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Form **990-PF**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

, and ending

Name of foundation UD JC & AJ BOWLING FOUNDATION		A Employer identification number 31-1522458
Number and street (or P.O. box number if mail is not delivered to street address) C/O BLAIR & POTTS, P.O. BOX 1214	Room/suite	B Telephone number 203-327-2333
City or town, state, and ZIP code STAMFORD, CT 06904		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) \$ 2,302,672.	J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____	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))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received				
	2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities	65,275.	65,275.		STATEMENT 1
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	<5,084.>			
	b Gross sales price for all assets on line 6a	169,902.			
	7 Capital gain net income (from Part IV, line 2)		0.		
	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)					
11 Other income	1,974.	1,974.	0.	STATEMENT 2	
12 Total. Add lines 1 through 11	62,165.	67,249.	0.		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	0.	0.	0.	0.
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees				
	b Accounting fees				
	c Other professional fees				
	17 Interest				
	18 Taxes STMT 3	9.	0.	0.	0.
	19 Depreciation and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses STMT 4	10,810.	10,810.	0.	0.
	24 Total operating and administrative expenses. Add lines 13 through 23	10,819.	10,810.	0.	0.
	25 Contributions, gifts, grants paid	143,000.			143,000.
26 Total expenses and disbursements. Add lines 24 and 25	153,819.	10,810.	0.	143,000.	
27 Subtract line 26 from line 12	<91,654.>				
a Excess of revenue over expenses and disbursements		56,439.			
b Net investment income (if negative, enter -0-)					
c Adjusted net income (if negative, enter -0-)			0.		

223501 12-05-12 LHA For Paperwork Reduction Act Notice, see instructions.

Form **990-PF** (2012)

09450809 783372 BOWFAMFOUND

2012.03030 UD JC & AJ BOWLING FOUNDATI BOWFAMF1

Part II Balance Sheets

Attached schedules and amounts in the description column should be for end-of-year amounts only

		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing			
	2 Savings and temporary cash investments	108,304.	158,446.	158,446.
	3 Accounts receivable ▶			
	Less allowance for doubtful accounts ▶			
	4 Pledges receivable ▶			
	Less allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons			
	7 Other notes and loans receivable ▶			
	Less allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments - U S and state government obligations			
	b Investments - corporate stock STMT 5	1,354,263.	1,217,276.	2,102,557.
	c Investments - corporate bonds			
11 Investments - land, buildings, and equipment basis ▶				
Less accumulated depreciation ▶				
12 Investments - mortgage loans				
13 Investments - other STMT 6	76,309.	71,500.	41,669.	
14 Land, buildings, and equipment basis ▶				
Less accumulated depreciation ▶				
15 Other assets (describe ▶)				
16 Total assets (to be completed by all filers)	1,538,876.	1,447,222.	2,302,672.	
Liabilities	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe ▶)			
	23 Total liabilities (add lines 17 through 22)	0.	0.	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/>			
	and complete lines 24 through 26 and lines 30 and 31.			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ <input checked="" type="checkbox"/>			
	and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds	1,639,475.	1,639,475.	
	28 Paid-in or capital surplus, or land, bldg, and equipment fund	0.	0.	
29 Retained earnings, accumulated income, endowment, or other funds	<100,599.>	<192,253.>		
30 Total net assets or fund balances	1,538,876.	1,447,222.		
31 Total liabilities and net assets/fund balances	1,538,876.	1,447,222.		

Part III Analysis of Changes in Net Assets or Fund Balances

1 Total net assets or fund balances at beginning of year - Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	1,538,876.
2 Enter amount from Part I, line 27a	2	<91,654.>
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	1,447,222.
5 Decreases not included in line 2 (itemize) ▶	5	0.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	1,447,222.

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.)
1a DEUTSCHE BANK TR. A/C 651429- SEE SCHEDULE			
b	P	VARIOUS	12/31/12
c DEUTSCHE BANK TR. A/C 651429- SEE SCHEDULE	P	VARIOUS	12/31/12
d CAPITAL GAINS DIVIDENDS			
e			

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a			
b 15,885.		15,749.	136.
c 152,115.		159,237.	<7,122.>
d 1,902.			1,902.
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a			
b			136.
c			<7,122.>
d			1,902.
e			

2 Capital gain net income or (net capital loss)	<div> <div> If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 </div> </div>	2	<5,084.>
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) If (loss), enter -0- in Part I, line 8	<div> <div> If gain, also enter in Part I, line 8, column (c) If (loss), enter -0- in Part I, line 8 </div> </div>	3	N/A

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

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

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

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

☐ Yes ☒ No

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2011	144,200.	2,334,522.	.061769
2010	140,689.	2,078,915.	.067674
2009	143,883.	1,928,336.	.074615
2008	140,099.	2,308,489.	.060689
2007	141,116.	2,407,009.	.058627

2 Total of line 1, column (d)	2	.323374
3 Average distribution ratio for the 5-year base period - divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	.064675
4 Enter the net value of noncharitable-use assets for 2012 from Part X, line 5	4	2,324,071.
5 Multiply line 4 by line 3	5	150,309.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	564.
7 Add lines 5 and 6	7	150,873.
8 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.	8	143,000.

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

1a 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 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		1	1,129.
c All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)			
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		2	0.
3 Add lines 1 and 2		3	1,129.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		4	0.
5 Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0-		5	1,129.
6 Credits/Payments			
a 2012 estimated tax payments and 2011 overpayment credited to 2012	6a	1,429.	
b Exempt foreign organizations - tax withheld at source	6b		
c Tax paid with application for extension of time to file (Form 8868)	6c	1,200.	
d Backup withholding erroneously withheld	6d		
7 Total credits and payments Add lines 6a through 6d	7	2,629.	
8 Enter any penalty for underpayment of estimated tax Check here <input checked="" type="checkbox"/> if Form 2220 is attached	8		
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9		
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	1,500.	
11 Enter the amount of line 10 to be Credited to 2013 estimated tax <input type="checkbox"/> 1,500. Refunded <input type="checkbox"/>	11	0.	

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? 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.		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation <input type="checkbox"/> \$ 0. (2) On foundation managers <input type="checkbox"/> \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input type="checkbox"/> \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV.	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) <input type="checkbox"/> NONE		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2012 or the taxable year beginning in 2012 (see instructions for Part XIV)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

N/A

Form 990-PF (2012)

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► N/A	13	X	
14	The books are in care of ► BLAIR & POTTS Located at ► P.O. BOX 1214, STAMFORD, CT	Telephone no	► (203) 327-2333	
		ZIP+4	► 06904	
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year	15	N/A	
16	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 ►	16	Yes	No
				X

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

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

	Yes	No
1a During the year did the foundation (either directly or indirectly)		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here ► <input type="checkbox"/>	1b	X
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2012?	1c	X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))		
a At the end of tax year 2012, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2012? If "Yes," list the years ►	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
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)	N/A	2b
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ►		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b If "Yes," did it have excess business holdings in 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.)	N/A	3b
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2012?	4b	X

Form 990-PF (2012)

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)?

☐ 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)?

N/A

5b

Organizations relying on a current notice regarding disaster assistance check here

☒**c** If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?

N/A

☐ Yes ☐ No

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

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

X

If "Yes" to 6b, file Form 8870.

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?☐ Yes ☒ No**b** If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?

N/A

7b**Part VIII** Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors**1** List all officers, directors, trustees, foundation managers and their compensation.

(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
ANN J. BOWLING				
3315 WINDSOR BLVD.				
VERO BEACH, FL 32963	0.00	0.	0.	0.
BELINDA BEWKES METZGER				
36 OX RIDGE LANE				
DARIEN, CT 06820	0.00	0.	0.	0.
NANCY BOWLING GRAMPS				
18 OAK PARK AVENUE				
DARIEN, CT 06820	0.00	0.	0.	0.
STEPHANIE B. ZIEGLER				
1 SUNWICH ROAD				
ROWAYTON, CT 06853	0.00	0.	0.	0.

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

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

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

0

Form 990-PF (2012)

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
a	Average monthly fair market value of securities	1a	2,215,419.
b	Average of monthly cash balances	1b	144,044.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	2,359,463.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	2,359,463.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	35,392.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	2,324,071.
6	Minimum investment return. Enter 5% of line 5	6	116,204.

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

1	Minimum investment return from Part X, line 6	1	116,204.
2a	Tax on investment income for 2012 from Part VI, line 5	2a	1,129.
b	Income tax for 2012 (This does not include the tax from Part VI)	2b	
c	Add lines 2a and 2b	2c	1,129.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	115,075.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	115,075.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	115,075.

Part XII Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes		
a	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	1a	143,000.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	143,000.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	0.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	143,000.

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.

Form 990-PF (2012)

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2011	(c) 2011	(d) 2012
1 Distributable amount for 2012 from Part XI, line 7				115,075.
2 Undistributed income, if any, as of the end of 2012				
a Enter amount for 2011 only			0.	
b Total for prior years		0.		
3 Excess distributions carryover, if any, to 2012				
a From 2007	24,534.			
b From 2008	32,277.			
c From 2009	48,100.			
d From 2010	37,765.			
e From 2011	28,896.			
f Total of lines 3a through e	171,572.			
4 Qualifying distributions for 2012 from Part XII, line 4 ▶ \$	143,000.			
a Applied to 2011, but not more than line 2a			0.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2012 distributable amount				115,075.
e Remaining amount distributed out of corpus	27,925.			
5 Excess distributions carryover applied to 2012 (If an amount appears in column (d), the same amount must be shown in column (a).)	0.			0.
6 Enter the net total of each column as indicated below:	199,497.			
a Corpus Add lines 3f, 4c, and 4e Subtract line 5				
b Prior years' undistributed income Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b Taxable amount - see instructions		0.		
e Undistributed income for 2011 Subtract line 4a from line 2a Taxable amount - see instr			0.	
f Undistributed income for 2012 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2013				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)	0.			
8 Excess distributions carryover from 2007 not applied on line 5 or line 7	24,534.			
9 Excess distributions carryover to 2013. Subtract lines 7 and 8 from line 6a	174,963.			
10 Analysis of line 9:				
a Excess from 2008	32,277.			
b Excess from 2009	48,100.			
c Excess from 2010	37,765.			
d Excess from 2011	28,896.			
e Excess from 2012	27,925.			

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
VARIOUS CHARITIES SEE ATTACHED	NONE	PUBLIC	GENERAL EXEMPT PURPOSE	80,000.
VARIOUS CHARITIES SEE ATTACHED	NONE	PUBLIC	GENERAL EXEMPT PURPOSE	20,000.
VARIOUS CHARITIES SEE ATTACHED	NONE	PUBLIC	GENERAL EXEMPT PURPOSE	20,000.
NEW CANAAN COUNTRY SCHOOL P.O. BOX 997 NEW CANAAN , CT 06840	NONE	PUBLIC	GENERAL EXEMPT PURPOSE	10,000.
THE HOTCHKISS SCHOOL P.O. BOX 800 LAKEVILLE, CT 06039-0800	NONE	PUBLIC	GENERAL EXEMPT PURPOSE	5,000.
Total SEE CONTINUATION SHEET(S)			3a	143,000.
b Approved for future payment				
NONE				
Total			3b	0.

Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

- | | | Yes | No |
|----------|--|--------------|----|
| 1 | 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? | | |
| a | Transfers from the reporting foundation to a noncharitable exempt organization of | | |
| | (1) Cash | 1a(1) | X |
| | (2) Other assets | 1a(2) | X |
| b | Other transactions | | |
| | (1) Sales of assets to a noncharitable exempt organization | 1b(1) | X |
| | (2) Purchases of assets from a noncharitable exempt organization | 1b(2) | X |
| | (3) Rental of facilities, equipment, or other assets | 1b(3) | X |
| | (4) Reimbursement arrangements | 1b(4) | X |
| | (5) Loans or loan guarantees | 1b(5) | X |
| | (6) Performance of services or membership or fundraising solicitations | 1b(6) | X |
| c | Sharing of facilities, equipment, mailing lists, other assets, or paid employees | 1c | X |
| d | 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
N/A		

Sign Here	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 instr) ? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
	Signature of officer or trustee <i>Dave J. Bowling</i>		Date <i>08.13.13</i>		Title TRUSTEE	
Paid Preparer Use Only	Print/Type preparer's name JEROME D. LEVY		Preparer's signature <i>Jerome Levy</i>		Date <i>8/9/13</i>	
	Check <input type="checkbox"/> if self-employed		PTIN P01026658			
	Firm's name ▶ BLAIR AND POTTS				Firm's EIN ▶ 06-1357173	
Firm's address ▶ P.O. BOX 1214 STAMFORD, CT 06904-1214				Phone no (203) 327-2333		

Form **990-PF** (2012)

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

UD JC & AJ BOWLING FOUNDATION

Employer identification number

31-1522458

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 foundation

Check 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).

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990, 990-EZ, or 990-PF. Schedule B (Form 990, 990-EZ, or 990-PF) (2012)

Name of organization

Employer identification number

UD JC & AJ BOWLING FOUNDATION

31-1522458

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	ANN J. BOWLING C/O BLAIR & POTTS, P.O. BOX 1214 STAMFORD, CT 06904	\$	Person <input checked="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.)

Name of organization

Employer identification number

UD JC & AJ BOWLING FOUNDATION

31-1522458

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
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	

Name of organization

Employer identification number

UD JC & AJ BOWLING FOUNDATION

31-1522458

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) ▶ \$

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
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee

FORM 990-PF	DIVIDENDS AND INTEREST FROM SECURITIES	STATEMENT	1
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SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
DEUTSCHE BANK TRUST CO. AMERICA 651429	33,354.	1,902.	31,452.
DEUTSCHE BANK TRUST CO. AMERICA 651430	33,823.	0.	33,823.
TOTAL TO FM 990-PF, PART I, LN 4	67,177.	1,902.	65,275.

FORM 990-PF	OTHER INCOME	STATEMENT	2
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DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
K-1 EXCELSIOR BUYOUT INVESTORS	2,147.	2,147.	0.
K-1 EXCELSIOR VENTURE INVESTORS III	<173.>	<173.>	0.
TOTAL TO FORM 990-PF, PART I, LINE 11	1,974.	1,974.	0.

FORM 990-PF	TAXES	STATEMENT	3
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FOREIGN TAXES PAID	1,438.	0.	0.	0.
IRS TAX REFUNDS	<1,429.>	0.	0.	0.
TO FORM 990-PF, PG 1, LN 18	9.	0.	0.	0.

FORM 990-PF	OTHER EXPENSES			STATEMENT	4
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
ADVISORY FEES HIRTLE CALLAGHAN MANAGEMENT DEUTSCHE BANK TRUST CO.	5,157.	5,157.	0.	0.	
AMERICA FEE	1,173.	1,173.	0.	0.	
BLAIR & POTTS FEES	4,480.	4,480.	0.	0.	
TO FORM 990-PF, PG 1, LN 23	10,810.	10,810.	0.	0.	

FORM 990-PF	CORPORATE STOCK		STATEMENT	5
DESCRIPTION	BOOK VALUE		FAIR MARKET VALUE	
DEUTSCHE BANK	1,217,276.		2,102,557.	
TOTAL TO FORM 990-PF, PART II, LINE 10B	1,217,276.		2,102,557.	

FORM 990-PF	OTHER INVESTMENTS		STATEMENT	6
DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE	
EXCELSIOR BUYOUT INVESTORS, LLC	FMV	12,477.	7,803.	
EXCELSIOR VENTURE INVESTORS III, LLC	FMV	59,023.	33,866.	
TOTAL TO FORM 990-PF, PART II, LINE 13		71,500.	41,669.	

3 Grants and Contributions Paid During the Year (Continuation)

223631
05-01-12

FOUNDATION 2012

UNIVERSITY OF LOUISVILLE Development Office Louisville, Kentucky 40292 (Designated for James Bowling Scholarships School of Business)	\$15,000
UNIVERSITY OF LOUISVILLE SCHOOL OF MEDICINE HSC Development & Alumni 132 East Gray Street Louisville, Kentucky 40202 (Designated for the Dr. Norman S. Fisher, Jr. Scholarship Fund)	2,000
BEREA COLLEGE Development Berea, Kentucky 40404	15,000
UNIVERSITY OF KENTUCKY Development Office 356 Peterson Service Building Lexington, Kentucky 40506 (Designated for the James Bowling Lecture Series)	15,000
PERSON-TO-PERSON P.O. Box 3128 1864 Post Road Darien, Connecticut 06820	3,000
UNITED WAY OF INDIAN RIVER COUNTY P.O. Box 1960 Vero Beach, Florida 32961	3,000
COMMUNITY FUND of DARIEN P.O. Box 926 Darien, Connecticut 06820	3,000
DEPARTMENT OF OPHTHALMOLOGY Columbia University 365 West 165 th Street Box 13 New York, New York 10032	500

INSPIRICA 141 Franklin Street Stamford, Connecticut 06913	700
INDIAN RIVER HOSPITAL FOUNDATION (GOLDEN EAGLE) 1000 36 th Street Vero Beach, Florida 32963 (in my name only, Ann J. Bowling)	1,000
NATURE CONSERVANCY, KENTUCKY CHAPTER 642 West Main Street Lexington, Kentucky 40508	500
SHAKERTOWN AT PLEASANT HILL, KENTUCKY, INC. 3501 Lexington Road Harrodsburg, Kentucky 40330	500
PADUCAH JUNIOR COLLEGE JAMES C. BOWLING ENDOWED SCHOLARSHIP Alben Barkley Drive P.O. Box 7380 Paducah, Kentucky 42002	1,500
COLGATE UNIVERSITY 13 Oak Drive Hamilton, New York 13346 (designated for the James C. Bowling Library Endowed Book Fund)	1,000
INDIAN RIVER HABITAT FOR HUMANITY 4568 U. S. Highway 1 Vero Beach, Florida 32967	700
THE HOTCHKISS SCHOOL Annual Fund Office P.O. Box 800 Lakeville, Connecticut 06039-0800	700
NEW CANAAN COUNTRY SCHOOL P.O. Box 997 New Canaan, Connecticut 06840 (from Ann Bowling, Grey, Rett, and Bo Zeigler's grandmother) (donated to the Grandparents' Fund)	3,000
LAMBDA CHI ALPHA EDUCATIONAL FOUNDATION 8741 Founder's Road Indianapolis, Indiana 46209-6882	400

DARIEN LIBRARY 1441 Post Road Darien, Connecticut 06820	500
BOY SCOUTS OF AMERICA 1325 Walnut Hill Lane P.O. Box 152079 Irving, Texas 75015	300
TAYLOR MANOR 300 Berry Avenue Versailles, Kentucky 40383	200
POST 53 P.O. Box 2066 Darien, Connecticut 06820	500
LAYMAN'S NATIONAL BIBLE ASSOCIATION 1865 Broadway 12 th floor New York, New York 10023	500
WORLD PRESS INSTITUTE MacAlester College 1635 Summit Avenue Saint Paul, Minnesota 55105	200
KEEP AMERICA BEAUTIFUL 1010 Washington Boulevard Stamford, Connecticut 06901	300
SIGMA KAPPA FOUNDATION 8733 Founder's Road Indianapolis, Indiana 46268 (in name of Ann Jones Bowling, Alpha Theta '49)	400
ROWAYTON ARTS CENTER 145 Rowayton Avenue Rowayton, Connecticut 06853	200
DOCTORS WITHOUT BORDERS/ MEDCINS SANS FRONTIERES PO BOX 5022 Hagerstown, Maryland	500
CONVENT OF SAINT BRIGITTA 4 Runkenhage Darien, Connecticut 06820	500

VNA & HOSPICE FOUNDATION, INC. 1110 35 th Lane Vero Beach, Florida 32960	500
THE CHRISTOPHERS 12 East 48 th Street New York, New York 10017	300
GIDDEONS INTERNATIONAL P.O. Box 440244 Nashville, Tennessee 37244	500
AMERICAN RED CROSS P. O. Box 4002018 Des Moines, Iowa 50340 (where need is greatest for children in USA)	300
DISABLED AMERICAN VETERANS P.O. Box 14301 Cincinnati, Ohio 45250	400
DARIEN FIRE DEPARTMENT ANNUAL FUND 848 Post Road Darien, Connecticut 06820	300
DARIEN POLICE ASSOCIATION P.O. Box 53 Darien, Connecticut 06820	300
RIVERSIDE THEATRE 3250 Riverside Park Drive Vero Beach, Florida 32963	300
SHAKESPEARE ON THE SOUND P.O. Box 15 Norwalk, Connecticut 06853	300
REGAN RANCH HISTORICAL TRUST 217 State Street Santa Barbara, California 93101	300
SALVATION ARMY P.O. Box 509 Hartford, Connecticut 06141	500
THE EDUCATION FOUNDATION OF INDIAN RIVER COUNTY P. O. Box 7046 Vero Beach, Florida 32961	300

SPECIAL OLYMPICS CONNECTICUT P.O. Box 6607 Hamden, Connecticut 06507	200
MAKE-A-WISH Make-A-Wish Foundation P.O. Box 97104 Washington, D.C. 20090	500
SMILE TRAIN P.O. BOX 96231 WASHINGTON D.C. 20090-6231	500
LEADERSHIP INSTITUTE Stephen P. J. Wood Building 1101 North Highland Street Arlington, Virginia 22308	300
CHILDREN'S AID SOCIETY Church Street Station PO Box 29517 New York, New York 10277	500
MENTAL HEALTH ASSOCIATION 2001 9 th Avenue Suite 301 Vero Beach, Florida 32960	300
CHRISTIAN APPALACHIAN PROJECT P. O. Box 511 Lancaster, Kentucky 40444	500
COVENANT HOUSE P. O. Box 96708 Washington, DC 20090	500
FEED THE CHILDREN P. O. Box 36 Oklahoma City, Oklahoma 73101	500
THE FRESH AIR FUND 633 Third Avenue 14 th floor New York, New York 10164	300
TOYS FOR TOTS FOUNDATION Marine Corps Base P. O. Box 227 Quantico, Virginia 22134	500

ALLIANCE OF GUARDIAN ANGELS, INC.
982 East 89th Street
Brooklyn, New York 11236

200

JOHN'S ISLAND COMMUNITY SERVICE LEAGUE
3 John's Island Drive
Vero Beach, Florida 32963

300

\$80,000

The Bowling Family Foundation
2012 Gifts Designated by Belinda Bowling Bewkes Metzger, Trustee

<u>Name & Address</u>	<u>Amount</u>
1. Inspirica 141 Franklin Street Stamford, CT 06901-1014.....	\$ 3,000
2. Eaglebrook School Pine Nook Road Deerfield, MA 01342.....	\$ 2,500
3. St. Luke's Church 1864 Post Road Darien, CT 06820	\$ 2,500
4. Skidmore College Alumni Giving 815 North Broadway Saratoga Springs, NY 12866.....	\$ 1,000
5. University of Kentucky UK Office of Development Attn: Gift Receiving Office William B. Sturgill Development Building Lexington, KY 40506-0015 Memo: J. C. Bowling Lecture Series.....	\$ 1,000
6. The Wee Burn Scholarship Fund The Wee Burn Country Club P.O. Box 1046 Darien, CT 06820-1046	\$ 1,000
7. The Lustgarten Foundation 1111 Stewart Avenue Bethpage, NY 11714 Memo: In Memory of James Chandler Bowling.....	\$ 1,000
8. Stamford Hospital Foundation 1351 Washington Boulevard Suite 202 Stamford, CT 06820 Memo: Bennett Cancer Center.....	\$ 1,000
9. Post 53 P.O. Box 2066 Darien, CT 06820	\$ 1,000

<u>Name & Address</u>	<u>Amount</u>
10. The Darien Police Association P.O. Box 53 Darien, CT 06820-9861.....	\$ 1,000
11. Noroton Heights Fire Department 209 Noroton Avenue Darien, CT 96820.....	\$ 1,000
12. The Community Fund of Darien P.O. Box 926 Darien, CT 06820.....	\$ 1,000
13. Berea College 103 Jackson Street Berea, KY 40403	\$ 500
14. ^{Darien} The Land Trust of Darien P.O. Box 1074 Darien, CT 06820.....	\$ 500
15. The Susan G. Komen Breast Cancer Foundation P.O. Box 650309 Dallas, TX 75265-0309.....	\$ 500
16. Child Guidance Center of Southern Connecticut 196 Greyrock Place Stamford, CT 16901.....	\$ 500
17. ^{h Theatre} Long Warf Theater 222 Sargent Drive New Haven, CT 06511	\$ 500
18. Friends of the Darien Library 1441 Post Road Darien, CT 06820.....	\$ 250
19. The Darien Historical Society 45 Old Kings Hwy North Darien, CT 06820.....	\$ 250
Total	\$20,000

BOWLING FAMILY FOUNDATION
Designations of Nancy Gramps
2012

Person-To-Person	\$ 1,000	Noroton Heights	\$ 1,000
1864 Post Road		Fire Department	
Darien, CT 06820		Mr. Christian Schneider – President	
		Noroton Heights Fire Dept., Inc.	
Inspirica	\$ 6,000	P.O. Box 2124	
141 Franklin Street		Darien, CT 06820	
Stamford, CT 06901			
		Cumberland College	\$ 1,000
St. Luke's Parish	\$1,000	Mr. Jim Taylor	
The Reverend David Anderson		Office of the President	
St. Luke's Parish		Cumberland College	
1864 Post Road		816 Walnut Street	
Darien, CT 06820		Williamsburg, KY 40769-9983	
King School	\$ 1,000	Coalition for the Homeless	\$ 1,000
1450 Newfield Avenue		Ms. Mary B. Sullivan	
Stamford, CT 06913-0671		Coalition for the Homeless	
		129 Fulton Street	
Skidmore College	\$ 2,000	New York, New York 10038	
Ms. Lori Eastman			
Skidmore College		Neighbor's Link Stamford	\$ 1,000
815 North Broadway		74 Selleck Ave	
Saratoga Springs, NY 12866-1632		Stamford, CT 06902	
University of Kentucky	\$ 1,000	Friends of Darien Library	\$ 500
Ms. Janice Birdwhistle		Attn: Mrs. Kim Huffard	
Development Officer		35 Leroy Avenue	
College of Communications		Darien, CT 06820	
and Information Studies			
Grehan Building		Joshua House Fund, Inc.	\$ 500
University of Kentucky		P.O. Box 1792	
Lexington, KY 40506-0042		Darien, CT 06820	
Water for People	\$ 1,000	Rowayton Arts Center	\$ 500
Caitlin Harris,		145 Rowayton Avenue	
Coordinator, Donation Relations		Rowayton, CT 06853	
6666 West Quincy Avenue			
Denver, CO 80235		Stamford Hospital Foundation	\$ 500
		P.O. B9ox 110315	
Post 53	\$ 1,000	Stamford, CT 06913-0273	
Darien Emergency			
Medical Services			
P.O. Box 2066			
Darien, CT 06820			

\$ 20,000

2012 Tax Information Statement

Page 7 of 33

Account Number:

651429

Recipient's Tax ID Number:

31-1522458

Payer's Federal ID Number:

13-4941247

Payer's State ID Number:

FL

(212)250-0949

Questions?

☐ Corrected

☐ 2nd TIN notice

Payer's Name and Address:

DEUTSCHE BANK TRUST CO AMERICAS
60 WALL STREET MS NYC60-3203
NEW YORK, NY 10005

Recipient's Name and Address:

THE BOWLING FAMILY FOUNDATION
C/O NANCY E BLAIR ESQ BLAIR&POTTS
PO BOX 1214
STAMFORD, CT 06904-1214

2012 Form 1099-B: Proceeds from Broker and Barter Exchange Transactions

OMB No. 1545-0715

Reported to the IRS is Sales Price of stocks, bonds, etc., less commissions and option premiums.
For noncovered securities (Box 6a is checked) shown on this statement, cost basis information including wash sale disallowed loss is not being reported to the IRS.

Cusip		Description (Box 8)		Stock or Other Symbol (Box 1d)				Federal Income Tax Withheld (Box 4)		State Tax Withheld (Box 15)	
Quantity Sold (Box 1e)	Date of Sale or Exchange (Box 1a)	Date of Acquisition	Stocks, Bonds, etc. (Box 2a)	Cost or Other Basis	Wash Sale Loss Disallowed	Net Gain or Loss	Federal Income Tax Withheld (Box 4)	State Tax Withheld (Box 15)			
Short Term Sales Reported on 1099-B											
40415H578	HC CAPITAL TRUST US CORP FIXED INC SEC PORTFOLIO		40415H578								
754.0060	06/01/2012	12/14/2011	8,000.00	7,849.20	0.00	150.80	0.00	0.00			
40415H552	HC CAPITAL TRUST US MORT/AB FIXED INC		40415H552								
769.9810	06/01/2012	12/14/2011	7,884.61	7,900.00	0.00	-15.39	0.00	0.00			
Total Short Term Sales Reported on 1099-B											
Report on Form 8949, Part I, with Box B checked											
Long Term 15% Sales Reported on 1099-B											
40415H628	HC CAPITAL TRUST COMMODITY RELATED SEC PORTFOLIO		40415H628								
747.6640	12/06/2012	04/27/2011	8,000.00	10,243.00	0.00	-2,243.00	0.00	0.00			
40415H107	HC CAPITAL TRUST EMERGING MKTS PORTFOLIO		40415H107								
677.4360	12/06/2012	03/29/2010	13,000.00	13,196.45	0.00	-196.45	0.00	0.00			
40415H883	HC CAPITAL TRUST GROWTH PORTFOLIO		40415H883								
1414.4270	06/01/2012	01/18/2008	20,000.00	17,199.43	0.00	2,800.57	0.00	0.00			
40415H883	HC CAPITAL TRUST GROWTH PORTFOLIO		40415H883								
2006.4720	12/06/2012	01/18/2008	31,000.00	24,398.70	0.00	6,601.30	0.00	0.00			

This is important tax information and is being furnished to the Internal Revenue Service (except as indicated). If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported. For noncovered securities shown on this statement, cost basis information including wash sale disallowed loss is not being reported to the Internal Revenue Service. The taxpayer is ultimately responsible for the accuracy of their own tax return.

2012 Tax Information Statement

Account Number:

651429
 Recipient's Tax ID Number: 31-1522458
 Payer's Federal ID Number: 13-4941247
 Payer's State ID Number: FL
 State: (212)250-0949
 Questions? ☐ Corrected ☐ 2nd TIN notice

Payer's Name and Address:

DEUTSCHE BANK TRUST CO AMERICAS
 60 WALL STREET MS NYC60-3203
 NEW YORK, NY 10005

Recipient's Name and Address:
 THE BOWLING FAMILY FOUNDATION
 C/O NANCY E BLAIR ESQ BLAIR&POTTS
 PO BOX 1214
 STAMFORD, CT 06904-1214

For noncovered securities (Box 6a is checked) shown on this statement, cost basis information including wash sale disallowed loss is not being reported to the IRS.

Cusip	Description (Box 8)	Quantity Sold (Box 1e)	Date of Sale or Exchange (Box 1a)	Date of Acquisition	Stocks or Other Symbol (Box 1d)	Stocks Bonds, etc. (Box 2a)	Cost or Other Basis	Wash Sale Loss Disallowed	Net Gain or Loss	Federal Income Tax Withheld (Box 4)	State Tax Withheld (Box 15)
40415H750	HC CAPITAL TRUST INTERNATIONAL EQUITY PORTFOLIO	40415H750	12/06/2012	01/18/2008	40415H750	55,000.00	66,056.69	0.00	-11,056.69	0.00	0.00
5078.4860	HC CAPITAL TRUST SMALL CAP EQUITY PORTFOLIO	5078.4860	06/01/2012	01/18/2008	40415H685	5,000.00	4,717.79	0.00	282.21	0.00	0.00
40415H552	HC CAPITAL TRUST US MORT/AB FIXED INC	40415H552	06/01/2012	12/06/2010	40415H552	115.39	112.69	0.00	2.70	0.00	0.00
40415H669	HC CAPITAL TRUST VALUE EQUITY PORTFOLIO	40415H669	06/01/2012	01/18/2008	40415H669	10,000.00	12,240.49	0.00	-2,240.49	0.00	0.00
865.0520	HC CAPITAL TRUST VALUE EQUITY PORTFOLIO	865.0520	12/06/2012	01/18/2008	40415H669	10,000.00	11,071.99	0.00	-1,071.99	0.00	0.00
782.4730	HC CAPITAL TRUST VALUE EQUITY PORTFOLIO	782.4730	12/06/2012	01/18/2008	40415H669	10,000.00	11,071.99	0.00	-1,071.99	0.00	0.00
						152,115.39	159,237.23	0.00	-7,121.84	0.00	0.00
Total Long Term 15% Sales Reported on 1099-B											
Report on Form 8949, Part II, with Box B checked											

This is important tax information and is being furnished to the Internal Revenue Service (except as indicated). If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported. For noncovered securities shown on this statement, cost basis information including wash sale disallowed loss is not being reported to the Internal Revenue Service. The taxpayer is ultimately responsible for the accuracy of their own tax return.

Application for Extension of Time To File an Exempt Organization Return

OMB No. 1545-1709

► **File a separate application for each return.**

- If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** and check this box ☒
- If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only **Part II** (on page 2 of this form).

Do not complete Part II unless you have already been granted an automatic 3-month extension on a previously filed Form 8868.

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

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

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

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

Type or print File by the due date for filing your return. See instructions.	Name of exempt organization or other filer, see instructions. UD JC & AJ BOWLING FOUNDATION	Employer identification number (EIN) or 31-1522458
	Number, street, and room or suite no. If a P.O. box, see instructions. C/O BLAIR & POTTS, P.O. BOX 1214	Social security number (SSN)
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. STAMFORD, CT 06904	

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

0 4

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

BLAIR & POTTS

- The books are in the care of ► **P.O. BOX 1214 - STAMFORD, CT 06904**

Telephone No. ► **(203) 327-2333**

FAX No. ►

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

- 1** I request an automatic 3-month (6 months for a corporation required to file Form 990-T) extension of time until **AUGUST 15, 2013**, to file the exempt organization return for the organization named above. The extension is for the organization's return for:
► ☒ calendar year **2012** or
► ☐ tax year beginning _____, and ending _____

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

3a If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	3a	\$	2,629.
b If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit.	3b	\$	1,429.
c Balance due. Subtract line 3b from line 3a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	3c	\$	1,200.

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

LHA For Privacy Act and Paperwork Reduction Act Notice, see instructions.

Form **8868** (Rev. 1-2013)