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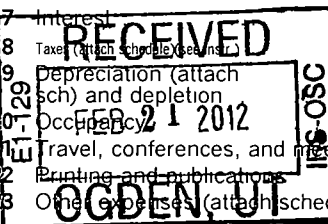
**Return of Private Foundation
or Section 4947(a)(1) Nonexempt Charitable Trust
Treated as a Private Foundation****2010**Department of the Treasury
Internal Revenue Service

Note: The foundation may be able to use a copy of this return to satisfy state reporting requirements

For calendar year 2010, or tax year beginning **Jul 1**, 2010, and ending **Jun 30**, 2011G Check all that apply ☐ Initial return ☐ Initial Return of a former public charity ☐ Final return
☐ Amended return ☐ Address change ☐ Name change

Name of foundation The Cawasa Grange Memorial Scholarship Fund, Inc.		A Employer identification number 06-1552895
Number and street (or P O box number if mail is not delivered to street address) 23 Thayer Avenue		B Telephone number (see the instructions) (860) 693-8513
City or town Canton	State CT	ZIP code 06019
H Check type of organization ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		C If exemption application is pending, check here ☐
I Fair market value of all assets at end of year (from Part II, column (c), line 16) \$ 872,651.		D 1 Foreign organizations, check here ☐
J Accounting method ☒ Cash ☐ Accrual ☐ Other (specify) _____		2 Foreign organizations meeting the 85% test, check here and attach computation ☐
(Part I, column (d) must be on cash basis)		E If private foundation status was terminated under section 507(b)(1)(A), check here ☐
		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see the instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
REVENUE	1 Contributions, gifts, grants, etc. received (att sch)	35.			
	2 Ck ☒ if the foundn is not req to att Sch B				
	3 Interest on savings and temporary cash investments	33.	33.		
	4 Dividends and interest from securities	21,454.	21,454.		
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain/(loss) from sale of assets not on line 10				
	b Gross sales price for all assets on line 6a				
	7 Capital gain net income (from Part IV, line 2)		114,734.		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
b Less: Cost of goods sold					
c Gross profit/(loss) (att sch)					
11 Other income (attach schedule)					
12 Total. Add lines 1 through 11	21,522.	136,221.			
ADMINISTRATIVE EXPENSES	13 Compensation of officers, directors, trustees, etc				
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule) STMT 1	850.			850.
	b Accounting fees (attach sch)				
	c Other prof fees (attach sch) STMT 2	4,675.	4,675.		
	17 Interest				
	18 Taxes (attach schedule) (see instructions)				
	19 Depreciation (attach sch) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
23 Other expenses (attach schedule)					
24 Total operating and administrative expenses. Add lines 13 through 23	5,525.	4,675.		850.	
25 Contributions, gifts, grants paid	22,500.			22,500.	
26 Total expenses and disbursements. Add lines 24 and 25	28,025.	4,675.		23,350.	
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements	-6,503.				
b Net investment income (if negative, enter -0-)		131,546.			
c Adjusted net income (if negative, enter -0-)					



Part II Balance Sheets		Beginning of year (a) Book Value	End of year	
			(b) Book Value	(c) Fair Market Value
ASSETS	1 Cash — non-interest-bearing	2,687.	1,837.	1,837.
	2 Savings and temporary cash investments	36,639.	38,200.	38,200.
	3 Accounts receivable			
	Less allowance for doubtful accounts			
	4 Pledges receivable			
	Less allowance for doubtful accounts			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see the instructions)			
	7 Other notes and loans receivable (attach sch)			
	Less allowance for doubtful accounts			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments — U S and state government obligations (attach schedule)			
	b Investments — corporate stock (attach schedule)			
	c Investments — corporate bonds (attach schedule)			
LIABILITIES	11 Investments — land, buildings, and equipment basis			
	Less accumulated depreciation (attach schedule)			
	12 Investments — mortgage loans			
	13 Investments — other (attach schedule) STMT 3	606,103.	713,623.	832,614.
	14 Land, buildings, and equipment basis			
	Less accumulated depreciation (attach schedule)			
	15 Other assets (describe)			
	16 Total assets (to be completed by all filers — see instructions Also, see page 1, item I)	645,429.	753,660.	872,651.
	17 Accounts payable and accrued expenses			
	18 Grants payable			
FUND ASSETS	19 Deferred revenue			
	20 Loans from officers, directors, trustees, & other disqualified persons			
	21 Mortgages and other notes payable (attach schedule)			
	22 Other liabilities (describe)			
	23 Total liabilities (add lines 17 through 22)			
	Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31.			
	24 Unrestricted			
BALANCE SHEET	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds			
	28 Paid-in or capital surplus, or land, building, and equipment fund			
	29 Retained earnings, accumulated income, endowment, or other funds	645,429.	753,660.	
	30 Total net assets or fund balances (see the instructions)	645,429.	753,660.	
	31 Total liabilities and net assets/fund balances (see the instructions)	645,429.	753,660.	

Part III Analysis of Changes in Net Assets or Fund Balances

1 Total net assets or fund balances at beginning of year — Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	645,429.
2 Enter amount from Part I, line 27a	2	-6,503.
3 Other increases not included in line 2 (itemize) Capital Gains	3	114,734.
4 Add lines 1, 2, and 3	4	753,660.
5 Decreases not included in line 2 (itemize)	5	
6 Total net assets or fund balances at end of year (line 4 minus line 5) — Part II, column (b), line 30	6	753,660.

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse, or common stock, 200 shares MLC Company)		(b) How acquired P — Purchase D — Donation	(c) Date acquired (month, day, year)	(d) Date sold (month, day, year)
1a See Statement 4				
b				
c				
d				
e				

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a			
b			
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) Gains (Column (h) gain minus column (k), but not less than -0-) or Losses (from column (h))
(i) Fair Market Value as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of column (i) over column (j), if any	
a			
b			
c			
d			
e			

2 Capital gain net income or (net capital loss)	— [If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7]	2	114,734.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6)	— [If gain, also enter in Part I, line 8, column (c) (see the instructions) If (loss), enter -0- in Part I, line 8]	3	

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

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income)

If section 4940(d)(2) applies, leave this part blank

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?

☐ Yes☒ No

If 'Yes,' the foundation does not qualify under section 4940(e). Do not complete this part.

1 Enter the appropriate amount in each column for each year, see the instructions before making any entries

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (column (b) divided by column (c))
2009	825.	645,429.	0.001278
2008	65,637.	628,635.	0.104412
2007	50,800.	857,169.	0.059265
2006	23,275.	865,017.	0.026907
2005	20,750.	819,168.	0.025331

2 Total of line 1, column (d)	2	0.217193
3 Average distribution ratio for the 5-year base period — divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	0.043439
4 Enter the net value of noncharitable-use assets for 2010 from Part X, line 5	4	812,205.
5 Multiply line 4 by line 3	5	35,281.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	1,315.
7 Add lines 5 and 6	7	36,596.
8 Enter qualifying distributions from Part XII, line 4	8	23,350.

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions.

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Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 – see the instructions)

1 a Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter 'N/A' on line 1 Date of ruling or determination letter _____ (attach copy of letter if necessary – see instr.)		1	2,631.
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☐ and enter 1% of Part I, line 27b			
c All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, column (b)			
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		2	0.
3 Add lines 1 and 2		3	2,631.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		4	0.
5 Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0-		5	2,631.
6 Credits/Payments			
a 2010 estimated tax pmts and 2009 overpayment credited to 2010	6a	970.	
b Exempt foreign organizations – tax withheld at source	6b		
c Tax paid with application for extension of time to file (Form 8868)	6c		
d Backup withholding erroneously withheld	6d		
7 Total credits and payments Add lines 6a through 6d	7	970.	
8 Enter any penalty for underpayment of estimated tax Check here ☐ if Form 2220 is attached	8		
9 Tax due If the total of lines 5 and 8 is more than line 7, enter amount owed	9	1,661.	
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	0.	
11 Enter the amount of line 10 to be Credited to 2011 estimated tax ☐ Refunded ☐	11		

Part VII-A Statements Regarding Activities

	Yes	No
1 a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see the instructions for definition)? <i>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</i>		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation ▶ \$ _____ (2) On foundation managers ▶ \$ _____		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ▶ \$ _____		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If 'Yes,' attach a detailed description of the activities</i>		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? <i>If 'Yes,' attach a conformed copy of the changes</i>		X
4 a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If 'Yes,' has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If 'Yes,' attach the statement required by General Instruction T</i>		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? <i>If 'Yes,' complete Part II, column (c), and Part XV</i>	X	
8 a Enter the states to which the foundation reports or with which it is registered (see the instructions) CT - Connecticut		
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 <i>General Instruction G</i> ? <i>If 'No,' attach explanation</i>	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2010 or the taxable year beginning in 2010 (see instructions for Part XIV)? <i>If 'Yes,' complete Part XIV</i>		X
10 Did any persons become substantial contributors during the tax year? <i>If 'Yes,' attach a schedule listing their names and addresses</i>		X

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Part VII-A Statements Regarding Activities (Continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If 'Yes', attach schedule (see instructions)	11		X
12	Did the foundation 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 application? Website address N/A	13	X	
14	The books are in care of Edward F. Kozlak Telephone no (860) 693-8513 Located at 92 Cherry Brook Road Canton CT ZIP + 4 06019			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 — Check here ☐ and enter the amount of tax-exempt interest received or accrued during the year 15			
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?	16	Yes	No
	See the instructions for exceptions and filing requirements for Form TD F 90-22.1 If 'Yes,' enter the name of the foreign country			X

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

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

	Yes	No
1 a 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 ☒ No		
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No		
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No		
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☒ 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 ☒ No		
(6) Agree to pay money or property to a government official? (Exception. Check 'No' if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days) ☐ Yes ☒ No		
b If any answer is 'Yes' to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see the instructions)? Organizations relying on a current notice regarding disaster assistance check here ☐	1 b	
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?	1 c	X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))		
a At the end of tax year 2010, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2010? ☐ Yes ☒ No If 'Yes,' list the years 20__ , 20__ , 20__ , 20__		
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 the instructions)	2 b	X
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here 20__ , 20__ , 20__ , 20__		
3 a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☒ No		
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 May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2010)	3 b	
4 a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4 a	X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2010?	4 b	X

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Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required (continued)**5a** During the year did the foundation pay or incur any amount to

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?

☐ Yes ☒ No

(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?

☐ Yes ☒ No

(3) Provide a grant to an individual for travel, study, or other similar purposes?

☒ Yes ☐ No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see instructions)

☐ Yes ☒ No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?

☐ Yes ☒ No**b** If any answer is 'Yes' to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?**5b**

X

Organizations relying on a current notice regarding disaster assistance check here

☐**c** If the answer is 'Yes' to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?☐ Yes ☐ No

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

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

X

If 'Yes' to 6b, file Form 8870

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?☐ Yes ☒ No**7b****b** If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?**Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors****1** List all officers, directors, trustees, foundation managers and their compensation (see instructions).

(a) Name and address	(b) Title and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
See Statement 5				

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

(a) Name and address of each employee paid more than \$50,000	(b) Title and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				
0				
0				
0				
0				

Total number of other employees paid over \$50,000

▶

None

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

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

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

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

None

Part IX-A Summary of Direct Charitable Activities

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

	Expenses
1 To provide financial assistance to graduates of Canton High School who are residents of the Town of Canton, Connecticut at the time of graduation to further their education.	0.
2	
3	
4	

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

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1 NONE	0.
2	
All other program-related investments See instructions	
3	
Total. Add lines 1 through 3	None

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Part X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see instructions.)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
a	Average monthly fair market value of securities	1a	795,265.
b	Average of monthly cash balances	1b	29,309.
c	Fair market value of all other assets (see instructions)	1c	
d	Total (add lines 1a, b, and c)	1d	824,574.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	
2	Acquisition indebtedness applicable to line 1 assets	2	
3	Subtract line 2 from line 1d	3	824,574.
4	Cash deemed held for charitable activities. Enter 1-1/2% of line 3 (for greater amount, see instructions)	4	12,369.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	812,205.
6	Minimum investment return. Enter 5% of line 5	6	40,610.

Part XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ☐ and do not complete this part.)

1	Minimum investment return from Part X, line 6	1	40,610.
2a	Tax on investment income for 2010 from Part VI, line 5	2a	2,631.
b	Income tax for 2010 (This does not include the tax from Part VI)	2b	
c	Add lines 2a and 2b	2c	2,631.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	37,979.
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	37,979.
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	37,979.

Part XII Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes		
a	Expenses, contributions, gifts, etc. — total from Part I, column (d), line 26	1a	23,350.
b	Program-related investments — total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required)	3a	
b	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	23,350.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b (see instructions)	5	0.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	23,350.

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)

	(a) Corpus	(b) Years prior to 2009	(c) 2009	(d) 2010
1 Distributable amount for 2010 from Part XI, line 7				37,979.
2 Undistributed income, if any, as of the end of 2010				
a Enter amount for 2009 only			35,410.	
b Total for prior years 20 <u>07</u> , 20 <u>08</u> , 20 <u> </u>		56,663.		
3 Excess distributions carryover, if any, to 2010				
a From 2005				
b From 2006				
c From 2007				
d From 2008				
e From 2009				
f Total of lines 3a through e				
4 Qualifying distributions for 2010 from Part XII, line 4 ▶ \$ <u>23,350.</u>				
a Applied to 2009, but not more than line 2a			0.	
b Applied to undistributed income of prior years (Election required — see instructions)		23,350.		
c Treated as distributions out of corpus (Election required — see instructions)	0.			
d Applied to 2010 distributable amount				
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2010 (If an amount appears in column (d), the same amount must be shown in column (a))	0.			
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	0.			
b Prior years' undistributed income Subtract line 4b from line 2b		33,313.		
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				
d Subtract line 6c from line 6b Taxable amount — see instructions		33,313.		
e Undistributed income for 2009 Subtract line 4a from line 2a Taxable amount — see instructions			35,410.	
f Undistributed income for 2010 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2011				37,979.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions)				
8 Excess distributions carryover from 2005 not applied on line 5 or line 7 (see instructions)	0.			
9 Excess distributions carryover to 2011. Subtract lines 7 and 8 from line 6a	0.			
10 Analysis of line 9				
a Excess from 2006	0.			
b Excess from 2007	0.			
c Excess from 2008	0.			
d Excess from 2009	0.			
e Excess from 2010	0.			

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

- 2a** Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed

[illegible]

- b** 85% of line 2a

- c Qualifying distributions from Part XII,
line 4 for each year listed

- d** Amounts included in line 2c not used directly for active conduct of exempt activities

- e** Qualifying distributions made directly for active conduct of exempt activities
Subtract line 2d from line 2c

- 3 Complete 3a, b, or c for the alternative test relied upon

- a 'Assets' alternative test – enter

- (1) Value of all assets**

- (2) Value of assets qualifying under section 4942(j)(3)(B)(i)

- b** 'Endowment' alternative test — enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed

- c 'Support' alternative test – enter

- (1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)

- (2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)

- (3) Largest amount of support from an exempt organization**

- (4) Gross investment income**

Part XV **Supplementary Information (Complete this part only if the organization had \$5,000 or more in assets at any time during the year – see instructions.)**

1 Information Regarding Foundation Managers:

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

NONE

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

NONE

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

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

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

Guidance Department

Canton High School

Canton

CT 06019

(860) 693-7707

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

See attached form

- c Any submission deadlines

Varies yearly - generally the last business day of April in each year.

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

Applicants must be residents of the Town of Canton, Connecticut at the time of graduation from High School.

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year See Statement 6				
Total				3a
b Approved for future payment See Statement 7				
Total				3b

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (see the instructions)
	(a) Business code	(b) Amount	(c) Exclu- sion code	(d) Amount	
1 Program service revenue					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments			14	33.	
4 Dividends and interest from securities			14	21,454.	
5 Net rental income or (loss) from real estate					
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal property					
7 Other investment income					
8 Gain or (loss) from sales of assets other than inventory					
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue					
a					
b					
c					
d					
e					
12 Subtotal. Add columns (b), (d), and (e)				21,487.	
13 Total. Add line 12, columns (b), (d), and (e)				13	21,487.

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

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

[illegible]

Statement 1 - Form 990PF, Part I, Line 16a - Legal Fees

<u>Description</u>	<u>Total</u>	<u>Net Investment</u>	<u>Adjusted Net</u>	<u>Charitable Purpose</u>
Scully, Nicksa & Reeve, LLP - legal fees	\$850.00			\$850.00

Statement 2- Form 990PF, Part I, Line 16c - Other Profession Fees

<u>Description</u>	<u>Total</u>	<u>Net Investment</u>	<u>Adjusted Net</u>	<u>Charitable Purpose</u>
Bank of America - investment fees	\$4,675.00	\$4,675.00	-0-	-0-

Statement 3 - Form 990PF, Part II, Line 13 - Other Investments

<u>Description</u>	<u>Book Value</u>	<u>Market Value</u>
Columbia Value and Restructuring Cl Z	101,969.71	127,753.14
Columbia Small Cap Growth Fund Cl Z	8,044.57	11,734.72
Columbia Large Cap Growth Fund Cl Z	149,242.35	203,578.87
Columbia Acorn Fund Cl Z	19,011.63	30,673.69
Columbia Mid Cap Value Fund Cl Z	20,158.74	21,248.69
Columbia Small Cap Fund Cl Z	7,736.49	10,146.60
Columbia Acorn Intern'l Fd Cl Z	6,051.60	11,344.68
Columbia Small Cap Value I Fund Cl Z	11,263.91	13,384.87
Columbia Emerging Markets Fund Cl Z	46,103.31	45,638.90
Columbia International Value Fund Cl Z	20,000.00	22,653.37
Columbia Marisco Internat'l Oppurt Fd Cl Z	18,782.42	22,182.20
Columbia Bond Fund Cl Z	235,875.36	231,228.68
Columbia Income Opportunities Fund Cl Z	24,746.68	25,230.70
Columbia Real Estate Equity Fund Cl Z	9,635.72	17,043.90
Pimco Commodity Real Return Strategy Fd	<u>35,000.00</u>	<u>38,770.60</u>
TOTAL	713,622.49	832,613.61

Statement 4 - Form 990PF, Part IV, Capital Gains and Losses

<u>Description</u>	<u>Date Acquired</u>	<u>Date Sold</u>	<u>Gross Sales Price</u>	<u>Basis</u>	<u>Gain or Loss</u>
<u>Columbia Acorn Intl 438.725 sh</u>	01/16/09	08/12/10	15,000.00	9,625.63	5,374.37
<u>Columbia Large Cap Enh Core Fd</u> <u>7,142.857 sh</u>	01/16/09	08/12/10	75,142.86	60,000.00	15,142.86
<u>Columbia Multi-Adv Int'l 4,554.623 sh</u>	01/16/09	08/12/10	48,643.37	38,532.11	10,111.26
<u>Columbia MidCapValue Fd 494.604 sh</u>	various	08/12/10	5,500.00	6,752.27	(1,252.27)
<u>Columbia High Yield Fd 5,392.973 sh</u>	various	08/12/10	21,032.59	16,500.00	4,532.59
<u>Columbia Dividend Inc Fd 7,201.646 sh</u>	01/16/09	08/12/10	83,899.18	70,000.00	13,899.18
<u>Columbia Intermediate Bond Fd</u> <u>23,427.553 sh</u>	various	08/12/10	213,659.28	206,635.40	7,023.88
<u>Columbia Real Estate Eq Fd 1,369.125 sh</u>	01/16/09	08/12/10	15,361.58	10,364.28	4,997.30
<u>Columbia Lg Cap Growth Fd 4,078.858 sh</u>	01/16/09	08/12/10	80,516.66	60,000.00	20,516.66
<u>Columbia Small Cap Core Fd 3,084.793 sh</u>	various	08/12/10	38,158.89	39,667.34	(1,508.45)
<u>Columbia Emerging Mkts Fd 4,313.415 sh</u>	various	08/12/10	45,722.20	30,000.00	15,722.20
<u>Columbia Acorn Int'l Fd 48.051 sh</u>	01/16/09	09/30/10	1,825.92	1,054.24	771.68
<u>Columbia Value & Restruct Fd 44.111 sh</u>	08/12/10	09/30/10	1,921.04	1,816.05	104.99
<u>Columbia Select Lg Cap Gwth 1,054.740 sh</u>	08/12/10	09/30/10	11,855.28	10,747.80	1,107.48
<u>Lazard Funds Inc. 127.144 sh</u>	08/13/10	09/30/10	2,661.12	2,406.84	254.28
<u>Columbia Acorn Fund 63.197 sh</u>	09/05/03	11/15/10	1,800.47	1,251.47	549.00
<u>Columbia Marisco Int'l Opp. Fd 120.433 sh</u>	08/12/10	11/15/10	1,418.70	1,217.58	201.12
<u>Columbia Mid Cap Value Fd 60.233 sh</u>	05/10/04	11/15/10	754.60	822.16	(67.56)
<u>Columbia Value & Restruct Fd 114.854 sh</u>	08/12/10	11/15/10	5,433.75	4,728.54	705.21
<u>Columbia Select Small Cap Fd 73.354 sh</u>	08/12/10	11/15/10	1,240.32	1,013.51	226.81
<u>Columbia Select Large Cap Fd 311.822 sh</u>	08/12/10	11/15/10	3,713.80	3,177.47	536.33
<u>IShares Russell 2000 Value Index 67.215 sh</u>	08/12/10	11/11/10	13,437.77	11,579.00	1,858.77
<u>Columbia Small Cap Growth I 60.092 sh</u>	08/12/10	03/01/11	2,001.06	1,455.43	545.63
<u>Columbia Value & Restruct Fd 45.673 sh</u>	08/12/10	03/01/11	2,375.44	1,880.36	495.08
<u>Columbia Select Large Cap Gr. 670.499 sh</u>	08/12/10	03/01/11	9,011.50	6,832.38	2,179.12
<u>Lazard Funds Inc. 1,985.904 sh</u>	08/12/10	03/01/11	40,691.17	37,593.16	3,098.01
<u>Columbia Mid Cap Value Fd 112.800 sh</u>	05/10/04	04/01/11	1,627.70	1,539.93	87.77
<u>Columbia Value & Restruct Fd 38.993 sh</u>	08/12/10	04/01/11	2,067.00	1,605.34	461.66
<u>SUBTOTAL</u>			746,473.25	638,798.29	107,674.96
<u>Long Term Capital Gain Distributions:</u>					
Columbia Bond Fund Class Z					530.27
Columbia Small Cap Value Fund Class Z					42.47
Columbia Acorn Fund Class Z					803.95
Columbia Acorn Fund Class Z					291.57
Columbia Select LgCap Growth					3,002.42
Columbia Emerging Markets Fd					<u>2,387.92</u>
TOTAL CAPITAL GAIN					<u>114,733.56</u>

Statement 5 - Form 990PF, Part VIII - Officers & Directors

<u>Name and Address</u>	<u>Title, and average hours per year devoted to position</u>	<u>Compensat ion (If not paid, enter -0-)</u>	<u>Contributio n s to employee benefit plans and deferred compensatio n</u>	<u>Expense account, other allowances</u>
Linea N. Erickson 21 Thayer Ave. Collinsville, CT 06019	President/Director 10 hours per year	-0-	-0-	-0-
Marguerite A. Schofield 23 Thayer Ave. Collinsville, CT 06019	Secretary/Director 10 hours per year	-0-	-0-	-0-
Edward F. Kozlak 92 Cherry Brook Rd. Canton, CT 06019	Treasurer/Director 40 hours per year	-0-	-0-	-0-
Bernice Wilson 121 Dowd Avenue Canton, CT 06019	Director 5 hours per year	-0-	-0-	-0-
Carl P. MacLaurin 31 Dowd Ave. Canton, CT 06019	Director 5 hours per year	-0-	-0-	-0-

Statement 6 - Form 990PF, Part XV – Grants and Contributions
Paid during the year

Recipient	Relationship	Foundation	Purpose	Amount
Oberlin College fbo Lauren Schwartzman 101 N. Professor Street Oberlin, OH	None	N/A	College Tuition	\$5,000.00
Brown University fbo Samuel E. Adler-Bell 164 Angell St., Box 1911 Providence, RI	None	N/A	College Tuition	\$2,500.00
Trinity College fbo Christopher Hyde 300 Summit Street Hartford, CT	None	N/A	College Tuition	\$5,000.00
Mount Holyoke College fbo Jane E. Bradley 50 College Street South Hadley, MA	None	N/A	College Tuition	\$5,000.00
College of the Holy Cross fbo Kelly E. Nedorostek 1 College Street Worcester, MA	None	N/A	College Tuition	\$5,000.00
TOTAL				\$22,500.00

Statement 7 - Form 990PF, Part XV – Grants and Contributions
Approved for future payment

Recipient	Relationship	Foundation	Purpose	Amount
Brown University fbo Samuel E. Adler-Bell 164 Angell St., Box 1911 Providence, RI	None	N/A	College Tuition	\$5,000.00
Trinity College fbo Christopher Hyde 300 Summit Street Hartford, CT	None	N/A	College Tuition	\$5,000.00
College of the Holy Cross fbo Kelly E. Nedorostek 1 College Street Worcester, MA	None	N/A	College Tuition	\$5,000.00
Hamilton College fbo Deanna Nappi 198 College Hill Road Clinton, NY 1332	None	N/A	College Tuition	\$10,000.00
Bristol Technical School fbo Kelly Day 431 Minor Street Bristol, CT 06010	None	N/A	College Tuition	\$2,500.00
Central CT State University fbo Matt Herman 1615 Stanley Street New Britain, CT 06050	None	N/A	College Tuition	\$2,500.00
Babson College fbo Alexandra Baechle 231 Forest Street Babson Park, MA 02457	None	N/A	College Tuition	\$5,000.00
Bentley University fbo Ned Furtney 175 Forest Street Waltham, MA 02452	None	N/A	College Tuition	\$5,000.00
Emmanuel College fbo Kassie Grecula 400 The Fenway Boston, MA 02115	None	N/A	College Tuition	\$5,000.00
Paul Smith's College fbo David Kucia P.O. Box 265 New York, NY 12970	None	N/A	College Tuition	\$5,000.00
TOTAL				\$50,000.00

THE CAWASA GRANGE MEMORIAL SCHOLARSHIP FUND INC.

The Cawasa Grange Memorial Scholarship Fund Inc. will award a scholarship to further the education of a student who has been accepted into an accredited College or University.

To provide financial assistance to further the Education of high school graduates who are residents of the town of Canton at the time of graduation from Canton High School or any other accredited secondary school.

The Scholarship will provide the selected applicant with \$5,000.00 per year (in two increments of \$2,500.00 each) for use towards tuition, room and board each year for up to four years of college. The money will be held in the selected applicant's name for distribution up to four years. Scholarship money will be paid directly to the institution attended by the recipient, for up to four years pending recipient's progress.

SCHOLARSHIP COMMITTEE:

This scholarship committee will review your application, and make the final grant selection. The Committee will evaluate:

1. Academic performance: The participant must have obtained a B average for the last four marking periods. A copy of your senior year report card to accompany application.
2. Community Service.
3. Financial need will be considered.

DEADLINE:

Completed applications must be submitted to Canton High School Guidance Dept., Collinsville, Ct., 06019 no later than April 22,nd, 2002.

The awards will be announced at Graduation or a special award presentation program on June

THE CAWASA GRANGE MEMORIAL SCHOLARSHIP FUND INC.

APPLICATION FORM

PERSONAL INFORMATION

- ♦ 1. Name (Mr./Mrs.) _____
- ♦ 2. Home Address _____
- ♦ 3. Date of Birth _____
- ♦ 4. Marital Status Single _____ Married _____
- ♦ 5. Applicant Normally Lives with (Check all that apply)
____ Father ____ Mother ____ Stepfather ____ Stepmother
____ Maintains Own Residence
- ♦ 6. Applicant's Social Security Number _____
- ♦ 7. Check if any apply:
____ Father unable to work
____ Mother unable to work
____ Mother is deceased
____ Father is deceased
____ Parents are separated or divorced

INFORMATION CONCERNING FAMILY

- ♦ Father or male guardian:

Name of father _____ Age _____
Home address _____
Occupation & title _____
Employed by _____
Years with firm _____

♦ Mother or female guardian:

Name of mother _____ Age _____

Home address _____

Occupation & title _____

Employed by _____

Years with firm _____

Enter number of children parents will claim as tax dependents
on their Federal Income Tax Return for year _____

Quantity _____

Enter number of other dependents receiving Financial Support
from the family

Quantity _____

FAMILY INCOME

A completed copy of the FAF form and FAFSA (available from the Guidance Department) must accompany this application. Please also provide a copy of your or your parents' most recent Federal Tax return.

COLLEGE INFORMATION

I have applied to the following colleges: (Include names & addresses).

I have been accepted and plan to attend:

Name of College

Address

Once completed, the application and necessary information must be postmarked no later than the 4th Friday of April and mailed to:

The Cawasa Grange Memorial Scholarship Fund Inc.
C/O Marguerite A. Schofield (Secretary)
23 Thayer Av.
Collinsville, Ct. 06022

Application for Extension of Time To File an Exempt Organization Return

OMB No 1545-1709

► File a separate application for each return.

- If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** and check this box ☒
 - If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only **Part II** (on page 2 of this form).
- Do not complete Part II unless** you have already been granted an automatic 3-month extension on a previously filed Form 8868.

Electronic filing (e-file). You can electronically file Form 8868 if you need a 3-month automatic extension of time to file (6 months for a corporation required to file Form 990-T), or an additional (not automatic) 3-month extension of time. You can electronically file Form 8868 to request an extension of time to file any of the forms listed in Part I or Part II with the exception of Form 8870, Information Return for Transfers Associated With Certain Personal Benefit Contracts, which must be sent to the IRS in paper format (see instructions). For more details on the electronic filing of this form, visit www.irs.gov/efile and click on *e-file for Charities & Nonprofits*.

Part I Automatic 3-Month Extension of Time. Only submit original (no copies needed).

A corporation required to file Form 990-T and requesting an automatic 6-month extension—check this box and complete Part I only ☐

All other corporations (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns.

Type or print File by the due date for filing your return. See instructions.	Name of exempt organization	Employer identification number
	The Cawasa Grange Memorial Scholarship Fund, Inc.	06-1552895
	Number, street, and room or suite no. If a P O box, see instructions	
	23 Thayer Avenue	
	City, town or post office, state, and ZIP code. For a foreign address, see instructions	
	Canton, CT 06019	

Enter the Return code for the return that this application is for (file a separate application for each return)

Application Is For	Return Code	Application Is For	Return Code
Form 990	01	Form 990-T (corporation)	07
Form 990-BL	02	Form 1041-A	08
Form 990-EZ	03	Form 4720	09
Form 990-PF	04	Form 5227	10
Form 990-T (sec. 401(a) or 408(a) trust)	05	Form 6069	11
Form 990-T (trust other than above)	06	Form 8870	12

- The books are in the care of ► Edward F. Kozlak

Telephone No ► 860-693-8513 FAX No. ► _____

- If the organization does not have an office or place of business in the United States, check this box ☐
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) _____. If this is for the whole group, check this box ☐. If it is for part of the group, check this box ☐ and attach a list with the names and EINs of all members the extension is for.

- 1 I request an automatic 3-month (6 months for a corporation required to file Form 990-T) extension of time until February 15, 20 12, to file the exempt organization return for the organization named above. The extension is for the organization's return for:
- ☐ calendar year 20 ____ or
- ☒ tax year beginning July 1, 20 10, and ending June 30, 20 11

- 2 If the tax year entered in line 1 is for less than 12 months, check reason: ☐ Initial return ☐ Final return ☐ Change in accounting period

3a	If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	3a	\$	320.00
b	If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit.	3b	\$	970.00
c	Balance due. Subtract line 3b from line 3a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	3c	\$	NONE

Caution. If you are going to make an electronic fund withdrawal with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions.