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Form 990

Department of the Treasury  
Internal Revenue Service

## Return of Organization Exempt From Income Tax

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except black lung benefit trust or private foundation)

▶ The organization may have to use a copy of this return to satisfy state reporting requirements

OMB No 1545-0047

2012

Open to Public  
Inspection

A For the 2012 calendar year, or tax year beginning , 2012, and ending , 20

## B Check if applicable

- ☐ Address change
- ☐ Name change
- ☐ Initial return
- ☐ Terminated
- ☐ Amended return
- ☐ Application pending

C Name of organization G WHITTEMORE TR FBO H WHITTEMORE LIBRARY, WEBSTER BANK

Doing Business As

Number and street (or P O box if mail is not delivered to street address)

Room/suite

123 BANK STREET

City, town or post office, state, and ZIP code

WATERBURY, CT 06702

F Name and address of principal officer

D Employer identification number

06-6025602

E Telephone number

203 578-2409

G Gross receipts \$ 1,418,213.

H(a) Is this a group return for affiliates? ☐ Yes ☒ NoH(b) Are all affiliates included? ☐ Yes ☐ No

If "No," attach a list (see instructions)

H(c) Group exemption number ▶

I Tax-exempt status ☐ 501(c)(3) ☐ 501(c) ( ) ◀ (insert no) ☒ 4947(a)(1) or ☐ 527

J Website: ▶ N/A

K Form of organization ☐ Corporation ☒ Trust ☐ Association ☐ Other ▶ L Year of formation 1932 M State of legal domicile NS

## Part I Summary

1 Briefly describe the organization's mission or most significant activities:

MAINTENANCE OF PUBLIC LIBRARY

2 Check this box ☐ if the organization discontinued its operations or disposed of more than 25% of its net assets

3 Number of voting members of the governing body (Part VI, line 1a) 3 1

4 Number of independent voting members of the governing body (Part VI, line 1b) 4 1

5 Total number of individuals employed in calendar year 2012 (Part V, line 2a) 5 NONE

6 Total number of volunteers (estimate if necessary) 6 NONE

7a Total unrelated business revenue from Part VIII, column (C), line 12 7a NONE

b Net unrelated business taxable income from Form 990-T, line 34 7b NONE

		Prior Year	Current Year
8	Contributions and grants (Part VIII, line 1h)		
9	Program service revenue (Part VIII, line 2g)		381,193.
10	Investment income (Part VIII, column (A), lines 3, 4, and 7d)	31,927	110,670.
11	Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)		
12	Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12)	31,927	491,863.
13	Grants and similar amounts paid (Part IX, column (A), lines 1-3)	109,612	105,984.
14	Benefits paid to or for members (Part IX, column (A), line 4)		
15	Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10)	18,633	18,200.
16a	Professional fundraising fees (Part IX, column (A), line 11e)		
b	Total fundraising expenses (Part IX, column (D), line 25) ▶ NONE		
17	Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e)	1,186	14,028.
18	Total expenses Add lines 13-17 (must equal Part IX, column (A), line 25)	129,431	138,212.
19	Revenue less expenses Subtract line 18 from line 12	-97,504	353,651.
20	Total assets (Part X, line 16)	2,236,166	2,589,817.
21	Total liabilities (Part X, line 26)	NONE	NONE
22	Net assets or fund balances Subtract line 21 from line 20	2,236,166	2,589,817.

## Part II Signature Block

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 officer) is based on all information of which preparer has any knowledge.

Sign Here

Signature of officer

Date 04/30/2013

Type or print name and title

Paid Preparer Use Only

Print/Type preparer's name

Preparer's signature

Date

Check ☐ if self-employed

PTIN

GORDON POWERS

04/30/2013

P00260194

Firm's name ▶ THOMSON REUTERS (TAX &amp; ACCOUNTING)

Firm's EIN ▶ 75-1297386

Firm's address ▶ 22 THOMSON PLACE, MS 36T1; BOSTON, MA 02210

Phone no 617-856-2811

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

For Paperwork Reduction Act Notice, see the separate instructions.

Form 990 (2012)

JSA  
2E1010 1 000

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**Part III** Statement of Program Service AccomplishmentsCheck if Schedule O contains a response to any question in this Part III ☐**1** Briefly describe the organization's mission:MAINTENANCE OF PUBLIC LIBRARY**2** Did the organization undertake any significant program services during the year which were not listed on the prior Form 990 or 990-EZ? ☐ Yes ☒ No

If "Yes," describe these new services on Schedule O.

**3** Did the organization cease conducting, or make significant changes in how it conducts, any program services? ☐ Yes ☒ No

If "Yes," describe these changes on Schedule O.

**4** Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses. Section 501(c)(3) and 501(c)(4) organizations are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported.**4a** (Code: ) (Expenses \$ 138,212. including grants of \$ 105,984.) (Revenue \$ 491,863.)**4b** (Code: ) (Expenses \$ including grants of \$ ) (Revenue \$ )**4c** (Code: ) (Expenses \$ including grants of \$ ) (Revenue \$ )**4d** Other program services (Describe in Schedule O.)

(Expenses \$ including grants of \$ ) (Revenue \$ )

**4e** Total program service expenses ► 138,212.

**Part IV Checklist of Required Schedules**

	Yes	No
<b>1</b> Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? If "Yes," complete Schedule A . . . . .	<b>1</b> X	
<b>2</b> Is the organization required to complete Schedule B, Schedule of Contributors (see instructions)? . . . . .	<b>2</b>	X
<b>3</b> Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? If "Yes," complete Schedule C, Part I . . . . .	<b>3</b>	X
<b>4</b> <b>Section 501(c)(3) organizations.</b> Did the organization engage in lobbying activities, or have a section 501(h) election in effect during the tax year? If "Yes," complete Schedule C, Part II . . . . .	<b>4</b>	X
<b>5</b> Is the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization that receives membership dues, assessments, or similar amounts as defined in Revenue Procedure 98-19? If "Yes," complete Schedule C, Part III . . . . .	<b>5</b>	X
<b>6</b> Did the organization maintain any donor advised funds or any similar funds or accounts for which donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? If "Yes," complete Schedule D, Part I . . . . .	<b>6</b>	X
<b>7</b> Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas, or historic structures? If "Yes," complete Schedule D, Part II . . . . .	<b>7</b>	X
<b>8</b> Did the organization maintain collections of works of art, historical treasures, or other similar assets? If "Yes," complete Schedule D, Part III . . . . .	<b>8</b>	X
<b>9</b> Did the organization report an amount in Part X, line 21, for escrow or custodial account liability; serve as a custodian for amounts not listed in Part X; or provide credit counseling, debt management, credit repair, or debt negotiation services? If "Yes," complete Schedule D, Part IV . . . . .	<b>9</b>	X
<b>10</b> Did the organization, directly or through a related organization, hold assets in temporarily restricted endowments, permanent endowments, or quasi-endowments? If "Yes," complete Schedule D, Part V . . . . .	<b>10</b>	X
<b>11</b> If the organization's answer to any of the following questions is "Yes," then complete Schedule D, Parts VI, VII, VIII, IX, or X as applicable.		
<b>a</b> Did the organization report an amount for land, buildings, and equipment in Part X, line 10? If "Yes," complete Schedule D, Part VI . . . . .	<b>11a</b>	X
<b>b</b> Did the organization report an amount for investments-other securities in Part X, line 12 that is 5% or more of its total assets reported in Part X, line 16? If "Yes," complete Schedule D, Part VII . . . . .	<b>11b</b>	X
<b>c</b> Did the organization report an amount for investments-program related in Part X, line 13 that is 5% or more of its total assets reported in Part X, line 16? If "Yes," complete Schedule D, Part VIII . . . . .	<b>11c</b>	X
<b>d</b> Did the organization report an amount for other assets in Part X, line 15 that is 5% or more of its total assets reported in Part X, line 16? If "Yes," complete Schedule D, Part IX . . . . .	<b>11d</b>	X
<b>e</b> Did the organization report an amount for other liabilities in Part X, line 25? If "Yes," complete Schedule D, Part X . . . . .	<b>11e</b>	X
<b>f</b> Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses the organization's liability for uncertain tax positions under FIN 48 (ASC 740)? If "Yes," complete Schedule D, Part X . . . . .	<b>11f</b>	X
<b>12a</b> Did the organization obtain separate, independent audited financial statements for the tax year? If "Yes," complete Schedule D, Parts XI and XII . . . . .	<b>12a</b>	X
<b>b</b> Was the organization included in consolidated, independent audited financial statements for the tax year? If "Yes," and if the organization answered "No" to line 12a, then completing Schedule D, Parts XI and XII is optional . . . . .	<b>12b</b>	X
<b>13</b> Is the organization a school described in section 170(b)(1)(A)(ii)? If "Yes," complete Schedule E . . . . .	<b>13</b>	X
<b>14a</b> Did the organization maintain an office, employees, or agents outside of the United States? . . . . .	<b>14a</b>	X
<b>b</b> Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking, fundraising, business, investment, and program service activities outside the United States, or aggregate foreign investments valued at \$100,000 or more? If "Yes," complete Schedule F, Parts I and IV . . . . .	<b>14b</b>	X
<b>15</b> Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or assistance to any organization or entity located outside the United States? If "Yes," complete Schedule F, Parts II and IV . . . . .	<b>15</b>	X
<b>16</b> Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or assistance to individuals located outside the United States? If "Yes," complete Schedule F, Parts III and IV . . . . .	<b>16</b>	X
<b>17</b> Did the organization report a total of more than \$15,000 of expenses for professional fundraising services on Part IX, column (A), lines 6 and 11e? If "Yes," complete Schedule G, Part I (see instructions) . . . . .	<b>17</b>	X
<b>18</b> Did the organization report more than \$15,000 total of fundraising event gross income and contributions on Part VIII, lines 1c and 8a? If "Yes," complete Schedule G, Part II . . . . .	<b>18</b>	X
<b>19</b> Did the organization report more than \$15,000 of gross income from gaming activities on Part VIII, line 9a? If "Yes," complete Schedule G, Part III . . . . .	<b>19</b>	X
<b>20a</b> Did the organization operate one or more hospital facilities? If "Yes," complete Schedule H . . . . .	<b>20a</b>	X
<b>b</b> If "Yes" to line 20a, did the organization attach a copy of its audited financial statements to this return? . . . . .	<b>20b</b>	

**Part IV Checklist of Required Schedules (continued)**

		Yes	No
<b>21</b>	Did the organization report more than \$5,000 of grants and other assistance to any government or organization in the United States on Part IX, column (A), line 1? <i>If "Yes," complete Schedule I, Parts I and II.</i>	X	
<b>22</b>	Did the organization report more than \$5,000 of grants and other assistance to individuals in the United States on Part IX, column (A), line 2? <i>If "Yes," complete Schedule I, Parts I and III.</i>		X
<b>23</b>	Did the organization answer "Yes" to Part VII, Section A, line 3, 4, or 5 about compensation of the organization's current and former officers, directors, trustees, key employees, and highest compensated employees? <i>If "Yes," complete Schedule J.</i>		X
<b>24 a</b>	Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the last day of the year, that was issued after December 31, 2002? <i>If "Yes," answer lines 24b through 24d and complete Schedule K. If No, go to line 25.</i>		X
<b>b</b>	Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception?		X
<b>c</b>	Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds?		X
<b>d</b>	Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year?		X
<b>25 a</b>	<b>Section 501(c)(3) and 501(c)(4) organizations.</b> Did the organization engage in an excess benefit transaction with a disqualified person during the year? <i>If "Yes," complete Schedule L, Part I.</i>		X
<b>b</b>	Is the organization aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? <i>If "Yes," complete Schedule L, Part I.</i>		X
<b>26</b>	Was a loan to or by a current or former officer, director, trustee, key employee, highly compensated employee, or disqualified person outstanding as of the end of the organization's tax year? <i>If "Yes," complete Schedule L, Part II.</i>		X
<b>27</b>	Did the organization provide a grant or other assistance to an officer, director, trustee, key employee, substantial contributor or employee thereof, a grant selection committee member, or to a 35% controlled entity or family member of any of these persons? <i>If "Yes," complete Schedule L, Part III.</i>		X
<b>28</b>	Was the organization a party to a business transaction with one of the following parties (see Schedule L, Part IV instructions for applicable filing thresholds, conditions, and exceptions):		
<b>a</b>	A current or former officer, director, trustee, or key employee? <i>If "Yes," complete Schedule L, Part IV.</i>		X
<b>b</b>	A family member of a current or former officer, director, trustee, or key employee? <i>If "Yes," complete Schedule L, Part IV.</i>		X
<b>c</b>	An entity of which a current or former officer, director, trustee, or key employee (or a family member thereof) was an officer, director, trustee, or direct or indirect owner? <i>If "Yes," complete Schedule L, Part IV.</i>		X
<b>29</b>	Did the organization receive more than \$25,000 in non-cash contributions? <i>If "Yes," complete Schedule M.</i>		X
<b>30</b>	Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? <i>If "Yes," complete Schedule M.</i>		X
<b>31</b>	Did the organization liquidate, terminate, or dissolve and cease operations? <i>If "Yes," complete Schedule N, Part I.</i>		X
<b>32</b>	Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? <i>If "Yes," complete Schedule N, Part II.</i>		X
<b>33</b>	Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? <i>If "Yes," complete Schedule R, Part I.</i>		X
<b>34</b>	Was the organization related to any tax-exempt or taxable entity? <i>If "Yes," complete Schedule R, Part II, III, or IV, and Part V, line 1.</i>		X
<b>35 a</b>	Did the organization have a controlled entity within the meaning of section 512(b)(13)?		X
<b>b</b>	If "Yes" to line 35a, did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? <i>If "Yes," complete Schedule R, Part V, line 2.</i>		X
<b>36</b>	<b>Section 501(c)(3) organizations.</b> Did the organization make any transfers to an exempt non-charitable related organization? <i>If "Yes," complete Schedule R, Part V, line 2.</i>		
<b>37</b>	Did the organization conduct more than 5% of its activities through an entity that is not a related organization and that is treated as a partnership for federal income tax purposes? <i>If "Yes," complete Schedule R, Part VI.</i>		X
<b>38</b>	Did the organization complete Schedule O and provide explanations in Schedule O for Part VI, lines 11b and 19? <b>Note.</b> All Form 990 filers are required to complete Schedule O.	X	

Form **990** (2012)

**Part V Statements Regarding Other IRS Filings and Tax Compliance**Check if Schedule O contains a response to any question in this Part V. ☐

Yes No

1a	Enter the number reported in Box 3 of Form 1096. Enter -0- if not applicable. . . . .	1a	0			
b	Enter the number of Forms W-2G included in line 1a. Enter -0- if not applicable. . . . .	1b	0			
c	Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners? . . . . .	1c				X
2a	Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements, filed for the calendar year ending with or within the year covered by this return . . . . .	2a	0			
b	If at least one is reported on line 2a, did the organization file all required federal employment tax returns? <b>Note.</b> If the sum of lines 1a and 2a is greater than 250, you may be required to e-file (see instructions) . . . . .	2b				
3a	Did the organization have unrelated business gross income of \$1,000 or more during the year? . . . . .	3a				X
b	If "Yes," has it filed a Form 990-T for this year? If "No," provide an explanation in Schedule O . . . . .	3b				
4a	At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a financial account in a foreign country (such as a bank account, securities account, or other financial account)? . . . . .	4a				X
b	If Yes, enter the name of the foreign country: ▶ See instructions for filing requirements for Form TD F 90-22.1, Report of Foreign Bank and Financial Accounts. . . . .					
5a	Was the organization a party to a prohibited tax shelter transaction at any time during the tax year? . . . . .	5a				X
b	Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction? . . . . .	5b				X
c	If "Yes" to line 5a or 5b, did the organization file Form 8886-T? . . . . .	5c				
6a	Does the organization have annual gross receipts that are normally greater than \$100,000, and did the organization solicit any contributions that were not tax deductible as charitable contributions? . . . . .	6a				X
b	If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible? . . . . .	6b				
7	<b>Organizations that may receive deductible contributions under section 170(c).</b>					
a	Did the organization receive a payment in excess of \$75 made partly as a contribution and partly for goods and services provided to the payor? . . . . .	7a				X
b	If "Yes," did the organization notify the donor of the value of the goods or services provided? . . . . .	7b				
c	Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282? . . . . .	7c				X
d	If "Yes," indicate the number of Forms 8282 filed during the year . . . . .	7d				
e	Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? . . . . .	7e				X
f	Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract? . . . . .	7f				X
g	If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required? . . . . .	7g				X
h	If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C? . . . . .	7h				X
8	<b>Sponsoring organizations maintaining donor advised funds and section 509(a)(3) supporting organizations.</b> Did the supporting organization, or a donor advised fund maintained by a sponsoring organization, have excess business holdings at any time during the year? . . . . .	8				X
9	<b>Sponsoring organizations maintaining donor advised funds.</b>					
a	Did the organization make any taxable distributions under section 4966? . . . . .	9a				X
b	Did the organization make a distribution to a donor, donor advisor, or related person? . . . . .	9b				X
10	<b>Section 501(c)(7) organizations.</b> Enter:					
a	Initiation fees and capital contributions included on Part VIII, line 12 . . . . .	10a				
b	Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities . . . . .	10b				
11	<b>Section 501(c)(12) organizations.</b> Enter:					
a	Gross income from members or shareholders . . . . .	11a				
b	Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them.) . . . . .	11b				
12a	<b>Section 4947(a)(1) non-exempt charitable trusts.</b> Is the organization filing Form 990 in lieu of Form 1041? . . . . .	12a				X
b	If "Yes," enter the amount of tax-exempt interest received or accrued during the year . . . . .	12b				
13	<b>Section 501(c)(29) qualified nonprofit health insurance issuers.</b>					
a	Is the organization licensed to issue qualified health plans in more than one state? . . . . . <b>Note.</b> See the instructions for additional information the organization must report on Schedule O. . . . .	13a				
b	Enter the amount of reserves the organization is required to maintain by the states in which the organization is licensed to issue qualified health plans . . . . .	13b				
c	Enter the amount of reserves on hand . . . . .	13c				
14a	Did the organization receive any payments for indoor tanning services during the tax year? . . . . .	14a				X
b	If "Yes," has it filed a Form 720 to report these payments? If "No," provide an explanation in Schedule O . . . . .	14b				

**Part VI Governance, Management, and Disclosure** For each "Yes" response to lines 2 through 7b below, and for a "No" response to line 8a, 8b, or 10b below, describe the circumstances, processes, or changes in Schedule O. See instructions.Check if Schedule O contains a response to any question in this Part VI. ☒ X**Section A. Governing Body and Management**

		Yes	No
<b>1a</b> Enter the number of voting members of the governing body at the end of the tax year. . . . .	<b>1a</b> 1		
If there are material differences in voting rights among members of the governing body, or if the governing body delegated broad authority to an executive committee or similar committee, explain in Schedule O			
<b>b</b> Enter the number of voting members included in line 1a, above, who are independent . . . . .	<b>1b</b> 1		
<b>2</b> Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee, or key employee? . . . . .	<b>2</b>		X
<b>3</b> Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors, or trustees, or key employees to a management company or other person? . . .	<b>3</b>		X
<b>4</b> Did the organization make any significant changes to its governing documents since the prior Form 990 was filed? . . . . .	<b>4</b>		X
<b>5</b> Did the organization become aware during the year of a significant diversion of the organization's assets? . . . . .	<b>5</b>		X
<b>6</b> Did the organization have members or stockholders? . . . . .	<b>6</b>		X
<b>7a</b> Did the organization have members, stockholders, or other persons who had the power to elect or appoint one or more members of the governing body? . . . . .	<b>7a</b>		X
<b>b</b> Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or persons other than the governing body? . . . . .	<b>7b</b>		X
<b>8</b> Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following:			
<b>a</b> The governing body? . . . . .	<b>8a</b>	X	
<b>b</b> Each committee with authority to act on behalf of the governing body? . . . . .	<b>8b</b>		X
<b>9</b> Is there any officer, director, trustee, or key employee listed in Part VII, Section A, who cannot be reached at the organization's mailing address? If "Yes," provide the names and addresses in Schedule O . . . . .	<b>9</b>		X

**Section B. Policies** (This Section B requests information about policies not required by the Internal Revenue Code.)

		Yes	No
<b>10a</b> Did the organization have local chapters, branches, or affiliates? . . . . .	<b>10a</b>		X
<b>b</b> If "Yes," did the organization have written policies and procedures governing the activities of such chapters, affiliates, and branches to ensure their operations are consistent with the organization's exempt purposes? . . . .	<b>10b</b>		
<b>11a</b> Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form? . .	<b>11a</b>	X	
<b>b</b> Describe in Schedule O the process, if any, used by the organization to review this Form 990. . . . .			
<b>12a</b> Did the organization have a written conflict of interest policy? If "No," go to line 13 . . . . .	<b>12a</b>		X
<b>b</b> Were officers, directors, or trustees, and key employees required to disclose annually interests that could give rise to conflicts? . . . . .	<b>12b</b>		
<b>c</b> Did the organization regularly and consistently monitor and enforce compliance with the policy? If "Yes," describe in Schedule O how this was done . . . . .	<b>12c</b>		
<b>13</b> Did the organization have a written whistleblower policy? . . . . .	<b>13</b>		X
<b>14</b> Did the organization have a written document retention and destruction policy? . . . . .	<b>14</b>	X	
<b>15</b> Did the process for determining compensation of the following persons include a review and approval by independent persons, comparability data, and contemporaneous substantiation of the deliberation and decision?			
<b>a</b> The organization's CEO, Executive Director, or top management official . . . . .	<b>15a</b>		X
<b>b</b> Other officers or key employees of the organization . . . . .	<b>15b</b>		X
If "Yes" to line 15a or 15b, describe the process in Schedule O (see instructions).			
<b>16a</b> Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a taxable entity during the year? . . . . .	<b>16a</b>		X
<b>b</b> If "Yes," did the organization follow a written policy or procedure requiring the organization to evaluate its participation in joint venture arrangements under applicable federal tax law, and take steps to safeguard the organization's exempt status with respect to such arrangements? . . . . .	<b>16b</b>		

**Section C. Disclosure**

**17** List the states with which a copy of this Form 990 is required to be filed ►Connecticut

**18** Section 6104 requires an organization to make its Forms 1023 (or 1024 if applicable), 990, and 990-T (Section 501(c)(3)s only) available for public inspection. Indicate how you made these available. Check all that apply.  
☐ Own website ☐ Another's website ☒ Upon request ☐ Other (explain in Schedule O)

**19** Describe in Schedule O whether (and if so, how), the organization made its governing documents, conflict of interest policy, and financial statements available to the public during the tax year.

**20** State the name, physical address, and telephone number of the person who possesses the books and records of the organization: ►WEBSTER BANK, NA TEL: (203) 578-2409

**Part VII Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors**Check if Schedule O contains a response to any question in this Part VII ☐**Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees****1a** Complete this table for all persons required to be listed. Report compensation for the calendar year ending with or within the organization's tax year.

- List all of the organization's **current** officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation. Enter -0- in columns (D), (E), and (F) if no compensation was paid.

- List all of the organization's **current** key employees, if any. See instructions for definition of "key employee."

- List the organization's five **current** highest compensated employees (other than an officer, director, trustee, or key employee) who received reportable compensation (Box 5 of Form W-2 and/or Box 7 of Form 1099-MISC) of more than \$100,000 from the organization and any related organizations.

- List all of the organization's **former** officers, key employees, and highest compensated employees who received more than \$100,000 of reportable compensation from the organization and any related organizations.

- List all of the organization's **former directors or trustees** that received, in the capacity as a former director or trustee of the organization, more than \$10,000 of reportable compensation from the organization and any related organizations.

List persons in the following order: individual trustees or directors; institutional trustees; officers; key employees; highest compensated employees; and former such persons.

☐ Check this box if neither the organization nor any related organization compensated any current officer, director, or trustee.

(A) Name and Title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(1) WEBSTER BANK, TRUSTEE	1.00		X					18,200	NONE	NONE
(2)										
(3)										
(4)										
(5)										
(6)										
(7)										
(8)										
(9)										
(10)										
(11)										
(12)										
(13)										
(14)										



**Part VII Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees** (continued)

(A) Name and title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(15) -----										
(16) -----										
(17) -----										
(18) -----										
(19) -----										
(20) -----										
(21) -----										
(22) -----										
(23) -----										
(24) -----										
(25) -----										
<b>1b Sub-total</b> .....										
<b>c Total from continuation sheets to Part VII, Section A</b> .....										
<b>d Total (add lines 1b and 1c)</b> .....							18,200	NONE	NONE	

**2** Total number of individuals (including but not limited to those listed above) who received more than \$100,000 of reportable compensation from the organization **0**

- 3** Did the organization list any **former** officer, director, or trustee, key employee, or highest compensated employee on line 1a? If "Yes," complete Schedule J for such individual .....
- 4** For any individual listed on line 1a, is the sum of reportable compensation and other compensation from the organization and related organizations greater than \$150,000? If Yes, complete Schedule J for such individual .....
- 5** Did any person listed on line 1a receive or accrue compensation from any unrelated organization or individual for services rendered to the organization? If Yes, complete Schedule J for such person .....

	Yes	No
<b>3</b>		X
<b>4</b>		X
<b>5</b>		X

**Section B. Independent Contractors**

**1** Complete this table for your five highest compensated independent contractors that received more than \$100,000 of compensation from the organization. Report compensation for the calendar year ending with or within the organization's tax year.

(A) Name and business address	(B) Description of services	(C) Compensation

**2** Total number of independent contractors (including but not limited to those listed above) who received more than \$100,000 of compensation from the organization **0**

**Part VIII Statement of Revenue**Check if Schedule O contains a response to any question in this Part VIII ☐

		(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512, 513, or 514
<b>Contributions, Gifts, Grants and Other Similar Amounts</b>	<b>1a</b> Federated campaigns . . . . . <b>1a</b>				
	<b>b</b> Membership dues . . . . . <b>1b</b>				
	<b>c</b> Fundraising events . . . . . <b>1c</b>				
	<b>d</b> Related organizations . . . . . <b>1d</b>				
	<b>e</b> Government grants (contributions) . . . . . <b>1e</b>				
	<b>f</b> All other contributions, gifts, grants, and similar amounts not included above . . . . . <b>1f</b>				
	<b>g</b> Noncash contributions included in lines 1a-1f: \$				
	<b>h</b> <b>Total.</b> Add lines 1a-1f . . . . . ▶				
<b>Program Service Revenue</b>	<b>2a</b> _____ <b>Business Code</b> _____				
	<b>b</b> _____				
	<b>c</b> _____				
	<b>d</b> _____				
	<b>e</b> _____				
	<b>f</b> All other program service revenue . . . . .	381,193.			381,193.
	<b>g</b> <b>Total.</b> Add lines 2a-2f . . . . . ▶	381,193.			
	<b>3</b> Investment income (including dividends, interest, and other similar amounts) . . . . . ▶	66,447.			66,447.
<b>4</b> Income from investment of tax-exempt bond proceeds . . . . . ▶					
<b>5</b> Royalties . . . . . ▶					
<b>Other Revenue</b>		(i) Real	(ii) Personal		
	<b>6a</b> Gross rents . . . . .				
	<b>b</b> Less: rental expenses . . . . .				
	<b>c</b> Rental income or (loss) . . . . .				
	<b>d</b> Net rental income or (loss) . . . . . ▶				
		(i) Securities	(ii) Other		
	<b>7a</b> Gross amount from sales of assets other than inventory . . . . .	970,573.			
	<b>b</b> Less: cost or other basis and sales expenses . . . . .	926,350.			
	<b>c</b> Gain or (loss) . . . . .	44,223.			
	<b>d</b> Net gain or (loss) . . . . . ▶	44,223.			
	<b>8a</b> Gross income from fundraising events (not including \$ _____ of contributions reported on line 1c) See Part IV, line 18 . . . . . <b>a</b>				
	<b>b</b> Less: direct expenses . . . . . <b>b</b>				
	<b>c</b> Net income or (loss) from fundraising events . . . . . ▶				
	<b>9a</b> Gross income from gaming activities See Part IV, line 19 . . . . . <b>a</b>				
	<b>b</b> Less: direct expenses . . . . . <b>b</b>				
	<b>c</b> Net income or (loss) from gaming activities . . . . . ▶				
	<b>10a</b> Gross sales of inventory, less returns and allowances . . . . . <b>a</b>				
	<b>b</b> Less: cost of goods sold . . . . . <b>b</b>				
<b>c</b> Net income or (loss) from sales of inventory . . . . . ▶					
<b>Miscellaneous Revenue</b>		<b>Business Code</b>			
<b>11a</b> _____					
<b>b</b> _____					
<b>c</b> _____					
<b>d</b> All other revenue . . . . .					
<b>e</b> <b>Total.</b> Add lines 11a-11d . . . . . ▶					
<b>12</b> <b>Total revenue.</b> See instructions . . . . . ▶	491,863.			447,640.	

**Part IX Statement of Functional Expenses**

Section 501(c)(3) and 501(c)(4) organizations must complete all columns. All other organizations must complete column (A).

Check if Schedule O contains a response to any question in this Part IX ☐**Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.**

	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
<b>1</b> Grants and other assistance to governments and organizations in the United States. See Part IV, line 21.	105,984.	105,984.		
<b>2</b> Grants and other assistance to individuals in the United States. See Part IV, line 22.				
<b>3</b> Grants and other assistance to governments, organizations, and individuals outside the United States. See Part IV, lines 15 and 16.				
<b>4</b> Benefits paid to or for members.				
<b>5</b> Compensation of current officers, directors, trustees, and key employees.	18,200.		18,200.	
<b>6</b> Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B).				
<b>7</b> Other salaries and wages.				
<b>8</b> Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions).				
<b>9</b> Other employee benefits.				
<b>10</b> Payroll taxes.				
<b>11</b> Fees for services (non-employees):				
<b>a</b> Management.				
<b>b</b> Legal.				
<b>c</b> Accounting.	296.		296.	
<b>d</b> Lobbying.				
<b>e</b> Professional fundraising services. See Part IV, line 17.				
<b>f</b> Investment management fees.				
<b>g</b> Other. (If line 11g amount exceeds 10% of line 25, column (A) amount, list line 11g expenses on Schedule O.)				
<b>12</b> Advertising and promotion.				
<b>13</b> Office expenses.				
<b>14</b> Information technology.				
<b>15</b> Royalties.				
<b>16</b> Occupancy.				
<b>17</b> Travel.				
<b>18</b> Payments of travel or entertainment expenses for any federal, state, or local public officials.				
<b>19</b> Conferences, conventions, and meetings.				
<b>20</b> Interest.				
<b>21</b> Payments to affiliates.				
<b>22</b> Depreciation, depletion, and amortization.				
<b>23</b> Insurance.				
<b>24</b> Other expenses. Itemize expenses not covered above. (List miscellaneous expenses in line 24e. If line 24e amount exceeds 10% of line 25, column (A) amount, list line 24e expenses on Schedule O.)				
<b>a</b> _____				
<b>b</b> _____				
<b>c</b> _____				
<b>d</b> _____				
<b>e</b> All other expenses.	13,732.		13,732.	
<b>25</b> Total functional expenses. Add lines 1 through 24e.	138,212.	105,984.	32,228.	NONE
<b>26</b> Joint costs. Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation. Check here <input type="checkbox"/> if following SOP 98-2 (ASC 958-720).				

**Part X Balance Sheet**

Check if Schedule O contains a response to any question in this Part X

		(A) Beginning of year		(B) End of year
<b>Assets</b>	<b>1</b> Cash - non-interest-bearing	25,731.	<b>1</b>	25,731.
	<b>2</b> Savings and temporary cash investments		<b>2</b>	
	<b>3</b> Pledges and grants receivable, net		<b>3</b>	
	<b>4</b> Accounts receivable, net		<b>4</b>	
	<b>5</b> Loans and other receivables from current and former officers, directors, trustees, key employees, and highest compensated employees. Complete Part II of Schedule L		<b>5</b>	
	<b>6</b> Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), persons described in section 4958(c)(3)(B), and contributing employers and sponsoring organizations of section 501(c)(9) voluntary employees' beneficiary organizations (see instructions) Complete Part II of Schedule L		<b>6</b>	
	<b>7</b> Notes and loans receivable, net		<b>7</b>	
	<b>8</b> Inventories for sale or use		<b>8</b>	
	<b>9</b> Prepaid expenses and deferred charges		<b>9</b>	
	<b>10a</b> Land, buildings, and equipment: cost or other basis Complete Part VI of Schedule D	<b>10a</b>		
	<b>b</b> Less: accumulated depreciation	<b>10b</b>	<b>10c</b>	
	<b>11</b> Investments - publicly traded securities	2,210,435.	<b>11</b>	2,564,086.
	<b>12</b> Investments - other securities. See Part IV, line 11		<b>12</b>	
	<b>13</b> Investments - program-related See Part IV, line 11		<b>13</b>	
	<b>14</b> Intangible assets		<b>14</b>	
	<b>15</b> Other assets. See Part IV, line 11		<b>15</b>	
<b>16</b> <b>Total assets.</b> Add lines 1 through 15 (must equal line 34)	2,236,166.	<b>16</b>	2,589,817.	
<b>Liabilities</b>	<b>17</b> Accounts payable and accrued expenses		<b>17</b>	
	<b>18</b> Grants payable		<b>18</b>	
	<b>19</b> Deferred revenue		<b>19</b>	
	<b>20</b> Tax-exempt bond liabilities		<b>20</b>	
	<b>21</b> Escrow or custodial account liability. Complete Part IV of Schedule D		<b>21</b>	
	<b>22</b> Loans and other payables to current and former officers, directors, trustees, key employees, highest compensated employees, and disqualified persons. Complete Part II of Schedule L		<b>22</b>	
	<b>23</b> Secured mortgages and notes payable to unrelated third parties		<b>23</b>	
	<b>24</b> Unsecured notes and loans payable to unrelated third parties		<b>24</b>	
	<b>25</b> Other liabilities (including federal income tax, payables to related third parties, and other liabilities not included on lines 17-24). Complete Part X of Schedule D		<b>25</b>	
	<b>26</b> <b>Total liabilities.</b> Add lines 17 through 25	NONE	<b>26</b>	NONE
<b>Net Assets or Fund Balances</b>	<b>Organizations that follow SFAS 117 (ASC 958), check here</b> <input type="checkbox"/> <b>and complete lines 27 through 29, and lines 33 and 34.</b>			
	<b>27</b> Unrestricted net assets		<b>27</b>	
	<b>28</b> Temporarily restricted net assets		<b>28</b>	
	<b>29</b> Permanently restricted net assets		<b>29</b>	
	<b>Organizations that do not follow SFAS 117 (ASC 958), check here</b> <input checked="" type="checkbox"/> <b>and complete lines 30 through 34.</b>			
	<b>30</b> Capital stock or trust principal, or current funds	2,236,166.	<b>30</b>	
	<b>31</b> Paid-in or capital surplus, or land, building, or equipment fund		<b>31</b>	
	<b>32</b> Retained earnings, endowment, accumulated income, or other funds		<b>32</b>	2,589,817.
<b>33</b> <b>Total net assets or fund balances</b>	2,236,166.	<b>33</b>	2,589,817.	
<b>34</b> <b>Total liabilities and net assets/fund balances</b>	2,236,166.	<b>34</b>	2,589,817.	

Form **990** (2012)

**Part XI Reconciliation of Net Assets**Check if Schedule O contains a response to any question in this Part XI. ☐

<b>1</b>	Total revenue (must equal Part VIII, column (A), line 12) . . . . .	<b>1</b>	491,863.
<b>2</b>	Total expenses (must equal Part IX, column (A), line 25) . . . . .	<b>2</b>	138,212.
<b>3</b>	Revenue less expenses. Subtract line 2 from line 1 . . . . .	<b>3</b>	353,651.
<b>4</b>	Net assets or fund balances at beginning of year (must equal Part X, line 33, column (A)) . . . . .	<b>4</b>	2,236,166.
<b>5</b>	Net unrealized gains (losses) on investments . . . . .	<b>5</b>	
<b>6</b>	Donated services and use of facilities . . . . .	<b>6</b>	
<b>7</b>	Investment expenses . . . . .	<b>7</b>	
<b>8</b>	Prior period adjustments . . . . .	<b>8</b>	
<b>9</b>	Other changes in net assets or fund balances (explain in Schedule O) . . . . .	<b>9</b>	
<b>10</b>	Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 33, column (B)) . . . . .	<b>10</b>	2,589,817.

**Part XII Financial Statements and Reporting**Check if Schedule O contains a response to any question in this Part XII. ☒

	Yes	No
<b>1</b> Accounting method used to prepare the Form 990: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other _____ If the organization changed its method of accounting from a prior year or checked "Other," explain in Schedule O.		
<b>2a</b> Were the organization's financial statements compiled or reviewed by an independent accountant? . . . . . If "Yes," check a box below to indicate whether the financial statements for the year were compiled or reviewed on a separate basis, consolidated basis, or both: <input type="checkbox"/> Separate basis <input type="checkbox"/> Consolidated basis <input type="checkbox"/> Both consolidated and separate basis		X
<b>2b</b> Were the organization's financial statements audited by an independent accountant? . . . . . If "Yes," check a box below to indicate whether the financial statements for the year were audited on a separate basis, consolidated basis, or both: <input type="checkbox"/> Separate basis <input type="checkbox"/> Consolidated basis <input type="checkbox"/> Both consolidated and separate basis		X
<b>2c</b> If "Yes" to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant? If the organization changed either its oversight process or selection process during the tax year, explain in Schedule O.		
<b>3a</b> As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Single Audit Act and OMB Circular A-133? . . . . .		X
<b>3b</b> If "Yes," did the organization undergo the required audit or audits? If the organization did not undergo the required audit or audits, explain why in Schedule O and describe any steps taken to undergo such audits		

Form **990** (2012)

**SCHEDULE A**  
**(Form 990 or 990-EZ)**

Department of the Treasury  
Internal Revenue Service

**Public Charity Status and Public Support**

Complete if the organization is a section 501(c)(3) organization or a section 4947(a)(1) nonexempt charitable trust.

► Attach to Form 990 or Form 990-EZ. ► See separate instructions.

OMB No 1545-0047

**2012**

Open to Public  
Inspection

Name of the organization

G WHITTEMORE TR FBO H WHITTEMORE LIBRARY, C/O

Employer identification number

06-6025602

**Part I Reason for Public Charity Status** (All organizations must complete this part.) See instructions.

The organization is not a private foundation because it is: (For lines 1 through 11, check only one box.)

- 1 ☐ A church, convention of churches, or association of churches described in **section 170(b)(1)(A)(i).**
- 2 ☐ A school described in **section 170(b)(1)(A)(ii).** (Attach Schedule E.)
- 3 ☐ A hospital or a cooperative hospital service organization described in **section 170(b)(1)(A)(iii).**
- 4 ☐ A medical research organization operated in conjunction with a hospital described in **section 170(b)(1)(A)(iii).** Enter the hospital's name, city, and state: \_\_\_\_\_
- 5 ☐ An organization operated for the benefit of a college or university owned or operated by a governmental unit described in **section 170(b)(1)(A)(iv).** (Complete Part II.)
- 6 ☐ A federal, state, or local government or governmental unit described in **section 170(b)(1)(A)(v).**
- 7 ☐ An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in **section 170(b)(1)(A)(vi).** (Complete Part II.)
- 8 ☐ A community trust described in **section 170(b)(1)(A)(vi).** (Complete Part II.)
- 9 ☐ An organization that normally receives: (1) more than 33 1/3% of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions - subject to certain exceptions, and (2) no more than 33 1/3% of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975. See **section 509(a)(2).** (Complete Part III.)
- 10 ☐ An organization organized and operated exclusively to test for public safety. See **section 509(a)(4).**
- 11 ☒ An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or more publicly supported organizations described in **section 509(a)(1)** or **section 509(a)(2).** See **section 509(a)(3).** Check the box that describes the type of supporting organization and complete lines 11e through 11h.
  - a ☐ Type I    b ☐ Type II    c ☐ Type III-Functionally integrated    d ☒ Type III-Non-functionally integrated
  - e ☒ By checking this box, I certify that the organization is not controlled directly or indirectly by one or more disqualified persons other than foundation managers and other than one or more publicly supported organizations described in **section 509(a)(1)** or **section 509(a)(2).**
  - f If the organization received a written determination from the IRS that it is a Type I, Type II, or Type III supporting organization, check this box ☐
  - g Since August 17, 2006, has the organization accepted any gift or contribution from any of the following persons?
 

	Yes	No
(i) A person who directly or indirectly controls, either alone or together with persons described in (ii) and (iii) below, the governing body of the supported organization? .....		X
(ii) A family member of a person described in (i) above? .....		X
(iii) A 35% controlled entity of a person described in (i) or (ii) above? .....		X
  - h Provide the following information about the supported organization(s).

(i) Name of supported organization	(ii) EIN	(iii) Type of organization (described on lines 1-9 above or IRC section (see instructions))	(iv) Is the organization in col (i) listed in your governing document?		(v) Did you notify the organization in col (i) of your support?		(vi) Is the organization in col (i) organized in the U S ?		(vii) Amount of monetary support
			Yes	No	Yes	No	Yes	No	
(A) SEE PART IV									
(B)									
(C)									
(D)									
(E)									
<b>Total</b>									

For Paperwork Reduction Act Notice, see the Instructions for Form 990 or 990-EZ.

Schedule A (Form 990 or 990-EZ) 2012

**Part II** **Support Schedule for Organizations Described in Sections 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi)**  
 (Complete only if you checked the box on line 5, 7, or 8 of Part I or if the organization failed to qualify under Part III. If the organization fails to qualify under the tests listed below, please complete Part III.)

Section A. Public Support						N/A
Calendar year (or fiscal year beginning in) ▶	(a) 2008	(b) 2009	(c) 2010	(d) 2011	(e) 2012	(f) Total
<b>1</b> Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants") . . . . .						
<b>2</b> Tax revenues levied for the organization's benefit and either paid to or expended on its behalf . . . . .						
<b>3</b> The value of services or facilities furnished by a governmental unit to the organization without charge . . . . .						
<b>4</b> Total. Add lines 1 through 3 . . . . .						
<b>5</b> The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f). . . . .						
<b>6</b> Public support. Subtract line 5 from line 4 . . . . .						

Section B. Total Support						
Calendar year (or fiscal year beginning in) ▶	(a) 2008	(b) 2009	(c) 2010	(d) 2011	(e) 2012	(f) Total
<b>7</b> Amounts from line 4 . . . . .						
<b>8</b> Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources . . . . .						
<b>9</b> Net income from unrelated business activities, whether or not the business is regularly carried on . . . . .						
<b>10</b> Other income. Do not include gain or loss from the sale of capital assets (Explain in Part IV) . . . . .						
<b>11</b> Total support. Add lines 7 through 10 . . . . .						
<b>12</b> Gross receipts from related activities, etc. (see instructions) . . . . .					<b>12</b>	
<b>13</b> First five years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and stop here . . . . . <input type="checkbox"/>						

Section C. Computation of Public Support Percentage		
<b>14</b> Public support percentage for 2012 (line 6, column (f) divided by line 11, column (f)) . . . . .	<b>14</b>	%
<b>15</b> Public support percentage from 2011 Schedule A, Part II, line 14 . . . . .	<b>15</b>	%
<b>16a 33 1/3% support test - 2012.</b> If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization . . . . . <input type="checkbox"/>		
<b>b 33 1/3% support test - 2011.</b> If the organization did not check a box on line 13 or 16a, and line 15 is 33 1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization . . . . . <input type="checkbox"/>		
<b>17a 10%-facts-and-circumstances test - 2012.</b> If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and stop here. Explain in Part IV how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization . . . . . <input type="checkbox"/>		
<b>b 10%-facts-and-circumstances test - 2011.</b> If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and stop here. Explain in Part IV how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization . . . . . <input type="checkbox"/>		
<b>18 Private foundation.</b> If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions . . . . . <input type="checkbox"/>		

**Part III Support Schedule for Organizations Described in Section 509(a)(2)**

(Complete only if you checked the box on line 9 of Part I or if the organization failed to qualify under Part II.  
If the organization fails to qualify under the tests listed below, please complete Part II.)

**Section A. Public Support**

N/A

Calendar year (or fiscal year beginning in) ▶	(a) 2008	(b) 2009	(c) 2010	(d) 2011	(e) 2012	(f) Total
<b>1</b> Gifts, grants, contributions, and membership fees received (Do not include any "unusual grants.")						
<b>2</b> Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose . . . . .						
<b>3</b> Gross receipts from activities that are not an unrelated trade or business under section 513 . . . . .						
<b>4</b> Tax revenues levied for the organization's benefit and either paid to or expended on its behalf . . . . .						
<b>5</b> The value of services or facilities furnished by a governmental unit to the organization without charge . . . . .						
<b>6 Total.</b> Add lines 1 through 5 . . . . .						
<b>7a</b> Amounts included on lines 1, 2, and 3 received from disqualified persons . . . . .						
<b>b</b> Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of \$5,000 or 1% of the amount on line 13 for the year . . . . .						
<b>c</b> Add lines 7a and 7b . . . . .						
<b>8 Public support.</b> (Subtract line 7c from line 6) . . . . .						

**Section B. Total Support**

Calendar year (or fiscal year beginning in) ▶	(a) 2008	(b) 2009	(c) 2010	(d) 2011	(e) 2012	(f) Total
<b>9</b> Amounts from line 6 . . . . .						
<b>10a</b> Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources . . . . .						
<b>b</b> Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975 . . . . .						
<b>c</b> Add lines 10a and 10b . . . . .						
<b>11</b> Net income from unrelated business activities not included in line 10b, whether or not the business is regularly carried on . . . . .						
<b>12</b> Other income. Do not include gain or loss from the sale of capital assets (Explain in Part IV) . . . . .						
<b>13 Total support.</b> (Add lines 9, 10c, 11, and 12) . . . . .						
<b>14 First five years.</b> If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and <b>stop here</b> . . . . . ▶ <input type="checkbox"/>						

**Section C. Computation of Public Support Percentage**

<b>15</b> Public support percentage for 2012 (line 8, column (f) divided by line 13, column (f)) . . . . .	<b>15</b>	%
<b>16</b> Public support percentage from 2011 Schedule A, Part III, line 15 . . . . .	<b>16</b>	%

**Section D. Computation of Investment Income Percentage**

<b>17</b> Investment income percentage for 2012 (line 10c, column (f) divided by line 13, column (f)) . . . . .	<b>17</b>	%
<b>18</b> Investment income percentage from 2011 Schedule A, Part III, line 17 . . . . .	<b>18</b>	%

**19a 33 1/3% support tests - 2012.** If the organization did not check the box on line 14, and line 15 is more than 33 1/3%, and line 17 is not more than 33 1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization ▶ ☐

**b 33 1/3% support tests - 2011.** If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33 1/3%, and line 18 is not more than 33 1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization ▶ ☐

**20 Private foundation.** If the organization did not check a box on line 14, 19a, or 19b, check this box and see instructions ▶ ☐



**Part IV** **Supplemental Information.** Complete this part to provide the explanations required by Part II, line 10; Part II, line 17a or 17b; and Part III, line 12. Also complete this part for any additional information. (See instructions).

SCHEDULE A, PART I (h) - INFORMATION ABOUT SUPPORTED ORGANIZATIONS  
=====

NAME OF SUPPORTED ORGANIZATION:

NAUGATUCK PUBLIC LIBRARY

EIN: 06-0646963

TYPE OF ORGANIZATION FROM PART I: 6

IS THE ORGANIZATION LISTED IN GOVERNING DOCUMENT?: YES

DID YOU NOTIFY THE ORGANIZATION OF YOUR SUPPORT?: YES

IS THE ORGANIZATION ORGANIZED IN THE U.S.?: YES

AMOUNT OF SUPPORT: ..... 105,984.

TOTAL SUPPORT:

-----  
105,984.  
=====

SCHEDULE I  
(Form 990)

Department of the Treasury  
Internal Revenue Service

Grants and Other Assistance to Organizations,  
Governments, and Individuals in the United States

Complete if the organization answered "Yes" to Form 990, Part IV, line 21 or 22.  
▶ Attach to Form 990.

OMB No. 1545-0047

2012

Open to Public  
Inspection

Name of the organization

G WHITTEMORE TR FBO H WHITTEMORE LIBRARY, C/O

Employer identification number

06-6025602

Part I General Information on Grants and Assistance

- 1 Does the organization maintain records to substantiate the amount of the grants or assistance, the grantees' eligibility for the grants or assistance, and the selection criteria used to award the grants or assistance? ☒ Yes ☐ No
- 2 Describe in Part IV the organization's procedures for monitoring the use of grant funds in the United States.

Part II Grants and Other Assistance to Governments and Organizations in the United States. Complete if the organization answered "Yes" to Form 990, Part IV, line 21, for any recipient that received more than \$5,000. Part II can be duplicated if additional space is needed.

1	(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
(1)	-----							
(2)	-----							
(3)	-----							
(4)	-----							
(5)	-----							
(6)	-----							
(7)	-----							
(8)	-----							
(9)	-----							
(10)	-----							
(11)	-----							
(12)	-----							

2 Enter total number of section 501(c)(3) and government organizations listed in the line 1 table

3 Enter total number of other organizations listed in the line 1 table

For Paperwork Reduction Act Notice, see the Instructions for Form 990.

Schedule I (Form 990) (2012)

**Part III** **Grants and Other Assistance to Individuals in the United States.** Complete if the organization answered "Yes" to Form 990, Part IV, line 22. Part III can be duplicated if additional space is needed.

(a) Type of grant or assistance	(b) Number of recipients	(c) Amount of cash grant	(d) Amount of non-cash assistance	(e) Method of valuation (book, FMV, appraisal, other)	(f) Description of non-cash assistance
N/A					
2					
3					
4					
5					
6					
7					

**Part IV** **Supplemental Information.** Complete this part to provide the information required in Part I, line 2, Part III, column (b), and any other additional information.

NONE

EXPLANATION FOR FORM 990, SCHEDULE I, PART 1, LINE 2

ALL INCOME GRANTS GO TO HOWARD WHITTEMORE MEMORIAL LIBRARY, NAUGATUCK

CT 06770

**SCHEDULE O**  
**(Form 990 or 990-EZ)**

Department of the Treasury  
Internal Revenue Service

**Supplemental Information to Form 990 or 990-EZ**

Complete to provide information for responses to specific questions on  
Form 990 or 990-EZ or to provide any additional information.

▶ Attach to Form 990 or 990-EZ.

OMB No 1545-0047

**2012**

**Open to Public  
Inspection**

Name of the organization

G WHITTEMORE TR FBO H WHITTEMORE LIBRARY, C/O

Employer identification number

06-6025602

PAGE 6, PART VI, LINE 8a: WEBSTER BANK IS THE TRUSTEE AND KEEPS

TRACK OF MEETINGS WITH THE LIBRARY.

PAGE 6, PART VI, LINE 10: 990 PROVIDED TO THE BANK PRIOR TO FILING

WITH IRS.

PAGE 6, PART VI, LINE 14: BANK AS TRUSTEE HAS DOCUMENT RETENTION

POLICY.

EXPLANATION FOR FORM 990, PAGE 6, PART VI, LINE 1a

N/A

EXPLANATION FOR FORM 990, PAGE 6, PART VI, LINE 8a

N/A

FORM 990, PAGE 6, PART VI, LINE 11-DESCRIPTION OF PROCESS FOR REVIEW

MAILED TO CLIENT FOR REVIEW

DESCRIPTION FOR MAKING DOCUMENTS PUBLIC

FORM 990, PAGE 6, PART VI, LINE 19

N/A

ESTIMATE OF AVERAGE HOURS PER WEEK DEVOTED TO RELATED ORGANIZATIONS

FORM 990, PAGE 7, PART VII, SECTION A

WEBSTER BANK

123 BANK ST, WATERBURY, CT 06702

1 HR/WEEK

Name of the organization

Employer identification number

G WHITTEMORE TR FBO H WHITTEMORE LIBRARY, C/O

06-6025602

**CHANGE IN ACCOUNTING METHOD OR DESCRIPTION OF OTHER METHOD USED**

FORM 990, PAGE 11, PART XII, LINE 1

NONE

**CHANGE IN COMMITTEE OVERSIGHT REVIEW FROM PRIOR YEAR**

FORM 990, PAGE 11, PART XII, LINE 2

N/A

**EXPLANATION FOR FORM 990, PAGE 11, PART XII, LINE 3b**

N/A

**EXPLANATION FOR FORM 990, PART XI, LINE 9**

BOOK VALUE ADJUSTMENT -\$8694

**SCHEDULE D  
(Form 1041)**

Department of the Treasury  
Internal Revenue Service

**Capital Gains and Losses**

► Attach to Form 1041, Form 5227, or Form 990-T.  
► Information about Schedule D (Form 1041) and its separate instructions is at  
[www.irs.gov/form1041](http://www.irs.gov/form1041)

OMB No 1545-0092

**2012**

Name of estate or trust

G WHITEMORE TR FBO H WHITEMORE LIBRARY, C/O

Employer identification number

06-6025602

**Note:** Form 5227 filers need to complete *only* Parts I and II.

**Part I Short-Term Capital Gains and Losses - Assets Held One Year or Less**

(a) Description of property (Example 100 shares 7% preferred of "Z" Co)	(b) Date acquired (mo, day, yr)	(c) Date sold (mo, day, yr)	(d) Sales price	(e) Cost or other basis (see instructions)	(f) Gain or (loss) for the entire year Subtract (e) from (d)
<b>1a</b> SHORT-TERM CAPITAL GAIN DIVIDENDS		STMT 1			2,316.

<b>b</b> Enter the short-term gain or (loss), if any, from Schedule D-1, line 1b . . . . .	<b>1b</b>	-56.
<b>2</b> Short-term capital gain or (loss) from Forms 4684, 6252, 6781, and 8824 . . . . .	<b>2</b>	
<b>3</b> Net short-term gain or (loss) from partnerships, S corporations, and other estates or trusts . . . . .	<b>3</b>	
<b>4</b> Short-term capital loss carryover. Enter the amount, if any, from line 9 of the 2011 Capital Loss Carryover Worksheet . . . . .	<b>4</b>	( )
<b>5</b> <b>Net short-term gain or (loss).</b> Combine lines 1a through 4 in column (f). Enter here and on line 13, column (3) on the back . . . . .	<b>5</b>	2,260.

**Part II Long-Term Capital Gains and Losses - Assets Held More Than One Year**

(a) Description of property (Example 100 shares 7% preferred of "Z" Co)	(b) Date acquired (mo, day, yr)	(c) Date sold (mo, day, yr)	(d) Sales price	(e) Cost or other basis (see instructions)	(f) Gain or (loss) for the entire year Subtract (e) from (d)
<b>6a</b> LONG-TERM CAPITAL GAIN DIVIDENDS		STMT 1			14,439.

<b>b</b> Enter the long-term gain or (loss), if any, from Schedule D-1, line 6b . . . . .	<b>6b</b>	27,521.
<b>7</b> Long-term capital gain or (loss) from Forms 2439, 4684, 6252, 6781, and 8824 . . . . .	<b>7</b>	
<b>8</b> Net long-term gain or (loss) from partnerships, S corporations, and other estates or trusts . . . . .	<b>8</b>	
<b>9</b> Capital gain distributions . . . . .	<b>9</b>	3.
<b>10</b> Gain from Form 4797, Part I . . . . .	<b>10</b>	
<b>11</b> Long-term capital loss carryover. Enter the amount, if any, from line 14 of the 2011 Capital Loss Carryover Worksheet . . . . .	<b>11</b>	( )
<b>12</b> <b>Net long-term gain or (loss).</b> Combine lines 6a through 11 in column (f). Enter here and on line 14a, column (3) on the back . . . . .	<b>12</b>	41,963.

For Paperwork Reduction Act Notice, see the Instructions for Form 1041.

Schedule D (Form 1041) 2012

<b>Part III Summary of Parts I and II</b> <b>Caution: Read the instructions before completing this part.</b>		(1) Beneficiaries' (see instr.)	(2) Estate's or trust's	(3) Total
<b>13</b> Net short-term gain or (loss) . . . . .	<b>13</b>			2,260.
<b>14</b> Net long-term gain or (loss):				
<b>a</b> Total for year . . . . .	<b>14a</b>			41,963.
<b>b</b> Unrecaptured section 1250 gain (see line 18 of the wrksht.) . . . .	<b>14b</b>			3.
<b>c</b> 28% rate gain . . . . .	<b>14c</b>			
<b>15</b> Total net gain or (loss). Combine lines 13 and 14a . . . . . ▶	<b>15</b>			44,223.

**Note:** If line 15, column (3), is a net gain, enter the gain on Form 1041, line 4 (or Form 990-T, Part I, line 4a). If lines 14a and 15, column (2), are net gains, go to Part V, and do not complete Part IV. If line 15, column (3), is a net loss, complete Part IV and the **Capital Loss Carryover Worksheet**, as necessary.

**Part IV Capital Loss Limitation**

<b>16</b> Enter here and enter as a (loss) on Form 1041, line 4 (or Form 990-T, Part I, line 4c, if a trust), the smaller of: <b>a</b> The loss on line 15, column (3) or <b>b</b> \$3,000	<b>16</b> ( )
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**Note:** If the loss on line 15, column (3), is more than \$3,000, or if Form 1041, page 1, line 22 (or Form 990-T, line 34), is a loss, complete the **Capital Loss Carryover Worksheet** in the instructions to figure your capital loss carryover.

**Part V Tax Computation Using Maximum Capital Gains Rates**

**Form 1041 filers.** Complete this part **only** if both lines 14a and 15 in column (2) are gains, or an amount is entered in Part I or Part II and there is an entry on Form 1041, line 2b(2), and Form 1041, line 22, is more than zero.

**Caution:** Skip this part and complete the **Schedule D Tax Worksheet** in the instructions if:

- Either line 14b, col. (2) or line 14c, col. (2) is more than zero, or
- Both Form 1041, line 2b(1), and Form 4952, line 4g are more than zero.

**Form 990-T trusts.** Complete this part **only** if both lines 14a and 15 are gains, or qualified dividends are included in income in Part I of Form 990-T, and Form 990-T, line 34, is more than zero. Skip this part and complete the **Schedule D Tax Worksheet** in the instructions if either line 14b, col. (2) or line 14c, col. (2) is more than zero.

<b>17</b> Enter taxable income from Form 1041, line 22 (or Form 990-T, line 34) . . .	<b>17</b>		
<b>18</b> Enter the smaller of line 14a or 15 in column (2) but not less than zero . . . . .	<b>18</b>		
<b>19</b> Enter the estate's or trust's qualified dividends from Form 1041, line 2b(2) (or enter the qualified dividends included in income in Part I of Form 990-T) . .	<b>19</b>		
<b>20</b> Add lines 18 and 19 . . . . .	<b>20</b>		
<b>21</b> If the estate or trust is filing Form 4952, enter the amount from line 4g; otherwise, enter -0- . . . ▶	<b>21</b>		
<b>22</b> Subtract line 21 from line 20. If zero or less, enter -0- . . . . .	<b>22</b>		
<b>23</b> Subtract line 22 from line 17. If zero or less, enter -0- . . . . .	<b>23</b>		
<b>24</b> Enter the smaller of the amount on line 17 or \$2,400 . . . . .	<b>24</b>		
<b>25</b> Is the amount on line 23 equal to or more than the amount on line 24? <input type="checkbox"/> <b>Yes.</b> Skip lines 25 and 26; go to line 27 and check the "No" box. <input type="checkbox"/> <b>No.</b> Enter the amount from line 23 . . . . .	<b>25</b>		
<b>26</b> Subtract line 25 from line 24 . . . . .	<b>26</b>		
<b>27</b> Are the amounts on lines 22 and 26 the same? <input type="checkbox"/> <b>Yes.</b> Skip lines 27 thru 30, go to line 31 <input type="checkbox"/> <b>No.</b> Enter the smaller of line 17 or line 22	<b>27</b>		
<b>28</b> Enter the amount from line 26 (If line 26 is blank, enter -0-) . . . . .	<b>28</b>		
<b>29</b> Subtract line 28 from line 27 . . . . .	<b>29</b>		
<b>30</b> Multiply line 29 by 15% (.15) . . . . .		<b>30</b>	
<b>31</b> Figure the tax on the amount on line 23. Use the 2012 Tax Rate Schedule for Estates and Trusts (see the Schedule G instructions in the instructions for Form 1041) . . . . .		<b>31</b>	
<b>32</b> Add lines 30 and 31 . . . . .		<b>32</b>	
<b>33</b> Figure the tax on the amount on line 17. Use the 2012 Tax Rate Schedule for Estates and Trusts (see the Schedule G instructions in the instructions for Form 1041) . . . . .		<b>33</b>	
<b>34</b> Tax on all taxable income. Enter the smaller of line 32 or line 33 here and on Form 1041, Schedule G, line 1a (or Form 990-T, line 36) . . . . .		<b>34</b>	

Schedule D (Form 1041) 2012

**SCHEDULE D-1**  
**(Form 1041)**

Department of the Treasury  
Internal Revenue Service

**Continuation Sheet for Schedule D**  
**(Form 1041)**

▶ Attach to Schedule D to list additional transactions for lines 1a and 6a.

▶ Information about Schedule D (Form 1041) and its separate instructions is at [www.irs.gov/form1041](http://www.irs.gov/form1041)

OMB No 1545-0092

**2012**

Name of estate or trust

Employer identification number

G WHITEMORE TR FBO H WHITEMORE LIBRARY, C/O

06-6025602

**Part I Short-Term Capital Gains and Losses - Assets Held One Year or Less**

(a) Description of property (Example 100 sh 7% preferred of "Z" Co)	(b) Date acquired (mo, day, yr)	(c) Date sold (mo, day, yr)	(d) Sales price	(e) Cost or other basis (see instructions)	(f) Gain or (loss) Subtract (e) from (d)
1a 175. ADVANCED AUTO PARTS	09/30/2011	01/12/2012	12,454.00	10,374.00	2,080.00
160. COSTCO WHSL CORP NEW	03/02/2011	01/12/2012	12,813.00	11,467.00	1,346.00
218. POLYCOM INC	04/04/2011	02/13/2012	4,585.00	5,261.00	-676.00
5. LABORATORY CORP AMERICA	11/09/2011	02/22/2012	440.00	410.00	30.00
475. JUNIPER NETWORKS INC	03/21/2011	03/01/2012	10,526.00	20,242.00	-9,716.00
72. GOLDMAN SACHS GROUP IN	11/23/2011	03/19/2012	8,984.00	6,344.00	2,640.00
10. ECOLAB INC	04/26/2012	08/13/2012	649.00	632.00	17.00
30. ISHARES TR NASDAQ BIOT	04/26/2012	08/13/2012	3,970.00	3,756.00	214.00
225. JUNIPER NETWORKS INC	10/19/2011	08/15/2012	4,104.00	4,732.00	-628.00
450. CONSTELLATION BRANDS	02/13/2012	08/23/2012	14,468.00	9,220.00	5,248.00
238. TEVA PHARMACEUTICAL I	04/26/2012	08/23/2012	9,625.00	10,917.00	-1,292.00
17.511 MATTHEWS PACIFIC TI	12/08/2011	09/24/2012	405.00	362.00	43.00
745.284 MATTHEWS PACIFIC T	06/01/2012	09/24/2012	17,216.00	15,144.00	2,072.00
247.383 ROYCE PENNSYLVANIA	12/08/2011	09/24/2012	2,971.00	2,627.00	344.00
88. DANAHER CORP	04/26/2012	10/12/2012	4,915.00	4,759.00	156.00
975. ABB LTD SPONS ADR	05/18/2012	11/15/2012	17,443.00	18,853.00	-1,410.00
100. MCDONALDS CORP	05/31/2012	11/15/2012	8,439.00	8,963.00	-524.00

**1b Total.** Combine the amounts in column (f). Enter here and on Schedule D, line 1b ..... -56.00

For Paperwork Reduction Act Notice, see the Instructions for Form 1041.

Schedule D-1 (Form 1041) 2012



Name of estate or trust as shown on Form 1041 Do not enter name and employer identification number if shown on the other side

Employer identification number

G WHITTEMORE TR FBO H WHITTEMORE LIBRARY, C/O

06-6025602

**Part II Long-Term Capital Gains and Losses - Assets Held More Than One Year**

(a) Description of property (Example 100 sh 7% preferred of "Z" Co)	(b) Date acquired (mo, day, yr)	(c) Date sold (mo, day, yr)	(d) Sales price	(e) Cost or other basis (see instructions)	(f) Gain or (loss) Subtract (e) from (d)
<b>6a</b> 68. DIAGEO PLC ADR	01/26/2007	01/18/2012	5,854.00	5,343.00	511.00
54. PEPSICO INC	01/05/2007	01/18/2012	3,499.00	3,406.00	93.00
206. PETSMART INC	07/02/2007	01/18/2012	11,111.00	6,800.00	4,311.00
1042. POWERSHARES DYN BIOT	01/05/2007	02/03/2012	23,663.00	18,838.00	4,825.00
200. PEPSICO INC	01/05/2007	02/09/2012	12,758.00	12,593.00	165.00
318. PHILIP MORRIS INTERNA	01/26/2007	02/13/2012	25,932.00	7,679.00	18,253.00
14. APPLE COMPUTER	01/23/2008	02/22/2012	7,195.00	1,959.00	5,236.00
81. CHEVRONTEXACO CORP	04/11/2007	02/22/2012	8,703.00	6,234.00	2,469.00
6. DANAHER CORP	01/05/2007	02/22/2012	318.00	214.00	104.00
19. GENERAL ELECTRIC CORP	01/05/2007	02/22/2012	365.00	713.00	-348.00
31. IBM CORPORATION	09/30/2009	02/22/2012	6,023.00	3,356.00	2,667.00
46. JOHNSON & JOHNSON	01/05/2007	02/22/2012	2,993.00	3,069.00	-76.00
300. PETSMART INC	11/02/2007	02/22/2012	16,233.00	9,877.00	6,356.00
40. PFIZER INC	09/30/2009	02/22/2012	852.00	664.00	188.00
2. STERICYCLE INC	01/19/2010	02/22/2012	177.00	112.00	65.00
4. UNITED TECHNOLOGIES COR	02/27/2008	02/22/2012	336.00	293.00	43.00
25. APPLE COMPUTER	01/23/2008	03/01/2012	13,583.00	3,498.00	10,085.00
182. VERIZON COMMUNICATION	09/11/2008	03/01/2012	6,967.00	5,860.00	1,107.00
35. CHEVRONTEXACO CORP	12/14/2006	03/14/2012	3,908.00	2,622.00	1,286.00
144. GOLDMAN SACHS GROUP I	07/29/2010	03/19/2012	17,968.00	21,249.00	-3,281.00
300. MEDCO HEALTH SOLUTION	04/02/2012	04/02/2012	8,640.00		8,640.00
409.45 DODGE & COX INTL ST	01/05/2007	04/26/2012	13,172.00	17,668.00	-4,496.00
382. GENERAL ELECTRIC CORP	01/05/2007	04/26/2012	7,496.00	13,996.00	-6,500.00
95. ISHARES S&P GLB MATERI	09/30/2009	04/26/2012	5,895.00	4,737.00	1,158.00
168. JOHNSON & JOHNSON	01/05/2007	04/26/2012	10,895.00	11,141.00	-246.00

**6b Total.** Combine the amounts in column (f). Enter here and on Schedule D, line 6b . . . . .

Schedule D-1 (Form 1041) 2012

Name of estate or trust as shown on Form 1041 Do not enter name and employer identification number if shown on the other side

Employer identification number

G WHITEMORE TR FBO H WHITEMORE LIBRARY, C/O

06-6025602

**Part II Long-Term Capital Gains and Losses - Assets Held More Than One Year**

(a) Description of property (Example: 100 sh 7% preferred of "Z" Co)	(b) Date acquired (mo, day, yr)	(c) Date sold (mo, day, yr)	(d) Sales price	(e) Cost or other basis (see instructions)	(f) Gain or (loss) Subtract (e) from (d)
<b>6a</b> 445. PFIZER INC	09/30/2009	04/26/2012	10,224.00	7,029.00	3,195.00
3595.115 ROYCE PENNSYLVANI	12/15/2006	04/26/2012	42,638.00	41,775.00	863.00
490.796 SCOUT INTERNATIONAL	05/30/2008	04/26/2012	15,411.00	18,493.00	-3,082.00
63. VANGUARD MATERIALS ETF	09/10/2008	04/26/2012	5,163.00	4,813.00	350.00
50000. INTL LEASE FIN MTN 5/01/12	08/21/2007	05/01/2012	50,000.00	49,765.00	235.00
1737.368 ROYCE PENNSYLVANI	01/05/2007	05/09/2012	19,806.00	19,827.00	-21.00
1879.111 DODGE & COX INTL	09/04/2009	05/29/2012	54,381.00	71,960.00	-17,579.00
1756.852 FIDELITY DIVERSIF FUND #325	12/03/2010	05/29/2012	45,871.00	59,223.00	-13,352.00
450. VODAFONE GROUP ADR	04/05/2011	05/31/2012	11,902.00	13,063.00	-1,161.00
1511. ISHARES MSCI EMERGIN INDEX	09/30/2009	06/01/2012	55,619.00	62,744.00	-7,125.00
181. PETSMART INC	11/02/2007	08/08/2012	12,245.00	5,202.00	7,043.00
20. DIAGEO PLC ADR	12/14/2006	08/13/2012	2,133.00	1,568.00	565.00
643. ISHARES MSCI CANADA I	09/30/2009	08/13/2012	17,296.00	13,593.00	3,703.00
10. ISHARES S&P GLB MATERI	05/20/2009	08/13/2012	569.00	482.00	87.00
170. ISHARES DOW JONES US EXPL	09/30/2009	08/13/2012	10,511.00	8,277.00	2,234.00
30. PETSMART INC	11/02/2007	08/13/2012	2,040.00	862.00	1,178.00
10. VANGUARD MATERIALS ETF	09/10/2008	08/13/2012	793.00	764.00	29.00
375. JUNIPER NETWORKS INC	06/15/2011	08/15/2012	6,840.00	12,453.00	-5,613.00
70000. UNITED STATES TREAS 08/15/2002 4.375% 08/15/201	08/15/2002	08/15/2012	70,000.00	70,000.00	
6. NOVO NORDISK AS SPONS A	03/02/2011	08/23/2012	943.00	751.00	192.00
136. TEVA PHARMACEUTICAL I	01/05/2007	08/23/2012	5,500.00	4,383.00	1,117.00
50000. WELLS FARGO CORP 9/01/12	01/03/2007	09/01/2012	50,000.00	49,992.00	8.00
1093.613 MATTHEWS PACIFIC	08/16/2011	09/24/2012	25,262.00	25,000.00	262.00
1586.678 ROYCE PENNSYLVANI	12/09/2008	09/24/2012	19,056.00	17,368.00	1,688.00
23. DANAHER CORP	01/05/2007	10/12/2012	1,285.00	818.00	467.00

**6b Total.** Combine the amounts in column (f). Enter here and on Schedule D, line 6b . . . . .

Schedule D-1 (Form 1041) 2012



FEDERAL CAPITAL GAIN DIVIDENDS  
=====SHORT-TERM CAPITAL GAIN DIVIDENDS  
-----

BAIRD CORE PLUS BOND FUND-IS	159.00
FIDELITY FLOATING RATE H/INC	739.00
FIDELITY STRATEGIC INCOME FUND	329.00
T ROWE PRICE MID CAP GROWTH FD #64	317.00
T ROWE PRICE MID CAP GROWTH FD #64	136.00
T ROWE PRICE MID-CAP VALUE FD INC	168.00
VANGUARD GNMA FUND-ADM	469.00

TOTAL SHORT-TERM CAPITAL GAIN DIVIDENDS

2,316.00  
=====LONG-TERM CAPITAL GAIN DIVIDENDS  
-----

## 15% RATE CAPITAL GAIN DIVIDENDS

BAIRD CORE PLUS BOND FUND-IS	216.00
FIDELITY SMALL CAP DISCOVERY	465.00
FIDELITY SMALL CAP VALUE-I	650.00
FIDELITY STRATEGIC INCOME FUND	369.00
MEDCO HEALTH SOLUTIONS INC	8,640.00
T ROWE PRICE MID CAP GROWTH FD #64	2,050.00
T ROWE PRICE MID-CAP VALUE FD INC	1,680.00
VANGUARD GNMA FUND-ADM	370.00

TOTAL 15% RATE CAPITAL GAIN DIVIDENDS

14,439.00  
-----

TOTAL LONG-TERM CAPITAL GAIN DIVIDENDS

14,439.00  
=====

## LIST OF ASSETS

G. WHITTEMORE TR FBO H WHITTEMORE LI  
ACCOUNT: WTC983800

PAGE: 2

AS OF 12/31/12

+	PAR VALUE OR SHARES	ASSET DESCRIPTION	FEDERAL TAX COST	MARKET VALUE	MARKET PRICE	ACCRUED INCOME
		CASH	1,110.91	1,110.91		
	CASH EQUIVALENTS					
+	159,061.4900	WEBSTER BANK MONEY MARKET/PT	159,061.49	159,061.49	1.000	0
	U.S. TREASURY OBLIGATIONS					
+	50,000.0000	UNITED STATES TREASURY NOTES DTD 08/15/2003 4.250% 08/15/2013	48,601.77	51,263.50	102.527	0
	U.S. GOVERNMENT AGENCIES					
+	50,000.0000	FEDERAL HOME LOAN BANK DTD 07/23/2003 VAR CPN 07/23/2013 CALLABLE	49,772.00	51,341.00	102.682	0
	CORPORATE & FOREIGN BONDS					
+	50,000.0000	BOEING COMPANY DTD 02/11/2003 5.125% 02/15/2013 NON CALLABLE	49,952.50	50,276.00	100.552	0
	50,000.0000	MORGAN STANLEY DTD 02/26/2003 5.300% 03/01/2013 NON CALLABLE	48,934.00	50,273.00	100.546	0
	50,000.0000	CHUBB CORP DTD 10/01/2003 5.200% 04/01/2013 NON CALLABLE	49,620.00	50,584.50	101.169	0
	50,000.0000	GOLDMAN SACHS GROUP INC DTD 10/14/2003 5.250% 10/15/2013 NON CALLABLE	49,917.00	51,750.50	103.501	0

## LIST OF ASSETS

G. WHITTEMORE TR FBO H WHITTEMORE LI  
ACCOUNT: WTC983800

PAGE: 3

AS OF 12/31/12

PAR VALUE OR SHARES	ASSET DESCRIPTION	FEDERAL TAX COST	MARKET VALUE	MARKET PRICE	ACCRUED INCOME
50,000.0000	JPMORGAN CHASE & CO DTD 11/18/2010 2.600% 01/15/2016 NON CALLABLE	49,483.50	51,978.50	103.957	0
50,000.0000	LAB CORP OF AMER HLDGS DTD 08/23/2012 2.200% 08/23/2017 NON CALLABLE	50,722.00	51,322.00	102.644	0
50,000.0000	GENERAL ELEC CAP CORP MEDIUM TERM NOTE DTD 12/17/2009 4.850% 12/15/2018 NON CALLABLE	50,000.00	54,839.00	109.678	0
25,000.0000	TOYOTA MOTOR CREDIT CORP MEDIUM TERM NOTE DTD 01/28/2011 VAR CPN 01/28/2026 CALLABLE	24,187.50	24,991.75	99.967	0
+ TOTAL CORPORATE & FOREIGN BONDS		372,816.50	386,015.25		0
COMMON EQUITY SECURITIES					
54.0000	AMAZON.COM INC	13,819.14	13,546.98	250.870	0
158.0000	APACHE CORP	12,458.97	12,403.00	78.500	0
125.0000	APPLE INC	15,887.00	66,521.63	532.173	0
1,626.0000	BANK OF AMERICA CORP COM	12,422.47	18,877.86	11.610	0
150.0000	BLACKROCK INC CLASS A	26,721.45	31,006.50	206.710	0

## LIST OF ASSETS

G. WHITTEMORE TR FBO H WHITTEMORE LI  
ACCOUNT: WTC983800

PAGE: 4

AS OF 12/31/12

PAR VALUE OR SHARES	ASSET DESCRIPTION	FEDERAL TAX COST	MARKET VALUE	MARKET PRICE	ACCRUED INCOME
415.0000	CHEVRON CORPORATION	29,921.05	44,878.10	108.140	0
1,091.0000	CISCO SYSTEMS INC	30,112.58	21,437.50	19.649	0
539.0000	COACH INC	29,667.91	29,919.89	55.510	0
450.0000	CONSTELLATION BRANDS INC	8,176.27	15,925.50	35.390	0
1,425.0000	CORNING INC	19,818.66	17,983.50	12.620	0
710.0000	CVS CAREMARK CORP	21,763.00	34,328.50	48.350	0
613.0000	DANAHER CORP	20,571.92	34,266.70	55.900	0
230.0000	DIAGEO PLC AMERICAN DEPOSITORY RECEIPT	17,924.82	26,813.40	116.580	0
498.0000	DOMINION RES INC VA	22,060.71	25,796.40	51.800	0
420.0000	DUNKIN BRANDS GROUP INC	12,546.74	13,935.60	33.180	0
1,068.0000	E M C CORP MASS	26,738.58	27,020.40	25.300	0
307.0000	ECOLAB INC	19,411.58	22,073.30	71.900	0
364.0000	EXPRESS SCRIPTS HLDG	19,517.06	19,656.00	54.000	0
443.0000	EXXON MOBIL CORP	24,022.84	38,341.65	86.550	0
1,448.0000	GENERAL ELECTRIC CORP	22,251.70	30,393.52	20.990	0
25.0000	GOOGLE INC-CL A	11,003.00	17,684.50	707.380	0

## LIST OF ASSETS

G. WHITTEMORE TR FBO H WHITTEMORE LI  
ACCOUNT: WTC983800

PAGE: 5

AS OF 12/31/12

PAR VALUE OR SHARES	ASSET DESCRIPTION	FEDERAL TAX COST	MARKET VALUE	MARKET PRICE	ACCRUED INCOME
300.0000	HEINZ H J CO	14,843.97	17,304.00	57.680	0
750.0000	INTEL CORP	15,359.93	15,465.00	20.620	0
242.0000	INTL. BUSINESS MACHINES CORP	20,654.08	46,355.10	191.550	0
228.0000	ISHARES DOW JONES US OIL AND GAS EXPLORATION AND PRODUCTION INDEX FUND	9,594.32	14,487.26	63.541	0
208.0000	ISHARES NASDAQ BIOTECHNOLOGY INDEX FUND	25,015.12	28,541.76	137.220	0
216.0000	ISHARES S&P GLOBAL MATERIALS INDEX FUND	10,071.24	13,489.20	62.450	0
175.0000	ITC HOLDINGS CORP	13,143.81	13,459.25	76.910	0
272.0000	JOHNSON & JOHNSON	17,975.14	19,067.20	70.100	0
706.0000	JOHNSON CTLS INC	23,125.76	21,653.02	30.670	0
975.0000	JP MORGAN CHASE & CO	27,199.01	42,869.87	43.969	0
151.0000	KRAFT FOODS GROUP INC	3,359.66	6,865.97	45.470	0
270.0000	LABORATORY CORP AMERICA HOLDINGS	22,158.65	23,387.40	86.620	0
720.0000	MICROSOFT CORP	20,793.70	19,230.98	26.710	0
454.0000	MONDELEZ INTERNATIONAL INC	6,230.48	11,555.75	25.453	0
694.0000	NOBLE CORP	23,869.18	24,165.08	34.820	0



## LIST OF ASSETS

G. WHITTEMORE TR FBO H WHITTEMORE LI  
ACCOUNT: WTC983800

PAGE: 6

AS OF 12/31/12

PAR VALUE OR SHARES	ASSET DESCRIPTION	FEDERAL TAX COST	MARKET VALUE	MARKET PRICE	ACCRUED INCOME
180.0000	NOVO NORDISK AS SPONSORD AMERICAN DEPOSITORY RECEIPT	21,801.93	29,377.80	163.210	0
996.0000	ORACLE CORPORATION COM	22,020.78	33,186.72	33.320	0
200.0000	PEPSICO INC	12,569.46	13,686.00	68.430	0
489.0000	PETSMART INC	10,156.45	33,418.26	68.340	0
905.0000	PFIZER INC	11,620.20	22,696.77	25.079	0
1,250.0000	POLYCOM INC	24,184.89	13,075.00	10.460	0
378.0000	PROCTER & GAMBLE COMPANY	23,143.45	25,662.42	67.890	0
290.0000	SCHLUMBERGER LTD	23,567.81	20,096.59	69.299	0
83.0000	SPDR GOLD TRUST	13,941.43	13,447.69	162.020	0
225.0000	STERICYCLE INC	12,600.45	20,988.00	93.280	0
643.0000	TARGET CORP	37,298.65	38,046.31	59.170	0
350.0000	TEVA PHARMACEUTICAL INDS LTD AMERICAN DEPOSITORY RECEIPT	11,274.29	13,069.00	37.340	0
247.0000	THERMO FISHER SCIENTIFIC INC	12,517.01	15,753.66	63.780	0
362.0000	TRAVELERS COMPANIES INC	15,797.11	25,998.84	71.820	0
540.0000	UNDER ARMOUR INC-CLASS A	18,795.49	26,206.20	48.530	0
453.0000	UNITED TECHNOLOGIES CORP	32,370.73	37,150.53	82.010	0

## LIST OF ASSETS

G. WHITTEMORE TR FBO H WHITTEMORE LI  
ACCOUNT: WTC983800

PAGE: 7

AS OF 12/31/12

+	PAR VALUE OR SHARES	ASSET DESCRIPTION	FEDERAL TAX COST	MARKET VALUE	MARKET PRICE	ACCRUED INCOME
	216.0000	VANGUARD MATERIALS ETF	16,500.24	18,189.36	84.210	0
	340.0000	VERIZON COMMUNICATIONS	10,947.49	14,711.80	43.270	0
	932.0000	WELLS FARGO & CO NEW	29,219.51	31,855.76	34.180	0
+		TOTAL COMMON EQUITY SECURITIES	1,030,538.87	1,327,323.98		0
		PREFERRED EQUITY SECURITIES				
+						
	30.0000	BANK OF AMERICA CORP 7.250% CONVERTIBLE PFD SER L	24,974.40	34,050.00	1,135.000	0
		DOMESTIC EQUITY MUTUAL FUNDS				
+						
	1,857.9240	FIDELITY SMALL CAP DISCOVERY FUND	42,136.55	44,720.23	24.070	0
	1,417.2640	FIDELITY SMALL CAP VALUE FUND	21,649.94	22,931.33	16.180	0
	751.8070	T ROWE PRICE MID-CAP GROWTH FD #64	30,078.02	42,454.54	56.470	0
	1,607.3700	T ROWE PRICE MID-CAP VALUE FD INC	26,155.28	38,641.17	24.040	0
+		TOTAL DOMESTIC EQUITY MUTUAL FUNDS	120,019.79	148,747.27		0
		INTL EQUITY MUTUAL FUNDS				
+						
	2,994.0120	MFS INTERNATIONAL VALUE FUND	75,000.00	84,341.32	28.170	0
	2,527.5050	OPPENHEIMER DEVELOPING MARKETS FUND	78,917.90	88,159.37	34.880	0
	2,635.3580	SCOUT INTERNATIONAL FUND	86,203.68	87,889.19	33.350	0
+		TOTAL INTL EQUITY MUTUAL FUNDS	240,121.58	260,389.88		0

## LIST OF ASSETS

G. WHITTEMORE TR FBO H WHITTEMORE LI  
ACCOUNT: WTC983800

PAGE: 8

AS OF 12/31/12

PAR VALUE OR SHARES	ASSET DESCRIPTION	FEDERAL TAX COST	MARKET VALUE	MARKET PRICE	ACCRUED INCOME
+ INTL FIXED INCOME MUTUAL FUNDS					
4,561.7470	FIDELITY STRATEGIC INCOME FUND	50,697.57	51,867.06	11.370	0
+ TAXABLE FIXED INCOME FUNDS					
17,755.9350	BAIRD CORE PLUS BOND FUND	200,551.65	200,109.39	11.270	0
15,149.9170	FIDELITY FLOATING RATE HIGH INCOME FUND	149,973.38	150,287.18	9.920	0
9,098.1040	VANGUARD GNMA FUND	100,884.01	99,260.31	10.910	0
+ TOTAL TAXABLE FIXED INCOME FUNDS		451,409.04	449,656.88		0
+ CLOSED-END FIXED INCOME					
6,000.0000	ABERDEEN ASIA PACIFIC PRIME INCOME FUND, INC.	38,849.25	46,440.00	7.740	0
+ CASH EQUIVALENTS					
1,844.4200	WEBSTER BANK MONEY MARKET/PT	1,844.42	1,844.42	1.000	0
+ TOTAL ASSETS		2,589,817.59 ✓	2,969,111.64		0