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Fcim **990-PF**

Department of the Treasury Internal Pevenue Service

Return of Private Foundation

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

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

OMB No 1545-0052

2011

FO	r caler	idar year 2011 or tax year beginning OLTOBE	$\mathbb{Z}/201$	ı, and e	enaing 5	SYTEMBEL	30,212
Na	ime of fo	undation			A Employer	identification number	
7	1465	WALLINGFORD HISZORICAL	SCIETY	we	06	-60351d	P
Nu	umber an	WALLINGSORD HISZORICAL d street (or P.O. box number if mail is not delivered to street address)	Room	/suite	B Telephone	number (see instruction	is)
P.O.BOX 73 203.269.9							
Cri	tv or tow	n state and ZIP code				ion application is pend	
	-	_	カママ		C ir exempi	ion application is peno	ing, check here
_	Chapt	All that apply: Initial return Initial return	a of a formar public	ob ovity			
G	Check		of a former public	Charity	D 1. Foreigi	n organizations, check	here ► 📗
						n organizations meeting	
		Address change Name cha			check	here and attach compu	tation ►
Н		type of organization: Section 501(c)(3) exempt p				foundation status was	
<u> </u>		n 4947(a)(1) nonexempt charitable trust 🔲 Other tax			section 5	07(b)(1)(A) check here	. ▶□
ı		narket value of all assets at J Accounting method	l: MX_Cash ∐ Ad	ccrual		ndation is in a 60-mont	h termination
		f year (from Part II, col. (c), Other (specify)			underse	ction 507(b)(1)(B) checl	chere
_		6) ► \$ 1 179 , 90 2 (Part I, column (d) must be	on cash basis)	<u></u>		, .	
Р	art I	Analysis of Revenue and Expenses (The total of	(a) Revenue and	(b) Net	ınvestment	(c) Adjusted net	(d) Disbuisements for charitable
		amounts in columns (b), (c), and (d) may not necessarily equal	expenses per books		come	income	purposes
		the amounts in column (a) (see instructions))	Dooks				(cash basis only)
	1	Contributions, gifts, grants, etc., received (attach schedule)	12,160				
30	2	Check ► 🔀 f the foundation is not required to attach Sch. B					
.D	3	Interest on savings and temporary cash investments	60		COD	(ato	
<u> </u>	4	Dividends and interest from securities	8235	8	235	8231	
雲	5a	Gross rents					
	Ь	Net rental income or (loss)					
် စ	6a	Net gain or (loss) from sale of assets not on line 10					
AON evenue	b	Gross sales price for all assets on line 6a					
<u>چ</u>	7	Capital gain net income (from Part IV, line 2)			(D)		
E	8	· · · · · · · · · · · · · · · · · · ·			Ψ	<i>C</i> 0	
en	ł	Net short-term capital gain				φ	
	9	Income modifications					
2013	10a	Gross sales less returns and allowances					
ಡಾ	b	Less: Cost of goods sold	170				
	С	Gross profit or (loss) (attach schedule)	110				
	11	Other income (attach schedule)					
	12	Total. Add lines 1 through 11	ZD,691	d	7295	8291	
Ø	13	Compensation of officers, directors, trustees, etc.					
Se	14	Other employee salaries and wages			_		
ē	15	Pension plans, employee benefits ?					
Expenses	16a	Legarices (attach conceduc)					
	b	Accounting fees (attach schedule)				L	
Operating and Administrative	С	Other professional fees (attach schedule) 😁					
<u>, 1</u>	17	Interest					
ist	18	Taxes (attach schedule) (see instructions)	1852		1852	1852	
.⊑	19	Depreciation (attach schedule) and depletion	7.7	,			
튱	20	Occupancy	13960				13960
Ž	21	Travel, conferences, and meetings	7-5-4				T. T.
2	22	Printing and publications					
<u>س</u> ھ	23	Other expenses (attach schedule)	11488		9401	8401	.3087
<u>⊒</u>	24	Total operating and administrative expenses.	- · · · ·				
j j		Add lines 13 through 23	Z7300	11	2,213	10.253	17042
§ §	25		LTOU		<u>, - v - </u>	14-4	
୍ରଠୀୀଙ୍କ କୁଷ୍ୟକ୍ଷୀ Operating	25	- · · · · · · · · · · · · · · · · · · ·	07 ZWA	<i>p.</i> 77	0,253	10 7:00	12007
Ý —	26	Total expenses and disbursements. Add lines 24 and 25	Z7,300	1.10	1104.7	14,413	ITWIF
Ī	27	Subtract line 26 from line 12:	1000				
<u>ي</u>	а	Excess of revenue over expenses and disbursements	(6659)		Ø6		
	b	Net investment income (if negative, enter -0-) .			Ø		
	С	Adjusted net income (if negative, enter -0-)	Li	· · · · · · · · · · · · · · · · · · ·		<u> </u>	000 DE
For	Papen	vork Reduction Act Notice, see instructions.	Cat No	11289X		· Fo	ım 990-PF (2011)

06-6035188

		Attached schedules and amounts in the description column	Beginning of year	End	of year
Pa	rt II	Balance Sheets should be for end-of-year amounts only (See instructions)	(a) Book Value	(b) Book Value	(c) Fair Market Value
	1	Cash—non-interest-bearing	1484	1873	1873
	2	Savings and temporary cash investments	52,542	- 41703	41703
ļ	3	Accounts receivable ▶	7		
		Less: allowance for doubtful accounts ▶			
ĺ	4	Pledges receivable ▶			
- 1		Less: allowance for doubtful accounts ▶			
	5	Grants receivable			
- 1	6	Receivables due from officers, directors, trustees, and other			
- 1		disqualified persons (attach schedule) (see instructions)			
- 1	7	Other notes and loans receivable (attach schedule) ▶			
- }		Less: allowance for doubtful accounts ▶			
ध	8	Inventories for sale or use	6717	6566	11229
Assets	9	Prepaid expenses and deferred charges			
As	10a	Investments—U.S. and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)	780,070	786 634	760,027
	С	Investments—corporate bonds (attach schedule)			7-1
	11	investments—land, buildings, and equipment basis▶			
		Less accumulated depreciation (attach schedule) ▶			
	12	Investments-mortgage loans			
j	13	Investments—other (attach schedule)			
-	14	Land. buildings. and equipment basis ▶			
- 1		Less. accumulated depreciation (attach schedule) ▶	12.397	12,397	Z600 10000
	15				105,000
	16	Total assets (to be completed by all filers-see the		_	
		instructions. Also, see page 1, item l)	862,019	847 173	ZLD, OOO LOS, OOD 1, 179, 90Z
	17	Accounts payable and accrued expenses			
8	18	Grants payable]
<u>ë</u>	19	Deferred revenue			
Liabilities	20	Loans from officers, directors, trustees, and other disqualified persons]
<u>.e</u>	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ►			
	23	Total liabilities (add lines 17 through 22)			
es		Foundations that follow SFAS 117, check here ▶ ☐ and complete lines 24 through 26 and lines 30 and 31.			
Balances	24	Unrestricted			
<u>=</u>	25	Temporarily restricted			
	26	Permanently restricted			=
밀		Foundations that do not follow SFAS 117, check here ▶ □			
Fund		and complete lines 27 through 31.			
5	27	Capital stock, trust principal, or current funds			
\$	28	Paid-in or capital surplus, or land, bldg., and equipment fund			
Net Assets	29	Retained earnings, accumulated income, endowment, or other funds			
۲	30	Total net assets or fund balances (see instructions)	862.010	849173	1
e	31	Total liabilities and net assets/fund balances (see		 	
~		instructions)	862,010	849173	
	t III	Analysis of Changes in Net Assets or Fund Balances		, –	
1		I net assets or fund balances at beginning of year-Part II, colu			
	end-	of-year figure reported on prior year's return)			86Z,010
2	Ente	r amount from Part I, line 27a			66659
3	Othe	r increases not included in line 2 (itemize) 🕨		3	
4	Add	lines 1, 2, and 3		<u>4</u>	855,351
5	Decr	eases not included in line 2 (itemize) > SHORT-TELM INCE	SMENT LOS	S+ ADT 5	161787
6	Tota	net assets or fund balances at end of year (line 4 minus line 5) — f	Part II, column (b), lir	ne 30 6	849,173
					Form 990-PF (2011)

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, -	_		

Far	Capital Gains and	Losses for Tax on Investm	ent income			
		ne kınd(s) of property sold (e.g. real estat ise or common stock, 200 shs. MLC Co		(b) How acquired P—Purchase D—Donation	(c) Date ac	
1a						
b						
c						
d						
e						
	(e) Gross sales price (f) Depreciation allowed (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 sho	wing gain in column (h) and owned	by the foundation	on 12/31/69	m c	Same (Cal. In name areas
	(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess	s of col (i)	col ik	Gains (Col. _T hi gain minus kill but not less than -0-i or Losses (from col. (hir
a				• •	· · · · · · · · · · · · · · · · · · ·	·
<u>a</u>			0	20.		
		SEE	477	46/15	<i>/</i>	
<u>c</u>						
<u>d</u>			SPH=	DUIC		
<u>e</u>			- C/100	1000		
2	Capital gain net income o		also enter in Par enter -0- in Par		2	\mathcal{O}
3	Net short-term capital gail	n or (loss) as defined in sections	1222(5) and (6):	:		
	If gain, also enter in Part Part I, line 8	I. line 8, column (c) (see instruc	tions). If (loss),	enter -0- in)	3	(11705)
Part	V Qualification Und	er Section 4940(e) for Redu		et Investment	Income	17.00
		vate foundations subject to the s				no)
	tion 4940(d)(2) applies, leave		300 don 10 10 (a)	war off file till took		
Was t If "Ye	he foundation liable for the s." the foundation does not	section 4942 tax on the distribut qualify under section 4940(e). D	table amount of	any year in the b	ase perioc	d? ☐ Yes ☐ 1√10
1		unt in each column for each yea			eking any e	entries
	(a) Base period years	(b)		(c) nonchantable-use as		(d) Distribution ratio
Car	endar year (oi tax year beginning ini	0.00	1100 1000 31			(col. (bi divided by col. (cii
	2010	19059		79+711		
	2009	13697		815,457		-01674
	2008	20,456		875,080	·	
	2007	10.157		928 072		- DI 094
	2006	53 777		860 770		- DG 193
2	Total of line 1, column (d)				. 2	13788
3		for the 5-year base period -divid	de the total on li	ne 2 by 5, or by		
		ation has been in existence if le			. 3	
4	Enter the net value of nonc	haritable-use assets for 2011 fr	om Part X, line 5	5	. 4	803, 828
5	Multiply line 4 by line 3					22,166
6	6 Enter 1% of net investment income (1% of Part I, line 27b)					
7	Add lines 5 and 6				. 7	ZZ/66
8		ns from Part XII, line 4			. 8	17.047
		ter than line 7, check the box in	Part VI, line 1b.	and complete th	iai part usi	ng a 1% tax rate. See the
	Part VI instructions.					Form 990-PF (2011)

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Part		<u>nstruc</u>	tions	<u>) </u>
1a	Exempt operating foundations described in section 4940(d)(2) check here and enter "N/A" on line 1. Cate of ruling or determination letter: (attach copy of letter if necessary—see instructions)			
b		\mathcal{D}		
	here ▶ ☐ and enter 1% of Part I, line 27b			_
С	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b).			
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	_@		—
3	Add lines 1 and 2	<u> </u>	-	
4 5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0	$-\frac{\omega}{2}$	'	—
6	Credits/Payments:	<u> </u>	+-	
a	2011 estimated tax payments and 2010 overpayment credited to 2011 6a		- 1	
b	Exempt foreign organizations—tax withheld at source 6b		- 1	
Ç	Tax paid with application for extension of time to file (Form 6666) . 6c 44000 -		ŀ	
d	Backup withholding erroneously withheld 6d			
7	Total credits and payments. Add lines 6a through 6d	40	$Q \perp$	<u> </u>
8	Enter any penalty for underpayment of estimated tax. Check here if Form 2220 is attached 8		21	—
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	1100	2 -	_
10 11	Overpayment. If line 7 is more than the total of lines 5 and 6, enter the amount overpaid ▶ 10 Enter the amount of line 10 to be. Credited to 2012 estimated tax ▶ Refunded ▶ 11	4400	5 .	_
	VII-A Statements Regarding Activities	440		_
	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it	Y	es N	10
	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 page 19 of the instructions for definition)?	1b		X_
	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.			τ
С	Did the foundation file Form 1120-POL for this year?	1c		丛
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. ▶ \$			
е	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?	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? If "Yes," attach a conformed copy of the changes	3		سر
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a		テ
b	If "Yes," has it filed a tax return on Form 990-T for this year?	4b		E
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year?	5	-12	<u>X</u>
	If "Yes," attach the statement required by General Instruction T.			
6	Are the requirements of section 506(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? 	6		
7	Did the foundation have at least \$5.000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV	7 /	\ \ \ \	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions)		\uparrow	_
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	8b)		
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2011 or the taxable year beginning in 2011 (see instructions for Part XIV)? If "Yes," complete Part XIV	9	V	
10	Did any persons become substantial contributors during the tax year? If "Yes" attach a schedule listing their names and addresses	10		ー メ
	E-	99n_	DE m	

Pan	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?	13	X	-
	Website address ► VA		/ · · · · ·	
14	The books are in care of ▶ NOMA G. BEAUMONT Telephone no. ▶ 203	21	2/.	7.70
	Located at > 7 1 MAPLECO YOD AVE WALLINGTON CT. ZIP+4 > QGY	42	-0	D£3
15	Section 4947(a)(1) nonexempt charitable trusts filling Form 990-PF in fled of Form 1041 — Check fiere	• •	•	▶ ⊔
	and enter the amount of tax-exempt interest received or accrued during the year		· ·	<u> </u>
16	At any time during calendar year 2011, did the foundation have an interest in or a signature or other authority		Yes	No ~
	over a bank, securities, or other financial account in a foreign country?	16		4
	the foreign country ▶	l		•
		L		
Pan	VII-B Statements Regarding Activities for Which Form 4720 May Be Required		Yes	No
	File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.	$\vdash \vdash \vdash$	162	140
1a	During the year did the foundation (either directly or indirectly):			
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? Yes (1) Regress meney from lend meney to be often used exclusions as the result to for account it from 3.			
	(2) Borrow money from, tend money to, or otherwise extend credit to (or accept it from) a disqualified person?			
	- · · ·			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? Yes Yes Transfer any income or assets to a disqualified person (or make any of either available for			
	the benefit or use of a disqualified person)?			
	(6) Agree to pay money or property to a government official? (Exception. Check "No" if the			
	foundation agreed to make a grant to or to employ the official for a period after			
_	termination of government service, if terminating within 90 days.)			
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)–3 or in a current notice regarding disaster assistance (see instructions)?	1b		NA
	Organizations relying on a current notice regarding disaster assistance check here			
С	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)):			,
а	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?			
	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)			j
	(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		X
	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		,	
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise			
	at any time during the year?			
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		111
4-	•	4a		N
	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its	40		$\overline{}$
b	chantable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2011?	4b		×
		ım 99	0-PF	12011
				(

orm 99	10-PF 120171 ## ## ## ## ## ## ## ## ## ## ## ## ##	5-6	035	180	7				Page 6
Part	VII-B Statements Regarding Activities				May Be R	equire	d (continued	1)	 ,
5a	During the year did the foundation pay or incur a (1) Carry on propaganda, or otherwise attempt t (2) Influence the outcome of any specific public directly or indirectly, any voter registration dr	any amo to influei c electic	unt to: nce legislatio	on (sec	tion 4945(e))? .	Yes	No	
	(3) Provide a grant to an individual for travel, stu (4) Provide a grant to an organization other than section 509(a)(1), (2), or (3), or section 4940(d	n a char 1)(2)? (se	itable, etc., è e instruction	organız ns) .	ation desci	ibed in	Yes T		
	(5) Provide for any purpose other than religious, purposes, or for the prevention of cruelty to o	children	or animals?				☐Yes ☑	i .	
b	If any answer is "Yes" to 5a(1)–(5), did any of the Regulations section 53.4945 or in a current notice	regardın	ng disaster as	ssistand	ce (see instr			ın 5b	NA
С	Organizations relying on a current notice regarding the answer is "Yes" to question 5a(4), does to because it maintained expenditure responsibility	the foun	idation claim			the tax		U	
6a	If "Yes," attach the statement required by Regula Did the foundation, during the year, receive any on a personal benefit contract?					mums	□Yes □1	10	
b	Did the foundation, during the year, pay premium If "Yes" to 6b. file Form 8870.	ns, direc	ctly or indired	ctly, on	a personal	benefit		6b	
	At any time during the tax year, was the foundation a If "Yes," did the foundation receive any proceeds						☐ Yes ☐/1 ransaction? .	√0 7b	$ _{\mathcal{X}}$
_	VIII Information About Officers, Direct								ees,
	and Contractors								
1	List all officers, directors, trustees, foundation	n mana	gers and th						
	(a) Name and address	hour	and average s per week d to position	(c) Co (If not	mpensation paid, enter -0-)	emplo	Contributions to eyee benefit plans erred compensation	otha:	ense account allowances
	THE SCHEDUCE OF 1	140							
0	FICERS +DIRECTOR	15	AT	74	HED				
N	O OFFICER ORDIRA	70l							
2	COMPENSATION OF five highest-paid employee "NONE."	nPC= es (othe	ENSA Ter than thos	7/02 se incl	<u>U</u> uded on li	ne 1—:	see instruction	ons). If r	one, enter
(a) Name and address of each employee paid more than \$50 00	00	(b) Title and a hours per v devoted to pe	/eek	(c) Compei	sation	(d) Contributions employee benefi- plans and deferre compensation	t (e)Exp	ense account allowances
									·
	NO16			·		·-·-	 		<u>-</u>
				· -					
otal r	number of other employees paid over \$50,000 .				· · · ·		•	Form 99	0-PF (2011)

Part IVIII 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." (c) Compensation (d) Name and address of each person paid more than \$50,000 (e) Type of service (c) Compensation (d) Name and address of each person paid more than \$50,000 (e) Type of service (c) Compensation (e) Type of service (e) Compensation (e)	Form 990-PF (2011) ## (1) 6 - 60 35 60	Page 7
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 (d) Compensation (d) Compensation (e) Name and address of each person paid more than \$50,000 (b) Type of service (d) Compensation (e) Name and address of each person paid more than \$50,000 (b) Type of service (d) Compensation (f) Name and address of each person paid more than \$50,000 (b) Type of service (d) Compensation (e) Compensation (f) Name and address of each person paid more than \$50,000 (c) Type of services Part IX-A Summary of Direct Charitable Activities Lust the foundations four largest direct charitable activities during the tax year include relevant statistical information such as the number of organizations and other beneficialises served conferences convened issearch papers produced etc. 1 2 2 2 2 2 2 2 2 2 2 2 2		Highly Paid Employees,
(a) Name and address of each person paid more than \$50,000. (b) Type of service. (c) Compensation ### Compensation #### Compensation #### Compensation #### Compensation #### Compensation #### Compensation #### Compensation ###################################		
Total number of others receiving over \$50,000 for professional services Partix-A Summary of Direct Charitable Activities Liet the foundation is 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 1 2 AMUNTEUALIES - WILLIAM OPERATION 2 SAMUEL PARSONS - HOUS - MISSEUM - HOUSE - HO		
Total number of others receiving over \$50,000 for professional services Part IX-A Summary of Direct Charitable Activities Let the foundation is four largest direct charitable activities during the tax year include relevant statistical information such as the number of organizations and other beneficialises served conferences convened research papers produced etc 1 2 AMAINTELIABLE + WILLIAMLE OPERATION 3 SAMUEL PHISONS HOUS MISSEUM 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 larges 1 and 2 Amount 1 AMOUNT AMOUNT Total Acid lines 1 through 3	(a) Name and address of each person paid more than \$50 000 (b) Type	of service (c) Compensation
Total number of others receiving over \$50,000 for professional services Part IX-A Summary of Direct Charitable Activities Let the foundation is four largest direct charitable activities during the tax year include relevant statistical information such as the number of organizations and other beneficialises served conferences convened research papers produced etc 1 2 APPLICATION 3 SANUEL PHISONS HOUS MISSEUM 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 largest 1 and 2 Amount 1 All other program-elated investments. See instructions 3 All other program-elated investments. See instructions 5 Total. Add lines 1 through 3		{
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Part IX-A Summary of Direct Charitable Activities	1010	
Part IX-A Summary of Direct Charitable Activities		
Part IX-A Summary of Direct Charitable Activities		
Part IX-A Summary of Direct Charitable Activities		
List the foundation is four largest direct charitable activities List the foundation is 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. 1 2 List the foundation is 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. 1 2 List the foundation statistical information such as the number of expenses. 2 List the foundation statistical information such as the number of expenses. 2 List the foundation statistical information such as the number of expenses. 2 List the foundation statistical information such as the number of expenses. 4 List the foundation statistical information such as the number of expenses. 4 List the foundation statistical information such as the number of expenses. 4 List the foundation statistical information such as the number of expenses. 5 List the foundation statistical information such as the number of expenses. 6 List the foundation statistical information such as the number of expenses. 6 List the foundation statistical information such as the number of expenses. 6 List the foundation statistical information such as the number of expenses. 7 List the foundation statistical information such as the number of expenses. 8 List the foundations and other beneficial information such as the number of expenses. 8 List the foundations and other properties. 9 List the foundation statistical information such as the number of expenses. 1 List the foundation statistical information such as the number of expenses. 1 List the foundation statistical information statistical information such as the number of expenses. 1 List the foundations and other properties. 2 List the foundation statistical information such as the number of expe	Total number of others receiving over \$50,000 for professional services	•
Comparison and other beneficiaries served conferences convened research papers produced etc 1		
2 3 SANUEL PARSONS HOUS MUSEUM. 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 vear on lines 1 and 2 All other program-related investments See instructions All other program-related investments See instructions Total, Add lines 1 through 3		ch as the number of Expenses
2 3 SANUEL PARSONS HOUS MUSEUM. 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 All other program-related investments See instructions All other program-related investments See instructions All other program-related investments See instructions	1	
2 3 SANUEL PARSONS HOUS MUSEUM. 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 All other program-related investments See instructions All other program-related investments See instructions All other program-related investments See instructions	A	_
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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 All other program-related investments. See instructions 3 MAUG. Total. Add lines 1 through 3	3	
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 All other program-related investments. See instructions 3 MAUG. Total. Add lines 1 through 3		
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 All other program-selated investments. See instructions 3 Total. Add lines 1 through 3		7_,
Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2 1 2 All other program-related investments. See instructions. 3 Total. Add lines 1 through 3	4	
Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2 1 2 All other program-related investments. See instructions. 3 Total. Add lines 1 through 3		
Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2 1 2 All other program-related investments. See instructions. 3 Total. Add lines 1 through 3	Part IX-B. Summary of Program-Related Investments (see instructions)	
All other program-related investments. See instructions 3 Total. Add lines 1 through 3		Amount
All other program-related investments. See instructions 3 Total. Add lines 1 through 3		
All other program-related investments. See instructions 3 Total. Add lines 1 through 3	·	
All other program-related investments. See instructions 3 Total. Add lines 1 through 3	NOME	
3	2	
3		
3		
Total. Add lines 1 through 3	All other program-related investments. See instructions	1
Total. Add lines 1 through 3	3	
Total. Add lines 1 through 3	NONT	
	Total. Add titles Ethioughs	Form 990-DF 2011

Par	Minimum Investment Return (All domestic foundations must complete this part. Fore	ign fo	undations,
	see instructions.)		
1.	Fair market value of assets not used (or held for use) directly in carrying out charitable etc., purposes:		
а	Average monthly fair market value of securities	1a	767 260
b	Average of monthly cash balances	1b	148 801
С	Fair market value of all other assets (see instructions)	1c	70/2
d	Total (add lines 1a, b, and c)	1d	8/6,06
е	Reduction claimed for blockage or other factors reported on lines 1a and		7
	1c (attach detailed explanation)	1	
2	Acquisition indebtedness applicable to line 1 assets	2	\mathcal{O}
3	Subtract line 2 from line 1d	3	816,069
4	Cash deemed held for charitable activities. Enter 1 ½ % of line 3 (for greater amount, see		7
	instructions)	4	12.241
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	AD3.826
6	Minimum investment return. Enter 5% of line 5	6	40191
Part	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.)		- 7 + 7 - 7
1	Minimum investment return from Part X, line 6	1	100 191
2a	Tax on investment income for 2011 from Part VI, line 5		
b	Income tax for 2011. (This does not include the tax from Part VI.) 2b	1	
С	Add lines 2a and 2b	2c	Q2
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	40.91
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	40.191
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	40.191
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	1-2 1147
b	Program-related investments—total from Part IX-B	1b	- trutt
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:		
а	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	120182
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income		
	Enter 1% of Part I, line 27b (see instructions)	5	
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	17047
	Note. The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating qualifies for the section 4940(e) reduction of tax in those years.	whe	ther the foundation

Part	XIII Undistributed Income (see instruction	ons)			
1	Distributable amount for 2011 from Part XI.	(a) Corpus	(b) Years prior to 2010	(c) 2010	(d) 2011
2	Undistributed income if any, as of the end of 2011:				
a	Enter amount for 2010 only				
b	Total for prior years: 20 ,20 ,20	-			
3	Excess distributions carryover, if any, to 2011:				
	From 2006				
a	From 2007				
b	From 2008				
C	From 2009				
d e	From 2010				İ
f					
4	Total of lines 3a through e		1		
а	Applied to 2010, but not more than line 2a.	//	I/V		
	Applied to undistributed income of prior years (Election required—see instructions)		11		***
С	Treated as distributions out of corpus (Election	/-/-/			
	required—see instructions)				
d	Applied to 2011 distributable amount /				
e	Remaining amount distributed out of corpus/ Excess distributions carryover applied to 2011				
5	(If an amount appears in column (a) the same	11			
	amount must be shown in column (a))		•		
6	Enter the net total of each column as indicated below:				
a	Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	 			
a	Prior years' undistributed income. Subtract line 4b from line 2b				
С	Enter the amount of pror years' undistributed income for which a notice of deficiency has been issued, or oil which the section 4942(a) tax has been previously assessed				! !
d	Subtract line 6c from line 6b. Taxable amount—see instructions				
e	Undistributed income for 2010. Subtract line				
	4a from line 2a Taxable amount—see instructions				
f	Undistributed income for 2011. Subtract lines				
•	4d and 5 from line 1. This amount must be distributed in 2012				
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 2006 not				
	applied on line 5 or line 7 (see instructions).				
9	Excess distributions carryover to 2012. Subtract lines 7 and 8 from line 6a				
10	Analysis of line 9:				
	Excess from 2007				
b	Excess from 2008				
c	Excess from 2009				
d	Excess from 2010				
e	Excess from 2011				000 05

			~. CO			
		-603U				Page 10
Part	XIV Private Operating Founda	itions (see instru	ctions and Part	VII-A, question 9))	
1a	If the foundation has received a ruling			private operating		
-	foundation, and the ruling is effective fo			🟲		
b	Check box to indicate whether the four	ndation is a private	operating foundat	tion described in se	ection	(3) or 4942(j)(5)
2a	Enter the lesser of the adjusted net	Tax year		Prior 3 years		(e) Total
	income from Part I or the minimum investment return from Part X for	(a) 2011	(b) 2010	(c) 2009	(d) 2008	(-7
	each year listed	(P)	Ø	12475	17.498	79973
b	85% of line 2a	6	Ø	10,604	14.873	25.477
С	Qualifying distributions from Part XII. line 4 for each year listed	17 OFF	19,854	13,697	20.874	71.422
ď	Amounts included in line 2c not used directly for active conduct of exempt activities					
е 3	Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c Complete 3a, b. or c for the alternative test relied upon:	17,047	19,854	13,697	20,874	71,422
а	"Assets" alternative test—enter: (1) Value of all assets	1,179,900	1,205,021	1,216,189	1,181,766	4,782,8
h	section 4942(j)(3)(B)(i)	365,000	365,00gg	301,000	365,000	1,460,00
	of minimum investment return shown in Part X, line 6 for each year listed .	26794	26,591	27,183	29,169	109,73
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 royalities). (2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)	12,168	12/25	27,995 220RV	16,641	68919
	(3) Largest amount of support from	10,100	1414	27,700	14,011	- Contract
	an exempt organization					
Part	(4) Gross investment income			531 823 ne foundation h	#3/36 ad \$5,000 or mo	699.2500 ore in assets at
1	Information Regarding Foundation	Managers:				
а	List any managers of the foundation of before the close of any tax year (but of	who have contribu				by the foundation
	\sim \sim \sim \sim \sim	100	The state of the state	le of a corporation	o for on ogually lo	rae portion of the
D	List any managers of the foundation ownership of a partnership or other en					rge portion of the
2	Information Regarding Contribution	, Grant, Gift, Loa	n, Scholarship. e	tc., Programs:	.,	
	Check here ▶ ☐ If the foundation unsolicited requests for funds. If the fother conditions, complete items 2a.	only makes contr oundation makes	ibutions to presel	lected charitable		
a	The name, address, and telephone nu	imber of the perso	n to whom applica	ations should be a	ddressed:	

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

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

c Any submission deadlines

factors:

06-6030 180

	99-PF 120111	0-0000	/00		Page 1
Part	XV Supplementary Information (co	ntinued)			
3	Grants and Contributions Paid During	g the Year or Approv	ed for Fut	ure Payment	
	Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
а		or substantial contributor	 		
	Total				3a
b		· · · · · · · · · · · · · · · · · · ·			~
			7		

3b

Form 990-PF (2011)

Part XVI-A | Analysis of Income-Producing Activities

Ente	er gr	oss amounts unless otherwise indicated.	Unrelated by	siness income	Excluded by sect	on 512 513, or 514	(0)
		ogram service revenue:	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	(e) Related or exemp function income (See instructions.)
•	a	gira ii sei vise ieveilae.	 				
	þ	**************************************				-	
	C						
	d						
	е					·	
	f				A		
_	g	Fees and contracts from government agencies		/	/		<u> </u>
_		mbership dues and assessments			Y		
3		erest on savings and temporary cash investments indends and interest from securities	//	/			
4 5		t rental income or (loss) from real estate:		/	•		
J		Debt-financed property				-	
		Not debt-financed property	<u> </u>				
6		t rental income or (loss) from personal property					
7		ner investment income					
8	Gai	n or (loss) from sales of assets other than inventory					
9		t income or (loss) from special events					
10		oss profit or (loss) from sales of inventory					
11	_	ner re venue: a		<u> </u>			
	b					<u></u>	
	d						
	4						
12	Sul	ototal. Add columns (b), (d), and (e)					
						13	L
See	WOI	ksheet in line 13 instructions to verify calculation	s.)				
_	_	VI-B Relationship of Activities to the A					
	e No ▼	 Explain below how each activity for which accomplishment of the foundation's exempt pur 	income is repo	orted in column	(e) of Part XVI	-A contributed in oses) (See instruc	mportantly to the
	<u> </u>	accomplication of the real date of the exempt par	pooco (o a loi a la				
							<u></u>
							-
		***************************************			- 		
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# 06	-603	1/Pr

Part	XVII		n Regarding Trans ganizations	sters to and transacti	ons and H	elationsni	ips with Noncha	ritabi	e	
1	Did th			ngage in any of the follow	ng with any	other organ	nization described	T	Yes	No
•				ection 501(c)(3) organizati				1 1		
		izations?			J. 1.5, G. 11. G.			1 1	1	
			corting foundation to	a noncharitable exempt o	rappization	of		1 1		
а		•	•	a nonchamable exempt of	gariizalion	OI.		4-41	ŀ	
								1a(1)		
		ther assets .						1a(2)		
b	Other	transactions:						1 1	- 1	
	(1) Sa	ales of assets to	a noncharitable exer	mptorganization				1b(1)		
	(2) Pt	urchases of asse	ets from a noncharital	ble exempt organization .		.,//		1b(2)		
	(3) R	ental of facilities.	, equipment, or other	assets	. 1.	/. 75		1b(3)		
					///	/. [)		1b(4)		
			rantees			/ 0		1b(5)		-
				p or fundraising solicitation	ne			1b(6)		
С				ts, other assets, or paid en				1c		
				" complete the following					four me	orkot
a				es given by the reporting						
				ment, show in column (d)						
(a) Line	no (b) Amount involved	(c) Name of noncha	antable exempt organization	(d) Descri	ption of transfe	rs transactions, and sha	ring arra	ingeme	nts
										
			· · · · · · · · · · · · · · · · · · ·							
					 		· · · · · · · · · · · · · · · · · · · 			
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	-				<u></u>					
					 					
			. =: -:= .		<u> </u>					
				liated with, or related to,				-		
	descr	ibed in section 5	501(c) of the Code (ot	ther than section 501(c)(3))	or in section	n 527?	[] Yes		VO.
b	If "Ye	s," complete the	following schedule.							
		(a) Name of organi	ızatıon	(b) Type of organization	n		(c) Description of relatio	nship		
							<u></u>			
					1					
					^/					
					/					
						 				
o ;				this return, including accompanying taxpayer) is based on all information				ige and b	elief, it i	s true
Sign	conec	A. GIRLI GARAGE DELL	perale joiler that	• • •			May the II			
Here		' /// / ///	\leftarrow	SENDING LT Title	TVICE	PRES	WED with the p	reparer s	shown b	HOW
	Signe	der of officer or trus	Les POBERT N.	BEANNITT Title		/-	isee instru	Luons)/ [Tes[Пио
	Ī	Print Type preparer	s name	Preparer's signature		Date	[05.7] F	NIT		
Paid		0					Check [] If self-employed			
Prepa				<u> </u>		' - 				
Use C)nly	Firm's name					Firm's EIN ▶			
		Firm's address 🕨					Phone no.			

THE WALLINGFORD HISTORICAL SOCIETY, INC.

ID #: 06-6035188 Year Ending 9-30-2012

PART I, Line 10, Profit on Items for Resale:

	Sales	Cost	Profit
"Images of America - Wallingfo	ord"		
(Book)	\$200	\$81	\$119
Wallingford Tea	18	8	10
Glass Medallion	48	34	14
Note Paper	3	1.50	1.50
Note Cube	4	3	1
Reminiscences of My Mother	1.50	1	.50
"Memories of Red O'Connell"	15	9	6
Post Cards (sets of 4)	<u>39</u>	<u>13</u>	<u>26</u>
	\$328.50	\$150.50	\$178
PART 1, Line 18, Taxes:			
2010 Taxes on Net Investment	Income		\$1852
PART I, Line 23, Other Expense	es:		
Meeting Expenses			\$1947
Secretary of the State - Annua	l Filing Fee	;	50
Postage & Supplies	_		480
Post Office Box Rental			76
Conn. League of Historical Soc	ieties Due	s	40
Preservation Expense	494		

Form 990PF

THE WALLINGFORD HISTORICAL SOCIETY, INC.

ID #: 06-6035188 Year Ending 9-30-2012

PART I, Line 23, Other Expenses: (cont.)

invest	tment	Expense:
Dank	E	

Bank Fee	1
Safe Deposit Box Rental	33
Check Expense	27
Portfolio Management Fee	8240
Fidelity Bond for Treasurer	<u>100</u>

Total Other Expenses \$11488

									•
		The Wa	Illingford	Wallingford Historica	Society,	Inc.			
			ID #: 60-6035188	188					
			Year Ending 9-30-2012	9-30-2012			Page 1		
Part IV 1 ine 1 Canital Gains	ן קבר דינו	oceae for Tax	for Tay on Investment Income	nt Income					
	2						Lona Term	Short Term	E
enssi	Svmbol	# of shs	Purch Date	Purch Price	Sale Date	Sale Price	Gain/Loss	Gain/Loss	y y
Apple Inc	AAPL	09	5/16/2012	\$ 32,689	100	\$ 37,299			4.610
Apple, Inc	AAPL	40	5/16/2012		8/17/2012	l		3.9	3,928
Apple, Inc	AAPL	25	5/18/2012	\$ 13,350	8/20/2012				2,725
Apple, Inc	AAPL	20	5/18/2012		8/20/2012	\$ 32,987			6,286
Cameron Intl Corp	CAM	700	5/16/2012		8/7/2012			\$ 4,5	4,518
Canadian National Railway	CNI	100	1/30/2012		-			မှာ	4
Canadian National Railway	CN	100	2/14/2012	\$ 7,829	3/8/2012	\$ 7,564			(265)
Chevron Corporation	CVX	200	2/14/2012	7	9/13/2012	\$ 22,925		,	1,649
Clean Energy Fuels Corp	CLNE	200	3/5/2012	\$ 3,797	8/7/2012	\$ 2,729		\$ (1,0	(1,068)
Clean Energy Fuels Corp	CLNE	300	3/5/2012		8/7/2012	\$ 4,096			(669
Clean Energy Fuels Corp	CLNE	200	3/5/2012	-	8/7/2012	\$ 9,551		\$ (3,7	(3,738)
Clean Energy Fuels Corp	CLNE	360	3/6/2012		8/7/2012	\$ 4,912		(1,925)	325)
ConocoPhillips	COP	200	5/20/2011	43	10/12/2011	4			(3,335)
Eaton Corporation	ETN	75	1/30/2012	\$ 3,693	2/14/2012				171
Google Inc class A	9009	25	1/30/2012	į	2/14/2012				738
Halliburton Co Hldg Co	HAL	1000	2/14/2012			\$ 30,192			(5,365)
Heinz H J Co	HNZ	300	2/14/2012			\$ 16,630		,	1,117
Heinz H J Co	HNZ	200	1/30/2012						708
Heinz H J Co	HNZ	400	3/1/2012	~	8/7/2012	~		\$	988
Honeywell International	HON	100	1/30/2012						110
Honeywell International	NOH NOH	5	2/14/2012			\$ 5,892		မာ	(86)
Honeywell International	HON	200	3/6/2012						237
Ishares MSCI CDA IDX FD	EWC	1400	7/28/2011			-			(8,455)
Johnson & Johnson	S	300	2/14/2012					_	1,114
Johnson & Johnson	3	200	3/5/2012					s	728
Market Vectors ETF Trust	CDX	200	9/26/2011						413
Market Vectors ETF Trust	XQ9	200	9/26/2011	\$ 11,177	1	\$ 11,165			(12)
Market Vectors ETF Trust	GDX	300	9/26/2011	\$ 16,766	3/5/2012			\$	(731)
McDonalds Corp	MCD	200	2/14/2012			ĺ			(1,988)
McDonalds Corp	MCD	150	3/8/2012	\$ 14,548				\$ (1,	(1,144)
McDonalds Corp	MCD	5	3/1/2012	j				\$ (1,0	(1,006)
Microchip Technology, Inc.	MCHP	200	1/30/2012					ક્ર	(28)
Noble Energy	NBL	75	1/30/2012	\$ 7,471	\neg	\$ 7,055		7)	(417)
Noble Energy	NBL PBL	125	2/14/2012	12,	3/6	=		\$ (1,1	(1,154)
Noble Energy	NBL	9	3/1/2012	\$ 9,586	3/6/2012	\$ 9,406			(180)

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The Wallingford Historical Society, Inc. ID #: 60-6035188								Form 990PF		
Near Ending 9-30-2012 Page 2			The Wa	allingford	Historica	Il Society,	Inc.		 	1
Symbol # of shs Prace Ending 9-30-2012 Page 2 Symbol # of shs Purch Date Purch Price Sale Date Sale Price Gain/Loss Gain Symbol # of shs Purch Date Purch Price Sale Date Sale Price Gain/Loss Gain PAYX 200 1/30/2012 \$ 6,317 2/14/2012 \$ 6,215 \$ 5 PAY 200 2/14/2012 \$ 6,317 2/14/2012 \$ 6,215 \$ 5 PAY 200 2/14/2012 \$ 1,251 \$ 1,251 \$ 13,737 \$ 5 PAY 150 2/14/2012 \$ 1,261 \$ 1,377 \$ 5 PAY 150 2/14/2012 \$ 1,261 \$ 1,377 \$ 5 PAY 150 1/30/2012 \$ 1,377 \$ 5 \$ 5 PCP 50 1/30/2012 \$ 1,377 \$ 1,377 \$ 5 \$ 5 PCP 50 1/30/2012 \$ 1,376 \$ 1,377 \$ 1,377 \$ 5 \$ 1,377 \$ 1,377 \$ 1,377 \$ 1,377 \$ 1,377				ID #: 60-603£	5188					;
Symbol # of shs Purch Date Sale Date Sale Price Gain/Loss				Year Ending	9-30-2012			Page 2		1
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Symbol # of shs Purch Date Purch Date Sale Date Sale Price Gain/Loss Gain/Los								Long Term	Short Term	erm
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PEP 400 2/14/2012 \$ 25,496 8/7/2012 \$ 28,899 \$ 5 PM 150 1/30/2012 \$ 11,251 8/7/2012 \$ 13,737 \$ 5 PM 150 1/30/2012 \$ 12,184 8/7/2012 \$ 13,737 \$ 5 PSX 150 2/14/2012 \$ 4,977 5/16/2012 \$ 4,808 \$ 5 PC 300 2/14/2012 \$ 4,977 5/16/2012 \$ 8,512 \$ 5 PC 300 2/14/2012 \$ 13,241 \$ 13,241 \$ 13,241 \$ 15,265 STO 300 3/1/2012 \$ 13,241 \$ 13,241 \$ 13,241 \$ 13,241 \$ 13,341 \$ 13,343 \$	Paychex Inc	PAYX	200	1/30/2012		_				(101)
PM 150 1/30/2012 \$ 11,251 8/7/2012 \$ 13,737 \$ PM 150 2/14/2012 \$ 12,184 8/7/2012 \$ 4,808 \$ PSX 150 4/30/2012 \$ 4,977 5/16/2012 \$ 4,808 \$ PC 300 2/14/2012 \$ 8,265 2/14/2012 \$ 8,512 \$ PG 300 2/14/2012 \$ 13,34 8/7/2012 \$ 13,887 \$ PG 300 3/1/2012 \$ 13,34 8/7/2012 \$ 13,265 \$ STO 300 3/1/2012 \$ 14,458 9/19/2012 \$ 13,313 \$ STO 300 3/1/2012 \$ 14,458 9/19/2012 \$ 7,988 \$ STO 300 3/1/2012 \$ 14,458 9/19/2012 \$ 7,988 \$ STO 400 3/8/2012 \$ 3,3743 9/19/2012 \$ 34,615 \$ SU 400 3/1/2012 \$ 3,478 9/19/2012 \$ 3,481 \$ SU </td <td>Pepsico Incorporated</td> <td>PEP</td> <td>400</td> <td>2/14/2012</td> <td></td> <td>_</td> <td>10</td> <td></td> <td></td> <td>3,403</td>	Pepsico Incorporated	PEP	400	2/14/2012		_	10			3,403
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SU 900 2/14/2012 \$ 30,481 9/13/2012 \$ 30,323 \$ 5 SU 400 3/1/2012 \$ 14,580 9/13/2012 \$ 13,481 \$ 5 WPRT 200 3/5/2012 \$ 8,735 5/16/2012 \$ 4,809 \$ 5 VWPRT 400 3/5/2012 \$ 17,475 5/16/2012 \$ 9,619 \$ 5 Irm Capital Gains/(Losses) * 17,475 5/16/2012 \$ 9,619 \$ 5 Irm Capital Gains/(Losses) * 9,619 * 9,619 \$ 5 Irm Capital Gains/(Losses) * (11,705) \$ 6 Irrm Capital Gains/(Losses) * (11,705) \$ 6	Suncor Energy Inc New	SU	100	2/14/2012	က					(989)
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oital Gains/(Losses) \$ (11,705) \$ (11,705)]:							
Sale of Investments	lotal Short Teri	m Capital	Gains/(Lo	sses)						(11,705)
Sale of Investments										
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	Wallingf	ord Histo	Wallingford Historical Society, Inc.	ety, Inc.		
	INVE	INVESTMENT PORTFOLIO	ORTFOLIO			
	Value	as of Septer	Value as of September 30, 2012	2		
			Nimber	Share	Market	Book
ISSUE		Symbol	of Shares	Price	Value	Value
\ \\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\		Š	000	1, 000		
Apache Corp		APA	800	\$86.47	\$69,176	\$/8,644
Apple Inc		AAPL	300	\$667.11	\$200,132	\$198,285
Conocophillips		COP	1200	\$57.18	\$68,616	\$73,696
Continental Resources		CLR	1000	\$76.90	\$76,900	\$84,628
EOG Resources Inc		EOG	1000	\$112.05	\$112,050	\$113,914
Hess Corporation		HES	1500	\$53.72	\$80,580	\$82,090
Westport Innovation NEW		WPRT	1600	\$27.84	\$44,544	\$56,662
SPDR Gold Trust		GLD	009	\$171.89	\$103,134	\$93,749
Schwab Adv Cash Reserve		SWQXX			\$4,965	\$4,965
	TOTAL				\$760,097	\$786,634

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The Wallingford Historical Society, Inc. Officers & Directors 2011-2012

1. Full Legal NAME: Raymond Chappell Tel. #: 203-265-0313 Title: President Residence Addr: 31 Parkview Road Wallingford, CT 06492 2. Full Legal NAME: Robert N. Beaumont Tel. #: 203-269-9988 Title: 1st Vice President Residence Addr: 25 Maplewood Avenue Wallingford, CT 06492 3. Full Legal NAME: Amy Humphries
Title: 2nd Vice President Tel. #: 203-265-4943 Residence Addr: 17 Mellor Drive Wallingford, CT 06492 4. Full Legal NAME: Barbara Sibley Tel. #: 203-265-1123 Title: 3rd Vice President Residence Addr: 3 Eaton Trail Wallingford, CT 06492 5. Full Legal NAME: Patricia Chappell Tel. #: 203-265-0313 Title: Recording Secretary Residence Addr: 31 Parkview Road Wallingford, CT 06492 6. Full Legal NAME: Laura Bertekap Tel: #: 203-269-3241 Title: Corresponding Secretary Residence Addr: 7 Vumbaco Drive Wallingford, CT 06492 7. Full Legal NAME: Deborah Foley Tel. #: 203-269-2710 Title: Financial Secretary Residence Addr: 987 Yale Avenue Wallingford, CT 06492 Tel. #: 203-269-9988 8. Full Legal NAME: Noma G. Beaumont Title: Treasurer Residence Addr: 25 Maplewood Avenue Wallingford, CT 06492 9. Full Legal NAME. Robert Page Tel. #: 203-265-2394 Title: Director Residence Addr: 54 Sunrise Circle Wallingford, CT 06492

The Wallingford Historical Society, Inc. Officers & Directors 2011-2012 Page 2

Tel. #: 203-265-1284 10. Full Legal NAME: Shirley Lagerstrom Title: Director Residence Addr: 55 Grieb Road Wallingford, CT 06492 Tel. #: 203-269-2793 11. Full Legal NAME: Joyce Kowalczyk Title: Director Residence Addr: 3 Pilgrim Harbor Wallingford, CT 06492 Tel. #: 203-294-1160 12. Full Legal NAME: William E. Austin Title: Director Residence Addr: 30 Northford Road Wallingford, CT 06492 Tel. #: 203-265-2231 13. Full Legal NAME: James Leigh Barnes Title: Director Residence Addr: 340 Barnes Road Wallingford, CT 06492 Tel. #: 203-679-0575 14. Full Legal NAME: Jane Reed Title: Director Residence Addr: 4 Reskin Drive Wallingford, CT 06492 Tel. #: 203-284-3354 15. Full Legal NAME: Doris Hall Title: Director Residence Addr: 96 Putter Drive Wallingford, CT 06492 16. Full Legal NAME: Margaret Brown Tel. #: 203-265-6884 Title: Director Residence Addr: 29 Pierson Drive Wallingford, CT 06492 Tel. #: 203-269-3241 17. Full Legal NAME: Robert Bertakap

Title: Director Residence Addr: 7 Vumbaco Drive

Wallingford, CT 06492

(Rev January 2012)

Department of the Treasury Internal Revenue Service

Application for Extension of Time To File an Exempt Organization Return

► File a separate application for each return.

OMB No. 1545-1709

-	are filing for an Automatic 3-Month Extension,	-					🕨 🗸	
-	are filing for an Additional (Not Automatic) 3-Me complete Part II unless you have already been c		•				ı 8868.	
Electron a corpor 8868 to Return	nic filing (e-file). You can electronically file Form ration required to file Form 990-T), or an addition request an extension of time to file any of the for Transfers Associated With Certain Persona ons). For more details on the electronic filing of the	8868 if yo al (not auto forms listed Benefit C	u need a 3-month autor omatic) 3-month extensi d in Part I or Part II with contracts, which must	natic extension of on of time. You can the exception of be sent to the II	time an ele f Fon RS in	to file (6 ectronica n 8870, paper 1	months for lly file Form Information format (see	
Part I	Automatic 3-Month Extension of Time	. Only sub	omit original (no copie	s needed).				
A corpo	oration required to file Form 990-T and requently	sting an a	utomatic 6-month exte	ension-check thi			▶ 🔲	
	come tax returns.							
			En	ter filer's identifyin				
Type or	Name of exempt organization or other filer, see in	nstructions.		Employer identif		n number 135188	(EIN) or	
print	The Wallingford Historical Society, Inc. Number, street, and room or suite no. If a P.O. be	ov coo inctr	untions	Social security r				
File by the	D O D TO (1000	DA, SEE MSM	Judons.		1011100	(OOI4)		
filing your	City, town or post office, state, and ZIP code. For a foreign address, see instructions.							
return See Instructions Wallingford, CT 06492-0073								
	e Return code for the return that this application i	is for (file a	separate application for	each return) .			0 4	
Applic	ation	Return	Application				Return	
Is For		Code	Is For				Code	
Form 9	90	01	Form 990-T (corporati	on)			07	
Form 9	90-BL	02	Form 1041-A				08	
Form 9	90-EZ	01	Form 4720				09	
Form 9	90-PF	04	Form 5227				10	
Form 9	90-T (sec. 401(a) or 408(a) trust)	05	Form 6069				11	
Form 9	90-T (trust other than above)	06	Form 8870				12	
Teleph • If the o	none No. ► 203-269-9988 organization does not have an office or place of bis for a Group Return, enter the organization's found by the group, check this box ► □ . If	usiness in t ur digit Gro	up Exemption Number (GEN)		If th	is is	
	h the names and EINs of all members the extensi							
i. fi	request an automatic 3-month (6 months for a countil May 15, 20, 13, to file the exertor the organization's return for: Calendar year 20 or	npt organiz	zation return for the orga	0-T) extension of ti anization named a	ime bove	. The ext	ension is	
	► ✓ tax year beginning October 1 if the tax year entered in line 1 is for less than 12 m	, 20 nonths, che	11 , and ending eck reason: Initial re	September 30 turn		, 20	12 .	
	Change in accounting period					,		
n	this application is for Form 990-BL, 990-PF, 990 onrefundable credits. See instructions.				3a	\$	400	
b lf	this application is for Form 990-PF, 990-T, 4 stimated tax payments made. Include any prior y	1720, or 6	069, enter any refunda yment allowed as a cred	able credits and dit.	3b	\$	0	
c E	Ralance due. Subtract line 3b from line 3a. Includ FTPS (Electronic Federal Tax Payment System).	e your pay	ment with this form, if re			\$	400	
	If you are going to make an electronic fund withdrawal			O and Form 8879-F0		<u> </u>		