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## Return of Private Foundation

or Section 4947(a)(1) Trust Treated as Private Foundation

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OMB No 1545-0052

2013

Open to Public Inspection

For calendar year 2013 or tax year beginning

, and ending

Name of foundation <b>LOUIS F. &amp; MARY A. TAGLIATELA FOUNDATION &amp; STEVEN V. LOPES</b>		A Employer identification number <b>06-1482333</b>
Number and street (or P O box number if mail is not delivered to street address) <b>1621 STATE STREET</b>	Room/suite	B Telephone number <b>203-624-4196</b>
City or town, state or province, country, and ZIP or foreign postal code <b>NEW HAVEN, CT 06511</b>		C If exemption application is pending, check here <input type="checkbox"/>
G Check all that apply: <input type="checkbox"/> Initial return <input type="checkbox"/> Final return <input type="checkbox"/> Address change <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Amended return <input type="checkbox"/> Name change		D 1 Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
H Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col (c), line 16) \$ <b>5557434.</b>	J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ (Part I, column (d) must be on cash basis.)	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a).)		(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			N/A	
	2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities				Statement 1
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10				
	b Gross sales price for all assets on line 6a <b>519100.</b>				
	7 Capital gain net income (from Part IV, line 2)		86802.		
	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		176190.	176190.		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	0.	0.		0.
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees				
	b Accounting fees Stmt 2	2907.	0.		0.
	c Other professional fees Stmt 3	47055.	47055.		0.
	17 Interest				
	18 Taxes Stmt 4	7660.	1444.		0.
	19 Depreciation and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings	1676.	0.		0.
	22 Printing and publications				
	23 Other expenses Stmt 5	128.	0.		0.
	24 Total operating and administrative expenses. Add lines 13 through 23	59426.	48499.		0.
	25 Contributions, gifts, grants paid	72800.			72800.
26 Total expenses and disbursements. Add lines 24 and 25	132226.	48499.		72800.	
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements	43964.				
b Net investment income (if negative, enter -0-)		127691.			
c Adjusted net income (if negative, enter -0-)			N/A		

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2

LOUIS F. & MARY A. TAGLIATELA FOUNDATION

Form 990-PF (2013)

& STEVEN V. LOPES

06-1482333

Page 2

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		60362.		
	2	Savings and temporary cash investments		378443.	450133.	450133.
	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 6		2448396.	2479401.	5107301.
	c	Investments - corporate bonds				
	11	Investments - land, buildings, and equipment basis ▶				
	Less accumulated depreciation ▶					
12	Investments - mortgage loans					
13	Investments - other					
14	Land, buildings, and equipment: basis ▶					
	Less accumulated depreciation ▶					
15	Other assets (describe ▶ )					
16	Total assets (to be completed by all filers - see the instructions. Also, see page 1, item 1)			2887201.	2929534.	5557434.
Liabilities	17	Accounts payable and accrued expenses				
	18	Grants payable				
	19	Deferred revenue				
	20	Loans from officers, directors, trustees, and other disqualified persons		10000.		
	21	Mortgages and other notes payable				
	22	Other liabilities (describe ▶ Statement 7 )		0.	8369.	
23	Total liabilities (add lines 17 through 22)		10000.	8369.		
Net Assets or Fund Balances		Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31. ▶ <input type="checkbox"/>				
	24	Unrestricted				
	25	Temporarily restricted				
	26	Permanently restricted				
		Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. ▶ <input checked="" type="checkbox"/>				
	27	Capital stock, trust principal, or current funds		0.	0.	
	28	Paid-in or capital surplus, or land, bldg., and equipment fund		2232216.	2232216.	
	29	Retained earnings, accumulated income, endowment, or other funds		644985.	688949.	
	30	Total net assets or fund balances		2877201.	2921165.	
31	Total liabilities and net assets/fund balances		2887201.	2929534.		

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	2877201.
2	Enter amount from Part I, line 27a	2	43964.
3	Other increases not included in line 2 (itemize) ▶	3	0.
4	Add lines 1, 2, and 3	4	2921165.
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	2921165.

**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			
b See Attached Statements			
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			
b			
c			
d			
e 519100.		432298.	86802.

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

(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	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a			
b			
c			
d			
e			86802.

2 Capital gain net income or (net capital loss)	<div> <div>If gain, also enter in Part I, line 7</div> <div>If (loss), enter -0- in Part I, line 7</div> </div>	2	86802.
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))
2012	209800.	4043663.	.051884
2011	135250.	4010690.	.033722
2010	726420.	3807163.	.190803
2009	211050.	3367121.	.062680
2008	622653.	4895496.	.127189

2 Total of line 1, column (d)	2	.466278
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	.093256
4 Enter the net value of noncharitable-use assets for 2013 from Part X, line 5	4	4836019.
5 Multiply line 4 by line 3	5	450988.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	1277.
7 Add lines 5 and 6	7	452265.
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	72800.

## LOUIS F. &amp; MARY A. TAGLIATELA FOUNDATION

Form 990-PF (2013)

% STEVEN V. LOPES

06-1482333

Page 4

**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	2554.
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	2554.
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	2554.
6 Credits/Payments:			
a 2013 estimated tax payments and 2012 overpayment credited to 2013	6a	2560.	
b Exempt foreign organizations - tax withheld at source	6b		
c Tax paid with application for extension of time to file (Form 8868)	6c	1000.	
d Backup withholding erroneously withheld	6d		
7 Total credits and payments. Add lines 6a through 6d	7	3560.	
8 Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8	3.	
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	1003.	
11 Enter the amount of line 10 to be: Credited to 2014 estimated tax <input type="checkbox"/> 1003. Refunded <input type="checkbox"/>	11	0.	

**Part VII-A Statements Regarding Activities**

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for the definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. ► \$ 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		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) ► 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 2013 or the taxable year beginning in 2013 (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

Form 990-PF (2013)

**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 ▶ <u>N/A</u>	13	X	
14	The books are in care of ▶ <u>STEVE LOPES</u> Telephone no. ▶ <u>203-624-4196</u> Located at ▶ <u>1621 STATE STREET, NEW HAVEN, CT</u> ZIP+4 ▶ <u>06511</u>			
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 ▶ <u>15</u> <u>N/A</u>			
16	At any time during calendar year 2013, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for Form TD F 90-22.1. If "Yes," enter the name of the foreign country ▶	16	Yes	No
				X

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

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

		Yes	No
1a	During the year did the foundation (either directly or indirectly):		
(1)	Engage in the sale or exchange, or leasing of property with a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(2)	Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input checked="" type="checkbox"/> Yes <input 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 ▶ <input type="checkbox"/>	1b	X
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2013?	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 2013, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2013? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years ▶ _____, _____, _____		
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.) <u>N/A</u>	2b	
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ▶ _____, _____, _____		
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b	If "Yes," did it have excess business holdings in 2013 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 2013) <u>N/A</u>	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 2013?	4b	X

Form 990-PF (2013)

**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

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?

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

6b

X

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
LOUIS F. TAGLIATELA, SR. 18 PRIMROSE ST. NORTH HAVEN, CT 06473	PRESIDENT/DIRECTOR 0.50	0.	0.	0.
PATRICIA TAGLIATELA 1621 STATE STREET NEW HAVEN, CT 06511	SECRETARY/DIRECTOR 0.50	0.	0.	0.
LOUIS F. TAGLIATELA JR. 2 SMOKE RISE ROAD WALLINGFORD, CT 06492	DIRECTOR 0.50	0.	0.	0.
STEPHEN TAGLIATELA 1621 STATE STREET NEW HAVEN, CT 06511	DIRECTOR 0.50	0.	0.	1676.

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

0

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	4878042.
b	Average of monthly cash balances	1b	31622.
c	Fair market value of all other assets	1c	
d	<b>Total</b> (add lines 1a, b, and c)	1d	4909664.
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	4909664.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	73645.
5	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. Enter here and on Part V, line 4	5	4836019.
6	<b>Minimum investment return.</b> Enter 5% of line 5	6	241801.

**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	241801.
2a	Tax on investment income for 2013 from Part VI, line 5	2a	2554.
b	Income tax for 2013. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	2554.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	239247.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	239247.
6	Deduction from distributable amount (see instructions)	6	0.
7	<b>Distributable amount as adjusted.</b> Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	239247.

**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	72800.
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	<b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	72800.
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	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4	6	72800.

**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 2012	(c) 2012	(d) 2013
<b>1</b> Distributable amount for 2013 from Part XI, line 7				239247.
<b>2</b> Undistributed income, if any, as of the end of 2013				
<b>a</b> Enter amount for 2012 only			0.	
<b>b</b> Total for prior years:		0.		
<b>3</b> Excess distributions carryover, if any, to 2013:				
<b>a</b> From 2008	27828.			
<b>b</b> From 2009	43680.			
<b>c</b> From 2010	541822.			
<b>d</b> From 2011				
<b>e</b> From 2012	12733.			
<b>f</b> Total of lines 3a through e	626063.			
<b>4</b> Qualifying distributions for 2013 from Part XII, line 4: ► \$ 72800.				
<b>a</b> Applied to 2012, but not more than line 2a			0.	
<b>b</b> Applied to undistributed income of prior years (Election required - see instructions)		0.		
<b>c</b> Treated as distributions out of corpus (Election required - see instructions)	0.			
<b>d</b> Applied to 2013 distributable amount				72800.
<b>e</b> Remaining amount distributed out of corpus	0.			
<b>5</b> Excess distributions carryover applied to 2013 (If an amount appears in column (d), the same amount must be shown in column (a))	166447.			166447.
<b>6</b> Enter the net total of each column as indicated below:				
<b>a</b> Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	459616.			
<b>b</b> Prior years' undistributed income. Subtract line 4b from line 2b		0.		
<b>c</b> Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
<b>d</b> Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
<b>e</b> Undistributed income for 2012. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
<b>f</b> Undistributed income for 2013. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2014				0.
<b>7</b> Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)	0.			
<b>8</b> Excess distributions carryover from 2008 not applied on line 5 or line 7	0.			
<b>9</b> Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a	459616.			
<b>10</b> Analysis of line 9:				
<b>a</b> Excess from 2009				
<b>b</b> Excess from 2010	446883.			
<b>c</b> Excess from 2011				
<b>d</b> Excess from 2012	12733.			
<b>e</b> Excess from 2013				

N/A

Form **990-PF** (2013)

LOUIS F. & MARY A. TAGLIATELA FOUNDATION

Form 990-PF (2013)

% STEVEN V. LOPES

06-1482333 Page 11

**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				
BARBARA LYNCH FOUNDATION	NONE	PC	TO ACCOMPLISH CHARITABLE PURPOSE	1000.
FRANCISCAN LIFE CENTER	NONE	PC	TO ACCOMPLISH CHARITABLE PURPOSE	1500.
THE HENRY LEE INSTITUTE OF FORENSIC SCIENCE	NONE	PC	TO ACCOMPLISH CHARITABLE PURPOSE	4000.
AIDS PROJECT NEW HAVEN	NONE	PC	TO ACCOMPLISH CHARITABLE PURPOSE	300.
LEEWAY INC	NONE	PC	TO ACCOMPLISH CHARITABLE PURPOSE	1000.
Total	See continuation sheet(s) ▶ 3a			72800.
b Approved for future payment				
None				
Total				0.



## Part XVII

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

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

[illegible]

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

- | b If "Yes," complete the following schedule. |                          |                                 |
|--|--------------------------|---------------------------------|
| (a) Name of organization                     | (b) Type of organization | (c) Description of relationship |
| N/A  |                          |                                 |
|  |                          |                                 |
|  |                          |                                 |
|  |                          |                                 |

**Sign  
Here**

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

Signature of officer or trustee

✓6-9-14  
Date

 Title

May the IRS discuss this return with the preparer shown below (see instr.)?

☒ Yes ☐ No

**Paid  
Preparer  
Use Only**

Print/Type preparer's name

JOANNE E. BLANCK  
CPA

Preparer's signature

John & Blanche CPA 5/27/14

Date \_\_\_\_\_

4 5/27/14

Check ☒ self-employed

PTIN

P01214459

Firm's name ► **BLUMENTHAL SQUIRE & BLANCK**

Firm's EIN ▶ 06-0973492

Firm's address ► 2494 WHITNEY AVENUE  
HAMDEN, CT 06518

Phone no. 203-230-3567

**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 FLS LITIGATION SETTLEMENT		P	Various	03/31/13
b TOOTSIE ROLL - CASH IN LIEU		P	Various	04/05/13
c BOEING CO		P	Various	03/12/13
d MODINE MANUFACTURING		P	Various	03/27/13
e KRAFT FOODS GROUP INC		P	Various	05/17/13
f BOEING CO		P	Various	05/20/13
g DIEBOLD INC		P	Various	05/29/13
h ENERGIZER HLDGS INC		P	Various	05/29/13
i MODINE MANUFACTURING		P	Various	05/29/13
j PENTAIR LTD		P	Various	05/29/13
k PFIZER INC		P	Various	05/29/13
l HEINZ		P	Various	06/10/13
m SPRINT NEXTEL - CASH IN LIEU		P	Various	07/11/13
n SPRINT NEXTEL CORP - MERGER		P	Various	07/11/13
o BILGARI HLDGS		P	Various	09/05/13

(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 15.			15.
b 20.		14.	6.
c 16808.		14420.	2388.
d 9150.		16838.	-7688.
e 27841.		15295.	12546.
f 39482.		28637.	10845.
g 19140.		22550.	-3410.
h 38792.		7662.	31130.
i 9390.		13448.	-4058.
j 13814.		8126.	5688.
k 13221.		8247.	4974.
l 72500.		72073.	427.
m 5.			5.
n 28238.		14829.	13409.
o 6164.			6164.

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

(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	(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
a			15.
b			6.
c			2388.
d			-7688.
e			12546.
f			10845.
g			-3410.
h			31130.
i			-4058.
j			5688.
k			4974.
l			427.
m			5.
n			13409.
o			6164.

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	
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	

**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	EATON CORP PLC	P	Various	09/09/13
b	NV ENERGY INC	P	Various	12/19/13
c	NV ENERGY INC	P	Various	12/19/13
d	STEWART ENTERPRISES	P	Various	12/23/13
e	ROLLS ROYCE HLD-RET OF CAP	P	Various	07/08/13
f	ROLLS ROYCE HLD-RET OF CAP	P	Various	01/07/13
g	Capital Gains Dividends			
h				
i				
j				
k				
l				
m				
n				
o				

(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	51817.		39500.	12317.
b	47500.		47068.	432.
c	71250.		70530.	720.
d	53000.		52163.	837.
e	532.		532.	0.
f	366.		366.	0.
g	55.			55.
h				
i				
j				
k				
l				
m				
n				
o				

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

(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	(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
a			12317.
b			432.
c			720.
d			837.
e			0.
f			0.
g			55.
h			
i			
j			
k			
l			
m			
n			
o			

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	86802.
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 XV Supplementary Information**

**3 Grants and Contributions Paid During the Year (Continuation)**

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
ALS ASSOCIATION	NONE	PC	TO ACCOMPLISH CHARITABLE PURPOSE ;ListTotal 1000	1000.
CENTENARY COLLEGE	NONE	PC	TO ACCOMPLISH CHARITABLE PURPOSE ;ListTotal 8000	8000.
CHESHIRE ACADEMY	NONE	PC	TO ACCOMPLISH CHARITABLE PURPOSE ;ListTotal 5000	5000.
COMMUNITY FOUNDATION OF GREATER NEW HAVEN	NONE	PC	TO ACCOMPLISH CHARITABLE PURPOSE ;ListTotal 600	600.
CT COUNCIL FOR PHILANTHROPY	NONE	PC	TO ACCOMPLISH CHARITABLE PURPOSE ;ListTotal 300	300.
CYSTIC FIBROSIS FOUNDATION	NONE	PC	TO ACCOMPLISH CHARITABLE PURPOSE ;ListTotal 4500	4500.
DANTE ALIGHIERI SOC OF MA, INC.	NONE	PC	TO ACCOMPLISH CHARITABLE PURPOSE ;ListTotal 1000	1000.
EMANUEL BAPIST CHURCH	NONE	PC	TO ACCOMPLISH CHARITABLE PURPOSE ;ListTotal 1000	1000.
GOSPEL FOR ASIA	NONE	PC	TO ACCOMPLISH CHARITABLE PURPOSE ;ListTotal 8000	8000.
LATIN AMERICA CHILDCARE	NONE	PC	TO ACCOMPLISH CHARITABLE PURPOSE ;ListTotal 2000	2000.
<b>Total from continuation sheets</b>				<b>65000.</b>

LOUIS F. & MARY A. TAGLIATELA FOUNDATION  
 & STEVEN V. LOPES

06-1482333

**Part XV** **Supplementary Information**

**3 Grants and Contributions Paid During the Year (Continuation)**

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
LOAVES & FISHES	NONE	PC	TO ACCOMPLISH CHARITABLE PURPOSE ;ListTotal 500	500.
LYME ACADEMY COLLEGE OF FINE ARTS	NONE	PC	TO ACCOMPLISH CHARITABLE PURPOSE ;ListTotal 5000	5000.
NORTHEAST ORGANIC FARMING ASSOC. OF CT	NONE	PC	TO ACCOMPLISH CHARITABLE PURPOSE ;ListTotal 300	300.
SAINT JOHNS CHURCH	NONE	PC	TO ACCOMPLISH CHARITABLE PURPOSE ;ListTotal 1000	1000.
SAINT RAPHAEL FOUNDATION	NONE	PC	TO ACCOMPLISH CHARITABLE PURPOSE ;ListTotal 25000	25000.
SAVE THE CHILDREN FEDERATION, INC.	NONE	PC	TO ACCOMPLISH CHARITABLE PURPOSE ;ListTotal 1000	1000.
THE ANIMAL HAVEN, INC.	NONE	PC	TO ACCOMPLISH CHARITABLE PURPOSE ;ListTotal 300	300.
TRACY ART CENTER	NONE	PC	TO ACCOMPLISH CHARITABLE PURPOSE	500.
UNIVERSITY OF MIAMI	NONE	PC	TO ACCOMPLISH CHARITABLE PURPOSE	
UNIVERSITY OF NEW HAVEN	NONE	PC	TO ACCOMPLISH CHARITABLE PURPOSE ;ListTotal 10000	
<b>Total from continuation sheets</b>				

Form 990-PF	Dividends and Interest from Securities				Statement	1
Source	Gross Amount	Capital Gains Dividends	(a) Revenue Per Books	(b) Net Investment Income	(c) Adjusted Net Income	
GABELLI-INVESTMENT	89443.	55.	89388.	89388.		
To Part I, line 4	89443.	55.	89388.	89388.		

Form 990-PF	Accounting Fees				Statement	2
Description	(a) Expenses Per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes		
ACCOUNTING FEES	2907.	0.		0.		
To Form 990-PF, Pg 1, ln 16b	2907.	0.		0.		

Form 990-PF	Other Professional Fees				Statement	3
Description	(a) Expenses Per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes		
MANAGEMENT FEES	47055.	47055.		0.		
To Form 990-PF, Pg 1, ln 16c	47055.	47055.		0.		

Form 990-PF	Taxes				Statement	4
Description	(a) Expenses Per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes		
FOREIGN TAXES	1444.	1444.		0.		
FEDERAL INCOME TAXES	6216.	0.		0.		
To Form 990-PF, Pg 1, ln 18	7660.	1444.		0.		

Form 990-PF	Other Expenses			Statement	5
Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes	
LATE FILING PENALTY	128.	0.			0.
To Form 990-PF, Pg 1, ln 23	128.	0.			0.

Form 990-PF	Corporate Stock		Statement	6
Description	Book Value	Fair Market Value		
BANK OF NY	18797.	27952.		
JOHNSON & JOHNSON	24556.	45795.		
AMERICAN EXPRESS CO	39913.	145168.		
AMETEK INC	5393.	73738.		
CABLEVISION SYS CORP NY GRP	39398.	80685.		
CRANE CO	33200.	100875.		
DIAGEO PLC	43329.	132420.		
ENERGIZER HLDGS INC	14815.	86592.		
FERRO CORP	9254.	25660.		
FLOWERVE CORP COM	15336.	165543.		
HONEYWELL INT'L INC	36806.	127918.		
MEDIA GENERAL CL A	20563.	90400.		
MODINE MFG CO	0.	0.		
NAVISTAR INTL CORP COM	36110.	53466.		
NORTHEAST UTILS COM	18330.	42390.		
SPRINT CORP	2995.	14061.		
TELEPHONE & DATA SYSTEM INC	73711.	59835.		
UNITED STATES CELLULAR CORP	79589.	83640.		
ACUITY BRANDS INC	7264.	65592.		
ARCHER DANIELS MIDLAND	14090.	43400.		
SL INDS INC COM	10474.	40650.		
TECO ENERGY INC COM	16227.	20688.		
VIVENDI UNIVERSAL ADR	19728.	40971.		
WATTS INDS INC CL A	17100.	61870.		
WESTAR ENERGY INC	50159.	80425.		
CINCINNATI BELL	33220.	35600.		
GENERAL MILLS INC	46209.	99820.		
GREAT PLAINS ENERGY INC	18288.	29088.		
BEASLEY BROADCAST GRP INC	84752.	106445.		
DEERE & CO	40152.	109596.		
NISOURCE INC	12822.	19728.		
TIME WARNER INC	65983.	139440.		
UNISOURCE ENERGY CORP COM	12330.	29925.		
AVON PRODUCTS INC	22348.	20664.		

COCA COLA CO	44325.	82620.
EXXON MOBIL CORP	39483.	70840.
LIBERTY GLOBAL INC COM SER A	5928.	35422.
LIBERTY GLOBAL INC COM SER C	5696.	33559.
LILLY, ELI & COMPANY	18410.	25500.
NEWS CORP CL A	1762.	4505.
ROGERS COMMUNICATIONS CL B	13351.	45250.
PFIZER INC	30022.	52071.
ROLLS-ROYCE GROUP PLC	22466.	63390.
DIRECTV GROUP INC	24570.	103590.
GATX CORP	67196.	104340.
INTL FLAVORS & FRAGRANCES	41518.	85980.
TYCO INTERNATIONAL LTD	21128.	41040.
WASTE MGMT INC	37390.	44870.
DIEBOLD INC	50054.	46214.
DISCOVERY COMMS NEW SER A	7435.	45210.
DISCOVERY COMMS NEW SER C	5190.	41930.
DISH NETWORK CORPORATION	28131.	86880.
GRAFTECH INTERNATIONAL	14869.	28075.
LIBERTY MEDIA CORP DELEWARE	2596.	20627.
NCR CORP	16904.	34060.
SCRIPPS NETWORKS INTERAC	45923.	129615.
TOOTSIE ROLL INDS INC	23942.	37616.
DANONE SPONS ADR	31601.	43256.
LEGG MASON INC	35399.	65220.
NATIONAL FUEL GAS CO	35559.	57120.
BIGLARI HOLDINGS INC.	58501.	101328.
GRIFFON CORP	23317.	26420.
KRAFT FOODS	0.	0.
MILLICOM INTL CELLULAR	40126.	49685.
STATE STREET	46763.	73390.
MADISON SQUARE GARDEN	7729.	57580.
AMC NETWORKS INC.	8498.	57893.
BEAM, INC.	35258.	54448.
BOEING CO.	0.	0.
EXELIS INC.	15223.	28590.
FIRST ENERGY CORP	5989.	21998.
FORTUNE BRANDS HOME & SECURITY INC.	10350.	36560.
INTERNAP NETWORK SERVICES CORP	22591.	22560.
ITT CORP NEW COM	12685.	32565.
J.P. MORGAN CHASE & CO	22509.	29240.
PNC FINANCIAL SERVICES GROUP	49812.	62064.
SNYDERS LANCE INC	10420.	14330.
XYLEM	35519.	51900.
ADT CORP	13685.	20235.
EATON CORP PLC	0.	0.
HILLSHIRE BRANDS CO	12434.	16720.
MONDELEZ INTERNATIONAL	28495.	52950.
PENTAIR LTD	0.	0.
PEP BOYS MANNY MOE & JACK	37840.	48560.
RYMAN HOSPITALITY PPTYS INC	31725.	94548.
BOULDER BRANDS INC	11524.	31720.
TREDEGAR INDS INC	27893.	57620.
WELLS FARGO & CO	51631.	68100.

BRINKS CO	41190.	51210.
GRACO INC	39302.	54684.
LIFE TECHNOLOGIES CORP	74280.	75800.
STARZ LIBERTY CAP	336.	4123.
TWENTY FIRST CENTURY FOX	13298.	35170.
WEATHERFORD INTERNATIONAL LTD	36389.	46470.
Total to Form 990-PF, Part II, line 10b	2479401.	5107301.

Form 990-PF	Other Liabilities	Statement	7
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Description	BOY Amount	EOY Amount
CREDIT BALANCE-SWEEP ACCOUNT	0.	8369.
Total to Form 990-PF, Part II, line 22	0.	8369.

Form 990-PF	Part XV - Line 1a List of Foundation Managers	Statement	8
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## Name of Manager

LOUIS F. TAGLIATELA, SR.  
PATRICIA TAGLIATELA  
LOUIS F. TAGLIATELA JR.  
STEPHEN TAGLIATELA

# Application for Extension of Time To File an Exempt Organization Return

OMB No 1545-1709

► File a separate application for each return.

► Information about Form 8868 and its instructions is at [www.irs.gov/form8868](http://www.irs.gov/form8868).

• If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** and check this box ☒ **X**

• If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only **Part II** (on page 2 of this form)

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

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

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

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

Part I only ☐

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

Type or print	Name of exempt organization or other filer, see instructions.	Enter filer's identifying number
	<b>LOUIS F. &amp; MARY A. TAGLIATELA FOUNDATION &amp; STEVEN V. LOPES</b>	Employer identification number (EIN) or <b>06-1482333</b>
File by the due date for filing your return. See instructions	Number, street, and room or suite no. If a P O box, see instructions. <b>1621 STATE STREET</b>	Social security number (SSN)
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. <b>NEW HAVEN, CT 06511</b>	

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

**0 4**

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

**STEVE LOPES**

• The books are in the care of ► **1621 STATE STREET - NEW HAVEN, CT 06511**

Telephone No. ► **203-624-4196**

Fax No. ► **203-562-1240**

• If the organization does not have an office or place of business in the United States, check this box ☐

• If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) \_\_\_\_\_. If this is for the whole group, check this box ☐. If it is for part of the group, check this box ☐ and attach a list with the names and EINs of all members the extension is for.

**1** I request an automatic 3-month (6 months for a corporation required to file Form 990-T) extension of time until **August 15, 2014**, to file the exempt organization return for the organization named above. The extension

is for the organization's return for:

► ☒ calendar year **2013** or

► ☐ tax year beginning \_\_\_\_\_, and ending \_\_\_\_\_

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

<b>3a</b> If this application is for Forms 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	<b>3a</b>	\$	<b>3560.</b>
<b>b</b> If this application is for Forms 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit.	<b>3b</b>	\$	<b>2560.</b>
<b>c Balance due.</b> Subtract line 3b from line 3a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	<b>3c</b>	\$	<b>1000.</b>

**Caution.** If you are going to make an electronic funds withdrawal (direct debit) with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions.