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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 10-01-2012 , and ending 09-30-2013

Name of foundation CHERYL CHASE & STUART BEAR FAMILY FOUNDATION INC		A Employer identification number 06-1562154	
Number and street (or P O box number if mail is not delivered to street address) CHASE ENTERPGOODWIN SQ225 ASYLUM ST NO FL 29		Room/suite	
City or town, state, and ZIP code HARTFORD, CT 06103		B Telephone number (see instructions) (860) 549-1674	
G Check all that apply ☐ Initial return ☐ Initial return of a former public charity ☐ Final return ☐ Amended return ☐ Address change ☐ Name change		C If exemption application is pending, check here ☐	
H Check type of organization ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		D 1. Foreign organizations, check here ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ☐	
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 2,045,065		E If private foundation status was terminated under section 507(b)(1)(A), check here ☐ F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐	
J Accounting method ☐ Cash ☒ Accrual ☐ Other (specify) _____ (Part I, column (d) must be on cash basis.)			

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)	467,024			
	2 Check ☐ if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities.	95,040	95,040		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	142			
	b Gross sales price for all assets on line 6a _____ 142				
	7 Capital gain net income (from Part IV , line 2)		142		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
Operating and Administrative Expenses	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)				
	12 Total. Add lines 1 through 11	562,206	95,182		
	13 Compensation of officers, directors, trustees, etc	0	0		0
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)	446	401		45
	b Accounting fees (attach schedule)	8,200	7,380		790
	c Other professional fees (attach schedule)				
	17 Interest	7,224	0		0
	18 Taxes (attach schedule) (see instructions)	2,260	0		0
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	300	300		0
	24 Total operating and administrative expenses. Add lines 13 through 23	18,430	8,081		835
	25 Contributions, gifts, grants paid	533,629			533,629
	26 Total expenses and disbursements. Add lines 24 and 25	552,059	8,081		534,464
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	10,147			
	b Net investment income (if negative, enter -0-)		87,101		
	c Adjusted net income (if negative, enter -0-)				

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)	Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing	318	108	108
	2	Savings and temporary cash investments		57	57
	3	Accounts receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	4	Pledges receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see page 15 of the instructions)			
	7	Other notes and loans receivable (attach schedule) ▶ _____ Less allowance for doubtful accounts ▶ _____			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10a	Investments—U S and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)	1,319,310	1,319,310	2,044,900
	c	Investments—corporate bonds (attach schedule).			
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)			
	14	Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
Liabilities	15	Other assets (describe ▶ _____)			
	16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	1,319,628	1,319,475	2,045,065
	17	Accounts payable and accrued expenses	7,900	8,200	
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons	3,168,990	3,158,390	
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶ _____)			
	23	Total liabilities (add lines 17 through 22)	3,176,890	3,166,590	
Net Assets or Fund Balances		Foundations that follow SFAS 117, check here ▶ ☒ and complete lines 24 through 26 and lines 30 and 31.			
	24	Unrestricted	-1,857,262	-1,847,115	
	25	Temporarily restricted			
	26	Permanently restricted			
		Foundations that do not follow SFAS 117, check here ▶ ☐ and complete lines 27 through 31.			
	27	Capital stock, trust principal, or current funds			
	28	Paid-in or capital surplus, or land, bldg , and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds			
	30	Total net assets or fund balances (see page 17 of the instructions)	-1,857,262	-1,847,115	
	31	Total liabilities and net assets/fund balances (see page 17 of the instructions)	1,319,628	1,319,475	

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	-1,857,262
2	Enter amount from Part I, line 27a	2	10,147
3	Other increases not included in line 2 (itemize) ▶ _____	3	0
4	Add lines 1, 2, and 3	4	-1,847,115
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	-1,847,115

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)
1 a	LITIGATION SETTLEMENT INCOME COUNTRYWIDE FINANCIAL CORP	P	2007-01-09	2012-12-26
b				
c				
d				
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 142			142
b			
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
a			142
b			
c			
d			
e			

2	Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	142
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) (see instructions) If (loss), enter -0- in Part I, line 8		3	

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 page 18 of 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	326,743	1,903,283	0 171673
2010	526,430	1,714,298	0 307082
2009	464,487	1,614,736	0 287655
2008	425,027	1,800,592	0 236048
2007	471,543	2,355,104	0 200222

2	Total of line 1, column (d).	2	1 202680
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	0 240536
4	Enter the net value of noncharitable-use assets for 2012 from Part X, line 5.	4	2,073,240
5	Multiply line 4 by line 3.	5	498,689
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	871
7	Add lines 5 and 6.	7	499,560
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	534,464

Part VIExcise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the instructions)

1a		Exempt operating foundations described in section 4940(d)(2), check here ☐ 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 ☒ and enter 1% of Part I, line 27b		1	871	
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	871	
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	871	
6		Credits/Payments				
a		2012 estimated tax payments and 2011 overpayment credited to 2012	6a	1,763		
b		Exempt foreign organizations—tax withheld at source	6b			
c		Tax paid with application for extension of time to file (Form 8868)	6c			
d		Backup withholding erroneously withheld	6d			
7		Total credits and payments Add lines 6a through 6d.		7	1,763	
8		Enter any penalty for underpayment of estimated tax Check here ☐ 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	892	
11		Enter the amount of line 10 to be Credited to 2013 estimated tax ☒	892	Refunded ☒	11	0

Part VII-AStatements Regarding Activities

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?		Yes	No
		1a		No
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)?			No
	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.			
c	Did the foundation file Form 1120-POL for this year?.	1c		No
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation ☒ \$ 0 (2) On foundation managers ☒ \$ 0			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ☒ \$ 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.	2		No
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes	3		No
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?.	4a		No
b	If "Yes," has it filed a tax return on Form 990-T for this year?.	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.	5		No
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?	6	Yes	
7	Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), and Part XV	7	Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) ☒ CT			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation .	8b	Yes	
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	9		No
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10		No

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		No
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		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Yes	
Website address ▶N/A				
14	The books are in care of ▶JOHN P REDDING Telephone no ▶(860) 549-1674 Located at ▶GOODWIN SQ 225 ASYLUM ST 29TH FL HARTFORD CT ZIP +4 ▶06103			
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		
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?	16		No
See instructions for exceptions and filing requirements for Form TD F 90-22.1 If "Yes", enter the name of the foreign country ▶				

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			Yes	No
1a	During the year did the foundation (either directly or indirectly) (1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☒ No (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?. ☒ Yes ☐ No (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☒ Yes ☐ No (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☒ Yes ☐ 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)?. ☐ Yes ☒ 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). ☐ Yes ☒ 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 page 20 of the instructions)?. . . Organizations relying on a current notice regarding disaster assistance check here. ▶ ☐	1b		No
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		No
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?. ☐ Yes ☒ No If "Yes," list the years ▶ 20____, 20____, 20____, 20____			
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions).	2b		
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ▶ 20____, 20____, 20____, 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?. ☐ Yes ☒ 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? (<i>Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2012.</i>).	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
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		No

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required (continued)

5a

During the year did the foundation pay or incur any amount to

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?

☐ Yes ☒ No

(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?

☐ Yes ☒ No

(3) Provide a grant to an individual for travel, study, or other similar purposes?

☐ Yes ☒ No

(4) Provide a grant to an organization other than a charitable, etc , organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see instructions).

☐ Yes ☒ No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?

☐ Yes ☒ No

b

If any answer is "Yes" to 5a(1)–(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?

5b

Organizations relying on a current notice regarding disaster assistance check here.

☒

c

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

☐ Yes ☐ No

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

6a

Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?

☐ Yes ☒ No

b

Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

6b

No

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

7a

At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?

☐ Yes ☒ No

b

If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?

7b

Part VIII

Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors

1

List all officers, directors, trustees, foundation managers and their compensation (see instructions).

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
CHERYL A CHASE	PRESIDENT/CHAIRMAN 5 00	0	0	0
C/O CHASE ENT 225 ASYLUM ST29TH FL HARTFORD,CT 06103				
JOHN P REDDING	SECRETARY/DIRECTOR 1 00	0	0	0
C/O CHASE ENT 225 ASYLUM ST29TH FL HARTFORD,CT 06103				
DAVID T CHASE	DIRECTOR 1 00	0	0	0
C/O CHASE ENT 225 ASYLUM ST29TH FL HARTFORD,CT 06103				

2

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

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

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

0

Part VIII

Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)

3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE".		
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
Total number of others receiving over \$50,000 for professional services.		0

Part IX-A

Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1	
2	
3	
4	

Part IX-B

Summary of Program-Related Investments (see instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1	
2	
All other program-related investments. See page 24 of the instructions.	
3	0
Total. Add lines 1 through 3.	0

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	2,101,183
b	Average of monthly cash balances.	1b	3,629
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	2,104,812
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	2,104,812
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	31,572
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	2,073,240
6	Minimum investment return. Enter 5% of line 5.	6	103,662

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	103,662
2a	Tax on investment income for 2012 from Part VI, line 5.	2a	871
b	Income tax for 2012 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	871
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	102,791
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	102,791
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	102,791

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	534,464
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	534,464
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see instructions).	5	871
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	533,593
Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years			

Part XIII

Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2011	(c) 2011	(d) 2012
1 Distributable amount for 2012 from Part XI, line 7				102,791
2 Undistributed income, if any, as of the end of 2012				
a Enter amount for 2011 only.			0	
b Total for prior years 20__ , 20__ , 20__		0		
3 Excess distributions carryover, if any, to 2012				
a From 2007.	356,035			
b From 2008.	337,021			
c From 2009.	385,528			
d From 2010.	442,481			
e From 2011.	233,333			
f Total of lines 3a through e.	1,754,398			
4 Qualifying distributions for 2012 from Part XII, line 4 ▶ \$ 534,464				
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.				102,791
e Remaining amount distributed out of corpus	431,673			
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:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	2,186,071			
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 instructions			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) (see instructions).	0			
8 Excess distributions carryover from 2007 not applied on line 5 or line 7 (see instructions). . .	356,035			
9 Excess distributions carryover to 2013. Subtract lines 7 and 8 from line 6a	1,830,036			
10 Analysis of line 9				
a Excess from 2008. . . .	337,021			
b Excess from 2009. . . .	385,528			
c Excess from 2010. . . .	442,481			
d Excess from 2011. . . .	233,333			
e Excess from 2012. . . .	431,673			

Part XIVPrivate Operating Foundations (see instructions and Part VII-A, question 9)

1a

If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2012, enter the date of the ruling.

b

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

☐ 4942(j)(3) or ☐ 4942(j)(5)

2a	Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed.	Tax year	Prior 3 years			(e) Total
		(a) 2012	(b) 2011	(c) 2010	(d) 2009	
b	85% of line 2a					
c	Qualifying distributions from Part XII, line 4 for each year listed.					
d	Amounts included in line 2c not used directly for active conduct of exempt activities.					
e	Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c.					
3	Complete 3a, b, or c for the alternative test relied upon					
a	"Assets" alternative test—enter					
	(1) Value of all assets					
	(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b	"Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed.					
c	"Support" alternative test—enter					
	(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties).					
	(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii).					
	(3) Largest amount of support from an exempt organization					
	(4) Gross investment income					

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

1

Information Regarding Foundation Managers:

a

List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000) (See section 507(d)(2))

See Additional Data Table

b

List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest

2

Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:

Check here ☐ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. (see instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d.

a

The name, address, and telephone number or e-mail of the person to whom applications should be addressed

JOHN P REDDING CO CHASE ENTERPRISES
GOODWIN SQ 225 ASYLUM ST
HARTFORD,CT 06103
(860) 549-1674

b

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

NO SPECIFIC FORM

c

Any submission deadlines

NONE

d

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

NONE

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 See Additional Data Table				
Total			3a	533,629
b Approved for future payment				
Total			3b	0

Enter gross amounts unless otherwise indicated		Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions)
		(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1	Program service revenue					
a	_____					
b	_____					
c	_____					
d	_____					
e	_____					
f	_____					
g	Fees and contracts from government agencies					
2	Membership dues and assessments. . . .					
3	Interest on savings and temporary cash investments					
4	Dividends and interest from securities. . . .			14	95,040	
5	Net rental income or (loss) from real estate					
a	Debt-financed property.					
b	Not debt-financed property.					
6	Net rental income or (loss) from personal property					
7	Other investment income.					
8	Gain or (loss) from sales of assets other than inventory			18	142	
9	Net income or (loss) from special events					
10	Gross profit or (loss) from sales of inventory. .					
11	Other revenue a _____					
b	_____					
c	_____					
d	_____					
e	_____					
12	Subtotal. Add columns (b), (d), and (e). .		0		95,182	0
13	Total. Add line 12, columns (b), (d), and (e).			13		95,182

[illegible]

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

**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 or fiduciary) is based on all information of which preparer has any knowledge.

*****	2014-05-15	*****	
Signature of officer or trustee	Date	Title	May the IRS discuss this return with the preparer shown below (see Instr.)? ☐ Yes ☐ No

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

**Paid
Preparer
Use Only**

Print/Type preparer's name	Preparer's Signature	Date	Check if self-employed ☐	PTIN
Firm's name ☐ 			Firm's EIN ☐	
Firm's address ☐ 			Phone no	

Form 990PF Part XV Line 1a - List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000).

CHERYL A CHASE
DAVID T CHASE

Form 990PF Part XV Line 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 <i>Paid during the year</i>				
ALZHEIMER'S ASSOCIATION 2075 SILAS DEANE HIGHWAY SUITE 100 ROCKY HILL,CT 060672338	N/A	PUBLIC CHARITY	MEMORY OF PHYLLIS B PRICE	180
AMERICAN CANCER SOCIETY 825 BROOK STREET ROCKY HILL,CT 060672338	N/A	PUBLIC CHARITY	"PINK TRASH RECEPTACLE"	200
AMERICAN LIVER FOUNDATION 127 WASHINGTON AVE NORTH HAVEN,CT 064731715	N/A	PUBLIC CHARITY	LIVER LIFE WALK	1,000
AMERICAN SCHOOL FOR THE DEAF 139 NORTH MAIN ST WEST HARTFORD,CT 061071269	N/A	PUBLIC CHARITY	UNRESTRICTED PURPOSE	1,000
ANTI-DEFAMATION LEAGUE 605 THIRD AVE NEW YORK,NY 101583560	N/A	PUBLIC CHARITY	UNRESTRICTED PURPOSE	3,334
ARCHDIOCESE OF HARTFORD 135 FARMINGTON AVE HARTFORD,CT 061053723	N/A	PUBLIC CHARITY	OUR GIFT FOR TOMORROW CAMPAIGN	8,333
BROADWAY CARES 165 WEST 46TH ST SUITE 1300 NEW YORK,NY 100032508	N/A	PUBLIC CHARITY	FIGHT AIDS	150
BROOKLYN MUSEUM 200 EASTERN PARKWAY BROOKLYN,NY 112386052	N/A	PUBLIC CHARITY	UNRESTRICTED PURPOSE	150
BRUCE MUSEUM ONE MUSEUM DRIVE GREENWICH,CT 068307157	N/A	PUBLIC CHARITY	UNRESTRICTED PURPOSE	250
BUSHNELL THE 166 CAPITOL AVE HARTFORD,CT 061061621	N/A	PUBLIC CHARITY	2012-2013 ANNUAL FUND	15,000
CHABAD HOUSE JEWISH STUDENT CENTER 21 CHETWYND ROAD SOMERVILLE,MA 021441217	N/A	PUBLIC CHARITY	UNRESTRICTED PURPOSE	1,000
CHILDREN'S MUSEUM 950 TROUT BROOK DRIVE WEST HARTFORD,CT 061191437	N/A	PUBLIC CHARITY	2012-2013 ANNUAL FUND	100
CHOATE ROSEMARY HALL FOUNDATION 333 CHRISTIAN ST WALLINGFORD,CT 064923818	N/A	PUBLIC CHARITY	PARENTS & GRANDPARENTS GIVING	1,000
CIESLA FOUNDATION 5005 LINNEAN AVE NW WASHINGTON,DC 200082042	N/A	PUBLIC CHARITY	THE LIFE AND TIMES OF HANK GREENBERG	2,500
CLARK MUSEUM 225 SOUTH ST WILLIAMSTOWN,MA 012672878	N/A	PUBLIC CHARITY	UNRESTRICTED PURPOSE	90

Form 990PF Part XV Line 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 <i>Paid during the year</i>				
CONGREGATION BETH ISRAEL 701 FARMINGTON AVE WEST HARTFORD,CT 061193818	N/A	PUBLIC CHARITY	HIGH HOLY DAY APPEAL FUND	1,800
CONNECTICUT BAR FOUNDATION 31 PRATT ST HARTFORD,CT 061031631	N/A	PUBLIC CHARITY	SUSTAINING LIFE FELLOW	250
CONNECTICUT CHILDREN'S MEDICAL CENTER 282 WASHINGTON ST HARTFORD,CT 061063322	N/A	PUBLIC CHARITY	ACES FOR KIDS CHARITY GOLF TOURNAMENT	500
CONNECTICUT FOOD BANK PO BOX 8686 NEW HAVEN,CT 065310686	N/A	PUBLIC CHARITY	UNRESTRICTED PURPOSE	100
CONNECTICUT PUBLIC BROADCASTING 1049 ASYLUM AVE HARTFORD,CT 061052411	N/A	PUBLIC CHARITY	50TH GALA PLATINUM SPONSORSHIP	5,000
CONNECTICUT SCIENCE CENTER 250 COLUMBUS BOULEVARD HARTFORD,CT 061032802	N/A	PUBLIC CHARITY	EDISON CIRCLE OF THE VISIONARIES SOCIETY	1,000
CONNECTICUT SCIENCE CENTER 250 COLUMBUS BOULEVARD HARTFORD,CT 061032802	N/A	PUBLIC CHARITY	MCCLINTOCK CIRCLE OF THE VISIONARIES SOCIETY	15,000
CONNECTICUT SCIENCE CENTER 250 COLUMBUS BOULEVARD HARTFORD,CT 061032802	N/A	PUBLIC CHARITY	SUMMER CAMP	1,200
CONNECTICUT SCIENCE CENTER 250 COLUMBUS BOULEVARD HARTFORD,CT 061032802	N/A	PUBLIC CHARITY	LAST REEF MOVIE	5,000
CONNECTICUT SCIENCE CENTER 250 COLUMBUS BOULEVARD HARTFORD,CT 061032802	N/A	PUBLIC CHARITY	GENOMICS	43,800
CONNECTICUT SCIENCE CENTER 250 COLUMBUS BOULEVARD HARTFORD,CT 061032802	N/A	PUBLIC CHARITY	GREEN GALA	5,000
CONNECTICUT SCIENCE CENTER 250 COLUMBUS BOULEVARD HARTFORD,CT 061032802	N/A	PUBLIC CHARITY	GREEN GALA 2013	1,500
CONNECTICUT WOMEN'S EDUCATION AND LEGAL FUND ONE HARTFORD SQUARE WEST SUITE 1-300 HARTFORD,CT 061061953	N/A	PUBLIC CHARITY	UNRESTRICTED PURPOSE	325
CONNECTICUT WOMEN'S HALL OF FAME 320 FITCH ST NEW HAVEN,CT 065151306	N/A	PUBLIC CHARITY	UNRESTRICTED PURPOSE	500
DUNCASTER FOUNDATION 40 LOEFFLER ROAD BLOOMFIELD,CT 060021342	N/A	PUBLIC CHARITY	MEMORY OF MRS ETTA SUISMAN	250

Form 990PF Part XV Line 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 <i>Paid during the year</i>				
EMANUEL SYNAGOGUE 160 MOHEGAN DRIVE WEST HARTFORD,CT 061171421	N/A	PUBLIC CHARITY	TRIBUTE EVENT ADVERT	600
EMANUEL SYNAGOGUE 160 MOHEGAN DRIVE WEST HARTFORD,CT 061171421	N/A	PUBLIC CHARITY	GENERAL FUND	500
FLORENCE GRISWOLD MUSEUM 96 LYME STREET OLD LYME,CT 063711426	N/A	PUBLIC CHARITY	UNRESTRICTED PURPOSE	500
FOODSHARE 450 WOODLAND AVE BLOOMFIELD,CT 060021342	N/A	PUBLIC CHARITY	10 HOLIDAY ORNAMENTS	200
FOODSHARE 450 WOODLAND AVE BLOOMFIELD,CT 060021342	N/A	PUBLIC CHARITY	CHASE CHALLENGE FOR 2012	15,000
FOODSHARE 450 WOODLAND AVE BLOOMFIELD,CT 060021342	N/A	PUBLIC CHARITY	MOBILE FOODSHARE TRUCK	50,000
FOODSHARE 450 WOODLAND AVE BLOOMFIELD,CT 060021342	N/A	PUBLIC CHARITY	BETH ISRAEL FOOD DRIVE	500
GLASTONBURY PUBLIC SCHOOLS 628 HEBRON AVE GLASTONBURY,CT 060330191	N/A	PUBLIC CHARITY	UNRESTRICTED PURPOSE	250
GRACE ACADEMY 277 MAIN STREET HARTFORD,CT 060321818	N/A	PUBLIC CHARITY	SPONSOR A GRACE ACADEMY STUDENT	5,000
GREATER HARTFORD JEWISH COMMUNITY CENTER 335 BLOOMFIELD AVE WEST HARTFORD,CT 061171543	N/A	PUBLIC CHARITY	SPONSOR OF 14TH ANNUAL GOLF TOURNAMENT	1,500
GREATER HARTFORD JEWISH COMMUNITY CENTER 335 BLOOMFIELD AVE WEST HARTFORD,CT 061171543	N/A	PUBLIC CHARITY	PILLARS SOCIETY	10,000
HARTFORD FOUNDATION FOR PUBLIC GIVING 10 COLUMBUS BOULEVARD HARTFORD,CT 061061976	N/A	PUBLIC CHARITY	MEMORY OF SAM TITLE	250
HARTFORD HOSPITAL 80 SEYMOUR ST HARTFORD,CT 061025037	N/A	PUBLIC CHARITY	ANNUAL CAMPAIGN	100
HARTFORD HOSPITAL 80 SEYMOUR ST HARTFORD,CT 061025037	N/A	PUBLIC CHARITY	DEPRESSION INITIATIVE AT THE INSTITUTE OF LIVING	500
HARTFORD HOSPITAL 80 SEYMOUR ST HARTFORD,CT 061025037	N/A	PUBLIC CHARITY	HELEN & HARRY GRAY CANCER	250

Form 990PF Part XV Line 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 <i>Paid during the year</i>				
HARTFORD STAGE 50 CHURCH ST HARTFORD, CT 061031201	N/A	PUBLIC CHARITY	HORNS AND HALOS	1,100
HARTFORD STAGE 50 CHURCH ST HARTFORD, CT 061031201	N/A	PUBLIC CHARITY	FOUNDATION SUPPORT FOR CNC ROUTER	18,750
HARTFORD STAGE 50 CHURCH ST HARTFORD, CT 061031201	N/A	PUBLIC CHARITY	LA DISPUTE PRODUCTION SPONSORSHIP	25,000
HARTFORD SYMPHONY ORCHESTRA 99 PRATT STREET HARTFORD, CT 061031629	N/A	PUBLIC CHARITY	ANNUAL FUND	5,000
HEBREW HIGH SCHOOL OF NEW ENGLAND 300 BLOOMFIELD AVE WEST HARTFORD, CT 061171505	N/A	PUBLIC CHARITY	UNRESTRICTED PURPOSE	1,000
HOLE IN THE WALL GANG CAMP 555 LONG WHARF DRIVE NEW HAVEN, CT 065116107	N/A	PUBLIC CHARITY	UNRESTRICTED PURPOSE	250
JEWISH FEDERATION OF GREATER HARTFORD 333 BLOOMFIELD AVE WEST HARTFORD, CT 061171500	N/A	PUBLIC CHARITY	UNRESTRICTED PURPOSE	7,000
JEWISH MUSEUM 1109 FIFTH AVE NEW YORK, NY 101280118	N/A	PUBLIC CHARITY	UNRESTRICTED PURPOSE	1,000
JUNIOR ACHIEVEMENT 11 ASYLUM ST SUITE 601 HARTFORD, CT 061031538	N/A	PUBLIC CHARITY	BUSINESS HALL OF FAME HARTFORD EVENT	1,667
KINGSWOOD OXFORD SCHOOL 170 KINGSWOOD ROAD WEST HARTFORD, CT 061191430	N/A	PUBLIC CHARITY	KO FUND	5,100
LITERACY VOLUNTEERS OF GREATER HARTFORD 30 ARBOR STREET HARTFORD, CT 061061374	N/A	PUBLIC CHARITY	UNRESTRICTED PURPOSE	250
MALTA HOUSE OF CARE FOUNDATION INC 19 WOODLAND STREET SUITE 37 HARTFORD, CT 061052213	N/A	PUBLIC CHARITY	UNRESTRICTED PURPOSE	1,000
MARK TWAIN HOUSE & MUSEUM 351 FARMINGTON AVE HARTFORD, CT 061054401	N/A	PUBLIC CHARITY	UNRESTRICTED PURPOSE	1,000
MERCY HOUSING AND SHELTER CORP 211 WETHERSFIELD AVE HARTFORD, CT 061141148	N/A	PUBLIC CHARITY	DREAMS GALA	3,500
METROPOLITAN MUSEUM OF ART 1000 FIFTH AVE NEW YORK, NY 100280198	N/A	PUBLIC CHARITY	UNRESTRICTED PURPOSE	550

Form 990PF Part XV Line 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 <i>Paid during the year</i>				
MUSEUM OF FINE ARTS BOSTON 465 HUNTINGTON AVE BOSTON,MA 021155523	N/A	PUBLIC CHARITY	UNRESTRICTED PURPOSE	3,000
MUSEUM OF JEWISH HERITAGE 36 BATTERY PLACE NEWYORK,NY 102801502	N/A	PUBLIC CHARITY	UNRESTRICTED PURPOSE	180
MY SISTER'S PLACE INC 237 HAMILTON ST SUITE 203 HARTFORD,CT 060021342	N/A	PUBLIC CHARITY	UNRESTRICTED PURPOSE	150
NATIONAL CONFERENCE FOR COMMUNITY AND JUSTICE 1095 DAY HILL RD WINDSOR,CT 060951782	N/A	PUBLIC CHARITY	ANNUAL HUMAN RELATIONS AWARD BANQUET	1,667
NATIONAL MUSEUM OF WOMEN IN THE ARTS 1250 NEWYORK AVENUE NW WASHINGTON,DC 200053970	N/A	PUBLIC CHARITY	UNRESTRICTED PURPOSE	275
NEW BRITAIN MUSEUM OF AMERICAN ART 56 LEXINGTON ST NEW BRITAIN,CT 060521412	N/A	PUBLIC CHARITY	SPRING GALA	3,333
NEW BRITAIN MUSEUM OF AMERICAN ART 56 LEXINGTON ST NEW BRITAIN,CT 060521412	N/A	PUBLIC CHARITY	UNRESTRICTED PURPOSE	10,000
NEW BRITAIN MUSEUM OF AMERICAN ART 56 LEXINGTON ST NEW BRITAIN,CT 060521412	N/A	PUBLIC CHARITY	THE ART OF WINE & FOOD	600
NEW ENGLAND ORGAN BANK 60 FIRST AVE WALTHAM,MA 024511106	N/A	PUBLIC CHARITY	MEMORY OF MARK CATAUDELLA	500
RABBI EMERITUS DISCRETIONARY FUND 15 LEWIS ST HARTFORD,CT 061031201	N/A	PUBLIC CHARITY	UNRESTRICTED PURPOSE	2,000
ROMANO EDUCATIONAL TRUST 1739 BOULEVARD WEST HARTFORD,CT 061072820	N/A	PUBLIC CHARITY	3RD ANNUAL GOLF TOURNAMENT	500
SAVE THE CHILDREN 52 WILTON ROAD WESTPORT,CT 068803108	N/A	PUBLIC CHARITY	UNRESTRICTED PURPOSE	192
SIMON WIESENTHAL CENTER 1399 SOUTH ROXBURY DRIVE LOS ANGELES,CA 900354709	N/A	PUBLIC CHARITY	UNRESTRICTED PURPOSE	600
SISTERHOOD CONGREGATION BETH ISRAEL 701 FARMINGTON AVE WEST HARTFORD,CT 061191430	N/A	PUBLIC CHARITY	UNRESTRICTED PURPOSE	45
SMITHSONIAN INSTITUTION PO BOX 37012 WASHINGTON,DC 200137012	N/A	PUBLIC CHARITY	UNRESTRICTED PURPOSE	75

Form 990PF Part XV Line 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				
ST JUDE CHILDREN'S RESEARCH HOSPITAL 262 DANNY THOMAS PLACE MEMPHIS,TN 381053678	N/A	PUBLIC CHARITY	UNRESTRICTED PURPOSE	500
TALCOTT MOUNTAIN SCIENCE CENTER 324 MONTEVIDEO ROAD AVON,CT 060013946	N/A	PUBLIC CHARITY	TMA SCHOLARSHIP FUND	1,000
THEATHER WORKS 233 PEARL ST HARTFORD,CT 061031201	N/A	PUBLIC CHARITY	UNRESTRICTED PURPOSE	5,000
TUFTS UNIVERSITY 80 GEORGE ST MEDFORD,MA 021555519	N/A	PUBLIC CHARITY	TUFTS HILLEL ANNUAL FUND	25,000
UNITED WAY 30 LAUREL STREET HARTFORD,CT 061061374	N/A	PUBLIC CHARITY	UNRESTRICTED PURPOSE	10,000
UNIVERSITY OF CONNECTICUT FOUNDATION INC 2390 ALUMNI DRIVE STORRS,CT 062693206	N/A	PUBLIC CHARITY	UNRESTRICTED PURPOSE	20,000
UNIVERSITY OF CONNECTICUT FOUNDATION INC 2390 ALUMNI DRIVE STORRS,CT 062693206	N/A	PUBLIC CHARITY	ANNUAL WHITE COAT GALA	83,333
UNIVERSITY OF CONNECTICUT LAW SCHOOL FOUNDATION INC 45 ELIZABETH ST HARTFORD,CT 061052213	N/A	PUBLIC CHARITY	ANNUAL FUND 2012-2013	2,500
UNIVERSITY OF CONNECTICUT LAW SCHOOL FOUNDATION INC 45 ELIZABETH ST HARTFORD,CT 061052213	N/A	PUBLIC CHARITY	2012-2013 ANNUAL FUND	5,000
WADSWORTH ATHENEUM MUSEUM OF ART 600 MAIN ST HARTFORD,CT 061032990	N/A	PUBLIC CHARITY	ANNUAL FUND	50,000
WADSWORTH ATHENEUM MUSEUM OF ART 600 MAIN ST HARTFORD,CT 061032990	N/A	PUBLIC CHARITY	MEDIEVAL TO MODERN FRENCH PAINTINGS	20,000
WADSWORTH ATHENEUM MUSEUM OF ART 600 MAIN ST HARTFORD,CT 061032990	N/A	PUBLIC CHARITY	ANNUAL GALA	5,000
WADSWORTH ATHENEUM MUSEUM OF ART 600 MAIN ST HARTFORD,CT 061032990	N/A	PUBLIC CHARITY	ANONYMOUS FOUNDATION'S CHALLENGE	10,000
WESTFIELD STATE UNIVERSITY 577 WESTERN AVE WESTFIELD,MA 010862580	N/A	PUBLIC CHARITY	DANCE TEAM	100
WHITNEY MUSEUM OF AMERICAN ART 945 MADISON AVE AT 75TH ST NEWYORK,NY 100212790	N/A	PUBLIC CHARITY	UNRESTRICTED PURPOSE	250
Total  3a				533,629

Schedule B

(Form 990, 990-EZ, or 990-PF)

Department of the Treasury
Internal Revenue Service

Schedule of Contributors

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

OMB No 1545-0047

2012

Name of the organization CHERYL CHASE & STUART BEAR FAMILY FOUNDATION INC	Employer identification number 06-1562154
---	---

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 33¹/₃% 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)

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	CHERYL ANNE CHASE C/O CHASE ENTERPRISES GOODWIN SQ 22 HARTFORD, CT 06103	\$ 467,024	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)

Name of organization CHERYL CHASE & STUART BEAR FAMILY FOUNDATION INC	Employer identification number 06-1562154
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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
_____	_____ _____ _____ _____	\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	_____ _____ _____ _____	\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	_____ _____ _____ _____	\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	_____ _____ _____ _____	\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	_____ _____ _____ _____	\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	_____ _____ _____ _____	\$ _____	_____

Name of organization CHERYL CHASE & STUART BEAR FAMILY FOUNDATION INC	Employer identification number 06-1562154
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Part III

Exclusively religious, charitable, etc., individual contributions to section 501(c)(7), (8), or (10) organizations that total more than \$1,000 for the year. Complete columns (a) through (e) and the following line entry

For organizations completing Part III, enter the total of *exclusively* religious, charitable, etc , contributions of **\$1,000 or less** for the year (Enter this information once See instructions) ▶ \$

Use duplicate copies of Part III if additional space is needed

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

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

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

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

TY 2012 Accounting Fees Schedule

Name: CHERYL CHASE & STUART BEAR FAMILY FOUNDATION INC

EIN: 06-1562154

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
RETURN PREPARATION FEE	8,200	7,380		790

**TY 2012 All Other Program
Related Investments Schedule**

Name: CHERYL CHASE & STUART BEAR FAMILY FOUNDATION INC
EIN: 06-1562154

Category	Amount
N/A	0

**TY 2012 Investments Corporate
Stock Schedule**

Name: CHERYL CHASE & STUART BEAR FAMILY FOUNDATION INC
EIN: 06-1562154

Name of Stock	End of Year Book Value	End of Year Fair Market Value
UIL HOLDINGS CORPORATION	1,319,310	2,044,900

TY 2012 Legal Fees Schedule

Name: CHERYL CHASE & STUART BEAR FAMILY FOUNDATION INC

EIN: 06-1562154

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LEGAL FEES	446	401		45

TY 2012 Loans from Officers Schedule**Name:** CHERYL CHASE & STUART BEAR FAMILY FOUNDATION INC**EIN:** 06-1562154

Item No.	1
Lender's Name	CHERYL A CHASE
Lender's Title	OFFICER
Original Amount of Loan	2934390
Balance Due	3158390
Date of Note	
Maturity Date	
Repayment Terms	DEMAND
Interest Rate	0.000000000000
Security Provided by Borrower	NONE
Purpose of Loan	TO FUND CHARITABLE EXPENDITURES
Description of Lender Consideration	CASH
Consideration FMV	

TY 2012 Other Expenses Schedule

Name: CHERYL CHASE & STUART BEAR FAMILY FOUNDATION INC

EIN: 06-1562154

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT RELATED FEES	300	300		0

TY 2012 Taxes Schedule

Name: CHERYL CHASE & STUART BEAR FAMILY FOUNDATION INC

EIN: 06-1562154

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FEDERAL EXCISE TAX	2,260	0		0