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Department of the Treasury  
Internal Revenue 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

**2012**

Open to Public Inspection

**For calendar year 2012 or tax year beginning** 1/1 , **2012, and ending** 12/31 , **20** 12

Name of foundation <b>Tulgey Wood Foundation c/o Emile W. Jacques</b>		A Employer identification number <b>06-1062661</b>
Number and street (or P.O. box number if mail is not delivered to street address) <b>19 Field Point Drive</b>	Room/suite	B Telephone number (see instructions) <b>203-629-2484</b>
City or town, state, and ZIP code <b>Greenwich, CT 06830</b>		C If exemption application is pending, check here <input type="checkbox"/>
G Check all that apply: <input type="checkbox"/> Initial return <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Final return <input type="checkbox"/> Amended return <input type="checkbox"/> Address change <input type="checkbox"/> Name change		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
H Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) <b>\$</b>	J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ (Part I, column (d) must be on cash basis.)	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>

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)
<b>Revenue</b>	1 Contributions, gifts, grants, etc., received (attach schedule)	32101			STATEMENT #1
	2 Check <input type="checkbox"/> if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments	226	226		STATEMENT #2
	4 Dividends and interest from securities	84477	84477		STATEMENT #3
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10				
	b Gross sales price for all assets on line 6a				
	7 Capital gain net income (from Part IV, line 2)				
	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 or (loss) (attach schedule)					
11 Other income (attach schedule)	-11278	-11278		STATEMENT #4	
12 Total. Add lines 1 through 11	105526	73425			
<b>Operating and Administrative Expenses</b>	13 Compensation of officers, directors, trustees, etc.				
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)				
	c Other professional fees (attach schedule)				
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	213	213		STATEMENT #5
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	22927	22927		STATEMENT #6
	24 Total operating and administrative expenses. Add lines 13 through 23				
	25 Contributions, gifts, grants paid	90050			
26 Total expenses and disbursements. Add lines 24 and 25	113190	23140		90050	
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements	-7664				
b Net investment income (if negative, enter -0-)		50285			
c Adjusted net income (if negative, enter -0-)					

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<b>Part II Balance Sheets</b>		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
<b>Assets</b>	<b>1</b> Cash—non-interest-bearing . . . . .		<b>25849</b>	<b>12882</b>	<b>12882</b>
	<b>2</b> Savings and temporary cash investments . . . . .				
	<b>3</b> Accounts receivable ▶				
	Less: allowance for doubtful accounts ▶				
	<b>4</b> Pledges receivable ▶				
	Less: allowance for doubtful accounts ▶				
	<b>5</b> Grants receivable . . . . .				
	<b>6</b> Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions) . . . . .				
	<b>7</b> Other notes and loans receivable (attach schedule) ▶				
	Less: allowance for doubtful accounts ▶				
	<b>8</b> Inventories for sale or use . . . . .				
	<b>9</b> Prepaid expenses and deferred charges . . . . .				
	<b>10a</b> Investments—U.S. and state government obligations (attach schedule)				
	<b>b</b> Investments—corporate stock (attach schedule) . . . . .		<b>1016714</b>	<b>947426</b>	<b>1117596</b>
	<b>c</b> Investments—corporate bonds (attach schedule) . . . . .		<b>940560</b>	<b>984695</b>	<b>994230</b>
	<b>11</b> Investments—land, buildings, and equipment: basis ▶				
<b>Liabilities</b>	Less: accumulated depreciation (attach schedule) ▶				
	<b>12</b> Investments—mortgage loans . . . . .				
	<b>13</b> Investments—other (attach schedule) . . . . .		<b>197868</b>	<b>128997</b>	<b>288056</b>
	<b>14</b> Land, buildings, and equipment: basis ▶				
	Less: accumulated depreciation (attach schedule) ▶				
	<b>15</b> Other assets (describe ▶ )				
	<b>16</b> <b>Total assets</b> (to be completed by all filers—see the instructions. Also, see page 1, item I) . . . . .		<b>2180991</b>	<b>2074000</b>	<b>2412764</b>
	<b>17</b> Accounts payable and accrued expenses . . . . .				
	<b>18</b> Grants payable . . . . .				
	<b>19</b> Deferred revenue . . . . .				
	<b>20</b> Loans from officers, directors, trustees, and other disqualified persons				
	<b>21</b> Mortgages and other notes payable (attach schedule) . . . . .				
	<b>22</b> Other liabilities (describe ▶ )				
	<b>23</b> <b>Total liabilities</b> (add lines 17 through 22) . . . . .		<b>0</b>	<b>0</b>	
<b>Net Assets or Fund Balances</b>	<b>Foundations that follow SFAS 117, check here</b> ▶ <input type="checkbox"/> <b>and complete lines 24 through 26 and lines 30 and 31.</b>				
	<b>24</b> Unrestricted . . . . .				
	<b>25</b> Temporarily restricted . . . . .				
	<b>26</b> Permanently restricted . . . . .				
	<b>Foundations that do not follow SFAS 117, check here</b> ▶ <input type="checkbox"/> <b>and complete lines 27 through 31.</b>				
	<b>27</b> Capital stock, trust principal, or current funds . . . . .		<b>0</b>	<b>0</b>	
	<b>28</b> Paid-in or capital surplus, or land, bldg., and equipment fund		<b>0</b>	<b>0</b>	
	<b>29</b> Retained earnings, accumulated income, endowment, or other funds		<b>2180991</b>	<b>2074000</b>	
	<b>30</b> <b>Total net assets or fund balances</b> (see instructions) . . . . .		<b>2180991</b>	<b>2074000</b>	
	<b>31</b> <b>Total liabilities and net assets/fund balances</b> (see instructions) . . . . .		<b>2180991</b>	<b>2074000</b>	

**Part III Analysis of Changes in Net Assets or Fund Balances**

<b>1</b> 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) . . . . .	<b>1</b>	<b>2180991</b>
<b>2</b> Enter amount from Part I, line 27a . . . . .	<b>2</b>	<b>-7664</b>
<b>3</b> Other increases not included in line 2 (itemize) ▶	<b>3</b>	
<b>4</b> Add lines 1, 2, and 3 . . . . .	<b>4</b>	<b>2173327</b>
<b>5</b> Decreases not included in line 2 (itemize) ▶ <b>Basis adjustment in various partnerships</b>	<b>5</b>	<b>99,327</b>
<b>6</b> Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30 . . . . .	<b>6</b>	<b>2158901</b>

**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 shs. MLC Co)		(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
<b>1a</b>	See Statement # 8			
<b>b</b>				
<b>c</b>				
<b>d</b>				
<b>e</b>				

  

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
<b>a</b>	See Statement #8		
<b>b</b>			
<b>c</b>			
<b>d</b>			
<b>e</b>			

  

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

  

<b>2</b>	Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	<b>2</b>	-21445
<b>3</b>	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c) (see instructions). If (loss), enter -0- in Part I, line 8 . . . . . }	<b>3</b>	

**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.

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2011	84462	2187791	.038606
2010	61000	1315237	.046379
2009	57002	583267	.097729
2008	55297	770821	.071738
2007	52582	889977	.059082

  

<b>2</b>	Total of line 1, column (d) . . . . .	<b>2</b>	.313534
<b>3</b>	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 . . . . .	<b>3</b>	.062707
<b>4</b>	Enter the net value of noncharitable-use assets for 2012 from Part X, line 5 . . . . .	<b>4</b>	2558837
<b>5</b>	Multiply line 4 by line 3 . . . . .	<b>5</b>	160457
<b>6</b>	Enter 1% of net investment income (1% of Part I, line 27b) . . . . .	<b>6</b>	5028
<b>7</b>	Add lines 5 and 6 . . . . .	<b>7</b>	165485
<b>8</b>	Enter qualifying distributions from Part XII, line 4 . . . . . 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.	<b>8</b>	90050

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

<b>1a</b>	Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary—see instructions)			
<b>b</b>	Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b	<b>1</b>		1,006
<b>c</b>	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b).			
<b>2</b>	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	<b>2</b>		0
<b>3</b>	Add lines 1 and 2	<b>3</b>		1,006
<b>4</b>	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	<b>4</b>		0
<b>5</b>	<b>Tax based on investment income.</b> Subtract line 4 from line 3. If zero or less, enter -0-	<b>5</b>		1,006
<b>6</b>	<b>Credits/Payments:</b>			
<b>a</b>	2012 estimated tax payments and 2011 overpayment credited to 2012	<b>6a</b>		560
<b>b</b>	Exempt foreign organizations—tax withheld at source	<b>6b</b>		
<b>c</b>	Tax paid with application for extension of time to file (Form 8868)	<b>6c</b>		
<b>d</b>	Backup withholding erroneously withheld	<b>6d</b>		
<b>7</b>	Total credits and payments. Add lines 6a through 6d	<b>7</b>		560
<b>8</b>	Enter any <b>penalty</b> for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	<b>8</b>		0
<b>9</b>	<b>Tax due.</b> If the total of lines 5 and 8 is more than line 7, enter <b>amount owed</b>	<b>9</b>		446
<b>10</b>	<b>Overpayment.</b> If line 7 is more than the total of lines 5 and 8, enter the <b>amount overpaid</b>	<b>10</b>		
<b>11</b>	Enter the amount of line 10 to be: <b>Credited to 2013 estimated tax</b> <input type="checkbox"/> <b>Refunded</b> <input type="checkbox"/>	<b>11</b>		

**Part VII-A Statements Regarding Activities**

	Yes	No
<b>1a</b> 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?		✓
<b>b</b> Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for the definition)? <i>If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.</i>		✓
<b>c</b> Did the foundation file <b>Form 1120-POL</b> for this year?		✓
<b>d</b> Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. ▶ \$ _____ (2) On foundation managers. ▶ \$ _____		
<b>e</b> Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ \$ _____		
<b>2</b> Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If "Yes," attach a detailed description of the activities.</i>		✓
<b>3</b> 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>		✓
<b>4a</b> Did the foundation have unrelated business gross income of \$1,000 or more during the year?		✓
<b>b</b> If "Yes," has it filed a tax return on <b>Form 990-T</b> for this year?		
<b>5</b> Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If "Yes," attach the statement required by General Instruction T.</i>		✓
<b>6</b> Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	✓	
<b>7</b> Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col. (c), and Part XV</i>	✓	
<b>8a</b> Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ Connecticut		
<b>b</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>	✓	
<b>9</b> 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 2012 or the taxable year beginning in 2012 (see instructions for Part XIV)? <i>If "Yes," complete Part XIV</i>		✓
<b>10</b> Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses</i>		✓

**Part VII-A Statements Regarding Activities (continued)**

<b>11</b>	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)	<b>11</b>		✓
<b>12</b>	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)	<b>12</b>		✓
<b>13</b>	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	<b>13</b>		✓
Website address ▶				
<b>14</b>	The books are in care of ▶ <u>Emile W. Jacques, PC</u>	Telephone no. ▶	<u>203-629-2484</u>	
	Located at ▶ <u>19 Field Point Drive, Greenwich, CT</u>	ZIP+4 ▶	<u>06830</u>	
<b>15</b>	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041—Check here. and enter the amount of tax-exempt interest received or accrued during the year	▶ <u>15</u>	NA	
<b>16</b>	At any time during calendar year 2012, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for Form TD F 90-22.1. If "Yes," enter the name of the foreign country ▶	<b>16</b>	Yes	No
				✓

**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
<b>1a</b>	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>b</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)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	<b>1b</b>	
	Organizations relying on a current notice regarding disaster assistance check here ▶ <input type="checkbox"/>		
<b>c</b>	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 2012?	<b>1c</b>	✓
<b>2</b>	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)):		
<b>a</b>	At the end of tax year 2012, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2012? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
	If "Yes," list the years ▶ 20____, 20____, 20____, 20____		
<b>b</b>	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions.) NA	<b>2b</b>	
<b>c</b>	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____		
<b>3a</b>	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>b</b>	If "Yes," did it have excess business holdings in 2012 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 2012.)	<b>3b</b>	
<b>4a</b>	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	<b>4a</b>	✓
<b>b</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 2012?	<b>4b</b>	✓

**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** ☐ Yes ☒ No
- Organizations relying on a current notice regarding disaster assistance check here ☐
- c** If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? ☐ Yes ☒ No
- If "Yes," attach the statement required by Regulations section 53.4945–5(d).
- 6a** Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? ☐ Yes ☒ No
- b** Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? **6b** ☐ Yes ☒ No
- 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? **7b** ☐ Yes ☒ No

**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
Katherine R. Schubart 144 Magic Hill Road, Hinesburg, VT 05461	Pres. Dir 0 hours	0	0	0
Nicholas B. Deane 120 Fulton Street, Boston, MA 02109	VP Asst. Sec. 0 hours	0	0	0
Dr. Clinton B. Wright 3976 Wood Avenue, Miami, FL 33133	VP Asst. Sec. 0 hours	0	0	0
Emile W. Jacques, Esq. 19 Field Point Drive, Greenwich, CT 06830	Sec. Treas./Dir 0 hours	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

**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		
<b>Total number of others receiving over \$50,000 for professional services</b>		

**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

<b>1</b> N/A	
<b>2</b>	
<b>3</b>	
<b>4</b>	

**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

<b>1</b> N/A	
<b>2</b>	
All other program-related investments See instructions	
<b>3</b>	
<b>Total.</b> Add lines 1 through 3	



**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>1a</b>	2272657
<b>b</b>	Average of monthly cash balances . . . . .	<b>1b</b>	37091
<b>c</b>	Fair market value of all other assets (see instructions) . . . . .	<b>1c</b>	288056
<b>d</b>	<b>Total</b> (add lines 1a, b, and c) . . . . .	<b>1d</b>	2597804
<b>e</b>	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation) . . . . .	<b>1e</b>	
<b>2</b>	Acquisition indebtedness applicable to line 1 assets . . . . .	<b>2</b>	0
<b>3</b>	Subtract line 2 from line 1d . . . . .	<b>3</b>	2597804
<b>4</b>	Cash deemed held for charitable activities. Enter 1 1/2 % of line 3 (for greater amount, see instructions) . . . . .	<b>4</b>	38967
<b>5</b>	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. Enter here and on Part V, line 4	<b>5</b>	2558837
<b>6</b>	<b>Minimum investment return.</b> Enter 5% of line 5 . . . . .	<b>6</b>	127941

**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>	127941
<b>2a</b>	Tax on investment income for 2012 from Part VI, line 5 . . . . .	<b>2a</b>	1005
<b>b</b>	Income tax for 2012. (This does not include the tax from Part VI.) . . . . .	<b>2b</b>	
<b>c</b>	Add lines 2a and 2b . . . . .	<b>2c</b>	1006
<b>3</b>	Distributable amount before adjustments. Subtract line 2c from line 1 . . . . .	<b>3</b>	126935
<b>4</b>	Recoveries of amounts treated as qualifying distributions . . . . .	<b>4</b>	0
<b>5</b>	Add lines 3 and 4 . . . . .	<b>5</b>	126935
<b>6</b>	Deduction from distributable amount (see instructions) . . . . .	<b>6</b>	0
<b>7</b>	<b>Distributable amount</b> as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1 . . . . .	<b>7</b>	126935

**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>1a</b>	90050
<b>b</b>	Program-related investments—total from Part IX-B . . . . .	<b>1b</b>	0
<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>3a</b>	
<b>b</b>	Cash distribution test (attach the required schedule) . . . . .	<b>3b</b>	
<b>4</b>	<b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	<b>4</b>	90050
<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>	0
<b>6</b>	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4 . . . . .	<b>6</b>	90050

**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.

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

	(a) Corpus	(b) Years prior to 2011	(c) 2011	(d) 2012
<b>1</b> Distributable amount for 2012 from Part XI, line 7 . . . . .				<b>126935</b>
<b>2</b> Undistributed income, if any, as of the end of 2012:				
<b>a</b> Enter amount for 2011 only . . . . .			<b>0</b>	
<b>b</b> Total for prior years: 20____, 20____, 20____		<b>0</b>		
<b>3</b> Excess distributions carryover, if any, to 2012:				
<b>a</b> From 2007 . . . . .	<b>6316</b>			
<b>b</b> From 2008 . . . . .	<b>18407</b>			
<b>c</b> From 2009 . . . . .	<b>28019</b>			
<b>d</b> From 2010 . . . . .				
<b>e</b> From 2011 . . . . .				
<b>f</b> <b>Total</b> of lines 3a through e . . . . .	<b>52742</b>			
<b>4</b> Qualifying distributions for 2012 from Part XII, line 4: ► \$ <u>90050</u>				
<b>a</b> Applied to 2011, but not more than line 2a . . . . .			<b>0</b>	
<b>b</b> Applied to undistributed income of prior years (Election required—see instructions) . . . . .		<b>0</b>		
<b>c</b> Treated as distributions out of corpus (Election required—see instructions) . . . . .	<b>0</b>			
<b>d</b> Applied to 2012 distributable amount . . . . .				<b>90050</b>
<b>e</b> Remaining amount distributed out of corpus . . . . .	<b>0</b>			
<b>5</b> Excess distributions carryover applied to 2012 (If an amount appears in column (d), the same amount must be shown in column (a).)	<b>36885</b>			<b>36885</b>
<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 . . . . .	<b>15857</b>			
<b>b</b> Prior years' undistributed income. Subtract line 4b from line 2b . . . . .		<b>0</b>		
<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 . . . . .		<b>0</b>		
<b>d</b> Subtract line 6c from line 6b. Taxable amount—see instructions . . . . .		<b>0</b>		
<b>e</b> Undistributed income for 2011. Subtract line 4a from line 2a. Taxable amount—see instructions . . . . .			<b>0</b>	
<b>f</b> Undistributed income for 2012. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2013 . . . . .				<b>0</b>
<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) . . . . .	<b>0</b>			
<b>8</b> Excess distributions carryover from 2007 not applied on line 5 or line 7 (see instructions) . . . . .	<b>0</b>			
<b>9</b> <b>Excess distributions carryover to 2013.</b> Subtract lines 7 and 8 from line 6a . . . . .				
<b>10</b> Analysis of line 9:				
<b>a</b> Excess from 2008 . . . . .				
<b>b</b> Excess from 2009 . . . . .	<b>15857</b>			
<b>c</b> Excess from 2010 . . . . .				
<b>d</b> Excess from 2011 . . . . .				
<b>e</b> Excess from 2012 . . . . .				

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

<b>1a</b>	If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2012, enter the date of the ruling . . . . . ▶	N/A				
<b>b</b>	Check box to indicate whether the foundation is a private operating foundation described in section <input type="checkbox"/> 4942(j)(3) or <input type="checkbox"/> 4942(j)(5)					
<b>2a</b>	Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed . . . . .	Tax year	Prior 3 years			(e) Total
		(a) 2012	(b) 2011	(c) 2010	(d) 2009	
<b>b</b>	85% of line 2a . . . . .					
<b>c</b>	Qualifying distributions from Part XII, line 4 for each year listed . . . . .					
<b>d</b>	Amounts included in line 2c not used directly for active conduct of exempt activities . . . . .					
<b>e</b>	Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c . . . . .					
<b>3</b>	Complete 3a, b, or c for the alternative test relied upon:					
<b>a</b>	"Assets" alternative test—enter:					
	(1) Value of all assets . . . . .					
	(2) Value of assets qualifying under section 4942(j)(3)(B)(i) . . . . .					
<b>b</b>	"Endowment" alternative test—enter $\frac{2}{3}$ of minimum investment return shown in Part X, line 6 for each year listed . . . . .					
<b>c</b>	"Support" alternative test—enter:					
	(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties) . . . . .					
	(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii) . . . . .					
	(3) Largest amount of support from an exempt organization . . . . .					
	(4) Gross investment income . . . . .					

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

<b>1</b>	<b>Information Regarding Foundation Managers:</b>
<b>a</b>	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).)
<b>b</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.
<b>2</b>	<b>Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:</b>
	Check here <input checked="" type="checkbox"/> 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.
<b>a</b>	The name, address, and telephone number or e-mail of the person to whom applications should be addressed:
<b>b</b>	The form in which applications should be submitted and information and materials they should include:
<b>c</b>	Any submission deadlines:
<b>d</b>	Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors:

**Part XV** **Supplementary Information** (continued)**3 Grants and Contributions Paid During the Year or Approved for Future 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
<b>a</b> <i>Paid during the year</i>  See Attached Statement #8				
<b>Total</b> . . . . .			▶ <b>3a</b>	
<b>b</b> <i>Approved for future payment</i>				
<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	
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount
				(e) Related or exempt function income (See instructions.)
<b>1</b> Program service revenue:				
<b>a</b> _____				
<b>b</b> _____				
<b>c</b> _____				
<b>d</b> _____				
<b>e</b> _____				
<b>f</b> _____				
<b>g</b> Fees and contracts from government agencies				
<b>2</b> Membership dues and assessments . . . . .				
<b>3</b> Interest on savings and temporary cash investments			<b>14</b>	<b>226</b>
<b>4</b> Dividends and interest from securities . . . . .			<b>14</b>	<b>84477</b>
<b>5</b> Net rental income or (loss) from real estate:				
<b>a</b> Debt-financed property . . . . .				
<b>b</b> Not debt-financed property . . . . .				
<b>6</b> Net rental income or (loss) from personal property				
<b>7</b> Other investment income . . . . .			<b>15</b>	<b>-11278</b>
<b>8</b> Gain or (loss) from sales of assets other than inventory				
<b>9</b> Net income or (loss) from special events . . . . .				
<b>10</b> Gross profit or (loss) from sales of inventory . . . . .				
<b>11</b> Other revenue: <b>a</b> _____				
<b>b</b> _____				
<b>c</b> _____				
<b>d</b> _____				
<b>e</b> _____				
<b>12</b> Subtotal. Add columns (b), (d), and (e) . . . . .		<b>0</b>		<b>73425</b>
<b>13</b> Total. Add line 12, columns (b), (d), and (e) . . . . .				<b>73425</b>

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

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

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

- |          |  | Yes          | No |
|----------|--|--------------|----|
| <b>1</b> | Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?  |              |    |
| <b>a</b> | Transfers from the reporting foundation to a noncharitable exempt organization of:   |              |    |
|          | (1) Cash . . . . .   | <b>1a(1)</b> | ✓  |
|          | (2) Other assets . . . . .   | <b>1a(2)</b> | ✓  |
| <b>b</b> | Other transactions:  |              |    |
|          | (1) Sales of assets to a noncharitable exempt organization . . . . .   | <b>1b(1)</b> | ✓  |
|          | (2) Purchases of assets from a noncharitable exempt organization . . . . .   | <b>1b(2)</b> | ✓  |
|          | (3) Rental of facilities, equipment, or other assets . . . . .   | <b>1b(3)</b> | ✓  |
|          | (4) Reimbursement arrangements . . . . .   | <b>1b(4)</b> | ✓  |
|          | (5) Loans or loan guarantees . . . . .   | <b>1b(5)</b> | ✓  |
|          | (6) Performance of services or membership or fundraising solicitations . . . . .   | <b>1b(6)</b> | ✓  |
| <b>c</b> | Sharing of facilities, equipment, mailing lists, other assets, or paid employees . . . . .   | <b>1c</b>    | ✓  |
| <b>d</b> | If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received. |              |    |

[illegible]

- 2a** Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? . . . . . ☐ Yes ☒ No
- b** If "Yes," complete the following schedule.

(a) Name of organization	(b) Type of organization	(c) Description of relationship

**Sign** Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

May the IRS discuss this return with the preparer shown below (see instructions)? ☒ Yes ☐ No

<b>Paid Preparer Use Only</b>	Print/preparer's name	Preparer's signature	Date	Check <input type="checkbox"/> if self-employed	PTIN
	Firm's name ▶			Firm's EIN ▶	
	Firm's address ▶			Phone no.	

Emile W. Jacques, PC  
19 Field Point Drive  
Greenwich, CT 06830

**Schedule B**(Form 990, 990-EZ,  
or 990-PF)Department of the Treasury  
Internal Revenue Service**Schedule of Contributors**

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

OMB No. 1545-0047

**2012**

Name of the organization

Employer identification number

TULGEY WOOD FOUNDATION, INC.

06-1062661

Organization type (check one):

Filers of:

Section:

Form 990 or 990-EZ

☐ 501(c)( ) (enter number) organization☐ 4947(a)(1) nonexempt charitable trust not treated as a private foundation☐ 527 political organization

Form 990-PF

☒ 501(c)(3) exempt private foundation☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation☐ 501(c)(3) taxable private foundationCheck if your organization is covered by the **General Rule** or a **Special Rule**.**Note.** Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.**General Rule**

- ☒
- For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II.

**Special Rules**

- ☐ For a section 501(c)(3) organization filing Form 990 or 990-EZ that met the 33 1/3 % support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi) and received from any one contributor, during the year, a contribution of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 for use *exclusively* for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals. Complete Parts I, II, and III.
- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions for use *exclusively* for religious, charitable, etc., purposes, but these contributions did not total to more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Do not complete any of the parts unless the **General Rule** applies to this organization because it received nonexclusively religious, charitable, etc., contributions of \$5,000 or more during the year . . . . . ▶ \$ \_\_\_\_\_

**Caution.** An organization that is not covered by the General Rule and/or the Special Rules does not file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2 of its Form 990; or check the box on line H of its Form 990-EZ or on Part I, line 2 of its Form 990-PF, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

Name of organization	Employer identification number
----------------------	--------------------------------

**Part I Contributors** (see instructions). Use duplicate copies of Part I if additional space is needed.

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	ESTATE OF KATHERINE D. WRIGHT 19 FIELD POINT DRIVE GREENWICH, CT 06830	\$ 32101	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)



Name of organization	Employer identification number
----------------------	--------------------------------

**Part II** Noncash Property (see instructions). Use duplicate copies of Part II if additional space is needed.

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
-----	----- ----- ----- -----	\$ -----	-----
<del>(a) No.</del> from Part I	<del>(b)</del> Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
-----	----- ----- ----- -----	\$ -----	-----
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
-----	----- ----- ----- -----	\$ -----	-----
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
-----	----- ----- ----- -----	\$ -----	-----
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
-----	----- ----- ----- -----	\$ -----	-----
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
-----	----- ----- ----- -----	\$ -----	-----

Name of organization	Employer identification number
----------------------	--------------------------------

**Part III** **Exclusively** religious, charitable, etc., individual contributions to section 501(c)(7), (8), or (10) organizations that total more than \$1,000 for the year. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of *exclusively* religious, charitable, etc., contributions of \$1,000 or less for the year. (Enter this information once. See instructions.) ► \$ \_\_\_\_\_

Use duplicate copies of Part III if additional space is needed.

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
-----	----- ----- -----	----- ----- -----	----- ----- -----
	<b>(e) Transfer of gift</b>		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	----- ----- -----	----- ----- -----	
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
-----	----- ----- -----	----- ----- -----	----- ----- -----
	<b>(e) Transfer of gift</b>		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	----- ----- -----	----- ----- -----	
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
-----	----- ----- -----	----- ----- -----	----- ----- -----
	<b>(e) Transfer of gift</b>		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	----- ----- -----	----- ----- -----	
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
-----	----- ----- -----	----- ----- -----	----- ----- -----
	<b>(e) Transfer of gift</b>		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	----- ----- -----	----- ----- -----	

**TULGEY WOOD FOUNDATION INC.**

Form 990 PF - 2012

**Part 1 Analysis of Revenue and Expense**

**STATEMENT #1**

See Schedule B attached

**STATEMENT #2**

Line 3

Interest on Savings & Temporary Cash Investments

	<u>Amount</u>
511 Plaza Limited	\$1
Energy Transfer Equity LP	\$112
Targa Resources Partners LP	\$3
Energy Transfer Partners LP	<u>\$110</u>
	\$226

**STATEMENT #3**

Line 4 Dividends and Interest from Securities

	<u>Amount</u>
Energy Transfer Equity LP	\$726
Magellan Midstream Partners	\$1
Energy Transfer Partners LP	\$262
UBS 00959KK	<u>\$83,488</u>
	\$84,477

**STATEMENT #4**

Line 11 Other Income

	(A)	(B)
	Revenue	Net Invest-
DESCRIPTION	<u>Per Books</u>	<u>ment Income</u>
511 Plaza Limited	\$2,280	\$2,280
Energy Transfer Equity LP	-\$2,936	-\$2,936
Magellan Midstream Partners LP	\$321	\$321
Targa Resource Partners	-\$5,272	-\$5,272
Energy Transfer Equity LP	-\$2,553	-\$2,553
Penn Virginia Resource Partners LP	<u>-\$3,118</u>	<u>-\$3,118</u>
	-\$11,278	-\$11,278

**STATEMENT #5**

Line 18 - Taxes

Foreign Taxes	\$213
---------------	-------

**STATEMENT #6**

Line 23 - Other Expenses

Brokerage Fees	\$22,809
New checks	\$107
Security Fees	<u>\$11</u>
	\$22,927

TULGEY WOOD FOUNDATION INC.  
Form 990 PF - 2012

**Part II Balance Sheets**

**STATEMENT #7**

Line 13

	Valuation	Book	UBS
	<u>Method</u>	<u>Value</u>	Fair Mkt <u>Value</u>
DESCRIPTION			
511 Plaza Limited	FMV	\$37,480	\$40,672
Energy Transfer Equity LP	FMV	\$18,361	\$32,841
Magellan Midstream Partners LP	FMV	\$27,982	\$65,217
Targa Resources Partners	FMV	\$9,823	\$52,332
Energy Transfer Equity LP	COST	\$18,395	\$51,165
Penn Virginia Resource Partners LP	COST	<u>\$16,956</u>	<u>\$45,829</u>
		\$128,997	\$288,056

**Part XV Supplementary Information**

**#3 Grants and Contributions Paid During the Year**

**STATEMENT #8**

See attached.

## STATEMENT #8

TULGEY WOOD FOUNDATION, INC  
I.D. 06-1062661  
990 PF 2012

Part XV, Line 3a

Grants and Contributions Paid During the Year

<u>Recipient</u>	<u>Status</u>	<u>Purpose</u>	<u>Amount</u>
<b>ACLU FDN of Vermont</b> 137 Elm Street Montpelier, VT 05602	Public Charity	Support of Organization	\$1,000
<b>Aloha Foundation</b> 465 Pennell Road Chester, VT 05143	Public Charity	Support of Organization	\$500
<b>AM Hopkin Memorial Award Fund</b> Univ. of California, Berkeley 208 McLaughlin Hall #1722 Berkeley, CA 94720-1722	Public Charity	Support of Organization	\$500
<b>AMREF USA</b> 19 W. 44 St., Suite 710 New York, NY 10036	Public Charity	Support of Organization	\$1,000
<b>APNE AAP Women Worldwide</b> 1615 Q ST. NW #208 Washington, DC 20009	Public Charity	Support of Organization	\$1,000
<b>Associates of the Boston Public Library</b> 700 Boylston Street Boston, MA 02116	Public Charity	Support of Organization	\$200
<b>Barre Historical Society</b> P.O. Box 496 Barre, VT 05641-0496	Public Charity	Support of Organization	\$1,500
<b>Boston Athenaeum</b> Boston, MA	Public Charity	Support of Organization	\$2,000
<b>Brown University Annual Fund</b> Office of Development Box 1893 Providence, RI 02912	Public Charity	Support of Organization	\$1,000
<b>Burlington Dismas House</b> 96 Buell St. Burlington, VT05401	Public Charity	Support of Organization	\$350
<b>CAMFED USA Foundation</b> 221 Main Street San Francisco, CA 94105	Public Charity	Support of Organization	\$1,000

TULGEY WOOD FOUNDATION, INC  
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Part XV, Line 3a  
Grants and Contributions Paid During the Year

<u>Recipient</u>	<u>Status</u>	<u>Purpose</u>	<u>Amount</u>
<b>Care Intl</b> 151 Ellis Street, NE Atlanta, GA 30303	Public Charity	Support of Organization	\$1,000
<b>Chapman Partnership</b> 1550 North Miami Avenue Miami, FL 33136	Public Charity	Support of Organization	\$1,000
<b>Charity Water</b> 200 Varick Street, Suite 201 New York, NY 10014	Public Charity	Support of Organization	\$1,000
<b>Charles River Conservancy</b> 4 Brattle Street Cambridge, MA 02138	Public Charity	Support of Organization	\$300
<b>Columbia University Medical Center</b> 630 West 168th Street, Box 48 New York, NY 10032	Public Charity	Support of Organization	\$1,000
<b>Committee on Temporary Shelter</b> P.O. Box 1616 Burlington, VT 05402	Public Charity	Support of Organization	\$750
<b>Community Boating</b> 21 David Mugar Way Boston, MA 02114	Public Charity	Support of Organization	\$750
<b>Concord Academy Annual Fund</b> 166 Main Street Concord, MA 02114	Public Charity	Support of Organization	\$1,750
<b>Conservatory Lab Charter School</b> 25 Arlington Street Boston, MA 02116	Public Charity	Support of Organization	\$375
<b>Cradle to Grave Arts</b> P.O. Box 8 Chelsea, VT 05038	Public Charity	Support of Organization	\$2,500
<b>Diane Fossey Gorilla Fund</b> 800 Cherokee Ave. Atlanta, GA 30315	Public Charity	Support of Organization	\$500

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Part XV, Line 3a  
Grants and Contributions Paid During the Year

<u>Recipient</u>	<u>Status</u>	<u>Purpose</u>	<u>Amount</u>
<b>Direct Relief Intl</b> 27 South La Patera Lane Santa Barbara, CA 93117	Public Charity	Support of Organization	\$1,000
<b>Doctors Without Borders</b> 6 E. 39th Street New York, NY 10016	Public Charity	Support of Organization	\$1,000
<b>Emma Willard School 04 05 A</b> Troy, New York	Public Charity	Support of Organization	\$1,000
<b>Fauna &amp; Flora Intl Inc.</b> P.O. Box 42575 Washington, DC 20015-0575	Public Charity	Support of Organization	\$1,000
<b>FINCA INTL</b> P.O. Box 98048 Washington, DC 20090-8048	Public Charity	Support of Organization	\$1,000
<b>Fort Ticonderoga</b> Fort Road Ticonderoga, NY 12883	Public Charity	Support of Organization	\$1,000
<b>Flynn Theatre for Performing Arts</b> 153 Main Street Burlington, VT 05401	Public Charity	Support of Organization	\$2,000
<b>Fraternite Notre Dame</b> 2290 First Avenue New York, NY 10035	Public Charity	Support of Organization	\$500
<b>Free the Slaves</b> 1320 19th Street, NW, Suite 600 Washington, DC 20036	Public Charity	Support of Organization	\$1,000
<b>Friends of WLRN</b> 169 East Flagler, Suite 1400 Miami, FL 33131	Public Charity	Support of Organization	\$1,000
<b>Greater Baton Rouge Food Basket</b> 5546 Choctaw Drive Baton Rouge, LA 70805	Public Charity	Support of Organization	\$500
<b>Harvard College Fund</b> Massachusetts Hall Cambridge, MA 02138	Public Charity	Support of Organization	\$1,950

TULGEY WOOD FOUNDATION, INC  
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Part XV, Line 3a  
Grants and Contributions Paid During the Year

<u>Recipient</u>	<u>Status</u>	<u>Purpose</u>	<u>Amount</u>
<b>Heifer Project Intl</b> One World Avenue Little Rock, Arkansas 72202	Public Charity	Support of Organization	\$2,000
<b>Historic New England</b> 141 Cambridge Street Boston, MA 02114	Public Charity	Support of Organization	\$3,500
<b>Homeshare Vermont</b> 412 Farrell Street, Suite 300 South Burlington, VT 05403-4466	Public Charity	Support of Organization	\$2,500
<b>Hope for Haiti's Children</b> P.O. Box 864311 Orlando, FL 32886	Public Charity	Support of Organization	\$2,000
<b>Hopkins School</b> Office of Development Forest Road New Haven, CT 06505	Public Charity	Support of Organization	\$250
<b>Institute of Contemporary Art</b> 100 Northern Avenue Boston, MA 02210	Public Charity	Support of Organization	\$150
<b>Interfaith Center of New York</b> 570 Lexington Ave., 22nd Floor New York, NY 10022	Public Charity	Support of Organization	\$500
<b>International Rescue Committee</b> P.O. Box 98152 Washington, D C 20077-7355	Public Charity	Support of Organization	\$1,000
<b>Isabella Stuart Gardner Museum</b> Boston, MA 02115	Public Charity	Support of Organization	\$3,700
<b>Lamoille County Conservation District</b> 109 Professional Drive, Suite 2 Morrisville, VT 05661	Public Charity	Support of Organization	\$350
<b>Library Foundation of Los Angeles</b> 630 West Fifth Street Los Angeles, CA 90071	Public Charity	Support of Organization	\$100
<b>Los Angeles Conservancy</b> 523 W. Sixth St., Suite 826 Los Angeles, CA 90014	Public Charity	Support of Organization	\$100



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Part XV, Line 3a  
Grants and Contributions Paid During the Year

<u>Recipient</u>	<u>Status</u>	<u>Purpose</u>	<u>Amount</u>
<b>Maple Leaf Farm</b> 10 Maple Leaf Road Underhill, VT 05489	Public Charity	Support of Organization	\$2,500
<b>Morristown Centennial Library</b> 7 Richmond St., Bot 727 Morrisville, VT 05661	Public Charity	Support of Organization	\$150
<b>Morrisville Alliance for Culture &amp; Commerce</b> Box 748 Morrisville, VT 05661	Public Charity	Support of Organization	\$350
<b>Museum of Fine Arts</b> 465 Huntington Avenue Boston, MA 02115	Public Charity	Support of Organization	\$800
<b>National Parks Conservation</b> P.O. Box 97202 Washington, DC 20077-7431	Public Charity	Support of Organization	\$500
<b>Nature Conservancy</b> 4245 North Fairfax Drive, Suite 100 Arlington, VA 22203-1606	Public Charity	Support of Organization	\$1,000
<b>New York Public Library</b> New York, New York	Public Charity	Support of Organization	\$100
<b>North Bennet Street School</b> 39 North Bennet Street Boston, MA 02113	Public Charity	Support of Organization	\$2,000
<b>Occupy Sandy/ Alliance for Global Justice</b> 1247 E. St. SE Washington, DC 20003	Public Charity	Support of Organization	\$100
<b>Overtown Youth Center</b> 450 Northwest 14th Street Miami, FL 33136	Public Charity	Support of Organization	\$1,000
<b>Partners in Health Boston</b> 888 Commonwealth Ave., 3rd Floor Boston, MA 02215	Public Charity	Support of Organization	\$700
<b>Phillips Exeter Academy</b> Exeter, NH	Public Charity	Support of Organization	\$3,500

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Part XV, Line 3a  
Grants and Contributions Paid During the Year

<u>Recipient</u>	<u>Status</u>	<u>Purpose</u>	<u>Amount</u>
<b>Planned Parenthood of South Florida and the Treasure Coast, Inc.</b> 2300 North Florida Mango Road West Palm Beach, FL 34409	Public Charity	Support of Organization	\$1,000
<b>Planned Parenthood League of MASS</b> 1055 Commonwealth Avenue Boston, MA 02215-1001	Public Charity	Support of Organization	\$300
<b>RARE Conservation Programs</b> 1310 North Courthouse Road, Suite 110 Arlington, VA 22201	Public Charity	Support of Organization	\$750
<b>Reading is Fundamental</b> 1255 23rd Street Washington, DC 20037	Public Charity	Support of Organization	\$1,000
<b>Rebecca West Society</b> c/o Bernard Schweizer 236 Glenn Avenue Lawrenceville, NJ 08648	Public Charity	Support of Organization	\$250
<b>Shady Hill School Annual Fund</b> 178 Coolidge Hill Rd. Shelburne, VT 05482	Public Charity	Support of Organization	\$1,500
<b>St. Stephen's Episcopal Day School</b> 3439 Main Highway Coconut Grove, FL 33133	Public Charity	Support of Organization	\$1,000
<b>Stern Center for Language &amp; Learning</b> 135 Allen Brook Lane Williston, VT 05495-9209	Public Charity	Support of Organization	\$1,000
<b>Strawberry Banke</b> P.O. Bos 300 Portsmouth, NH 03801	Public Charity	Support of Organization	\$325
<b>Suffield Academy Annual Fund</b> Suffield, CT 06078	Public Charity	Support of Organization	\$250
<b>The Center for Sexual Assault Crisis Counsel.</b> 700 Canal Street, Suite 22B Stamford, CT 06902	Public Charity	Support of Organization	\$1,000

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Grants and Contributions Paid During the Year

<u>Recipient</u>	<u>Status</u>	<u>Purpose</u>	<u>Amount</u>
<b>University of Miami</b> Advancement Division P.O. Box 025388 Coral Gables, FL 33102-9811	Public Charity	Support of Organization	\$1,000
<b>United Way of Chittenden County</b> 412 Farrell St., Suite 200 South Burlington, VT 05403	Public Charity	Support of Organization	\$1,700
<b>VT College of Fine Arts</b> 36 College Street Montpelier, VT 05602-3145			\$1,000
<b>Vermont Folk Life Center Annual Fund</b> 2 Court Street, P.O. Box 442 Middlebury, VT 05753	Public Charity	Support of Organization	\$3,500
<b>Vermont Journalism Trust</b> c/o VT Digger Org. Box 2 East Hardwick, VT 05836	Public Charity	Support of Organization	\$3,500
<b>Vermont Land Trust</b> 8 Bailey Avenue Montpelier, VT 05602-9942	Public Charity	Support of Organization	\$1,750
<b>Vermont Works for Women</b> 51 Park Street Essex Junction, VT	Public Charity	Support of Organization	\$2,500
<b>WAMU 88.5</b> 4000 Brandywine St. NW Washington, DC 20016-8082	Public Charity	Support of Organization	\$200
<b>WDNA FM Public Radio</b> Bascomb Memorial Broadcasting Foundation 2921 SW 22 Street Miami, FL 33145	Public Charity	Support of Organization	\$2,000
<b>Wellesley Coll. Fund</b> Wellesley, MA	Public Charity	Support of Organization	<u>\$1,750</u>
<b>Total Donations</b>			<b>\$90,050</b>