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

2011

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

For calendar year 2011, or tax year beginning 7/01, 2011, and ending 6/30, 2012

DEVON ROTARY FOUNDATION TRUST FUND  
250 BROAD STREET  
MILFORD, CT 06460A Employer identification number  
22-2959085

B Telephone number (see the instructions)

C If exemption application is pending, check here ☐D 1 Foreign organizations, check here ☐2 Foreign organizations meeting the 85% test, check here and attach computation ☐E If private foundation status was terminated under section 507(b)(1)(A), check here ☐F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐G Check all that apply ☐ Initial return ☐ Initial Return of a former public charity  
☐ Final return ☐ Amended return  
☐ Address change ☐ Name changeH Check type of organization: ☒ Section 501(c)(3) exempt private foundation  
☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundationI Fair market value of all assets at end of year (from Part II, column (c), line 16)  
\$ 150,711.  
J Accounting method: ☒ Cash ☐ Accrual  
☐ Other (specify) \_\_\_\_\_  
(Part I, column (d) must be on cash basis)

| Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions).) |  | (a) Revenue and expenses per books | (b) Net investment income | (c) Adjusted net income | (d) Disbursements for charitable purposes (cash basis only) |
|---|--|------------------------------------|---------------------------|-------------------------|---|
| 1   | Contributions, gifts, grants, etc., received (att sch)                       | 14,790.                            |                           |                         |   |
| 2   | Ck <input checked="" type="checkbox"/> if the foundn is not req to att Sch B |                                    |                           |                         |   |
| 3   | Interest on savings and temporary cash investments                           |                                    |                           |                         |   |
| 4   | Dividends and interest from securities                                       | 3,136.                             | 3,136.                    | 3,136.                  |   |
| 5a  | Gross rents  |                                    |                           |                         |   |
| b   | Net rental income or (loss)  |                                    |                           |                         |   |
| 6a  | Net gain/(loss) from sale of assets not on line 10                           | 97.                                |                           |                         |   |
| b   | Gross sales price for all assets on line 6a                                  | 5,000.                             |                           |                         |   |
| 7   | Capital gain net income (from Part IV, line 2)                               |                                    | 97.                       |                         |   |
| 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)<br>SEE STATEMENT 1                            | 26,996.                            |                           |                         |   |
| 12  | Total. Add lines 1 through 11  | 45,019.                            | 3,233.                    | 3,136.                  |   |
| 13  | Compensation of officers, directors, trustees, etc                           | 0.                                 |                           |                         |   |
| 14  | Other employee salaries and wages  |                                    |                           |                         |   |
| 15  | Pension plans, employee benefits   |                                    |                           |                         |   |
| 16a   | Legal fees (attach schedule)   |                                    |                           |                         |   |
| b   | Accounting fees (attach sch) SEE ST 2  | 400.                               | 13.                       |                         |   |
| c   | Other prof fees (attach sch)   |                                    |                           |                         |   |
| 17  | Interest   |                                    |                           |                         |   |
| 18  | Taxes (attach schedule)(see instrs) SEE STM 3                                | 15.                                |                           |                         |   |
| 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         | 415.                               | 13.                       |                         |   |
| 25  | Contributions, gifts, grants paid PART XV                                    | 28,010.                            |                           |                         | 28,010.   |
| 26  | Total expenses and disbursements. Add lines 24 and 25                        | 28,425.                            | 13.                       | 0.                      | 28,010.   |
| 27  | Subtract line 26 from line 12:   |                                    |                           |                         |   |
| a   | Excess of revenue over expenses and disbursements                            | 16,594.                            |                           |                         |   |
| b   | Net investment income (if negative, enter -0-)                               |                                    | 3,220.                    |                         |   |
| c   | Adjusted net income (if negative, enter -0-)                                 |                                    |                           | 3,136.                  |   |

| Part II Balance Sheets |  | Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions.)     |                                     | Beginning of year | End of year    |                       |
|------------------------|--|---|-------------------------------------|-------------------|----------------|-----------------------|
|                        |  |   |                                     | (a) Book Value    | (b) Book Value | (c) Fair Market Value |
| ASSETS                 | 1  | Cash — non-interest-bearing   |                                     |                   |                |                       |
|                        | 2  | Savings and temporary cash investments  |                                     | 37,340.           | 44,088.        | 44,088.               |
|                        | 3  | Accounts receivable   |                                     |                   |                |                       |
|                        |  | Less: allowance for doubtful accounts   |                                     |                   |                |                       |
|                        | 4  | Pledges receivable  |                                     |                   |                |                       |
|                        |  | Less: allowance for doubtful accounts   |                                     |                   |                |                       |
|                        | 5  | Grants receivable   |                                     |                   |                |                       |
|                        | 6  | Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions) |                                     |                   |                |                       |
|                        | 7  | Other notes and loans receivable (attach 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)   |                                     | 33,021.           | 39,645.        | 39,645.               |
|                        | c  | Investments — corporate bonds (attach schedule)   |                                     | 10,030.           | 4,999.         | 4,999.                |
|                        | 11   | Investments — land, buildings, and equipment: basis   |                                     |                   |                |                       |
|                        | Less: accumulated depreciation (attach schedule)   |   |                                     |                   |                |                       |
| 12                     | Investments — mortgage loans   |   |                                     |                   |                |                       |
| 13                     | Investments — other (attach schedule)  |   | 55,779.                             | 61,979.           | 61,979.        |                       |
| 14                     | Land, buildings, and equipment: basis  |   |                                     |                   |                |                       |
|                        | Less: accumulated depreciation (attach schedule)   |   |                                     |                   |                |                       |
| 15                     | Other assets (describe _____)  |   |                                     |                   |                |                       |
| 16                     | <b>Total assets</b> (to be completed by all filers — see the instructions. Also, see page 1, item I) |   | 136,170.                            | 150,711.          | 150,711.       |                       |
| LIABILITIES            | 17   | Accounts payable and accrued expenses   |                                     |                   |                |                       |
|                        | 18   | Grants payable  |                                     |                   |                |                       |
|                        | 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   | <b>Total liabilities</b> (add lines 17 through 22)  |                                     | 0.                | 0.             |                       |
| NET FUND ASSETS OR     | Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31.   |   | <input checked="" type="checkbox"/> |                   |                |                       |
|                        | 24   | Unrestricted  |                                     | 123,961.          | 138,442.       |                       |
|                        | 25   | Temporarily restricted  |                                     | 12,209.           | 12,269.        |                       |
|                        | 26   | Permanently restricted  |                                     |                   |                |                       |
|                        | Foundations that do not follow SFAS 117, check here and complete lines 27 through 31.                |   | <input type="checkbox"/>            |                   |                |                       |
|                        | 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  |                                     |                   |                |                       |
|                        | 30   | <b>Total net assets or fund balances</b> (see instructions)   |                                     | 136,170.          | 150,711.       |                       |
|                        | 31   | <b>Total liabilities and net assets/fund balances</b> (see instructions)  |                                     | 136,170.          | 150,711.       |                       |

## 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 | 136,170. |
| 2 | Enter amount from Part I, line 27a   | 2 | 16,594.  |
| 3 | Other increases not included in line 2 (itemize)   | 3 |          |
| 4 | Add lines 1, 2, and 3  | 4 | 152,764. |
| 5 | Decreases not included in line 2 (itemize) <b>SEE STATEMENT 4</b>  | 5 | 2,053.   |
| 6 | Total net assets or fund balances at end of year (line 4 minus line 5) — Part II, column (b), line 30  | 6 | 150,711. |

**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<br>P — Purchase<br>D — Donation | (c) Date acquired<br>(month, day, year) | (d) Date sold<br>(month, day, year) |
|--|--|---|-------------------------------------|
| 1 a BANK OF AMERICA CORP INTERNOTES  | P  | 10/22/08                                | 11/15/11                            |
| b  |  |   |                                     |
| c  |  |   |                                     |
| d  |  |   |                                     |
| e  |  |   |                                     |

| (e) Gross sales price | (f) Depreciation allowed<br>(or allowable) | (g) Cost or other basis<br>plus expense of sale | (h) Gain or (loss)<br>(e) plus (f) minus (g) |
|-----------------------|--|---|--|
| a 5,000.              |  | 4,903.  | 97.  |
| b                     |  |   |  |
| c                     |  |   |  |
| d                     |  |   |  |
| e                     |  |   |  |

| Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69 |                                      |   | (l) Gains (Column (h)<br>gain minus column (k), but not less<br>than -0-) or Losses (from column (h)) |
|---|--------------------------------------|---|---|
| (i) Fair Market Value<br>as of 12/31/69   | (j) Adjusted basis<br>as of 12/31/69 | (k) Excess of column (i)<br>over column (j), if any |   |
| a   |                                      |   | 97.   |
| b   |                                      |   |   |
| c   |                                      |   |   |
| d   |                                      |   |   |
| e   |                                      |   |   |

|   |  |   |     |
|---|--|---|-----|
| 2 Capital gain net income or (net capital loss).                                | <div> <div>If gain, also enter in Part I, line 7</div> <div>If (loss), enter -0- in Part I, line 7</div> </div>                      | 2 | 97. |
| 3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6). | <div> <div>If gain, also enter in Part I, line 8, column (c) (see instructions). If (loss), enter -0- in Part I, line 8</div> </div> | 3 | 0.  |

**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)<br>Base period years<br>Calendar year (or tax year<br>beginning in)                                      | (b)<br>Adjusted qualifying distributions | (c)<br>Net value of<br>noncharitable-use assets | (d)<br>Distribution ratio<br>(column (b) divided by column (c)) |
| 2010   | 29,106.                                  |   |   |
| 2009   | 19,994.                                  |   |   |
| 2008   | 26,976.                                  |   |   |
| 2007   | 29,947.                                  |   |   |
| 2006   | 95,067.                                  |   |   |

|  |   |         |
|--|---|---------|
| 2 Total of line 1, column (d)  | 2 |         |
| 3 Average distribution ratio for the 5-year base period — divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years | 3 |         |
| 4 Enter the net value of noncharitable-use assets for 2011 from Part X, line 5   | 4 |         |
| 5 Multiply line 4 by line 3  | 5 |         |
| 6 Enter 1% of net investment income (1% of Part I, line 27b)   | 6 | 32.     |
| 7 Add lines 5 and 6  | 7 | 32.     |
| 8 Enter qualifying distributions from Part XII, line 4   | 8 | 28,010. |

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

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

|   |    |   |     |
|---|----|---|-----|
| 1 a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter 'N/A' on line 1.<br>Date of ruling or determination letter. _____ (attach copy of letter if necessary – see instrs) |    |   |     |
| b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b  |    | 1 | 32. |
| 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 | 32. |
| 4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)   |    | 4 | 0.  |
| 5 <b>Tax based on investment income.</b> Subtract line 4 from line 3. If zero or less, enter -0-  |    | 5 | 32. |
| 6 Credits/Payments:   |    |   |     |
| a 2011 estimated tax pmts and 2010 overpayment credited to 2011   | 6a |   |     |
| 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  |   | 0.  |
| 8 Enter any <b>penalty</b> for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached  | 8  |   |     |
| 9 <b>Tax due.</b> If the total of lines 5 and 8 is more than line 7, enter amount owed  | 9  |   | 32. |
| 10 <b>Overpayment.</b> If line 7 is more than the total of lines 5 and 8, enter the amount overpaid   | 10 |   |     |
| 11 Enter the amount of line 10 to be: <b>Credited to 2012 estimated tax</b> <input type="checkbox"/> <b>Refunded</b> <input type="checkbox"/>   | 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?  | 1a  | X   |
| b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see the instructions for definition)?<br><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> | 1b  | X   |
| c Did the foundation file <b>Form 1120-POL</b> for this year?   | 1c  | X   |
| d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year:<br>(1) On the foundation <input type="checkbox"/> \$ 0. (2) On foundation managers <input type="checkbox"/> \$ 0.  |     |     |
| e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. <input type="checkbox"/> \$ 0.  |     |     |
| 2 Has the foundation engaged in any activities that have not previously been reported to the IRS?<br><i>If 'Yes,' attach a detailed description of the activities.</i>  | 2   | 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>   | 3   | X   |
| 4 a Did the foundation have unrelated business gross income of \$1,000 or more during the year?   | 4a  | X   |
| b If 'Yes,' has it filed a tax return on <b>Form 990-T</b> for this year?   | 4b  | N/A |
| 5 Was there a liquidation, termination, dissolution, or substantial contraction during the year?<br><i>If 'Yes,' attach the statement required by General Instruction T</i>   | 5   | X   |
| 6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either:<br>• By language in the governing instrument, or<br>• 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?                | 6   | 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>  | 7   | X   |
| 8 a Enter the states to which the foundation reports or with which it is registered (see instructions)<br>N/A   |     |     |
| b If the answer is 'Yes' to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? <i>If 'No,' attach explanation</i>  | 8b  | 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 2011 or the taxable year beginning in 2011 (see instructions for Part XIV)? <i>If 'Yes,' complete Part XIV</i>   | 9   | X   |
| 10 Did any persons become substantial contributors during the tax year? <i>If 'Yes,' attach a schedule listing their names and addresses</i>  | 10  | 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 make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If 'Yes,' attach statement (see instructions)  | 12  |   | X                        |
| 13  | Did the foundation comply with the public inspection requirements for its annual returns and exemption application?<br>Website address _____ ▶ N/A  | 13  | X |                          |
| 14  | The books are in care of ▶ <u>ATTY. PAUL OTZEL</u> Telephone no ▶ <u>(203) 874-6773</u><br>Located at ▶ <u>250 BROAD STREET MILFORD CT</u> ZIP + 4 ▶ <u>06460</u>                         |     |   |                          |
| 15  | Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 — Check here<br>and enter the amount of tax-exempt interest received or accrued during the year .  | N/A | ▶ | <input type="checkbox"/> |
| 16  | At any time during calendar year 2011, 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  |   | X                        |
| See 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.

|  | Yes | No  |
|--|-----|-----|
| 1a During the year did the foundation (either directly or indirectly):   |     |     |
| (1) Engage in the sale or exchange, or leasing of property with a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No   |     |     |
| (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No   |     |     |
| (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No   |     |     |
| (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No   |     |     |
| (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No  |     |     |
| (6) Agree to pay money or property to a government official? (Exception. Check 'No' if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No   |     |     |
| b If any answer is 'Yes' to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)?   | 1b  | N/A |
| Organizations relying on a current notice regarding disaster assistance check here ▶ <input type="checkbox"/>  |     |     |
| 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 2011?  | 1c  | X   |
| 2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)).   |     |     |
| a At the end of tax year 2011, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2011? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No<br>If 'Yes,' list the years ▶ 20__ , 20__ , 20__ , 20__  |     |     |
| b Are there any years listed in 2a for which the foundation is <b>not</b> applying the provisions of section 4942(a)(2) (relating to incorrect 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)  | 2b  | N/A |
| c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here<br>▶ 20__ , 20__ , 20__ , 20__   |     |     |
| 3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No  |     |     |
| b If 'Yes,' did it have excess business holdings in 2011 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 2011) | 3b  | N/A |
| 4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?   | 4a  | X   |
| b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2011?  | 4b  | 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 N/A

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?N/A ☐ 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**b** If 'Yes,' did the foundation receive any proceeds or have any net income attributable to the transaction?

N/A

7b

**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      |   | 0.  | 0.  | 0.                                    |
|                      |   |   |   |                                       |
|                      |   |   |   |                                       |
|                      |   |   |   |                                       |
|                      |   |   |   |                                       |
|                      |   |   |   |                                       |

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

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

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

0

**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 |                     | 0                |

**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 N/A |          |
| 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 N/A  |        |
| 2  |        |
| All other program-related investments. See instructions  |        |
| 3  |        |
| Total. Add lines 1 through 3   | 0.     |

BAA

Form 990-PF (2011)



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

|  |            |    |
|--|------------|----|
| <b>1</b> Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes: |            |    |
| <b>a</b> Average monthly fair market value of securities   | <b>1 a</b> |    |
| <b>b</b> Average of monthly cash balances  | <b>1 b</b> |    |
| <b>c</b> Fair market value of all other assets (see instructions)  | <b>1 c</b> |    |
| <b>d Total</b> (add lines 1a, b, and c)  | <b>1 d</b> | 0. |
| <b>e</b> Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)   | <b>1 e</b> |    |
| <b>2</b> Acquisition indebtedness applicable to line 1 assets  | <b>2</b>   |    |
| <b>3</b> Subtract line 2 from line 1d  | <b>3</b>   |    |
| <b>4</b> Cash deemed held for charitable activities Enter 1-1/2% of line 3 (for greater amount, see instructions)    | <b>4</b>   |    |
| <b>5 Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. Enter here and on Part V, line 4        | <b>5</b>   | 0. |
| <b>6 Minimum investment return.</b> Enter 5% of line 5   | <b>6</b>   | 0. |

**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.)

|  |            |      |
|--|------------|------|
| <b>1</b> Minimum investment return from Part X, line 6   | <b>1</b>   |      |
| <b>2a</b> Tax on investment income for 2011 from Part VI, line 5   | <b>2 a</b> | 32.  |
| <b>b</b> Income tax for 2011 (This does not include the tax from Part VI.)                                 | <b>2 b</b> |      |
| <b>c</b> Add lines 2a and 2b   | <b>2 c</b> | 32.  |
| <b>3</b> Distributable amount before adjustments Subtract line 2c from line 1                              | <b>3</b>   | -32. |
| <b>4</b> Recoveries of amounts treated as qualifying distributions   | <b>4</b>   |      |
| <b>5</b> Add lines 3 and 4   | <b>5</b>   | -32. |
| <b>6</b> Deduction from distributable amount (see instructions)  | <b>6</b>   |      |
| <b>7 Distributable amount</b> as adjusted. Subtract line 6 from line 5 Enter here and on Part XIII, line 1 | <b>7</b>   | 0.   |

**Part XII Qualifying Distributions** (see instructions)

|   |            |         |
|---|------------|---------|
| <b>1</b> Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:   |            |         |
| <b>a</b> Expenses, contributions, gifts, etc. — total from Part I, column (d), line 26  | <b>1 a</b> | 28,010. |
| <b>b</b> Program-related investments — total from Part IX-B   | <b>1 b</b> |         |
| <b>2</b> Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes  | <b>2</b>   |         |
| <b>3</b> Amounts set aside for specific charitable projects that satisfy the  |            |         |
| <b>a</b> Suitability test (prior IRS approval required)   | <b>3 a</b> |         |
| <b>b</b> Cash distribution test (attach the required schedule)  | <b>3 b</b> |         |
| <b>4 Qualifying distributions.</b> Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4  | <b>4</b>   | 28,010. |
| <b>5</b> 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) | <b>5</b>   | 32.     |
| <b>6 Adjusted qualifying distributions.</b> Subtract line 5 from line 4   | <b>6</b>   | 27,978. |

**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.

BAA

Form 990-PF (2011)

**Part XIII Undistributed Income** (see instructions)

|   | (a)<br>Corpus | (b)<br>Years prior to 2010 | (c)<br>2010 | (d)<br>2011 |
|---|---------------|----------------------------|-------------|-------------|
| <b>1</b> Distributable amount for 2011 from Part XI, line 7   |               |                            |             | 0.          |
| <b>2</b> Undistributed income, if any, as of the end of 2011:   |               |                            |             |             |
| <b>a</b> Enter amount for 2010 only   |               |                            | 0.          |             |
| <b>b</b> Total for prior years 20__, 20__, 20__   |               | 0.                         |             |             |
| <b>3</b> Excess distributions carryover, if any, to 2011:   |               |                            |             |             |
| <b>a</b> From 2006  | 95,086.       |                            |             |             |
| <b>b</b> From 2007  | 29,972.       |                            |             |             |
| <b>c</b> From 2008  | 26,990.       |                            |             |             |
| <b>d</b> From 2009  | 20,026.       |                            |             |             |
| <b>e</b> From 2010  | 29,139.       |                            |             |             |
| <b>f</b> Total of lines 3a through e  | 201,213.      |                            |             |             |
| <b>4</b> Qualifying distributions for 2011 from Part XII, line 4: \$ 28,010.  |               |                            |             |             |
| <b>a</b> Applied to 2010, but not more than line 2a   |               |                            | 0.          |             |
| <b>b</b> Applied to undistributed income of prior years (Election required — see instructions)  |               | 0.                         |             |             |
| <b>c</b> Treated as distributions out of corpus (Election required — see instructions)  | 0.            |                            |             |             |
| <b>d</b> Applied to 2011 distributable amount   |               |                            |             | 0.          |
| <b>e</b> Remaining amount distributed out of corpus   | 28,010.       |                            |             |             |
| <b>5</b> Excess distributions carryover applied to 2011 (If an amount appears in column (d), the same amount must be shown in column (a).)  | 0.            |                            |             | 0.          |
| <b>6</b> Enter the net total of each column as indicated below:   |               |                            |             |             |
| <b>a</b> Corpus: Add lines 3f, 4c, and 4e. Subtract line 5  | 229,223.      |                            |             |             |
| <b>b</b> Prior years' undistributed income. Subtract line 4b from line 2b   |               | 0.                         |             |             |
| <b>c</b> 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.                         |             |             |
| <b>d</b> Subtract line 6c from line 6b. Taxable amount — see instructions   |               | 0.                         |             |             |
| <b>e</b> Undistributed income for 2010. Subtract line 4a from line 2a. Taxable amount — see instructions  |               |                            | 0.          |             |
| <b>f</b> Undistributed income for 2011. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2012  |               |                            |             | 0.          |
| <b>7</b> Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions)                                  | 0.            |                            |             |             |
| <b>8</b> Excess distributions carryover from 2006 not applied on line 5 or line 7 (see instructions)  | 95,086.       |                            |             |             |
| <b>9</b> Excess distributions carryover to 2012. Subtract lines 7 and 8 from line 6a  | 134,137.      |                            |             |             |
| <b>10</b> Analysis of line 9:   |               |                            |             |             |
| <b>a</b> Excess from 2007   | 29,972.       |                            |             |             |
| <b>b</b> Excess from 2008   | 26,990.       |                            |             |             |
| <b>c</b> Excess from 2009   | 20,026.       |                            |             |             |
| <b>d</b> Excess from 2010   | 29,139.       |                            |             |             |
| <b>e</b> Excess from 2011   | 28,010.       |                            |             |             |

N/A

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

- b 85% of line 2a**

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

- 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**

## 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.

SEE STATEMENT 6

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

SEE STATEMENT FOR LINE 2A

- c** Any submission deadlines:

SEE STATEMENT FOR LINE 2A

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

SEE STATEMENT FOR LINE 2A

**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)              |   |                                |                                  |         |
| <b>a</b> Paid during the year<br>SEE STATEMENT 7 |   |                                |                                  |         |
| <b>Total</b>                                     |   |                                | <b>3a</b>                        | 28,010. |
| <b>b</b> Approved for future payment             |   |                                |                                  |         |
| <b>Total</b>                                     |   |                                | <b>3b</b>                        |         |

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

Enter gross amounts unless otherwise indicated.

| Enter gross amounts unless otherwise indicated. |  | Unrelated business income |               | Excluded by section 512, 513, or 514 |               | (e)<br>Related or exempt<br>function income<br>(See instructions) |
|---|--|---------------------------|---------------|--------------------------------------|---------------|---|
|   |  | (a)<br>Business<br>code   | (b)<br>Amount | (c)<br>Exclu-<br>sion<br>code        | (d)<br>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                                   |               |   |
| 4   | Dividends and interest from securities                   |                           |               | 14                                   | 3,136.        |   |
| 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 |                           |               |                                      |               | 97.   |
| 9   | Net income or (loss) from special events                 |                           |               |                                      |               |   |
| 10  | Gross profit or (loss) from sales of inventory           |                           |               |                                      |               |   |
| 11  | Other revenue:   |                           |               |                                      |               |   |
| a   | HARLEY RAFFLE  |                           |               | 1                                    | 26,996.       |   |
| b   |  |                           |               |                                      |               |   |
| c   |  |                           |               |                                      |               |   |
| d   |  |                           |               |                                      |               |   |
| e   |  |                           |               |                                      |               |   |
| 12  | Subtotal. Add columns (b), (d), and (e)                  |                           |               |                                      | 30,132.       | 97.   |
| 13  | Total. Add line 12, columns (b), (d), and (e)            |                           |               |                                      | 13            | 30,229.   |

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

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

[illegible]



2011

## FEDERAL STATEMENTS

PAGE 1

DEVON ROTARY FOUNDATION TRUST FUND

22-2959085

STATEMENT 1  
FORM 990-PF, PART I, LINE 11  
OTHER INCOME

|               | (A)<br>REVENUE<br>PER BOOKS | (B) NET<br>INVESTMENT<br>INCOME | (C)<br>ADJUSTED<br>NET INCOME |
|---------------|-----------------------------|---------------------------------|-------------------------------|
| HARLEY RAFFLE | \$ 26,996.                  |                                 |                               |
| TOTAL         | \$ 26,996.                  | \$ 0.                           | \$ 0.                         |

STATEMENT 2  
FORM 990-PF, PART I, LINE 16B  
ACCOUNTING FEES

|       | (A)<br>EXPENSES<br>PER BOOKS | (B) NET<br>INVESTMENT<br>INCOME | (C)<br>ADJUSTED<br>NET INCOME | (D)<br>CHARITABLE<br>PURPOSES |
|-------|------------------------------|---------------------------------|-------------------------------|-------------------------------|
|       | \$ 400.                      | \$ 13.                          |                               |                               |
| TOTAL | \$ 400.                      | \$ 13.                          | \$ 0.                         | \$ 0.                         |

STATEMENT 3  
FORM 990-PF, PART I, LINE 18  
TAXES

|       | (A)<br>EXPENSES<br>PER BOOKS | (B) NET<br>INVESTMENT<br>INCOME | (C)<br>ADJUSTED<br>NET INCOME | (D)<br>CHARITABLE<br>PURPOSES |
|-------|------------------------------|---------------------------------|-------------------------------|-------------------------------|
|       | \$ 15.                       |                                 |                               |                               |
| TOTAL | \$ 15.                       | \$ 0.                           | \$ 0.                         | \$ 0.                         |

STATEMENT 4  
FORM 990-PF, PART III, LINE 5  
OTHER DECREASES

|                                |  |           |
|--------------------------------|--|-----------|
| UNREALIZED LOSS ON INVESTMENTS |  | \$ 2,053. |
| TOTAL                          |  | \$ 2,053. |

## DEVON ROTARY FOUNDATION TRUST FUND

22-2959085

**STATEMENT 5**  
**FORM 990-PF, PART VIII, LINE 1**  
**LIST OF OFFICERS, DIRECTORS, TRUSTEES, AND KEY EMPLOYEES**

| NAME AND ADDRESS   | TITLE AND<br>AVERAGE HOURS<br>PER WEEK DEVOTED | COMPEN-<br>SATION | CONTRI-<br>BUTION TO<br>EBP & DC | EXPENSE<br>ACCOUNT/<br>OTHER |
|--|--|-------------------|----------------------------------|------------------------------|
| PAUL LEWIS OTZEL<br>23 FLAX MILL TERRACE<br>MILFORD, CT 06460    | SECRETARY/TREAS<br>0                           | \$ 0.             | \$ 0.                            | \$ 0.                        |
| RAYMOND A MACALUSO<br>14 SANDPIPER CRESCENT<br>MILFORD, CT 06460 | DIRECTOR<br>0                                  | 0.                | 0.                               | 0.                           |
| PAUL W. AUSTIN<br>136 PLATT LANE<br>MILFORD, CT 06460            | DIRECTOR<br>0                                  | 0.                | 0.                               | 0.                           |
| JAMES SECONDI<br>99 MELBA STREET<br>MILFORD, CT 06460            | DIRECTOR<br>0                                  | 0.                | 0.                               | 0.                           |
| DAVID SLOSSBERG<br>14 HONEYSUCKLE LANE<br>MILFORD, CT 06461      | DIRECTOR<br>0                                  | 0.                | 0.                               | 0.                           |
| MICHAEL ZANARINI<br>54 ROLLER TERRACE<br>MILFORD, CT 06461       | DIRECTOR<br>0                                  | 0.                | 0.                               | 0.                           |
| JAMES MARONEY<br>8 POINT BEACH<br>MILFORD, CT 06460              | DIRECTOR<br>0                                  | 0.                | 0.                               | 0.                           |
| SAMUEL ALAGNO<br>6 ELIZABETH STREET<br>SHELTON, CT 06484         | DIRECTOR<br>0                                  | 0.                | 0.                               | 0.                           |
| TOTAL  |  | \$ 0.             | \$ 0.                            | \$ 0.                        |

**STATEMENT 6**  
**FORM 990-PF, PART XV, LINE 2A-D**  
**APPLICATION SUBMISSION INFORMATION**

|                         |   |
|-------------------------|---|
| NAME OF GRANT PROGRAM:  |   |
| NAME:                   | DEVON ROTARY CLUB   |
| CARE OF:                | PAUL LEWIS OTZEL  |
| STREET ADDRESS:         | PO BOX 421  |
| CITY, STATE, ZIP CODE:  | MILFORD, CT 06460   |
| TELEPHONE:              |   |
| FORM AND CONTENT:       | APPLICATION IS ATTACHED AND AVAILABLE ONLINE AT<br>WWW.DEVONROTARY.ORG AND AT KAPUSTA & OTZEL, 250 BROAD<br>STREET, MILFORD, CT 06460 |
| SUBMISSION DEADLINES:   | APRIL, 2012   |
| RESTRICTIONS ON AWARDS: | SEE APPLICATION REGARDING VARIOUS SCHOLARSHIP LIMITATIONS<br>AND AWARDS   |



## DEVON ROTARY FOUNDATION TRUST FUND

22-2959085

**STATEMENT 7**  
**FORM 990-PF, PART XV, LINE 3A**  
**RECIPIENT PAID DURING THE YEAR**

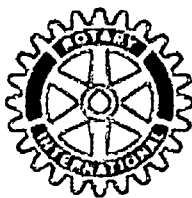
| NAME AND ADDRESS  | DONEE<br>RELATIONSHIP | FOUND-<br>ATION<br>STATUS | PURPOSE OF<br>GRANT            | AMOUNT  |
|---|-----------------------|---------------------------|--------------------------------|---------|
| DEVON ROTARY KNIGHTS<br>BASKETBALL LEAGUE<br>MILFORD, CT 06460, | NONE                  |                           | TO PROMOTE<br>COMMUNITY SPIRIT | \$ 705. |
| SHELJA PATEL<br>MILFORD, CT 06460,                              | NONE                  |                           | SCHOLARSHIP                    | 1,000.  |
| PHOEBE FRENCH<br>MILFORD, CT 06460,                             | NONE                  |                           | SCHOLARSHIP                    | 1,000.  |
| BING ZHENG<br>MILFORD, CT 06460,                                | NONE                  |                           | SCHOLARSHIP                    | 1,000.  |
| NAYAB MIR<br>MILFORD, CT 06460,                                 | NONE                  |                           | SCHOLARSHIP                    | 1,000.  |
| ALYSSA DAVANZA<br>MILFORD, CT 06460,                            | NONE                  |                           | SCHOLARSHIP                    | 1,000.  |
| ELIZABETH TOMASCO<br>MILFORD, CT 06460,                         | NONE                  |                           | SCHOLARSHIP                    | 1,000.  |
| FAREED HANANIA<br>MILFORD, CT 06460,                            | NONE                  |                           | SCHOLARSHIP                    | 1,000.  |
| RYAN BYTRIAK<br>MILFORD, CT 06460,                              | NONE                  |                           | SCHOLARSHIP                    | 1,000.  |
| KAITLYN BRANNIGAN<br>MILFORD, CT 06460,                         | NONE                  |                           | SCHOLARSHIP                    | 1,000.  |
| BRITTNEY CARROLL<br>MILFORD, CT 06460,                          | NONE                  |                           | SCHOLARSHIP                    | 1,000.  |
| CITY OF MILFORD<br>MILFORD, CT 06460,                           | NONE                  |                           | TO PROMOTE<br>COMMUNITY SPIRIT | 8,205.  |
| HANNAH KISSINGER<br>MILFORD, CT 06460,                          | NONE                  |                           | SCHOLARSHIP                    | 1,000.  |
| SARAH ARPJE<br>MILFORD, CT 06460,                               | NONE                  |                           | SCHOLARSHIP                    | 1,000.  |
| ANDREW HERRICK<br>MILFORD, CT 06460,                            | NONE                  |                           | SCHOLARSHIP                    | 1,000.  |
| ZACHARY SABO<br>MILFORD, CT 06460,                              | NONE                  |                           | SCHOLARSHIP                    | 1,000.  |
| RCHEL BORDEN<br>MILFORD, CT 06460,                              | NONE                  |                           | SCHOLARSHIP                    | 1,000.  |

## DEVON ROTARY FOUNDATION TRUST FUND

22-2959085

STATEMENT 7 (CONTINUED)  
FORM 990-PF, PART XV, LINE 3A  
RECIPIENT PAID DURING THE YEAR

| <u>NAME AND ADDRESS</u>                       | <u>DONEE<br/>RELATIONSHIP</u> | <u>FOUND-<br/>ATION<br/>STATUS</u> | <u>PURPOSE OF<br/>GRANT</u> | <u>AMOUNT</u>     |
|---|-------------------------------|------------------------------------|-----------------------------|-------------------|
| CASANDRA HOLVECK<br>MILFORD, CT 06460,        | NONE                          |                                    | SCHOLARSHIP                 | \$ 1,000.         |
| KATHRYN BLAIR<br>MILFORD, CT 06460,           | NONE                          |                                    | SCHOLARSHIP                 | 1,000.            |
| JACOB HUDSON<br>MILFORD, CT 06460,            | NONE                          |                                    | SCHOLARSHIP                 | 500.              |
| MEAGAN LISCINSKY<br>MILFORD, CT 06460,        | NONE                          |                                    | SCHOLARSHIP                 | 500.              |
| NYASIA RAMOS<br>MILFORD, CT 06460,            | NONE                          |                                    | SCHOLARSHIP                 | 500.              |
| COSTCO GOLF SPONSORSHIP<br>MILFORD, CT 06460, | NONE                          |                                    | COMMUNITY<br>GOODWILL       | 100.              |
| JOKARI TRUEHEART<br>MILFORD, CT               | NONE                          |                                    | SCHOLARSHIP                 | 500.              |
| TOTAL   |                               |                                    |                             | \$ <u>28,010.</u> |



## **Devon Rotary Club**

PO Box 421  
Milford, CT 06460

22-2959085

### **Devon Rotary 2014 Scholarships**

#### **Paul Austin Scholarship**

This scholarship is a \$1000 scholarship per year, renewable for four years. It is designated for a student graduating from Jonathan Law who will be attending a 4-year college in the Fall. This scholarship is based on academics, service, need, and high school activities. It is renewable provided that the student maintains a 3.0 college GPA and is enrolled as a full time student.

#### **Frederick De Luca Foundation Scholarship**

This \$1,000 scholarship is made possible through a grant from the DeLuca Foundation. It is designated for a graduating senior from Jonathan Law who will be attending a 4-year college in the Fall. Preference is given to Subway employees. This scholarship is based on academics, service, need, and high school activities.

#### **Dodie Ireland Memorial Scholarship**

This scholarship was established in memory of Gloria "Dodie" Ireland, a past member of the Devon Rotary who was extremely devoted to youth, and especially to the students at Platt Tech. This \$1,000 scholarship has been designated for a graduate of Platt RVTS who will be continuing his or her education at an accredited post-graduate institution.

#### **Duke Scholarship**

This scholarship is a \$1,000 award made possible by a donation from the Hassenmayer family. It is for any student graduating from a Milford high school or Milford resident graduating from any high school who is continuing his or her education at an accredited post-graduate institution. It is designated for a student who will be studying animal sciences, pre-veterinary studies, or any related major. It is based on service, need, and academics.

#### **Devon Rotary City Wide Scholarship**

This is a \$1,000 scholarship for any student graduating from a Milford high school or Milford resident graduating from any high school. This award is based on Academics, service, need, and activities

#### **John D. Gaynor Memorial Scholarship**

This is a \$1,000 scholarship for any student graduating from a Milford high school or Milford resident graduating from any high school who is continuing his or her education at a 4-year college. This is designated for a student who will be pursuing a degree in business, with additional consideration given to students who are interested in entrepreneurship. This scholarship is based on service, academics, and need.

#### **Barbara Burwell Gaynor Memorial Scholarship**

This is a \$1,000 scholarship for any student graduating from a Milford high school or any Milford student graduating from any high school who is continuing his or her education at a 4-year college. This is a designated for a student who will be pursuing a degree in education with the hopes of becoming a teacher. This scholarship is based on service, academics, and need.

**Steven G. Memorial Scholarship**

This is a \$1,000 a year scholarship renewable for 4-years. It is open to any student graduating from a Milford high school or any Milford resident graduating from any high school. This is designated for a student studying marine biology, aquatic sciences, or a related major, or for a student who has shown concern for the environment and an interest in marine life. This scholarship is based on service, academics, and need.

**Edward V. Bierne Memorial Scholarship**

This is a one-time \$1,000 scholarship. It is open to students from Jonathan Law High School who are interested in studying Biology or other life sciences at a 4-year college. This award is made possible by a donation from Jesse Thompson in honor of Edward V. Bierne, a former city science teacher.

**The Stanford Family Scholarship**

This is a one-time \$500 scholarship. It is open to students from Jonathan Law or Foran High Schools, and it is based on need and academics. Special consideration is given for a students who have overcome adversity. This award is made possible by a donation from the Stanford family.

# Devon Rotary 2011/2012 Scholarship Application



# 22-2959085

**NAME OF SCHOLARSHIP ORGANIZATION:**

**APPLICANT INFORMATION**

Full legal name

LAST

FIRST

MIDDLE

Mailing Address

Phone Number:

Email Address:

**EDUCATION**

High School

Address:

Phone:

Guidance Counselor's name:

Actual or Expected Graduation Date:

If you have attended more than one high school, please attach a separate piece of paper with the high school name(s), dates you attended, and reason for leaving.

**EMPLOYMENT HISTORY**

If you have worked regularly, please include it below. You may list the informal work that you have done such as baby-sitter, odd-jobs, lawn mowing, or other similar types of work, but you do not need to provide the names of the families for whom you have worked.

Name of employer

City, State:

Type of work:

Dates employed:

From:

To:

Average hours per week:

Name of employer

City, State:

Type of work:

Dates employed:

From:

To:

Average hours per week:

If you have additional employers, please attach on a separate sheet of paper the name of the employer(s), city, state, type of work, dates employed, and average number of hours worked per week.

Do you plan to work in college?

If so where?

Will you work this summer?

If so, what are your expected summer earnings?

# 22-2959085

**VOLUNTEER AND COMMUNITY SERVICE**

Name of Organization:

City, State:

Type of service:

Dates volunteered: From: To: Average hours per week:

Name of Organization:

City, State:

Type of service:

Dates volunteered: From: To: Average hours per week:

Name of Organization:

City, State:

Type of service:

Dates volunteered: From: To: Average hours per week:

**EXTRACURRICULAR, SPORTS, AND OTHER ACTIVITIES**

Briefly list the clubs, sports, and other activities in which you have been involved, and indicate any leadership positions held, awards or accomplishments. Activities can be either in school or out of school activities. If you need extra space, please attach an additional sheet. Feel free to attach a resume, but please also fill in this area in order of importance of the activity to you.

**Activity****Positions, Awards, Accomplishments****HONORS AND AWARDS****COLLEGE APPLICATIONS**

Please list the name(s) of the college(s) or trade school(s) where you have applied and the status of your application(s).

College Applied to

Status

Amount of Financial Aid offered by college

# 22-2959085

**FIELD OF STUDY**

College Major(s)

College Minor(s)

Future Career Goals:

**OTHER SCHOLARSHIPS**

Please list the name(s) of any other scholarships(s) you have applied for, and the status of your applications.

Scholarship Name:

Awarding Organization:

Amount applied for: Status: Pending Awarded \$ Denied

Scholarship Name:

Awarding Organization:

Amount applied for: Status: Pending Awarded Denied

Scholarship Name:

Awarding Organization:

Amount applied for: Status: Pending Awarded Denied

**FAMILY INFORMATION**

Father's Name

Father's Occupation

Father's Employer

Employer's Address

Mother's Name

Mother's Occupation

Mother's Employer

Employer's Address

Parent's Marital Status

Who do you live with?

Does your custodial parent receive child support?

How much per month?

Number of siblings

Ages of siblings

**ADDITIONAL INFORMATION**

Please attach a page briefly explaining any personal or family circumstances or information that you would like the scholarship committee to take into consideration when reviewing your application:

**GENERAL APPLICATION COVER SHEET**

I have enclosed the following materials:

M.I.

Date

General Scholarship Application Cover sheet

Official High School transcript (grades, GPA, class rank, and SAT scores)

Letters of recommendation (1 Academic)

# 22-2959085

|  |      |
|--|------|
| SAR (Student Aid Report) Please include all pages  |      |
| I have not yet received my SAR, but will send it to you by _____ (Month/Day/Year)  |      |
| Brief essay detailing your future goals, plans, and reasons for needing this scholarship.  |      |
| Cover Letter   |      |
| Additional materials required for this scholarship (list)  |      |
| Please check with your guidance office to find out their deadline for submitting our scholarship. Devon Rotary requires the submission of the original application plus 3 copies. All completed applications must be received by April 26, 2011. |      |
| <b>DISCLAIMER AND SIGNATURE</b>  |      |
| The undersigned hereby certifies that the information provided in this application is true to the best of their knowledge. Knowingly providing erroneous or misleading information will render this application ineligible for consideration.    |      |
| If you are awarded funds and you are unable to use them for the intended purpose you agree to contact the scholarship committee.   |      |
| Student's Signature  | Date |
| Parent's Signature   | Date |

**Please Circle the Scholarships that You Would Like to be Considered for:**

- Paul Austin Scholarship
- Frederick De Luca Foundation Scholarship
- Dodie Ireland Memorial Scholarship
- Duke (the dog) Scholarship
- Devon Rotary City Wide Scholarship
- John D. Gaynor Memorial Scholarship
- Barbara Burwell Gaynor Memorial Scholarship
- Steven G. Memorial Scholarship
- Edward V. Bierne Memorial Scholarship
- Stanford Family Scholarship