi		ned				ı t
			//A 🔲 Ye	s No			,
•	esponsibility for the grant?		'/ A 16	.s NO			
	och the statement required by Regulations section 53.494.				ŀ		i
	ation, during the year, receive any funds, directly or indirectly, to	pay premiums on		s X No			
•	nefit contract?				ا		X
	ation, during the year, pay premiums, directly or indirectly, on a p	personal benefit contract?		<u> </u> -	6b		
	b, file Form 8870.			<b>□</b>			
-	uring the tax year, was the foundation a party to a prohibited tax s		Ye	es X No			
	e foundation receive any proceeds or have any net income attribu				7b		
	nformation About Officers, Directors, Trust Paid Employees, and Contractors	ees, Foundation Ma	inagers, Highly	/			
		componentian					
1 List all office	rs, directors, trustees, foundation managers and their		(c) Compensation	(d) Contributions to	· ·	- L Evn	2000
	(a) Name and address	(b) Title, and average hours per week devoted	(If not paid,	(d) Contributions to employee benefit plans and deferred	aci	e) Expe count,	other
		to position	`enter'-0-)	compensation	а	llowan	ices
MARGARET		PRESIDENT					
77 HARTF					i		_
	, CT 06070	6.00	0.	0.			0.
ROBERT E		CHAIRMAN					
77 HARTE				_			_
SIMSBURY	, CT 06070	3.00	0.	0.			0.
THOMAS R		DIRECTOR					
77 HARTFO							
SIMSBURY	, CT 06070	0.50	0.	0.			0.
ALISON J		DIRECTOR					
77 HARTF		]					
SIMSBURY		0.50	0.	0.			0.
2 Compensation	on of five highest-paid employees (other than those inc		enter "NONE."				
(a) Name	and address of each employee paid more than \$50,000	(b) Title, and average hours per week	(c) Compensation	(d) Contributions to employee benefit plans and deferred	ac.	e) Expe count, illowar	ense other
		devoted to position	(C) compensation	and deferred compensation	a	llowar	ices
NOI	1E						
			}				
		]	<u>                                       </u>		L		
		1					
		1	<u> </u>				
		<del>                                     </del>					
		1					
Total number of o	ther employees paid over \$50,000	<b>-</b>		<b>•</b> 1	Ь		0
- Jean manibor of o				Form	99 <b>n</b> -	PF (	<u> </u>
				7 01111		. (	

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Part VIII Information About Officers, Directors, Trustees, Found Paid Employees, and Contractors (continued)		
3 Five highest-paid independent contractors for professional services. If none, en	ter "NONE."	
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
	· -	
	<del></del>	
		1
Total number of others receiving over \$50,000 for professional services		<b>&gt;</b>
Part IX-A Summary of Direct Charitable Activities		•
List the foundation's four largest direct charitable activities during the tax year. Include relevant sta	tistical information such as the	F
number of organizations and other beneficiaries served, conferences convened, research papers pl	roduced, etc.	Expenses
1 N/A		
	·-	
2		
3		··········
4		
Part IX-B Summary of Program-Related Investments		
Describe the two largest program-related investments made by the foundation during the tax year	on lines 1 and 2.	Amount
1 N/A		-
2		<del></del>
All other program-related investments. See instructions.		
3		
Total. Add lines 1 through 3	<b>&gt;</b>	0 .
		Form <b>990-PF</b> (2010)

FOUNDATION

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P	art X Minimum Investment Return (All domestic foundations must complete this part. Foreign four	ndations,	see instructions.)
1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
а	Average monthly fair market value of securities	1a	1,463,121.
b	Average of monthly cash balances	1b	1,117,739.
C	Fair market value of all other assets	1c	-
d	Total (add lines 1a, b, and c)	1d	2,580,860.
	Reduction claimed for blockage or other factors reported on lines 1a and		
	1c (attach detailed explanation) 1e 0.		
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	2,580,860.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	38,713.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	2,542,147.
6	Minimum investment return. Enter 5% of line 5	6	127,107.
P	art XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations are foreign organizations check here and do not complete this part.)	d certain	
1	Minimum investment return from Part X, line 6	1	127,107.
2a	Tax on investment income for 2010 from Part VI, line 5		
b	Income tax for 2010. (This does not include the tax from Part VI.)		
C	Add lines 2a and 2b	2c	24,210.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	102,897.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	102,897.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	102,897.
<u>P</u>	art XII Qualifying Distributions (see instructions)		
' -	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:  Expenses, contributions, gifts, etc total from Part I, column (d), line 26	 1a	609,489.
	Program-related investments - total from Part IX-B	1b	005,405.
	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
2	Amounts set aside for specific charitable projects that satisfy the:	-	
a		3a	
	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	609,489.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment	<del>                                     </del>	00371031
•	income. Enter 1% of Part I, line 27b	5	24,210.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	585,279.
v	Note. The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation of		
	4940(e) reduction of tax in those years.	quannos to	. 4.0 0000011

Part XIII Undistributed Income (see instructions)

•				
	(a) Corpus	(b) Years prior to 2009	(c) 2009	(d) 2010
1 Distributable amount for 2010 from Part XI,	001943	rears prior to 2005	2003	2010
line 7				102,897.
2 Undistributed income, if any, as of the end of 2010	· <u>-</u>			
a Enter amount for 2009 only			0.	
b Total for prior years:				
, ,		0.		
3 Excess distributions carryover, if any, to 2010:	_			
a From 2005 164,463.				
bFrom 2006 125,946.				
c From 2007 204,423.				
dFrom 2008 316,088.				ı
eFrom 2009 174,699.				
f Total of lines 3a through e	985,619.	<del></del>		
4 Qualifying distributions for 2010 from				,
Part XII, line 4: ►\$ 609, 489.				
a Applied to 2009, but not more than line 2a			0.	
b Applied to undistributed income of prior		0		
years (Election required - see instructions)		0.		
c Treated as distributions out of corpus	0.			
(Election required - see instructions)	····			102,897.
d Applied to 2010 distributable amount e Remaining amount distributed out of corpus	506,592.			102,037.
5 Excess distributions carryover applied to 2010	0.			0.
(If an amount appears in column (d), the same amount must be shown in column (a))	•			<u> </u>
6 Enter the net total of each column as				
indicated below:	1 400 011			
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	1,492,211.			<u> </u>
b Prior years' undistributed income. Subtract		0		
line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of				
deficiency has been issued, or on which				
the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable	-	0.		
amount - see instructions		0.		,
e Undistributed income for 2009. Subtract line				<u> </u>
4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2010. Subtract				
lines 4d and 5 from line 1. This amount must				
be distributed in 2011				0.
7 Amounts treated as distributions out of		·		
corpus to satisfy requirements imposed by				
section 170(b)(1)(F) or 4942(g)(3)	0.			
8 Excess distributions carryover from 2005				
not applied on line 5 or line 7	164,463.			
9 Excess distributions carryover to 2011.				
Subtract lines 7 and 8 from line 6a	1,327,748.			
10 Analysis of line 9:				
a Excess from 2006 125, 946.				
b Excess from 2007 204, 423.				
c Excess from 2008 316,088.				
d Excess from 2009 174,699.				
e Excess from 2010 506,592.			<u> </u>	Form <b>QQ0_DE</b> /2010\

## THE ROBERT & MARGARET PATRICELLI FAMILY

06-1487230 Form 990-PF (2010) FOUNDATION Page 10 Part XIV | Private Operating Foundations (see instructions and Part VII-A, question 9) N/A .1 a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2010, 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(1)(5) Tax year Prior 3 years 2 a Enter the lesser of the adjusted net (b) 2009 (a) 2010 (c) 2008 (d) 2007 (e) Total 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 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 the instructions.) 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).) ROBERT E. PATRICELLI b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest. NONE Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs: Check here Light 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 of the person to whom applications should be addressed: ROBERT E. PATRICELLI 77 HARTFORD ROAD, SIMSBURY, CT 06076 b The form in which applications should be submitted and information and materials they should include: c Any submission deadlines: d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors:

Form 990-PF (2010)

FOUNDATION

06-1487230 Page 11

Part XV Supplementary Informatio	n (continued)			<u></u>
3 Grants and Contributions Paid During the	Year or Approved for Future	Payment		
Recipient Name and address (home and houses)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of	Purpose of grant or contribution	Amount
Name and address (home or business)	or substantial contributor	recipient		
a Paid during the year SEE ATTACHMENT	NONE		501(C)(3)	581,822.
Total			▶ 3a	581,822.
Approved for future payment				
NONE				
Total			▶ 3b	0.
023611 12-07-10				orm 990-PF (2010)

Form 99Q-PF (2010)

FOUNDATION

Part XVI-A	Analysis of	Income-Producing	<b>Activities</b>
------------	-------------	------------------	-------------------

Enter gross amounts unless otherwise indicated.	Unrelated	business income		by section 512, 513, or 514	(e)
	(a)	(b)	(C) Exclu-	(d)	Related or exempt
1 Program service revenue:	Business code	Amount	sion	Amount	function income
a					
b					· · · · · · · · · · · · · · · · · ·
C					
d					
e					
f					<del></del>
g Fees and contracts from government agencies		-			
2 Membership dues and assessments					
3 Interest on savings and temporary cash					··
investments			14	7,387.	
4 Dividends and interest from securities			14	32,268.	
5 Net rental income or (loss) from real estate:		-			
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal					
property			1		
7 Other investment income		•	14	1,089.	-
8 Gain or (loss) from sales of assets other					
than inventory			18	2,404,881.	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue:		*			
a				1	
b					· -
c					· · · ·
d					
e					
12 Subtotal. Add columns (b), (d), and (e)			0.	2,445,625.	
13 Total. Add line 12, columns (b), (d), and (e)				13	2,445,62

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

ine No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes).
	<del></del>
-	
621 07-10	Form <b>990-PF</b> (

Form 99Q-PF (2010)

FOUNDATION

06-1487230

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

	Exempt Organ	izations					
1 Did	the organization directly or indir	rectly engage in any of the following with any other organization	described in section 501(c) of		Yes	No	
the	the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?						
a Tra	nsfers from the reporting founda	ation to a noncharitable exempt organization of:					
(1)	Cash			1a(1)		X	
(2)	Other assets			1a(2)		X	
<b>b</b> Oth	b Other transactions:						
(1)	Sales of assets to a noncharita	ble exempt organization		1b(1)		X	
(2)	Purchases of assets from a no	ncharitable exempt organization		1b(2)		X	
(3)	(3) Rental of facilities, equipment, or other assets						
(4)	(4) Reimbursement arrangements					X	
(5)	Loans or loan guarantees			1b(5)		X	
(6)	Performance of services or me	mbership or fundraising solicitations		1b(6)		X	
c Sha	iring of facilities, equipment, ma	iling lists, other assets, or paid employees		10		X	
d If th	e answer to any of the above is	"Yes," complete the following schedule. Column (b) should always	iys show the fair market value of the goods, oth	ier ass	ets,		
ors	ervices given by the reporting fo	oundation. If the foundation received less than fair market value	in any transaction or sharing arrangement, sho	)w in			
		other assets, or services received.					
(a)Line n	(b) Amount involved	(c) Name of noncharitable exempt organization	(d) Description of transfers, transactions, and sha	arıng am	angeme	nts	
		N/A					
	-						

- I							
·							
				<u> </u>			
2a Is the four	ndation directly or indirectly affili	ated with, or related to, one	or more tax-exempt organi	zations described			
ın section	501(c) of the Code (other than s	section 501(c)(3)) or in sect	tion 527?		-	Yes	X No
b If Yes, co	omplete the following schedule.						
	(a) Name of organization	on	(b) Type of organization		(c) Description of	relationship	
	N/A						
		<del>,</del>					
and	er penalties of perjury, I declare that I h complete beclaration of preparer (other					ge and belief, it is true,	correct,
Sign	Va m	tacell	111/1.1	/	11.	1	
Here	Supply of officer or trustee	mile.	Date	<u> </u>	Title	NAN	
	Signature of officer or trustee	Preparer's s		Date /	Check   if	PTIN	
	Print/Type preparer's name	Fiehaleiss	iudajure	Date //	self- employed	T T IN	
Daid	ANDREW LATTIM	TED ///		4/9/11	acii- ciripioyeu	i	
Paid			MPANY, P.C.,	CPA'S	I Comple CIN N		
Preparer Use Only	Firm's name ► BLUM,	SHAPIRO & CO	MITANI, P.C.,	CPA 5	Firm's EIN		
use only	Firm's address ▶ 29 S.	MATH CHDEEN	D O BOY 2	72000			
		HARTFORD, CT		12000	Dhana a	360 561-4	000
	MEDI.	DAKITUKU, CI	0012/-2000		Phone no. &	000 DOT-4	.000

## Schedule B

(Form 990, 990-EZ or 990-PF)

Department of the Treasury Internal Revenue Service

Name of the organization

## Schedule of Contributors

► Attach to Form 990, 990-EZ, or 990-PF.

OMB No 1545-0047

2010

**Employer identification number** 

THE ROBERT & MARGARET PATRICELLI FAMILY FOUNDATION 06-1487230 Organization type (check one): Filers of: Section: 501(c)( Form 990 or 990-EZ ) (enter number) organization 4947(a)(1) nonexempt charitable trust not treated as a private foundation 527 political organization 501(c)(3) exempt private foundation Form 990-PF 4947(a)(1) nonexempt charitable trust treated as a private foundation 501(c)(3) taxable private foundation Check if your organization is covered by the General Rule or a Special Rule. Note. Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions. General Rule For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II **Special Rules** ☐ For a section 501(c)(3) organization filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), and received from any one contributor, during the year, a contribution of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h or (ii) Form 990-EZ, line 1. Complete Parts I and II. For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, aggregate contributions of more than \$1,000 for use exclusively for religious, chantable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals. Complete Parts I, II, and III. For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year. contributions for use exclusively for religious, charitable, etc., purposes, but these contributions did not aggregate to more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an exclusively religious, charitable, etc., purpose. Do not complete any of the parts unless the General Rule applies to this organization because it received nonexclusively religious, charitable, etc., contributions of \$5,000 or more during the year.

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990, 990-EZ, or 990-PF. Schedule B (Form 990, 990-EZ, or 990-PF) (2010)

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 line 2 of its Form 990-PF, to certify

that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

Name of organization THE ROBERT & MARGARET PATRICELLI FAMILY FOUNDATION

Employer identification number

06-1487230

Part I	Contributors (see instructions)		
(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
1	ROBERT PATRICELLI 77 HARTFORD ROAD SIMSBURY, CT 06070	\$\$, 5,000.	Person X Payroll
(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
_			Person Payroll Noncash (Complete Part II if there is a noncash contribution)
(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
		\$	Person Payroll Noncash (Complete Part II if there is a noncash contribution.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
		\$	Person Payroll Noncash (Complete Part II if there is a noncash contribution.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
		\$	Person Payroll Noncash (Complete Part II if there is a noncash contribution.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
023452 12-2	23-10	\$Schedule B (Form	Person Payroll Noncash (Complete Part II if there is a noncash contribution.) 990, 990-EZ, or 990-PF) (2010)

Name of organization THE ROBERT & MARGARET PATRICELLI FAMILY FOUNDATION

Employer identification number

06-1487230

Part II	Noncash Property (see instructions)		
(a) No. from Part I	(b)  Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b)  Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b)  Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b)  Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
200452 12 00		\$ Sahadula B (Farm)	900 900.E7 or 000.BEV (2010)

Name of organization

Employer identification number

THE ROBERT & MARGARET PATRICELLI FAMILY FOUNDATION

06-1487230

Part III	more than \$1,000 for the year. Complet Part III, enter the total of exclusively religions \$1,000 or less for the year. (Enter this inf	e columns (a) through (e) and the ous, chantable, etc., contributions	n 501(c)(7), (8), or (10) organizations aggregating following line entry. For organizations completing of \$
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
-	Transferee's name, address, a	(e) Transfer of gift	Relationship of transferor to transferee
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	Transferee's name, address, a	(e) Transfer of gift	Relationship of transferor to transferee
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
_	Transferee's name, address, a	(e) Transfer of gift	Relationship of transferor to transferee
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
		(e) Transfer of gift	
	Transferee's name, address, a	nd ZIP + 4	Relationship of transferor to transferee

FORM 990-PF INTERES	T ON SAVINGS A	ND TEME	ORARY C	ASH I	NVESTMENTS	STATEMENT	1
SOURCE						AMOUNT	
BANK OF AMERICA					- -	7,3	87.
TOTAL TO FORM 990-PF	, PART I, LINE	3, COI	LUMN A		-	7,3	87.
FORM 990-PF	DIVIDENDS AND	INTER	EST FROM	SECU	JRITIES	STATEMENT	2
SOURCE		GROSS	AMOUNT		PITAL GAINS DIVIDENDS	COLUMN (A AMOUNT	)
UBS #HA-12228 UBS #HA-12229			2,402. 29,866.		0.	2,4 29,8	
TOTAL TO FM 990-PF,	PART I, LN 4		32,268.		0.	32,2	68.
FORM 990-PF	(	OTHER II	NCOME			STATEMENT	3
DESCRIPTION		1	(A) REVENUE PER BOOK		(B) NET INVEST- MENT INCOME		
MISC INCOME			1,	089.	1,089	•	
TOTAL TO FORM 990-PH	F, PART I, LINI	E 11	1,	089.	1,089	•	
FORM 990-PF	A	CCOUNTI	NG FEES			STATEMENT	4
DESCRIPTION	EXP	(A) ENSES BOOKS	(B) NET INV MENT IN	EST-	(C) ADJUSTED NET INCOM		
BLUM SHAPIRO		4,000.	2	,000	•	2,0	00.
TO FORM 990-PF, PG	 L, LN 16B	4,000.	2	,000	•	2,0	00.
	<del></del>		·		= <del></del>	===	

FORM 990-PF	TAX	ES		STATEMENT 5		
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOM			
PAYROLL TAXES	7,361.	0	•	7,361.		
TO FORM 990-PF, PG 1, LN 18	7,361.	0	•	7,361.		
FORM 990-PF	OTHER E	XPENSES		STATEMENT 6		
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOM			
ADMINISTRATIVE EXPENSES BANK CHARGES INVESTMENT MANAGEMENT FEES MISCELLANEOUS EXPENSE	695. 10. 2,319. 20,258.	0 10 2,319 20,258	•	695. 0. 0.		
TO FORM 990-PF, PG 1, LN 23	23,282.	22,587	•	695.		
FORM 990-PF	CORPORAT	E STOCK		STATEMENT 7		
DESCRIPTION		В	OOK VALUE	FAIR MARKET VALUE		
UBS #HA-12229 UBS #HA-12228 EVOLUTION BENEFITS DONATION			295,223. 370,772. 5,000.	383,609. 412,459. 5,000.		
TOTAL TO FORM 990-PF, PART I	I, LINE 10B		670,995.	801,068.		

FORM 990-PF CORPORATE BO	NDS	STATEMENT 8
DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
UBS #HA-12229 BONDS	441,963.	468,449.
TOTAL TO FORM 990-PF, PART II, LINE 10C	441,963.	468,449.

## · ATTACHMENT TO FORM 990PF, PART XV, 3A

GRANTS AND CONTRIBUTIONS TO VARIOUS ORGANIZATIONS ARE BROKEN DOWN INTO THE FOLLOWING CATEGORIES AND AMOUNTS.

Arts	36,402
E&S Ed.	6,000
Environment	710
Hartford Grants	69,915
Health Care	19,600
Higher Education	400,900
Public Policy	1,750
Religion	2,100
Social Service	23,345
Community Development	26,100
Total	586,822
Less. Contribution	(5,000)
TOTAL Paid by Private Foundation	581,822

3:08 PM 07/31/11 Cash Basis

# Robert & Margaret Patricelli Family Foundation Transactions by Account As of June 30, 2011

			AS Of Gallo Go, EG .		
Туре	Date	Num	Name	Memo	Paid Amount
Arts			"	increase FY 2010	-5,000 00
Check	7/7/2010	1483	Bushnell Playhouse on Park	Increase 1 1 2010	-2,500 00
Check	10/3/2010	1496 1515	Hill-Stead Museum		-300 00
Check	11/26/2010 11/26/2010	1518	Mark Twain House		-500 00 -1,000.00
Check Check	11/26/2010	1522	H\$O		-1,000.00
Check	11/26/2010	1527	Florence Griswold Museum		-500 00
Check	11/26/2010	1531	Full Force Dance Theater		-300.00
Check	12/10/2010	1540	Florence Griswold Museum	Patronannual	-422 00 400 00
Check Check	1/7/2011 2/19/2011	1547 1554	Milwaukee Choral Artists Harriet Beach Stowe Center	Jenny	-100 00 -500.00
Check	3/20/2011	1568	GH Arls Council	annual	-2,500.00
Check	3/20/2011	1569	Bushnell	annual	-15,000.00
Check	3/20/2011	1570	Harriet Beach Stowe Center	Nicolas Kristoff	-2,500.00
Check	3/31/2011	1571	Chestnut Hill Concerts	per Jeanne Potoff	-100.00 5.180.00
Check	6/30/2011	1603	Bushnell	Ovations donations	-5,180.00 -36,402.00
Total Arts					-30,402.00
Contribution	9/13/2010	DEP	EB Management Contributi .	SMC contribution as pr	5,000 00
Deposit -	9/13/2010	DLF	CD Management consider	•	
Community D					
Community Do	7/30/2010	1484	Madison Hose Company		-50.00
Check	10/28/2010	1501	Friends of the Simsbury Lib.	last year of pledge	-25,000.00
Check	11/13/2010	1508	WFCR		-350 00
Check	11/26/2010	1516	Simsbury Historical Society		-100.00
Check Check	11/26/2010	1521	Simsbury Volunteer Fire D		-100 00 -250.00
Check	11/26/2010 12/8/2010	1528 1539	CPTV Simsbury Land Trust	Tulmeadow Woodlot	-250.00
Total Commun			Simboli Land Tradi		-26,100 00
E&S Ed	ny Dovolopino				_0,.00 00
Check	10/22/2010	1591	Discovery Center		-500.00
Check	11/26/2010	1513	Simsbury ABC		-250.00
Check	11/26/2010	1517	Gillen BrewerSchool	Schacht	-500.00
Check	11/26/2010	1526	Junior Achievement of SE		-1,000.00
Check Check	3/20/2011 4/5/2011	1566 1572	Loomis Chaffee School Center for Creative Youth	annual NAncy Wolff program	-2,500 00 -1,250 00
Total E&S Ed			<b>55</b> ///	,	-6,000.00
Environment					,
Check	9/22/2010	1589	Farmington River LAC		-60 00
Check	10/7/2010	1498	Save the Redwoods League		-150 00
Check	10/13/2010	1500	Save the Redwoods League	Billy's 75th	-100 00
Check Check	11/9/2010	1505	Chesapeake Bay Foundation Ding Darling Wildlife Society	Chuck Shivery's mother	-150.00 -150 00
Check	1/7/2011 2/2/2011	1546 1550	Old Drake Hill Flower Bridge		-100 00
Total Environm		,,,,,	Old Broke Tim Flower Bridge		-710 00
Hartford Gran					
Check	7/30/2010	1485	Camp Courant	anti-obesity	-5,000.00
Check	8/1/2010	1486	Teach For America	-	-5,000 00
Check	9/13/2010	1489	Billings Forge Community .	youth nutrition	-3,000 00
Check Check	9/13/2010 9/18/2010	1490 1492	Pilar Community Developm . Kane's Market	First Cathedral progra . food for TFA event	-1,000 00 -1,749.00
Check	9/21/2010	1494	M&R Liquor	TFA event	-265.78
Check	9/23/2010	1441	CT Science Center	Gala	-2,500 00
Check	10/4/2010	EFT	Hartford Public Schools	TeacherDollars	-25,000 00
Check	10/29/2010	1502	Friends of Elizabeth Park		-250 00
Check Check	10/30/2010 11/13/2010	1503 1509	Shelter for Woman Hartford Public Library	health snacks	-450.00 -2,500.00
Check	11/26/2010	1519	CT Science Center	Visionaries Society	-1,000 00
Check	11/26/2010	1524	Loaves and Fishes		-500.00
Check	11/26/2010	1525	Charter Oak Cultural Center		-250.00
Check	11/26/2010	1532	Covenant Prep	per Paul Glover	-1,000 00
Check Check	12/12/2010 12/22/2010	1535 1543	MARC Community Resour.  Joe Picture This show	social services nutrition animation wor .	-150 00 -1,000 00
Check	1/7/2011	1548	Knoxs Parks Foundation	Americorps Green Crew	-1,000 00
Check	1/18/2011	1549	My Sisters' Place	homelessness	-500 00
Check	2/15/2011	1552	Foodshare		-250 00
Check Check	3/8/2011 3/9/2011	1556 1557	Discovery Center Boys and Girls Clubs of Ha.		-1,500 00 -200 00
Check	3/12/2011	1558	Riverfront Recapture	Marfuggi 30th annives	-1,500 00
**			•	'	•

## Robert & Margaret Patricelli Family Foundation Transactions by Account As of June 30, 2011

Check   3/12/2011   1564	Туре	Date	Num	Name	Memo	Pald Amount
Check   3/20/2011   1574	Check	3/12/2011	1560	Charter Oak Cultural Center		-1,000 00
Check   47/72011   1579   Achieve Hatford   1570   Achieve Hatford	-					-300 00
Total Hartford Grants	Check	4/7/2011	1574			-500 00
Total Hartford Grants	Check	5/6/2011	1579	All Our Kin	training day care provi	-50 00
Health Care	Check	6/3/2011	1585	Bright Futures Youth Center	1st of 4 for John Wilson	-12,500 00
Check	Total Hartford	Grants				-69,914 78
Check   9/13/2010   1485   Tufts University Friedman   1-10,000 00	Health Care					
Check	Check	8/29/2010	1487	JDRF		-1,000 00
Check	Check	9/13/2010	1488	Tufts University Friedman .	international student in	-10,000 00
Check	Check	10/3/2010	1495	CCC Jimmy Fund Golf Outi		
Check	Check	10/8/2010	1497	Planned Parenthood of CT		,
Check   11/28/2010   1523	Check	11/26/2010	1512			
Check   11/28/2010   1529	Check	11/26/2010	1520	Hartford Hospital		
Check	Check	11/26/2010		CHR		•
Check   12/3/2010   1534   Women's Health Research   Annual   250 00	Check	11/26/2010				
Check   12/3/2010   1537   Planned Parenthoof Feder.   1-150.00	Check					
Check   2/22/2011   1555   Haitina Fer Women   Check   4/13/2011   1562   Haitina Health Foundation   JDRF   Fund a Cure   -1,000 00	Check				annual	
Check   3/14/2011   1552   Haitlain Health Foundation   Check   4/13/2011   1577   JRR   Fund a Cure   -1,000 00						
Check				= ·······	women's nealth in Ecu	
Total Higher Education					Fried a Core	•
Total Health Care						
Higher Education			1581	Hill-Stead Museum	ranners market	
Check   11/13/2010   1545   Farmington River LAC   100 00						-19,600 00
Check   12/31/2010   1545			4507	Cauchas Callaga		-150.00
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