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

2012

Open to public inspection

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

For calendar year 2012 or tax year beginning DEC 1, 2012, and ending NOV 30, 2013

Name of foundation
CHARLES H. KAMAN CHARITABLE FOUNDATION
INC.

A Employer identification number

06-1386119

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

C/O C. H. KAMAN 43 PRATTLING POND RD

Room/suite

B Telephone number

(860) 240-6000

City or town, state, and ZIP code

FARMINGTON, CT 06032

C If exemption application is pending, check here ☐

G Check all that apply

☐

Initial return

☐

Initial return of a former public charity

☐

Final return

☐

Amended return

☐

Address change

☐

Name change

D 1. Foreign organizations, check here ☐2. Foreign organizations meeting the 85% test, check here and attach computation ☐

H Check type of organization

☒

Section 501(c)(3) exempt private foundation

☐ Section 4947(a)(1) nonexempt charitable trust☐ Other taxable private foundationE If private foundation status was terminated under section 507(b)(1)(A), check here ☐

I Fair market value of all assets at end of year

(from Part II, col. (c), line 16)

J Accounting method

☒

Cash

☐

Accrual

☐ Other (specify)F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

\$ 11,087,329. (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).)

(a) Revenue and expenses per books

(b) Net investment income

(c) Adjusted net income

(d) Disbursements for charitable purposes (cash basis only)

1 Contributions, gifts, grants, etc., received

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

301,995.

301,995.

STATEMENT 1

5a Gross rents

b Net rental income or (loss)

6a Net gain or (loss) from sale of assets not on line 10

98,830.

b Gross sales price for all assets on line 6a 470,498.

7 Capital gain net income (from Part IV, line 2)

98,830.

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

12 Total. Add lines 1 through 11

400,825.

400,825.

13 Compensation of officers, directors, trustees, etc

36,000.

0.

14 Other employee salaries and wages

15 Pension plans, employee benefits

16a Legal fees

STMT 2

68,194.

12,210.

68,194.

b Accounting fees

STMT 3

10,190.

10,190.

10,190.

c Other professional fees

STMT 4

150.

150.

0.

17 Interest

18 Taxes

STMT 5

19,058.

19,058.

0.

19 Depreciation and depletion

20 Occupancy

21 Travel, conferences, and meetings

22 Printing and publications

23 Other expenses

STMT 6

13.

13.

0.

24 Total operating and administrative expenses. Add lines 13 through 23

133,605.

41,621.

78,384.

25 Contributions, gifts, grants paid

382,129.

382,129.

26 Total expenses and disbursements.

515,734.

41,621.

460,513.

Add lines 24 and 25

27 Subtract line 26 from line 12

<114,909.>

a Excess of revenue over expenses and disbursements

b Net investment income (if negative, enter -0-)

359,204.

c Adjusted net income (if negative, enter -0-)

N/A

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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	58,569.	263,662.	263,662.
	2 Savings and temporary cash investments			
	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 7	6,242,024.	5,919,265.	8,215,142.
	c Investments - corporate bonds			
Liabilities	11 Investments - land, buildings, and equipment basis ▶			
	Less accumulated depreciation ▶			
	12 Investments - mortgage loans			
	13 Investments - other STMT 8	2,612,543.	2,612,603.	2,608,525.
	14 Land, buildings, and equipment basis ▶			
	Less accumulated depreciation ▶			
	15 Other assets (describe ▶)			
	16 Total assets (to be completed by all filers)	8,913,136.	8,795,530.	11,087,329.
	17 Accounts payable and accrued expenses			
	18 Grants payable			
Net Assets or Fund Balances	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.	
Foundations that follow SFAS 117, check here <input type="checkbox"/>	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here <input checked="" type="checkbox"/>			
	27 Capital stock, trust principal, or current funds	1,288,353.	1,285,656.	
	28 Paid-in or capital surplus, or land, bldg, and equipment fund	0.	0.	
	29 Retained earnings, accumulated income, endowment, or other funds	7,624,783.	7,509,874.	
	30 Total net assets or fund balances	8,913,136.	8,795,530.	
	31 Total liabilities and net assets/fund balances	8,913,136.	8,795,530.	

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	8,913,136.
2 Enter amount from Part I, line 27a	2	<114,909.>
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	8,798,227.
5 Decreases not included in line 2 (itemize) ▶ BOOK TO TAX DIFFERENCE	5	2,697.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	8,795,530.

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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 MERRILL LYNCH #16H-69790 - SEE ATTACHED	P	02/27/13	05/21/13
b MERRILL LYNCH #16H-69790 - SEE ATTACHED	P	VARIOUS	VARIOUS
c MERRILL LYNCH #16H-69790 - SEE ATTACHED	P	VARIOUS	05/21/13
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 28,742.		27,713.	1,029.
b 255,889.		222,592.	33,297.
c 176,967.		121,363.	55,604.
d 8,900.			8,900.
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) 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			1,029.
b			33,297.
c			55,604.
d			8,900.
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	98,830.
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	}	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	399,025.	9,753,922.	.040909
2010	550,518.	7,661,847.	.071852
2009	18,637.	1,471,030.	.012669
2008	165,148.	1,299,990.	.127038
2007	61,309.	1,740,738.	.035220

2 Total of line 1, column (d)	2	.287688
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	.057538
4 Enter the net value of noncharitable-use assets for 2012 from Part X, line 5	4	10,534,781.
5 Multiply line 4 by line 3	5	606,150.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	3,592.
7 Add lines 5 and 6	7	609,742.
8 Enter qualifying distributions from Part XII, line 4	8	460,513.

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.

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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)	1	7,184.
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		
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	7,184.
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	7,184.
6	Credits/Payments.		
a	2012 estimated tax payments and 2011 overpayment credited to 2012	6a	10,000.
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	10,000.
8	Enter any penalty for underpayment of estimated tax. Check here <input 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	2,816.
11	Enter the amount of line 10 to be Credited to 2013 estimated tax <input type="checkbox"/> 2,816. 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
1b 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
1c 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"/> 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	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

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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 JOHN C. YAVIS, JR. Telephone no (860) 240-6000 Located at C/O MURTHA CULLINA LLP, 185 ASYLUM STREET, HARTFO ZIP+4 06103			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here <input type="checkbox"/> and enter the amount of tax-exempt interest received or accrued during the year N/A	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? See the instructions for exceptions and filing requirements for Form TD F 90-22.1 If "Yes," enter the name of the foreign country N/A	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 type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(5)	Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(6)	Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b	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 N/A	1b	
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? N/A	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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years N/A	2a	
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 N/A	2c	
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	3a	
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

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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
C. WILLIAM KAMAN II - TRUSTEE	PRES & TREASURER			
95158 SPRING TIDE LANE				
FERNANDINA BEACH, FL 32034	1.00	12,000.	0.	0.
CATHLEEN H. KAMAN - TRUSTEE	VICE PRESIDENT			
10 SONRISA COURT				
SANTA FE, NM 87506-1204	1.00	12,000.	0.	0.
GLENN M. MESSEMER - TRUSTEE	SECRETARY			
P.O. BOX 412				
BLOOMFIELD, CT 06002	1.00	12,000.	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

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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	10,367,590.
b	Average of monthly cash balances	1b	327,619.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	10,695,209.
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	10,695,209.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	160,428.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	10,534,781.
6	Minimum investment return. Enter 5% of line 5	6	526,739.

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	526,739.
2a	Tax on investment income for 2012 from Part VI, line 5	2a	7,184.
b	Income tax for 2012 (This does not include the tax from Part VI)	2b	
c	Add lines 2a and 2b	2c	7,184.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	519,555.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	519,555.
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	519,555.

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	460,513.
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	460,513.
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	460,513.

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

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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				519,555.
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				
b From 2008				
c From 2009				
d From 2010	164,352.			
e From 2011				
f Total of lines 3a through e	164,352.			
4 Qualifying distributions for 2012 from Part XII, line 4 ▶ \$ 460,513.				
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				460,513.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2012 (If an amount appears in column (d), the same amount must be shown in column (a).)	59,042.			59,042.
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	105,310.			
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	0.			
9 Excess distributions carryover to 2013. Subtract lines 7 and 8 from line 6a	105,310.			
10 Analysis of line 9:				
a Excess from 2008				
b Excess from 2009				
c Excess from 2010	105,310.			
d Excess from 2011				
e Excess from 2012				

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

N/A

1 a 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 foundation is a private operating foundation described in section

☐ 4942(j)(3) or ☐ 4942(j)(5)

2 a 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

(a) 2012

(b) 2011

(c) 2010

(d) 2009

(e) Total

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

NONE

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

NONE

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

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

c Any submission deadlines

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

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year				
FIDELCO GUIDE DOG FOUNDATION 103 VISION WAY BLOOMFIELD, CT 06002	N/A	501(C)(3) ORGANIZATIONS	MAINTENANCE AND RENEWAL OF THE ROBERTA KAMAN MEMORIAL GARDEN	2,029.
FREEDOM GUIDE DOGS 1210 HARDCRABBLE ROAD CASSVILLE, NY 13318	N/A	501(C)(3) ORGANIZATIONS	GENERAL SUPPORT	20,000.
HARC INC 900 ASYLUM AVENUE HARTFORD, CT 06105	N/A	501(C)(3) ORGANIZATIONS	GENERAL SUPPORT	5,000.
HARTFORD PUBLIC LIBRARY 500 MAIN STREET HARTFORD, CT 06103	N/A	501(C)(3) ORGANIZATIONS	GENERAL SUPPORT	11,600.
HOSPITAL FOR SPECIAL CARE FOUNDATION 2150 CORBIN AVENUE NEW BRITAIN, CT 06053	N/A	501(C)(3) ORGANIZATIONS	GENERAL SUPPORT	93,500.
Total	SEE CONTINUATION SHEET(S)			3a 382,129.
b Approved for future payment				
NONE				
Total				3b 0.

Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income
(a) Business code	(b) Amount	(c) Exclu- sion code	(d) Amount	
		14	301,995.	
		18	98,830.	
	0.		400,825.	0.
		13		400,825.

(See worksheet in line 13 instructions to verify calculations)

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

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes)
----------------------	--

N/A

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3 Grants and Contributions Paid During the Year (Continuation)

223631
05-01-12

FORM 990-PF		DIVIDENDS AND INTEREST FROM SECURITIES		STATEMENT	1
SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT		
MERRILL LYNCH #16H-69790	310,895.	8,900.	301,995.		
TOTAL TO FM 990-PF, PART I, LN 4	310,895.	8,900.	301,995.		

FORM 990-PF		LEGAL FEES		STATEMENT	2
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
MURTHA CULLINA LLP	68,194.	12,210.		68,194.	
TO FM 990-PF, PG 1, LN 16A	68,194.	12,210.		68,194.	

FORM 990-PF		ACCOUNTING FEES		STATEMENT	3
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
WTAS LLC	10,190.	10,190.		10,190.	
TO FORM 990-PF, PG 1, LN 16B	10,190.	10,190.		10,190.	

FORM 990-PF		OTHER PROFESSIONAL FEES		STATEMENT	4
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
MERRILL LYNCH	150.	150.		0.	
TO FORM 990-PF, PG 1, LN 16C	150.	150.		0.	

FORM 990-PF

TAXES

STATEMENT 5

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FOREIGN TAXES PAID	4,606.	4,606.		0.
FEDERAL ESTIMATED TAX PAYMENT	10,000.	10,000.		0.
2011 FEDERAL BALANCE DUE	4,452.	4,452.		0.
TO FORM 990-PF, PG 1, LN 18	19,058.	19,058.		0.

FORM 990-PF

OTHER EXPENSES

STATEMENT 6

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
OTHER FEES	13.	13.		0.
TO FORM 990-PF, PG 1, LN 23	13.	13.		0.

FORM 990-PF

CORPORATE STOCK

STATEMENT 7

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
SEE ATTACHED	5,919,265.	8,215,142.
TOTAL TO FORM 990-PF, PART II, LINE 10B	5,919,265.	8,215,142.

FORM 990-PF

OTHER INVESTMENTS

STATEMENT 8

DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
SEE ATTACHED	COST	2,612,603.	2,608,525.
TOTAL TO FORM 990-PF, PART II, LINE 13		2,612,603.	2,608,525.

Charles H Kaman Charitable Foundation
STATEMENT OF BALANCE SHEET ASSETS

	12/31/2011	12/31/2010	12/31/2009
Investments- Corporate Stock			
Abbott Labs	174,928	73,207	114,570
Abbvie Inc SHS	-	91,006	169,575
Accenture PLC SHS	107,500	107,500	178,181
Apple Inc	136,649	136,649	166,821
AT&T Inc	247,975	242,061	299,285
Bank of Montreal	219,280	219,280	279,000
Blackrock Inc	87,495	87,495	151,375
Bristol-Myers Squibb Co	212,800	212,800	359,660
Chevron Corp	236,806	202,386	244,880
ConocoPhillips	213,761	213,761	320,320
DuPont E I De Nemours	128,610	128,610	184,140
Duke Energy Corp New	232,200	232,200	279,840
Emerson Elec Co	220,438	220,438	254,562
General Electric	181,850	181,850	239,940
General Mills	185,035	157,005	228,935
Illinois Tool Works Inc	153,683	153,683	222,824
Intel Corp	171,475	171,475	190,720
International Business Machines	147,672	147,672	179,680
Johnson & Johnson	112,060	100,996	160,922
JPMorgan Chase & Co	192,425	192,425	248,046
Kimberly Clark	273,920	219,136	349,312
Leggett & Platt Inc	139,020	139,020	211,470
Liberty Ppty Tr	222,150	204,880	229,730
McDonalds Corp	244,324	220,995	292,110
Nextera Energy Inc SHS	234,457	217,004	338,380
Novartis ADR	125,891	125,891	197,800
Nuance Communications Inc	84,030	-	-
Oracle Corp \$0 01 Del	63,597	63,597	70,580
OSI System Inc	100,110	100,110	138,060
Pepsico Inc	173,840	160,963	211,150
Pfizer Inc	158,220	149,430	269,705
Procter & Gamble Co	172,781	172,781	229,500
Qualcomm Inc	104,034	104,034	132,444
Toronto Dominion Bank	112,482	112,482	137,115
United Techs Corp	130,120	130,120	177,376
Verizon Communicatns Com	253,872	229,190	322,530
Williams Companies Del	96,709	96,709	140,880
Wisconsin Energy Corp	230,025	220,824	300,744
Total Investments- Corporate Stock	6,242,024	6,919,265	8,215,142
Investments- Other			
Vanguard Emerging Markets	236,235	223,277	207,400
Vanguard MSCI Europe	214,362	203,275	228,160
Vanguard Short Term Bond	1,829,432	1,859,537	1,643,785
Vanguard Intern Term	532,514	532,514	531,180
Total Investments- Other	2,612,543	2,612,603	2,608,525



Bank of America Corporation

Account No.
16H-69790

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THE CHARLES H KAMAN CHARITABLE

2013 ANNUAL STATEMENT SUMMARY

The following sections are provided to facilitate your review and the preparation of your tax return.

The 2013 Proceeds from Broker and Barter Exchange Transactions section includes both sales of positions for "covered securities" and "noncovered securities." A covered security includes those with a purchase date within the following timeline: Equities acquired on or after January 1, 2011 and Mutual Funds acquired on or after January 1, 2012. Legislation requires reporting the gross proceeds of the sales of "covered" and "noncovered" securities and the adjusted cost basis for "covered securities." Any sale of a security that is considered a "noncovered security" will still be included in this section with the adjusted cost basis (where available).

In calculating gain (loss), unless otherwise noted, it was assumed that the oldest position was liquidated first, and that you have made an election to amortize the premium paid on the purchase of taxable bonds. Under the Cost Basis Reporting Regulations, brokers need not track wash sale activity for substantially identical securities, transactions across accounts, or between covered and non-covered securities. However, you as a taxpayer still have to track and report wash sales as you have in the past which would include all of the aforementioned transaction types. Securities distributed from a retirement account reflect the tax basis on the date of distribution. Other methods for calculating gain (loss) are available. The cost basis for most Original Issue Discount ("OID") obligations includes the accretion of OID. For purposes of allocating original purchase price to the components of an equity unit consisting of a purchase contract and a debt security subject to a remarketing event, we assumed that the fair market value of the debt security on purchase date was equal to its adjusted issue price. The difference between your original cost and the amount allocable to the debt component was allocated to the purchase contract. In making adjustments to the cost basis of the purchase contract, it was assumed that the unit holder included contract adjustment payments in income when received.

This is important tax information and is being furnished to the Internal Revenue Service. 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.

1099-B

2013 PROCEEDS FROM BROKER & BARTER EXCHANGE TRANSACTIONS

1e. Quantity	Transaction Description	1b. Date of Acquisition	1a. Date of Sale or Exchange	2a. Amount	3. Cost Basis	5. Wash Sale Loss Disallowed	Gain or (Loss)	Remarks
SHORT TERM CAPITAL GAINS AND LOSSES - 1099-B Line 1c.								
COVERED TRANSACTIONS - 1099-B Line 6b. (cost basis reported to the IRS)								
1500.0000	NUANCE COMMUNICATIONS IN Sale	02/27/13	CUSIP Number 67020Y100 05/21/13	28,742.12	27,712.50	0.00	1,029.62	
	Covered Short Term Capital Gains and Losses Subtotal			28,742.12	27,712.50	0.00	1,029.62	
	NET SHORT TERM CAPITAL GAINS AND LOSSES			28,742.12	27,712.50	0.00	1,029.62	
LONG TERM CAPITAL GAINS AND LOSSES - 1099-B Line 1c.								
COVERED TRANSACTIONS - 1099-B Line 6b. (cost basis reported to the IRS)								
200.0000	GENERAL MILLS Sale	01/31/11	CUSIP Number 370334104 05/21/13	9,832.93	6,978.00	0.00	2,854.93	
500.0000	KIMBERLY CLARK Sale	09/22/11	CUSIP Number 494368103 03/14/13	46,959.00	34,240.00	0.00	12,719.00	
300.0000	Security Subtotal	09/22/11	05/21/13	30,709.91	20,544.00	0.00	10,165.91	
				77,668.91	54,764.00	0.00	22,884.91	



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THE CHARLES H KAMAN CHARITABLE

2013 ANNUAL STATEMENT SUMMARY 2013 PROCEEDS FROM BROKER & BARTER EXCHANGE TRANSACTIONS

1e. Quantity	Transaction Description	1b. Date of Acquisition	1a. Date of Sale or Exchange	2a. Amount	3. Cost Basis	5. Wash Sale Loss Disallowed	Gain or (Loss)	Remarks
LIBERTY PPTY TR REIT	SBI	CUSIP Number	531172104					
500 0000	Sale	09/22/11	05/21/13	22,295.19	14,620.00	0.00	7,675.19	
MCDONALDS CORP COM	COM	CUSIP Number	580135101					
90.0000	Sale	01/31/11	05/21/13	9,219.41	6,629.85	0.00	2,589.56	
NUANCE COMMUNICATIONS IN		CUSIP Number	67020Y100					
3000 0000	Sale	01/27/12	05/21/13	57,484.24	84,030.00	0.00	(26,545.76)	
PEPSICO INC		CUSIP Number	713448108					
200.0000	Sale	01/31/11	05/21/13	16,502.63	12,877.00	0.00	3,625.63	
PFIZER INC		CUSIP Number	717081103					
500 0000	Sale	09/22/11	05/21/13	14,206.68	8,790.00	0.00	5,416.68	
VERIZON COMMUNICATIONS COM		CUSIP Number	92343V104					
200.0000	Sale	09/22/11	03/14/13	9,682.78	7,052.00	0.00	2,630.78	
500.0000	Sale	09/22/11	05/21/13	26,036.42	17,630.00	0.00	8,406.42	
Security Subtotal				35,719.20	24,682.00	0.00	11,037.20	
WISCONSIN ENERGY CORP		CUSIP Number	976657106					
300.0000	Sale	09/22/11	05/21/13	12,959.71	9,201.00	0.00	3,758.71	
Covered Long Term Capital Gains and Losses Subtotal				255,888.90	222,591.85	0.00	33,297.05	

NONCOVERED TRANSACTIONS - 1099-B Line 6a. (cost basis not reported to the IRS)

ABBOTT LABS		CUSIP Number	002824100					
500 0000	Sale	04/14/09	05/21/13	18,846.06	10,715.11	0.00	8,130.95	
AT&T INC		CUSIP Number	00206R102					
150 0000	Sale	04/26/06	05/21/13	5,528.12	3,942.00	0.00	1,586.12	
50.0000	Sale	07/18/07	05/21/13	1,842.71	1,972.00	0.00	(129.29)	
Security Subtotal				7,370.83	5,914.00	0.00	1,456.83	
CHEVRON CORP		CUSIP Number	166764100					
400 0000	Sale	07/27/07	05/21/13	50,320.47	34,420.00	0.00	15,900.47	



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THE CHARLES H KAMAN CHARITABLE

2013 ANNUAL STATEMENT SUMMARY

1099-B 2013 PROCEEDS FROM BROKER & BARTER EXCHANGE TRANSACTIONS

1e. Quantity	Transaction Description	1b. Date of Acquisition	1a. Date of Sale or Exchange	2a. Amount	3 Cost Basis	5. Wash Sale Loss Disallowed	Gain or (Loss)	Remarks
	VANGUARD MSCI EMERGING MKRTS ETF		CUSIP Number 922042858					
200.0000	Sale	02/13/08	05/21/13	8,818.80	9,598.24	0.00	(779.44)	
100.0000	Sale	09/18/08	05/21/13	4,409.40	3,360.00	0.00	1,049.40	
	Security Subtotal			13,228.20	12,958.24	0.00	269.96	
	VANGUARD MSCI EAFE ETF		CUSIP Number 921943858					
300.0000	Sale	01/31/11	05/21/13	11,778.94	11,087.72	0.00	691.22	
	GENERAL MILLS		CUSIP Number 370334104					
40.0000	Sale	05/15/09	05/21/13	1,966.58	1,052.17	0.00	914.41	
	JOHNSON AND JOHNSON COM		CUSIP Number 478160104					
200.0000	Sale	05/15/09	05/21/13	17,664.46	11,063.58	0.00	6,600.88	
	MCDONALDS CORP COM		CUSIP Number 580135101					
310.0000	Sale	05/15/09	05/21/13	31,755.71	16,699.54	0.00	15,056.17	
	NEXTERA ENERGY INC SHS		CUSIP Number 65339F101					
300.0000	Sale	07/18/07	05/21/13	24,035.46	17,452.60	0.00	6,582.86	
	Noncovered Long Term Capital Gains and Losses Subtotal			176,966.71	121,362.96	0.00	55,603.75	
	NET LONG TERM CAPITAL GAINS AND LOSSES			432,855.61	343,954.81	0.00	88,900.80	
	TOTAL SALES PROCEEDS FOR CAPITAL GAINS AND LOSSES			461,597.73				
	TOTAL REPORTED SALES PROCEEDS			461,597.73				

2013 REALIZED CAPITAL GAIN AND LOSS SUMMARY

COVERED SHORT TERM GAINS/LOSSES	NONCOVERED SHORT TERM GAINS/LOSSES	COVERED LONG TERM GAINS/LOSSES	NONCOVERED LONG TERM GAINS/LOSSES
1,029.62	0.00	33,297.05	55,603.75