Form **990-PF**

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

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

▶ Do not enter Social Security numbers on this form as it may be made public

▶ Information about Form 990-PF and its separate instructions is at *www.irs.gov/form990pf.*

OMB No 1545-0052

2013

Open to Public Inspection

For calendar year 2013 or tax year beginning , and ending

Name of foundation

Ion Bank Foundation, Inc.

A Employer identification number

06-1513293

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

251 Church Street

B Telephone number

(203)729-5291

City or town, state or province, country, and ZIP or foreign postal code

Naugatuck, CT 06770

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 foundation

E 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)* ▶$ 8,610,674.

J Accounting method ☒ Cash ☐ Accrual
☐ 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 ▶ ☐

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	144,502.		N/A	
	2 Check ▶ ☐ if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	809.	809.		Statement 1
	4 Dividends and interest from securities	144,171.	144,171.		Statement 2
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	663,211.			
	b Gross sales price for all assets on line 6a 3,935,052.				
	7 Capital gain net income (from Part IV, line 2)		663,211.		
	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	952,693.	808,191.		
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 3	1,650.	825.		825.
	c Other professional fees Stmt 4	44,900.	23,900.		21,000.
	17 Interest				
	18 Taxes Stmt 5	63,000.	0.		0.
	19 Depreciation and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications	3,316.	0.		3,316.
	23 Other expenses Stmt 6	12,045.	0.		12,045.
	24 **Total operating and administrative expenses.** Add lines 13 through 23	124,911.	24,725.		37,186.
	25 Contributions, gifts, grants paid	496,360.			496,360.
	26 **Total expenses and disbursements.** Add lines 24 and 25	621,271.	24,725.		533,546.
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	331,422.			
	b **Net investment income** (if negative, enter -0-)		783,466.		
	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 (a) Book Value	End of year (b) Book Value	(c) Fair Market Value
Assets			
1 Cash - non-interest-bearing			
2 Savings and temporary cash investments	771,334.	1,224,183.	1,224,183.
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 8	1,965,126.	1,914,777.	2,362,345.
c Investments - corporate bonds			
11 Investments - land, buildings, and equipment basis ▶			
Less accumulated depreciation ▶			
12 Investments - mortgage loans			
13 Investments - other Stmt 9	4,034,392.	3,878,737.	5,024,146.
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 I)	6,770,852.	7,017,697.	8,610,674.
Liabilities			
17 Accounts payable and accrued expenses			
18 Grants payable			
19 Deferred revenue			
20 Loans from officers, directors, trustees, and other disqualified persons			
21 Mortgages and other notes payable			
22 Other liabilities (describe ▶)			
23 **Total liabilities** (add lines 17 through 22)	0.	0.	
Net Assets or Fund Balances			
Foundations that follow SFAS 117, check here ▶ [X] and complete lines 24 through 26 and lines 30 and 31.			
24 Unrestricted	6,770,852.	7,017,697.	
25 Temporarily restricted			
26 Permanently restricted			
Foundations that do not follow SFAS 117, check here ▶ [ ] and complete lines 27 through 31.			
27 Capital stock, trust principal, or current funds			
28 Paid-in or capital surplus, or land, bldg , and equipment fund			
29 Retained earnings, accumulated income, endowment, or other funds			
30 **Total net assets or fund balances**	6,770,852.	7,017,697.	
31 **Total liabilities and net assets/fund balances**	6,770,852.	7,017,697.	

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	6,770,852.
2 Enter amount from Part I, line 27a	2	331,422.
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	7,102,274.
5 Decreases not included in line 2 (itemize) ▶ See Statement 7	5	84,577.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	7,017,697.

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	3,935,052.		3,271,841.	663,211.

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				663,211.

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	663,211.
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	449,299.	6,790,856.	.066162
2011	462,820.	6,490,766.	.071304
2010	447,581.	6,183,808.	.072380
2009	447,937.	5,684,668.	.078797
2008	485,519.	7,289,106.	.066609

2 **Total** of line 1, column (d)	2	.355252
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	.071050
4 Enter the net value of noncharitable-use assets for 2013 from Part X, line 5	4	7,728,247.
5 Multiply line 4 by line 3	5	549,092.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	7,835.
7 Add lines 5 and 6	7	556,927.
8 Enter qualifying distributions from Part XII, line 4	8	533,546.

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

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 ▶ ☐ and enter "N/A" on line 1				
Date of ruling or determination letter ______ (attach copy of letter if necessary-see instructions)				
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ▶ ☐ and enter 1% of Part I, line 27b			1	15,669.
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	15,669.
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	15,669.
6 Credits/Payments				
a 2013 estimated tax payments and 2012 overpayment credited to 2013	6a	5,295.		
b Exempt foreign organizations - tax withheld at source	6b			
c Tax paid with application for extension of time to file (Form 8868)	6c	12,500.		
d Backup withholding erroneously withheld	6d			
7 Total credits and payments Add lines 6a through 6d			7	17,795.
8 Enter any **penalty** for underpayment of estimated tax Check here ☒ if Form 2220 is attached			8	110.
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	2,016.
11 Enter the amount of line 10 to be **Credited to 2014 estimated tax** ▶ 2,016. Refunded ▶			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?	1a		X
b Did it spend more than $100 during the year (either directly or indirectly) for political purposes (see instructions for the definition)?	1b		X
If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.			
c Did the foundation file **Form 1120-POL** for this year?	1c		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.*	2		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*	3		X
4a Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		X
b If "Yes," has it filed a tax return on **Form 990-T** for this year? N/A	4b		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? *If "Yes," attach the statement required by General Instruction T*	5		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?	6	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*	7	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*	8b	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*	9		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10		X

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Part VII-A Statements Regarding Activities *(continued)*

		Line	Yes	No
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?	13	X	

Website address ▶ ionbank.com/about-us/foundation/

14 The books are in care of ▶ Ion Bank Telephone no ▶(203)729-5291

Located at ▶251 Church St, Naugatuck, CT ZIP+4 ▶06770

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here ▶ ☐

and enter the amount of tax-exempt interest received or accrued during the year ▶ 15 N/A

		Line	Yes	No
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?	16		X
	See the instructions for exceptions and filing requirements for Form TD F 90-22 1 If "Yes," enter the name of the foreign country ▶			

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

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

			Line	Yes	No
1a	During the year did the foundation (either directly or indirectly)				
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	☐ Yes ☒ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	☐ Yes ☒ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	☐ Yes ☒ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	☐ Yes ☒ No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	☐ Yes ☒ No			
	(6) Agree to pay money or property to a government official? (**Exception.** Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days)	☐ Yes ☒ No			
b	If any answer is "Yes" to 1a(1)-(6), did **any** of the acts fail to qualify under the exceptions described in Regulations section 53 4941(d)-3 or in a current notice regarding disaster assistance (see instructions)?	N/A	1b		
	Organizations relying on a current notice regarding disaster assistance check here	▶ ☐			
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?	☐ Yes ☒ 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)	N/A	2b		
c	If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here ▶ ______, ______, ______, ______				
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	☐ Yes ☒ 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.)*	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 2013?		4b		X

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

			Yes	No
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
See Statement 10		0.	0.	0.

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

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

Total number of other employees paid over $50,000 ▶ 0

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

3 Five highest-paid independent contractors for professional services. If none, enter "NONE."

(a) Name and address of each person paid more than $50,000	(b) Type of service	(c) Compensation
NONE		
Total number of others receiving over $50,000 for professional services ▶		0

Part IX-A **Summary of Direct Charitable Activities**

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

Part IX-B **Summary of Program-Related Investments**

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

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes			
a	Average monthly fair market value of securities		1a	6,874,195.
b	Average of monthly cash balances		1b	971,741.
c	Fair market value of all other assets		1c	
d	**Total** (add lines 1a, b, and c)		1d	7,845,936.
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	7,845,936.
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions)		4	117,689.
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3 Enter here and on Part V, line 4		5	7,728,247.
6	**Minimum investment return.** Enter 5% of line 5		6	386,412.

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	386,412.
2a	Tax on investment income for 2013 from Part VI, line 5	2a 15,669.		
b	Income tax for 2013 (This does not include the tax from Part VI)	2b		
c	Add lines 2a and 2b		2c	15,669.
3	Distributable amount before adjustments Subtract line 2c from line 1		3	370,743.
4	Recoveries of amounts treated as qualifying distributions		4	0.
5	Add lines 3 and 4		5	370,743.
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	370,743.

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	533,546.
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	533,546.
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	533,546.

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
1 Distributable amount for 2013 from Part XI, line 7					370,743.
2 Undistributed income, if any, as of the end of 2013					
a Enter amount for 2012 only				0.	
b Total for prior years ______, ______, ______			0.		
3 Excess distributions carryover, if any, to 2013					
a From 2008	131,528.				
b From 2009	167,340.				
c From 2010	141,299.				
d From 2011	141,326.				
e From 2012	167,426.				
f Total of lines 3a through e		748,919.			
4 Qualifying distributions for 2013 from Part XII, line 4 ▶ $	533,546.				
a Applied to 2012, 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 2013 distributable amount					370,743.
e Remaining amount distributed out of corpus		162,803.			
5 Excess distributions carryover applied to 2013 (If an amount appears in column (d), the same amount must be shown in column (a).)		0.			0.
6 Enter the net total of each column as indicated below:					
a Corpus Add lines 3f, 4c, and 4e Subtract line 5		911,722.			
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 2012 Subtract line 4a from line 2a Taxable amount - see instr				0.	
f Undistributed income for 2013 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2014					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 2008 not applied on line 5 or line 7		131,528.			
9 **Excess distributions carryover to 2014.** Subtract lines 7 and 8 from line 6a		780,194.			
10 Analysis of line 9					
a Excess from 2009	167,340.				
b Excess from 2010	141,299.				
c Excess from 2011	141,326.				
d Excess from 2012	167,426.				
e Excess from 2013	162,803.				

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 2013, 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)

	Tax year	Prior 3 years			
	(a) 2013	(b) 2012	(c) 2011	(d) 2010	(e) Total
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					
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 address of the person to whom applications should be addressed

June M. Jarvis
251 Church St, PO Box 370, Nagatuck, CT 06770

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

See attached grant application (available on web-site)

c Any submission deadlines

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

See attached grant guidelines (available on web-site)

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*				
SEE Detail Schedule attached		various	detail attached	496,360.
Total			▶ 3a	496,360.
b *Approved for future payment* None				
Total			▶ 3b	0.

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments			14	809.	
4 Dividends and interest from securities			14	144,171.	
5 Net rental income or (loss) from real estate					
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal property					
7 Other investment income					
8 Gain or (loss) from sales of assets other than inventory			18	663,211.	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue					
a					
b					
c					
d					
e					
12 Subtotal Add columns (b), (d), and (e)		0.		808,191.	0.

13 Total. Add line 12, columns (b), (d), and (e) 13 808,191.

(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)

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

			Yes	No
1	Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?			
a	Transfers from the reporting foundation to a noncharitable exempt organization of			
	(1) Cash	1a(1)		X
	(2) Other assets	1a(2)		X
b	Other transactions			
	(1) Sales of assets to a noncharitable exempt organization	1b(1)		X
	(2) Purchases of assets from a noncharitable exempt organization	1b(2)		X
	(3) Rental of facilities, equipment, or other assets	1b(3)		X
	(4) Reimbursement arrangements	1b(4)		X
	(5) Loans or loan guarantees	1b(5)		X
	(6) Performance of services or membership or fundraising solicitations	1b(6)		X
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c		X

d If the answer to any of the above is "Yes," complete the following schedule Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received

(a) Line no	(b) Amount involved	(c) Name of noncharitable exempt organization	(d) Description of transfers, transactions, and sharing arrangements
		N/A	

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 — Date 5/28/14 — Title CFO

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

Paid Preparer Use Only

Print/Type preparer's name	Preparer's signature	Date	Check ☐ if self-employed	PTIN
Barbara J. Snyder CPA	B Snyder, CPA	5/28/14		P00621730

Firm's name ▶ Whittlesey & Hadley, P.C. — Firm's EIN ▶ 06-0903326

Firm's address ▶ 280 Trumbull St 24th Fl. Hartford, CT 06103-3509 — Phone no 860-522-3111

323622
10-10-13

Schedule B
(Form 990, 990-EZ, or 990-PF)
Department of the Treasury
Internal Revenue Service

Schedule of Contributors

▶ **Attach to Form 990, Form 990-EZ, or Form 990-PF.**
▶ **Information about Schedule B (Form 990, 990-EZ, or 990-PF) and its instructions is at** ***www.irs.gov/form990***

OMB No 1545-0047

2013

Name of the organization	**Employer identification number**
Ion Bank Foundation, Inc.	06-1513293

Organization type (check one):

Filers of:	**Section:**
Form 990 or 990-EZ	☐ 501(c)( ) (enter number) organization
	☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation
	☐ 527 political organization
Form 990-PF	☒ 501(c)(3) exempt private foundation
	☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation
	☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule.**
Note. Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

General Rule

☒ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, $5,000 or more (in money or property) from any one contributor. Complete Parts I and II.

Special Rules

☐ For a section 501(c)(3) organization filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi) and received from any one contributor, during the year, a contribution of the greater of **(1)** $5,000 or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.

☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than $1,000 for use *exclusively* for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals. Complete Parts I, II, and III.

☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions for use *exclusively* for religious, charitable, etc., purposes, but these contributions did not total to more than $1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Do not complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions of $5,000 or more during the year ▶ $ ____________

Caution. An organization that is not covered by the General Rule and/or the Special Rules does not file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2, of its Form 990, or check the box on line H of its Form 990-EZ or on its Form 990-PF, Part I, line 2, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

Name of organization

Ion Bank Foundation, Inc.

Employer identification number

06-1513293

Part I **Contributors** (see instructions). Use duplicate copies of Part I if additional space is needed.

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	Ion Bank 251 Church St Naugatuck, CT 06770	$ 123,211.	Person [ ] Payroll [ ] Noncash [X] (Complete Part II for noncash contributions.)
2	Ion Bank 251 Church St Naugatuck, CT 06770	$ 20,264.	Person [ ] Payroll [ ] Noncash [X] (Complete Part II for noncash contributions.)
3	Ion Bank 251 Church St Naugatuck, CT 06770	$ 1,027.	Person [X] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.)
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.)
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.)
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.)

Name of organization	Employer identification number
Ion Bank Foundation, Inc.	06-1513293

Part II **Noncash Property** (see instructions). Use duplicate copies of Part II if additional space is needed.

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
1	10,000 shares Flushing Financial common stock	$ 210,100.	12/24/13
2	271 shares iShares S&P Midcap 400 Growth Fund	$ 40,444.	12/24/13
		$	
		$	
		$	
		$	

Name of organization	Employer identification number
Ion Bank Foundation, Inc.	06-1513293

Part III *Exclusively* religious, charitable, etc., individual contributions to section 501(c)(7), (8), or (10) organizations that total more than $1,000 for the year. Complete columns (a) through (e) and the following line entry For organizations completing Part III, enter the total of *exclusively* religious, charitable, etc , contributions of $1,000 or less for the year (Enter this information once) ▶ $
Use duplicate copies of Part III if additional space is needed.

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

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	12/04/12	02/04/13
b	ABBOTT LABS	P	05/21/12	05/06/13
c	ABBOTT LABS	P	08/02/12	05/06/13
d	ABBOTT LABS	P	05/21/12	05/06/13
e	ABBVIE INC SHS	P	05/21/12	04/15/13
f	ABBVIE INC SHS	P	08/02/12	04/15/13
g	AIR PRODUCTS&CHEM	P	05/02/13	07/02/13
h	BAXTER INTERNTL INC	P	08/02/12	08/02/13
i	C.H. ROBINSON WORLDWIDE,	P	06/18/12	01/02/13
j	C.H. ROBINSON WORLDWIDE,	P	08/02/12	01/02/13
k	CHEVRON CORP	P	08/02/12	06/04/13
l	COCA COLA COM	P	08/02/12	05/02/13
m	COCA COLA COM	P	05/21/12	05/02/13
n	COCA COLA COM	P	06/04/13	08/02/13
o	DU PONT E I DE NEMOURS	P	08/02/13	11/04/13

	(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	156,734.		143,465.	13,269.
b	35,947.		29,644.	6,303.
c	8,088.		7,231.	857.
d	23,905.		19,715.	4,190.
e	69,175.		53,526.	15,649.
f	9,348.		7,842.	1,506.
g	125,087.		120,152.	4,935.
h	17,935.		14,854.	3,081.
i	105,880.		106,008.	-128.
j	17,855.		15,108.	2,747.
k	16,845.		15,044.	1,801.
l	15,656.		15,038.	618.
m	115,958.		103,252.	12,706.
n	116,030.		119,853.	-3,823.
o	120,677.		119,935.	742.

	Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Losses (from col (h)) Gains (excess of col (h) gain over col (k), but not less than "-0-")
	(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				13,269.
b				6,303.
c				857.
d				4,190.
e				15,649.
f				1,506.
g				4,935.
h				3,081.
i				-128.
j				2,747.
k				1,801.
l				618.
m				12,706.
n				-3,823.
o				742.

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	GENL DYNAMICS CORP COM	P	05/21/12	02/04/13
b	GENL DYNAMICS CORP COM	P	08/02/12	02/04/13
c	HONEYWELL INTL INC DEL	P	10/02/12	07/02/13
d	MEDTRONIC INC COM	P	08/02/12	08/02/13
e	MEDTRONIC INC COM	P	09/04/13	11/04/13
f	SPDR S&P 500 ETF TRUST	P	09/05/12	01/03/13
g	SPDR S&P 500 ETF TRUST	P	08/06/12	01/03/13
h	TARGET CORP COM	P	03/04/13	05/02/13
i	TARGET CORP COM	P	06/04/13	12/03/13
j	TIFFANY & CO NEW	P	01/02/13	02/04/13
k	EMERGING GLOBAL SHARES	P	09/19/13	11/25/13
l	ISHARES MSCI BRAZIL	P	12/05/12	09/19/13
m	ISHARES MSCI GERMANY	P	12/05/12	09/19/13
n	ISHARES MSCI HONG KONG	P	12/05/12	09/19/13
o	ISHARES INC CORE MSCI	P	09/19/13	11/25/13

	(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	104,070.		103,288.	782.
b	15,741.		14,997.	744.
c	153,063.		117,663.	35,400.
d	21,132.		15,027.	6,105.
e	128,794.		119,717.	9,077.
f	112,966.		109,578.	3,388.
g	294,117.		283,253.	10,864.
h	125,776.		119,927.	5,849.
i	103,728.		120,130.	-16,402.
j	127,222.		120,110.	7,112.
k	3,503.		3,725.	-222.
l	5,672.		5,960.	-288.
m	4,416.		3,726.	690.
n	1,895.		1,791.	104.
o	16,572.		16,960.	-388.

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				782.
b				744.
c				35,400.
d				6,105.
e				9,077.
f				3,388.
g				10,864.
h				5,849.
i				-16,402.
j				7,112.
k				-222.
l				-288.
m				690.
n				104.
o				-388.

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	POWERSHARES GLOBAL	P	07/24/12	07/11/13
b	BAXTER INTERNTL INC	P	05/21/12	08/02/13
c	CHEVRON CORP	P	05/21/12	06/04/13
d	MICROSOFT CORP	P	08/02/12	12/03/13
e	3M COMPANY	P	10/02/12	12/03/13
f	FLUSHING FINCL CORP	D	07/21/10	12/30/13
g	FLUSHING FINCL CORP	D	07/21/10	12/31/13
h	MEDTRONIC INC COM	P	10/26/96	08/02/13
i	MICROSOFT CORP	P	04/01/04	12/03/13
j	ISHARES MSCI AUSTRALIA	P	05/30/12	09/19/13
k	ISHARES MSCI AUSTRALIA	P	05/18/12	09/19/13
l	ISHARES MSCI BRAZIL	P	05/30/12	09/19/13
m	ISHARES MSCI BRAZIL	P	05/18/12	09/19/13
n	ISHARES MSCI CDA ETF	P	05/18/12	09/19/13
o	ISHARES MSCI UNITED	P	05/18/12	07/11/13

	(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	2,078.		2,244.	-166.
b	139,261.		103,185.	36,076.
c	129,106.		104,596.	24,510.
d	19,547.		15,013.	4,534.
e	159,153.		118,012.	41,141.
f	98,927.		58,562.	40,365.
g	108,839.		64,649.	44,190.
h	150,670.		44,140.	106,530.
i	132,925.		86,979.	45,946.
j	10,604.		8,438.	2,166.
k	23,682.		19,103.	4,579.
l	8,730.		8,934.	-204.
m	31,713.		32,513.	-800.
n	11,490.		10,141.	1,349.
o	5,330.		4,537.	793.

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				-166.
b				36,076.
c				24,510.
d				4,534.
e				41,141.
f				40,365.
g				44,190.
h				106,530.
i				45,946.
j				2,166.
k				4,579.
l				-204.
m				-800.
n				1,349.
o				793.

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	ISHARES MSCI UNITED	P	05/18/12	09/19/13
b	ISHARES MSCI FRANCE	P	05/18/12	07/11/13
c	ISHARES MSCI FRANCE	P	05/30/12	09/19/13
d	ISHARES MSCI FRANCE	P	05/18/12	09/19/13
e	ISHARES MSCI TAIWAN	P	05/18/12	09/19/13
f	ISHARES MSCI TAIWAN	P	05/30/12	09/19/13
g	ISHARES MSCI SWITZERLAND	P	05/18/12	07/11/13
h	ISHARES MSCI SPAIN	P	05/18/12	09/19/13
i	ISHARES MSCI SPAIN	P	05/30/12	09/19/13
j	ISHARES MSCI SOUTH KOREA	P	05/30/12	09/19/13
k	ISHARES MSCI SOUTH KOREA	P	05/18/12	09/19/13
l	ISHARES MSCI SOUTH AFRCA	P	05/18/12	09/19/13
m	ISHARES MSCI SOUTH AFRCA	P	05/30/12	09/19/13
n	ISHARES MSCI GERMANY	P	05/18/12	07/11/13
o	ISHARES MSCI GERMANY	P	05/18/12	09/19/13

	(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	9,911.		7,756.	2,155.
b	3,731.		2,892.	839.
c	17,859.		12,138.	5,721.
d	49,792.		34,352.	15,440.
e	22,505.		18,864.	3,641.
f	6,601.		5,487.	1,114.
g	4,811.		3,660.	1,151.
h	16,674.		11,386.	5,288.
i	8,957.		5,547.	3,410.
j	10,957.		9,005.	1,952.
k	40,962.		33,276.	7,686.
l	16,859.		15,561.	1,298.
m	5,553.		5,093.	460.
n	3,225.		2,541.	684.
o	39,888.		28,368.	11,520.

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				2,155.
b				839.
c				5,721.
d				15,440.
e				3,641.
f				1,114.
g				1,151.
h				5,288.
i				3,410.
j				1,952.
k				7,686.
l				1,298.
m				460.
n				684.
o				11,520.

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	ISHARES MSCI GERMANY	P	05/30/12	09/19/13
b	ISHARES MSCI NETHERLANDS	P	05/18/12	09/19/13
c	ISHARES MSCI NETHERLANDS	P	05/30/12	09/19/13
d	ISHARES MSCI ITALY	P	05/18/12	09/19/13
e	ISHARES MSCI ITALY	P	05/30/12	09/19/13
f	ISHARES MSCI HONG KONG	P	05/30/12	09/19/13
g	ISHARES MSCI HONG KONG	P	05/18/12	09/19/13
h	ISHARES IBOXX $	P	05/18/12	07/11/13
i	ISHARES NASDAQ BIOTECH	P	05/18/12	11/25/13
j	ISHARES 3-7 YEAR	P	05/18/12	07/11/13
k	MARKET VECTORS RUSSIA	P	05/30/12	09/19/13
l	MARKET VECTORS RUSSIA	P	05/18/12	09/19/13
m	MARKET VECTORS EMRG MKTS	P	05/18/12	07/11/13
n	SPDR S P CHINA	P	05/18/12	09/19/13
o	SPDR S P CHINA	P	05/30/12	09/19/13

	(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	13,334.		9,289.	4,045.
b	12,904.		8,743.	4,161.
c	3,879.		2,588.	1,291.
d	12,088.		8,691.	3,397.
e	4,490.		3,144.	1,346.
f	2,914.		2,274.	640.
g	10,250.		8,031.	2,219.
h	18,525.		18,850.	-325.
i	44,844.		24,382.	20,462.
j	5,548.		5,649.	-101.
k	4,869.		4,010.	859.
l	16,747.		13,821.	2,926.
m	10,768.		11,003.	-235.
n	37,469.		30,675.	6,794.
o	9,992.		8,260.	1,732.

	Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Losses (from col (h)) Gains (excess of col (h) gain over col (k), but not less than "-0-")
	(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				4,045.
b				4,161.
c				1,291.
d				3,397.
e				1,346.
f				640.
g				2,219.
h				-325.
i				20,462.
j				-101.
k				859.
l				2,926.
m				-235.
n				6,794.
o				1,732.

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	HEALTH CARE SELECT SPDR	P	05/18/12	11/25/13
b	SECTOR SPDR FINANCIAL	P	05/18/12	10/14/13
c	SECTOR SPDR FINANCIAL	P	05/18/12	11/25/13
d	VANGUARD INTERMEDIATE	P	05/18/12	07/11/13
e	VANGUARD CONSUMER	P	05/18/12	11/25/13
f	VANGUARD ENERGY ETF	P	05/18/12	11/25/13
g	VANGUARD INDUSTRIAL ETF	P	05/18/12	11/25/13
h	VANGUARD INFORMATION	P	05/18/12	11/25/13
i	VANGUARD MATERIALS ETF	P	05/18/12	11/25/13
j	WISDOMTREE INDIA	P	05/30/12	09/19/13
k	WISDOMTREE INDIA	P	05/18/12	09/19/13
l	WISDOMTREE TRUST JAPAN	P	05/18/12	07/11/13
m	Capital Gains Dividends			
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	22,041.		14,318.	7,723.
b	23,020.		15,817.	7,203.
c	10,660.		6,874.	3,786.
d	17,307.		18,375.	-1,068.
e	27,003.		17,207.	9,796.
f	15,276.		11,391.	3,885.
g	31,631.		20,849.	10,782.
h	42,465.		33,175.	9,290.
i	6,145.		4,444.	1,701.
j	3,782.		3,625.	157.
k	9,094.		8,919.	175.
l	51,249.		33,946.	17,303.
m	2,631.			2,631.
n				
o				

	Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Losses (from col (h)) Gains (excess of col (h) gain over col (k), but not less than "-0-")
	(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				7,723.
b				7,203.
c				3,786.
d				-1,068.
e				9,796.
f				3,885.
g				10,782.
h				9,290.
i				1,701.
j				157.
k				175.
l				17,303.
m				2,631.
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	663,211.
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

Form 990-PF Interest on Savings and Temporary Cash Investments Statement 1

Source	(a) Revenue Per Books	(b) Net Investment Income	(c) Adjusted Net Income
Interest	809.	809.	
Total to Part I, line 3	809.	809.	

Form 990-PF Dividends and Interest from Securities Statement 2

Source	Gross Amount	Capital Gains Dividends	(a) Revenue Per Books	(b) Net Investment Income	(c) Adjusted Net Income
Dividend	146,802.	0.	146,802.	146,802.	
To Part I, line 4	146,802.	0.	146,802.	146,802.	

Form 990-PF Accounting Fees Statement 3

Description	(a) Expenses Per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Accounting Fees	1,650.	825.		825.
To Form 990-PF, Pg 1, ln 16b	1,650.	825.		825.

Form 990-PF Other Professional Fees Statement 4

Description	(a) Expenses Per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Administrative Fees	44,900.	23,900.		21,000.
To Form 990-PF, Pg 1, ln 16c	44,900.	23,900.		21,000.

Form 990-PF	Taxes	Statement 5

Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Excise tax paid (refunded)	63,000.	0.		0.
To Form 990-PF, Pg 1, ln 18	63,000.	0.		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
Community Award Program	12,045.	0.		12,045.
To Form 990-PF, Pg 1, ln 23	12,045.	0.		12,045.

Form 990-PF	Other Decreases in Net Assets or Fund Balances	Statement 7

Description	Amount
Gain unsettled trade - income for tax not books	84,577.
Total to Form 990-PF, Part III, line 5	84,577.

Form 990-PF	Corporate Stock	Statement 8

Description	Book Value	Fair Market Value
Corporate Stock	1,914,777.	2,362,345.
Total to Form 990-PF, Part II, line 10b	1,914,777.	2,362,345.

Form 990-PF | Other Investments | Statement 9

Description	Valuation Method	Book Value	Fair Market Value
Mutual Funds	COST	3,878,737.	5,024,146.
Total to Form 990-PF, Part II, line 13		3,878,737.	5,024,146.

Form 990-PF | Part VIII - List of Officers, Directors Trustees and Foundation Managers | Statement 10

Name and Address	Title and Avrg Hrs/Wk	Compen-sation	Employee Ben Plan Contrib	Expense Account
Charles J Boulier, III 251 Church ST Naugatuck, CT 06770	President 0.00	0.	0.	0.
David J Rotatori 251 Church ST Naugatuck, CT 06770	Secretary & Treasurer 0.00	0.	0.	0.
Mark C Yanarella 251 Church ST Naugatuck, CT 06770	Director 0.00	0.	0.	0.
Stephen Widman 251 Church ST Naugatuck, CT 06770	Director 0.00	0.	0.	0.
Richard H Gesseck 251 Church ST Naugatuck, CT 06770	Director 0.00	0.	0.	0.
Lucille Janatka 251 Church ST Naugatuck, CT 06770	Director 0.00	0.	0.	0.
Francis R Powell 251 Church ST Naugatuck, CT 06770	Director 0.00	0.	0.	0.
John H Tobin 251 Church ST Naugatuck, CT 06770	Director 0.00	0.	0.	0.

David Nurnberger 251 Church ST Naugatuck, CT 06770	Director 0.00	0.	0.	0.
Ann Merriam Feinberg 251 Church ST Naugatuck, CT 06770	Director 0.00	0.	0.	0.
Totals included on 990-PF, Page 6, Part VIII		0.	0.	0.

Ion Bank Foundation, Inc. 06-1513293
Form 990-PF, Part II - Schedule of Assets Held at End of Year
As of 12/31/2013

Security	Shares	Quote/ Price	Cost Basis	Gain/Loss	Balance
AUTOMATIC DATA PROC	2,230 000	80 799	118,423 94	61,757 83	180,181 77
CSX CORP	4,615 000	28 770	120,128.45	12,645 10	132,773 55
EMERGING GLOBAL SHARE	2,036 000	26 880	57,455 71	(2,728 03)	54,727 68
EMERSON ELEC CO	2,200 000	70 180	119,777.64	34,618 36	154,396 00
EXXON MOBIL CORP COM	1,435 000	101 200	118,551.82	26,670 18	145,222 00
FLUSHING FINCL CORP	10,000 000	20 700	123,211 00	83,789 00	207,000 00
GENUINE PARTS CO	1,472 000	83 190	120,268 80	2,186 88	122,455 68
HEALTH CARE SELECT SPDR	5,108 000	55 440	184,841 45	98,346 07	283,187 52
ISHARES BARCLAYS MBS	756 000	104 570	82,024 50	(2,969 58)	79,054 92
ISHARES BARCLAYS TIPS	148 000	109 900	17,835 71	(1,570 51)	16,265 20
ISHARES BARCLYS 20+YR	72 000	101 860	8,953 93	(1,620 01)	7,333 92
ISHARES BARCLYS 3-7 YEA	136 000	120 030	16,713 60	(389 52)	16,324 08
ISHARESIBOXX$	436 000	114 188	50,872 07	(1,086 10)	49,785 97
ISHARES INC CORE MSCI	3,263 000	49 810	166,184 59	(3,654 56)	162,530 03
ISHARES MSCI CDA INDX FD	1,926 000	29 160	50,588 87	5,573 29	56,162 16
ISHARES MSCI EMU ETF	7,088 000	41 380	274,752.36	18,549 08	293,301 44
ISHARES MSCI PACIFIC EX	1,207 000	46 730	58,945 86	(2,542 75)	56,403 11
ISHARES MSCI SWEDEN	817 000	35 830	22,370 41	6,902 70	29,273 11
ISHARES MSCI SWITZERL	2,462 000	32 990	63,379 91	17,841 47	81,221 38
ISHARES MSCI UNITED	6,678 000	20 880	110,715 48	28,721 16	139,436 64
ISHARES NASDAQ BIOTECH	853 000	227 060	104,373 04	89,309 14	193,682 18
ISHARES S&P MIDCAP 400	271 000	150 190	20,264 16	20,437 33	40,701 49
Johnson & Johnson	1,550 000	91 590	119,814 25	22,150 25	141,964 50
LINEAR TECHNOLOGY CORP	3,600 000	45 550	117,913 36	46,066 64	163,980 00
MARKET VECTORS EMRG MKTS	673 000	23 550	16,503 00	(653 85)	15,849 15
MCDONALD'S COPR	1,297 000	97 030	118,089 51	7,758 40	125,847 91
NORTHROP GRUMMAN CO	1,278 000	114 610	120,129 50	26,342 08	146,471 58
PAYCHEX, INC	3,950 000	45 530	118,633 20	61,210 30	179,843 50
POWERSHARES GLOBAL	292 000	13 440	4,127 17	(202 69)	3,924 48
POWERSHARES GLOBAL-PCY	608 000	27 000	17,953 27	(1,537 27)	16,416 00
Proctor & Gamble	1,595 000	81 410	120,074 53	9,774 42	129,848 95
QUEST DIAGNOSTIC INC	1,935 000	53 540	119,894 21	(16,294 31)	103,599 90
RAYTHEON CO DELAWAR	1,610 000	90.700	119,908.45	26,118 55	146,027 00
SECTOR SPDR FINANCIAL	7,295 000	21 860	101,403.65	58,065 05	159,468 70
SPDR BARCLY CAPTL HIGH	1,239 000	40 560	48,118 65	2,135 19	50,253 84
SPDR BARCLY CPTAL INTL	233 000	57 740	13,689 96	(236 54)	13,453 42
Standard & Poors	4,682 000	184 690	665,426 61	199,291 97	864,718 58
UNITED TECHS CORP	1,338 000	113 800	120,072 71	32,191 69	152,264 40
VANGUARD CONSUMER (DISCRETIONARY)	3,226 000	108.056	218,618 45	129,970 21	348,588 66
VANGUARD CONSUMER (STAPLES)	951 000	110 080	82,450 64	22,235 44	104,686 08
VANGUARD ENERGY ETF	2,665 000	126 430	257,381 13	79,554 82	336,935 95
VANGUARD INDUSTRIAL ETF	4,052 000	100 030	267,539 59	137,781 97	405,321 56
VANGUARD INFORMATION	7,664 000	89 540	520,912 81	165,321 75	686,234 56
VANGUARD INTERMEDIA	347 000	81.700	30,698 07	(2,348 17)	28,349 90
VANGUARD MATERIAL ETF	775 000	103 250	58,502 22	21,516 53	80,018 75
VANGUARD SHORT TERM BOND	1,435 000	79 930	115,763 85	(1,064 30)	114,699 55
VANGUARD TELECOMM SRVS	926 000	83 660	60,263 27	17,205 89	77,469 16
WALT-MART STORES INC	1,658 000	78 690	119,885 82	10,582 20	130,468 02
WISDOMTREE TRUST JAPAN	3,115 000	50 840	109,112 43	49,254 17	158,366 60
TOTAL Investments			5,793,513 61	1,592,976 92	7,386,490 53

Shown as.

	Cost Basis	Balance
Investment - corporate stock, Line 10a	$ 1,914,777	$ 2,362,345
Investment - other, Line 13	3,878,737	5,024,146
	$ 5,793,514	$ 7,386,491

- Retirement Planning
- Rollovers & Transfers
- Column
  - Estate Conservation
  - Business Succession Planning
- Column
  - College Planning
  - Long Term Care Insurance

Close

About Us> Our Foundation

Our Foundation

Grant Application and Guidelines

- 2014 Ion Bank Foundation Grant Guidelines (PDF)
- 2014 Ion Bank Foundation Grant Application (MS Word)

The Ion Bank Foundation

Established in 1998, the Ion Bank Foundation has made a difference in the communities it serves through its support of a variety of causes The Foundation began with a $2 million contribution by the Bank and has since grown, through earnings and additional contributions, to over $6 0 million in assets

Ion Bank and the Ion Bank Foundation proudly support our area hospitals - Waterbury Hospital, St Mary's Hospital, Griffin Hospital and MidState Medical Center.

We also contribute to many community driven efforts specifically in economic development, human services, education and the arts.

Over the last decade, cumulative grants for purposes ranging from improving social services to enhancing the arts have exceeded $4 million. It is the goal of the Foundation to give approximately 5% of the Foundation's monies each year to non-profit organizations involved in enriching the lives of people who live in the local communities.

Where there is a need, the Foundation will try to fill it Through our grant application program, we feel we are able to identify the charities and non-profit organizations that can do the most good. The vision for the Foundation is to build a legacy of good works and to preserve funds to continue those good works in perpetuity

If you are interested in reviewing the Ion Bank Foundation guidelines or submitting an application for a grant and proposed project budget, please click on the links at the top of the page.

Applications may be mailed to:
Ion Bank Foundation
Attention June M Jarvis
PO Box 370
Naugatuck, CT 06770

203 729 4442 | 877 729.4442

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- Deposit Rates
- Lending
- Insurance
- Wealth Management
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- About
- Security Center
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BANK foundation

2014 GRANT APPLICATION

Legal Name of Organization	Date of Incorporation
Address of Organization	**Telephone / Fax Numbers**
Federal Tax ID Number	**Agency Website**
Chief Executive Officer (CEO) / Executive Director Name	**Title**
Contact for application (if different from CEO/Executive Director)	**Contact Title**
Contact E-mail address	**Contact Telephone / Fax Numbers**
# of Staff (full time/part time) ______ FT _______ PT	**Frequency of Board Meetings:**
# of Board Members	**Average % attendance:**
Agency Budget for Current Fiscal Year: $	**Agency Budget for Last Fiscal Year: $**
Project Name or Use of Funds:	**Grant period: From: To:**
Total Project Cost: $	**Amount requested from IBF: $**

Is applicant a public institution or private tax-exempt organization under Sections 501(c) (3), 501(c) (4) or 501(c) (6) of the Internal Revenue Code? Yes □ No □ (Please provide copy of verification of status)

Organizational Revenue Sources:

___% Public
___% Grants (Foundation)
___% Fees
___% Individual Gifts
___% United Way
___% Investment Income
___% Membership
___% Special Events

Signature of Board Chair/Date **Print Name and Title**

Signature of Executive Director (or equivalent)/Date **Print Name and Title**

Please send one original and one copy to:
June M. Jarvis
Ion Bank Foundation
PO Box 370
Naugatuck, CT 06770-0370

ion
BANK foundation

Proposal Narrative: Please use 12 point Garamond font and restate each question in its entirety.

1) **SUMMARY:** In one paragraph, describe the purpose of this request. What is the target population, location, and timeframe? Is it a new, existing, or improved/expanded program? What are the specific, quantifiable results that you plan to achieve?

2) **ORGANIZATION:** In one paragraph, describe your organization, identifying its mission, programs/services, geographic focus and client base.

3) **STATEMENT OF NEED:** What is the specific community need(s) that your proposed program will address? Include data substantiating the existence/scope of this need, citing specific source materials. How does this project relate to your agency's strategic plan and/or program priorities?

4) **WORKPLAN:**

   a) **Workplan Narrative**

Describe your plans for implementing the program. For instance: **WHO** will be carrying out the activities? Provide information on their skills & experience. **WHEN** will they occur? **WHERE** will programs take place? **HOW** will clients/participants be notified, if recruitment is necessary? **HOW MANY** area residents will benefit (providing information about their age, race, special needs, towns of residence, etc)?

   b) **Workplan Timeline**

Complete the following table:

Activities	Timeline	Results

- **Activities -** List the principal steps that you will take to complete the program (i.e. hire staff, conduct publicity campaign, recruit participants, hold workshops, etc.)
- **Timeline -** Assign benchmark dates (months) when principal activities will be completed.
- **Results -** List the projected results of your program. These can include changes in skill levels, knowledge, attitude, behavior, life condition, status, or numbers served that result from your program. They should be: **quantifiable and your method for collecting the information noted** (e.g., surveys, testing, etc.)

5) **SUSTAINABILITY:** What steps has your agency taken, if applicable, to plan for the continuation of this program after the initial grant period?

If applying for a Capital Campaign, please answer the following additional questions (if not, delete this section):

1. Include a copy of your campaign feasibility study (***required***). What impact do you think a capital campaign will have on annual giving? How have you developed your project so that your board will participate fully in the campaign? Summarize your organization's past experience with both capital and annual campaigns.
2. Provide the status of your capital campaign, listing amounts of requested versus secured contributions.
3. If your campaign involves a consultant, provide qualifications, work plan and cost estimate. Why this firm/person?

Proposed Project Budget & Explanation

ELIGIBLE EXPENSES: The Foundation will fund *primarily* direct costs incurred in starting or improving a program. However, indirect/overhead expenses are permitted as a line item – overhead above 10% of request must be documented in the Budget Narrative.

Organization Name: **Project Name:**

I. PROPOSED PROJECT BUDGET **Program Year: (Month/Year - Month/Year):**

LINE ITEM EXPENSE DESCRIPTION (PLEASE ADD ADDITIONAL LINES IF NEEDED)	SUPPORT FROM YOUR AGENCY*	SUPPORT FROM OTHER FUNDERS**	ION BANK FOUNDATION	PROJECT TOTAL
PERSONNEL (LAST NAME, POSITION, % TIME ON PROJECT):				
1)	$	$	$	$
2)	$	$	$	$
3)	$	$	$	$
TOTAL FRINGE BENEFITS (@__%)	$	$	$	$
SUB-TOTAL PERSONNEL	*$*	*$*	*$*	*$*
OTHER PROGRAM EXPENSES[1]				
1)	$	$	$	$
2)	$	$	$	$
3)	$	$	$	$
4)	$	$	$	$
5)	$	$	$	$
Sub-Total Other Expenses	*$*	*$*	*$*	*$*
INDIRECT/OVERHEAD (BELOW 10%)	*$*	*$*	*$*	*$*
TOTAL EXPENSES	$	$	$	$

***** Revenues generated by program and agency in-kind contributions (please asterisk in-kind contributions)***

***** Total revenues requested from other sources (break out other funders in table below)***

** SUPPORT FROM OTHER FUNDERS (SHOULD REFLECT TOTAL OF OTHER FUNDERS COLUMN ABOVE)		
FUNDER NAME	REQUEST AMOUNT	STATUS (COMMITTED / PENDING / PROJECTED). PLEASE NOTE DECISION DATE, IF KNOWN
1)	$	
2)	$	
3)	$	
TOTAL REVENUES (FROM OTHER FUNDERS)	$	

II. Budget Narrative / Explanation

Please use an additional page for budget narrative /explanation, accounting for each line item request in detail (e g , Printing: 10,000 copies @ $ 03/copy, Total = $300) If you are requesting support for significant ***equipment/capital expenditure,*** include three quotes.

1

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BANK foundation

CRA FORM

One of the priorities of the Ion Bank Foundation is to provide opportunities for individuals and families who are of low or moderate income. The Foundation seeks your assistance in documenting the use of its funds for these purposes. **The following information must be provided with your grant application.**

Name of project: ____

Project duration: (month year/start/finish): ______________________________

Number of persons assisted who are below the federal poverty level: __________

Number of persons who are below the 185% federal poverty level: ____________

Federal poverty level indices:

Size of family unit	One	Two	Three	Four	Five
Federal poverty level	10,830	14,570	18,310	22,050	25,790
185% federal poverty level	20,035.50	26,954.5	33,873.50	40,792.50	47,711.50

If you utilize **other indicators of need**, please describe the indicator and the process you utilize for determining need:

____

Ethnicity of clients: (Number)

African- American __________ Hispanic __________ White, non Hispanic _________ Other____________

The information provided above is accurate to the best of my knowledge.

Name: ___________________________________ Title: ________________________________

Organization: ____

Address: ____

City / State / Zip Code: ____

Signed: ____ Date: _______________

Please include this form with your grant application. If you have any questions, please contact Josh Carey at 203.753.1315 or josh@conncf.org. For your own protection, please do not email to Ion Bank Foundation any confidential information such as account numbers or Social Security numbers. If your communication contains confidential information, we suggest you call us at 203.729.4442, toll free 877.729.4442 or mail to Ion Bank Foundation, PO Box 370, Naugatuck, CT 06770-0370. Thank you.

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CHECKLIST FOR SUBMITTING A GRANT APPLICATION

Please check to see that all requested information is included.

The full proposal, as follows:

- ☐ Grant proposal summary sheet
- ☐ Proposal narrative
- ☐ Project budget / Budget explanation
- ☐ Signed CRA form
- ☐ Copy of your campaign feasibility study *(if applying for a capital campaign)*
- ☐ Documentation of support

  Note: For programs in schools, the application must document the school's commitment to the specific program as evidenced by the signature of the superintendent or building principal on the summary sheet. For programs in schools proposed by outside arts, cultural or other organizations, the application must include a letter signed by the superintendent or building principal committing to the specific project.
- ☐ Please mail one original and one copy to:

  June M. Jarvis
  Ion Bank Foundation
  PO Box 370
  Naugatuck, CT 06770-0370

ONE HARDCOPY each of:

☐ BOARD OF DIRECTORS LIST – Please include the most recent Board list for your organization. The applying organization must have a minimum six-member board, representative of the community, of which a majority is neither employees nor immediate relatives of employees.

☐ IRS TAX STATUS LETTER: The applicant must be either a public institution or a private tax-exempt organization under Sections 501(c) (3), 501(c) (4) or 501(c) (6) of the Internal Revenue Code.

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2014 Grant Guidelines

PO Box 370
Naugatuck, CT 06770-0370
203.729.4442 • Fax 203.720.5329

OUR MISSION

The mission of the Ion Bank Foundation is to support programs and organizations that will contribute to the betterment of the communities it serves. The Foundation will consider a broad range of requests to create opportunities for residents with emphasis on promoting education and the encouragement of homeownership.

ADMINISTRATION

The Ion Bank Foundation grant making is administered by the Connecticut Community Foundation.

ELIGIBLE APPLICANTS

1. The applicant is either a public institution or a private tax-exempt organization under Sections 501(c) (3), 501(c) (4) or 501(c) (6) of the Internal Revenue Code.

2. Political, lobbying or religious activities are ineligible. Religiously affiliated organizations may propose nonsectarian projects.

3. The applying organization must have an established board, representative of the community, of which a majority is neither employees nor relatives of employees.

TYPES OF GRANTS

The Ion Bank Foundation awards both **designated and competitive grants**. Agencies receiving designated grants will be notified by the Foundation about the schedule and amount of their annual funding.

Through its competitive program, the Foundation makes program and capital grants. Specifically, it seeks projects that will improve the quality of life for residents, increase the sense of community and provide lasting benefits, particularly for youth and those in need.

The Foundation will consider requests as follows:

- For new, enhanced or expanded projects based on a documented need, having a strong project plan, specific outcomes and a feasible budget. Priority is given to requests having the highest correlation to the Foundation's goals of promoting education and encouraging and supporting homeownership.

- For ongoing projects or programs that have proven specific benefits to the community.

- Located in or serving residents of Ansonia, Cheshire, Hamden, Meriden, Middlebury, Naugatuck, Oxford, Prospect, Southbury, Wallingford, Waterbury, Watertown or Woodbury.

- Give priority to providing programs or services over capital or equipment. Grants for previously incurred expenses are specifically prohibited.

- Although multi year requests will be considered, the agency must make a strong case for the need for multi year funding in its initial request.

- The Foundation gives lower priority to requests for publicly owned capital or equipment. Preference is afforded to those requests with broad, visible community involvement in the design and fundraising for the project.

- Requests from schools or for programs offered in schools by nonprofit organizations must include the approval of the superintendent as indicated by signing the grant application form.

- Organizations may submit only one grant request per round.

Grantmaking Process for New Requests

The first step in the grant process is to review the grant guidelines to determine your organization's eligibility and the appropriateness of the proposed project. Grant guidelines and the grant application packet are available on the Bank's website, www.ionbank.com. You can also contact the Ion Bank Foundation or the Connecticut Community Foundation to discuss the appropriateness of the grant request based on the guidelines. The Foundation's willingness to consider a grant request should in no way be construed as preliminary approval of the grant request. The request will then be reviewed at the next Ion Bank Foundation meeting. Grant applicants are notified by letter immediately following the Board meeting.

The Ion Bank Foundation reviews grant requests three times per year.

- For April consideration, grant applications should be submitted by **February 28, 2014**
- For August consideration, grant applications should be submitted by **June 30, 2014**
- For December consideration, grant applications should be submitted by **October 31, 2014**

Grant submission

Two copies of the application and budget (including the CRA form) and one copy of the agency's nonprofit determination letter and operating budget should be submitted to: **June M. Jarvis, Ion Bank Foundation, PO Box 370, Naugatuck, CT 06770-0370**

Contact information:

For further information about the Foundation or to discuss your proposal, please contact June M. Jarvis at 203. 729.5291, jjarvis@ionbank.com or Josh Carey at josh@conncf.org, 203.753.1315. For your own protection, please do not email to Ion Bank Foundation any confidential information such as account numbers or Social Security numbers. If your communication contains confidential information, we suggest you call us at 203.729.4442, toll free 877.729.4442 or mail to Ion Bank Foundation, PO 370 Box, Naugatuck, CT 06770-0370 Thank you.

Num	Description	Amount
1707	Saint Mary's Hospital Foundation 56 Franklin Street Waterbury CT 06706 501 (c) (3) "2013 Gala "	(1,200.00)
1710	Naugatuck Educational Foundation PO Box 1717 Naugatuck CT 06770 501 (c) (3) "3rd Annual St.Petrick's Day 5K"	(1,000.00)
1715	BSA Troop 138 210 church Street Naugatuck CT 06770 501 (c)) (3) "Zach's Eagle Project"	(200 00)
1716	Connecticut Community Care, Inc 43 Enterprise Dr Bristol CT 06010 501 (c) (3) "Greater Naugatuck Region Clients"	(1,500.00)
1718	Shakesperience productions, Inc P.O. Box 361 Naugatuck, CT 06770 501 (c) (3) "2013 Adopt-a-District"	(3,000.00)
1719	New Haven Symphony Orchestra P.O.Box 9718, New Haven, CT 06536 501 (c) (3) "Wintergreen Interdistrict Magnet Program"	(1,000.00)
1720	CancerCare 120 East Ave Norwalk, CT 06851 501 (c) (3) Naugatuck Area Residents"	(2,000.00)
1721	Franciscan Life Center Network, Inc 271 Finch Ave, Meriden CT 06451 501 (c) (3) "Land-based Summer Exper. & Youth Leadership"	(3,000 00)
1722	Safe Haven of Greater 29 Central Ave. Waterbury CT 06702 501 (c) (3) Out the Shadows-Silver Sponsor"	(1,250.00)
1724	Granville Academy of Waterbury 66 Red Coat Road Waterbury, CT 06704 501 (c) (3) "Nat'l Soc. Of Black Engineers Convention Trip"	(5,000.00)
1725	Griffin Hospital 130 Division st Derby, CT 06418 501 (c) (3) "2013 Partner Sponsorship"	(5,000.00)
1726	Naugatuck Economic Development Corporation 195 Water St Naugatuck CT 06770 501 (c) (3) "2013 Gold Sponsor"	(10,000.00)
1727	JDRF 20 Batterson Park Rd. 3rd.floor Farmington, CT 06032 501 (c) (3) "1/4 Page ad-Promise Ball Journal"	(750.00)
1728	Cheshire H S Class of 2013-Grad Party 72 Hampshire Court, Cheshire CT 06410 501 (c) (3) "All Night Frad Party"	(500.00)
1729	American Lung Association 45 Ash Street East Hartford CT 06108 501 (c) (3) "Michael Litwinka Memorial Run"	(500.00)
1730	Council of Neighborhoods 77 Oak Street, Meriden CT 06450 501 (c) (3) "National Night Out 2013"	(1,000 00)
1732	National Multiple Sclerosis Soceity 705 North Mountain Rd Suite G102 Newington CT 06111 501 (c) (3) "Travelers Walk Ms"	(2,500.00)
1733	Shakesperience P.O. Box 361 Naugatuck, CT 06770 501 (c) (3) "Sweet to the Sweet Fund Raiser"	(1,000.00)
1734	American Cancer Society 538 Preston Ave Meriden CT 501 (c) (3) "Relay for Life- Greater Waterbury"	(1,000.00)
1735	Meriden-Wallingford Campership Fund 50 W.Main Street Meriden, CT 06451 501 (c) (3) "2013 Campership Fund"	(2,000 00)
1736	Meriden Daffodil Festival P.O Box 40 Meriden CT 06450 501 (c) (3) "2013 Sponsor"	(3,000.00)
1737	Oxford High School 61 Quaker Farms Road, Oxford, CT 06478 501 (c) (3) "2011 Post Prom Event"	(500 00)
1738	American Cancer Society 538 Preston Ave Meriden CT 501 (c) (3) "Relay for Life-Cheshire"	(1,000.00)
1739	Naugatuck Campership Fund 87 Church St Naugatuck, CT 06770 501 (c) (3) "2013 Campership"	(3,000 00)
1740	Quinnipiac University 275 Mount Carmel Ave, Hamden CT 06518 501 (c) (3) "2nd Year Installment-NSB Endowed Scholarship"	(5,000 00)
1741	Hidden Acres Therapeutic Riding Center 45 Gabriel Drive, Naugatuck CT 501 (c) (3) "2nd Year Installment of 3"	(5,000 00)
1742	Friends of the Watertown Library 470 Main Street Watertown Ct 06795 501 (c) (3) "Friends Read Together"	(500.00)
1743	Woodbury Scholarship Fund-GTD P O Box 728 Woodbury CT 06798 501 (c) (3) "Honor Sponsor-Go the Distance"	(500.00)
1744	Naugatuck Exchange Foundation P.O. Box 641 Naugatuck CT 06770 501 (c) (3) "Tee off Againts Child Abuse"	(1,000.00)
1747	American Cancer Society 538 Preston Ave Meriden CT 501 (c) (3) "Meriden/Wallingford Relay for Life"	(1,000 00)
1749	Boys & Girls Club of Meriden 15 Lincoln St Meriden CT 06451 501 (c) (3) Project Streamline Data"	(5,950.00)
1750	Girls, Inc of Meriden 130 Lincoln St. Meriden CT 06451 501 (c) (3) "Wallingford Programming"	(5,000.00)
1758	Girl's Inc of So. Western CT 35 Park Place Waterbury CT 06702 501 (c) (3) "Camp Explore 2013"	(2,500.00)
1759	Home Front Inc 88 Hamilton Ave Stamford CT 06902 501 (c) (3) "Home-Front Naugatuck 2013"	(5,000 00)

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Num	Description	Amount
1760	My City Kitchen 384 Pratt St Meriden CT 06450 501 (c) (3) "Healthy Eating & Cooking for Children"	(5,000.00)
1761	Nutmeg Big Bros. Big Sisters 30 Laurel St Suite 3 hartford CT 06106 501 (c) (3) "Community Based Mentoring"	(1,500.00)
1762	St. Margaret Willow Plaza NRZ Assoc. Inc 60 Elmwood Ave Waterbury CT 06710 501 (c) (3) "After School, Summer & Sr. Day Programs"	(5,000.00)
1765	St. Vincent De Paul P.O Box 1612 Waterbury CT, 06721 501 (c) (3) "Soup Kitchen & Food Party"	(5,000.00)
1766	St. Vincent De Paul P.O.Box 1612 Waterbury CT, 06721 501 (c) (3) "Shelter Program"	(5,000.00)
1767	Howard Whittemore Memorial Library 243 Church St Naugatuck CT 06770 501 (c) (3) "Non Fiction Books Grades K-6"	(500.00)
1768	Saint Francis Church 294 Church St Naugatuck CT 06770 501 (c) (3) "Community Awards Program"	(3,975.10)
1769	St. Mary's Chucrh N. Main Street Naugatuck CT 06770 (c) (3) "Community Awards Program"	(2,777 78)
1770	St. Hedwig Church 32 Golden Hill Street Naugatuck CT 501 (c) (3) "Community Awards Program"	(2,777.78)
1771	Middlebury Senior Center 1172 White Middlebury CT 06762 501 (c) (3) "Community Awards Program"	(2,777.78)
1772	Middlebury Congregation Church 1242 Whitemore Rd. Middlebury CT 06762 501 (c) (3) "Community Awards Program"	(2,203.07)
1773	Prospect Senior Center 6 Center St Prospect CT 06712 501 (c) (3) "Community Awards Program"	(2,011.49)
1774	Naugatuck YMCA 284 Church St Naugatuck CT 06770 501 (c) (3) "Community Awards Program"	(1,915.71)
1775	GIL Foundation 34 Waterbury Rd. Prospect CT 06712 501 (c) (3) "Community Awards Program"	(1,867.82)
1776	Seven Angels Theatre Plank Rd. P.O.Box 3358 Waterbury CT 06705 501 (c) (3) "Community Awards Program"	(1,772 03)
1777	St. Anthonys Church 4 Union City Rd Prospect CT 06712 501 (c) (3) "Community Awards Program"	(1,532.57)
1778	Oxford United Church of Christ 3 Academy Rd. Oxford CT 06478 501 (c) (3) "Community Awards Program"	(1,532.57)
1779	St Francis St. Hedwig School 318 Church St Naugatuck CT 06770 501(c) (3) "Community Awards Program"	(1,484.67)
1780	Oxford Special Olympics 115 Foxton Court Beacon Falls CT 06403 501 (c) (3) "Community Awards Program"	(1,436.78)
1781	St. Augustine Church 121 Camp Street Meriden CT 06450 501 (c) (3) "Community Awards Program"	(1,388 89)
1782	St. Augustine Church 121 Camp Street Meriden CT 06450 501 (c) (3) "Community Awards Program"	(1,388.89)
1783	Ansonia Nature Center Deerfield Rd. Ansonia CT 501 (c) (3) "Community Awards Program"	(1,293.10)
1784	Stone Chiropractic Center Baseball Camp 15 Depot St Watertown CT 06795 501 (c) (3) "Community Awards Program"	(1,293.10)
1785	Safe Haven of Greater 29 Central Ave. Waterbury CT 06702 501 (c) (3) "Community Awards Program"	(1,245.21)
1786	Palace Theater 100 E Main Street Waterbury CT 06702 501 (c) (3) "Community Awards Program"	(1,149.43)
1787	Ecumenical Food Bank P.O. Box 796 Naugatuck CT 06770 501 (c) (3) "Community Awards Program"	(1,101.53)
1788	Hidden Acres Therapeutic Riding Center 45 Gabriel Drive, Naugatuck CT 501 (c) (3) "Community Awards Program"	(1,101.53)
1789	Prospect Congregational Church 25 Center St, Prospect CT 06712 501 (c) (3) "Community Awards Program"	(1,101.53)
1790	Naugatuck Valley Community Church 159 Church St Naugatuck CT 06770 501 (c) (3) "Community Awards Program"	(1,053.64)
1791	Hillside Conveneth Church 100 Hillside Ave Naugatuck CT 06770 501 (c) (3) "Community Awards Program"	(1,005 75)
1792	ACTS4 Ministries 150 East Aurora St Waterbury CT 06708 501 (c) (3) "Community Awards Program"	(1,005 75)
1793	Beacon Falls Congregational Church 69 Wolf ave Beacon Falls CT 06403 501 (c) (3) "Community Awards Program"	(1,005 75)
1795	Middlebury Lions Club PO Box 442 Middlebury CT 06762 501 (c) (3) "Community Awards Program"	(909 96)
1796	Jane Doe No More, Inc 203 Church St Naugatuk CT 501 (c) (3) "Community Awards Program"	(909.96)

Num	Description	Amount
1797	Naugatuck Community Choir P.O. Box 314 Naugatuck CT 06770 501 (c) (3) "Community Awards Program"	(862 07)
1798	Woodbury Lians Club P.O.Box 314 Woodbury CT 501 (c) (3) "Community Awards Program"	(862.07)
1799	Literacy Volunteers of Greater Waterbury 267 Grand St Waterbury CT 06702 501 (c) (3) "Community Awards Program"	(814.18)
1800	Howard Whittemore Memorial Library 243 Church St Naugatuck CT 06770 501 (c) (3) "Community Awards Program"	(814 18)
1801	Salvation Army (Ansonia) 26 Lester Street Ansonia CT 06401 501 (c) (3) "Community Awards Program"	(814.18)
1802	Naugatuck Ecumenical Outreach Network 210 Church St Naugatuck CT 06770 501 (c) (3) "Community Awards Program"	(814.18)
1803	Greater Waterbury Interfaith Ministries 16 Churchh St Waterbury CT 06702 501 (c) (3) "Community Awards Program"	(500 00)
1804	Oxford High School-Backpack Basis 61 Quaker Farms Road, Oxford, CT 06478 501 (c) (3) "Community Awards Program"	(500 00)
1805	Rochambeau Middle School 100 Peter Rd Southbury CT 06488 501 (c) (3) "Community Awards Program"	(500.00)
1806	St John of the Cross Mission Trip 1321 Whittemore Rd Middlebury CT 06762 501 (c) (3) "Community Awards Program"	(500.00)
1807	Thresholds, Inc P.O.Box 504 Cheshire CT 501 (c) (3) "Community Awards Program"	(500.00)
1808	United Methodist Church 305 Main St. Watertown CT 501 (c) (3) "Community Awards Program"	(500.00)
1809	Seven Angels Theatre Plank Rd. P.O.Box 3358 Waterbury CT 06705 501 (c) (3) "Halo Awards"	(7,500.00)
1810	Naugatuck Senior Center 300 Meadow Street Naugatuck CT 06770 501 (c) (3) "Boxed lunches for Naugatuck Senior Day"	(750.00)
1811	New Beginnings Lutheran Church, 505 South Main Street, Thomaston, CT 06787 501 (c) (3) "New Beginnings-June-Sept. 2013"	(1,000 00)
1815	Greater Waterbury Interfaith Ministries 16 Church St Waterbury CT 06702 501 (c) (3) "Summer Soup Kitchen"	(3,000.00)
1817	Town of Oxford 486 Oxford Rd Oxford CT 06478 501 (c) (3) "Oxford H.S. Scoreboard 1st	(13,150.00)
1818	United Way of Naugatuck & Beacon Falls 284 Church St Naugatuck CT 501 (c) (3) "Community Impact Transition"	(4,440.00)
1819	CCSU Foundation, Inc 1615 Stanley St , New Britain, CT 06050 501 (c) (3) "Ins. & Banking Initiatives & Boot Camp"	(5,000.00)
1822	Spanish Community of Wallingford 284 Washington St, Wallingford, CT 06492 "Noche de Musica"	(1,000 00)
1823	Quinnipiac University 275 Maount Carmel Ave, Hamden CT 06518 501 (c) (3) "School of Med. Naming Pledge 1 of 5"	(10,000.00)
1824	Town of Oxford 486 Oxford Rd Oxford CT 06478 501 (c) (3) "Oxford H S. Scoreboard - Final Payment"	(13,150.00)
1826	Young Audiences Arts for Learning Connecticut 3074 Whitney Avenue, Building 2,2nd Floor, Hamden CT 501 (c) (3) "Lerning Together Workshop, Hamden"	(1,000.00)
1827	City of Waterbury, Bd of Education 236 Grand Street, 3rd Floor, Waterbury CT 06702 501 (c) (3) "Wtby. Pub. H.S. Subs Abuse Prev"	(1,500.00)
1828	Corporation of the Blessed Sacrament Waterbury CT 06702 501 (c) (3) "Blessed Sacrament Child Theatre"	(2,000.00)
1829	Rebuilding Together Litchfield Country 122 Stilson Hill Road New Milford CT 06776 501 (c) (3) "Woodbury & Southbury Homes"	(500.00)
1831	Literacy Volunteers of Greater 267 Grand St Waterbury CT 06702 501 (c) (3) "2013 Scrabble Challenge Sponsor"	(1,250.00)
1832	Children's Community School, Inc 31Wolcott Street, P.O Box 1746 Waterbury CT 06721 501 (c) (3) "Comp. Lab & Information Tech.System Center"	(5,000.00)
1834	Ronald McDonald House 501 George St New Haven CT 06511 501 (c) (3) "Trees of Hope-2013"	(800.00)
1836	Mattatuck Museum 144 West Main St Waterbury CT 06702 501 (c) (3) "5th Annual Brass Button Award"	(600.00)
1837	Concepts for Adaptive Learning "Digital Literacy for Early Leaners-Wtby"	(4,000.00)
1838	Connecticut Assoc. for Human Services "VITA"	(3,000.00)
1839	Connecticut Community Foundation 43 Field St Waterbury, CT 06702 501 (c) (3) "Give Local-2013 Presenting Sponsor"	(10,000.00)
1841	Family Service Of Greater Waterbury 34 Murray st Waterbury 501 (c) (3) "Behavior Health Prog Expansion Training"	(5,000.00)

Num	Description	Amount
1842	Flanders Nature Center & Land Trust, Inc 5 Church Hıll Rd Woodbury CT 06798 501 (c) (3) "Contrıbution"	(3,000.00)
1843	Lıteracy Volunteers of Greater Waterbury 267 Grand St Waterbury CT 06702 501 (c) (3) "Contrıbution"	(3,000.00)
1845	New Brıtaın Museum of Amerıcan Art 56 Lexıngtn St New Brıtaın CT 06052 501 (c) (3) "Access to Arts-Naugatuck & Waterbury"	(10,000.00)
1846	New Haven Symphony Orchestra, Inc P.O.Box 9718, New Haven, CT 06536 501 (c) (3) "Emerg. Shelter for Woman & Chıldren"	(1,000.00)
1847	Salvation Army - 24 Central Ave Waterbury CT 06702 501 (c) (3) "Waterbury Famıly Emerg.Shelter"	(10,000 00)
1848	Seymou Publıc Schools 2 Botsford Rd Seymour CT 06483 501 (c) (3) "10th Annıversary Take a Stand 2014"	(1,000 00)
1849	Mattatuck Museum Arts & Hıstory Center 144 West Maın St Waterbury CT 06702 501 (c) (3) "Family Arts & Hıstory Packs"	(4,620.00)
1851	MıdState Medıcal Center 435 Lewıs Ave Merıden, CT 06451 501 (c) (3) "Royal Tıger 2013 Gala Sponsor"	(5,500 00)
1852	Unıted Way Of Greater Waterbury P.O. Box 2688 Waterbury, CT 06723 501 (c) (3) "Bronze Corporate Sponsorshıp"	(2,500.00)
1853	Naugatuck Valley Communıty College 750 Chase Parkway Waterbury CT 06708 501 (c) (3) "Adv Manufacturıng Tech Center"	(1,000.00)
1854	Waterbury Symphony Orchestra P.O.Box 1762 Waterbury CT 501 (c) (3) "A Connectıcut Chrıstmas"	(2,500.00)
1855	Cheshire Communıty YMCA 961 South Maın Street Cheshıre CT 06410 501 (c) (3) "Lıvestrong - Pıcnıc"	(750.00)
1856	The Naugatuck Senıor Center 300 Meadow St Naugatuck CT 06770 501 (c) (3) "Balance Owed for Senior Day 09/19/13"	(250.00)
1857	Bhcare 435 E. Maın St. Ansonıa CT 06401 501 (c) (3) "Annual Holıday Gala"	(500.00)
2001	Naugatuck Beautıficatıon Naugatuck CT 06770 501 (c) (3) "Portable Skatıng Rınk"	(3,000.00)
2002	Waterbury Hospıtal Fund Development Office 64 Robbıns St Waterbury, CT 06721 501 (c) (3) "14th Annual Charıty Gala"	(1,250.00)
2003	Salvatıon Army -Wterbury 24 Central Ave Waterbury CT 06702 501 (c) (3) "2013 Kettle Kick-off Breakfast"	(2,600 00)
2004	Naugatuck YMCA 284 Church St Naugatuck CT 06770 501 (c) (3) "Basıc Metricks Toolkıt"	(2,000.00)
2009	Boys & Gırls Club of Merıden 15 Lıncoln St Merıden CT 06451 501 (c) (3) "125th Ann. Celebratıon-Event Sponsor"	(5,000 00)
2010	Connectıcut Counselıng Center, Inc 60 Beaver Brook Rd Danbury CT 06810 501 (c) (3) "Translatıon & Ed. Materıals.-Wtby Area"	(3,000.00)
2011	TEAM Elızabeth St Derby, CT 06418 501 (c) (3) "Toys 4 Kıds"	(500.00)
2012	Saınt Mıchael's on the Green 210 Church St Naugatuck CT 06770 501 (c) (3) "Annual Thanksgivıng Dınner	(250.00)
2013	Unıted Way of Naugatuck & Beacon Falls 284 Church St Naugatuck CT 501 (c) (3) "Festıval of Trees Sponsor"	(1,000.00)
2014	St.Brıdget School 171 Maın Street Cheshıre CT 06410 501 (c) (3) Beardsley Zoo Mobıle Wıld Assembly Sponsor"	(400.00)
2015	Gırls, Inc of Merıden 130 Lıncoln St. Merıden CT 06451 501 (c) (3) "Commıttee of 100 Dınner"	(500.00)
2016	St. Vıncent De Paul P.O.Box 1612 Waterbury CT, 06721 501 (c) (3) "Thanksgıvıng Turkey for "	(762 00)
2017	Unıted Way of Merıden 35 Pleasant St Merıden CT 06450 501 (c) (3) "Thanksgıvıng Turkey for Non-Profits'	(1,000.00)
2018	Connecticut Councıl for Education Reform "Connectıcut Educatıonal Challenges"	(5,000 00)
2023	Connectticut Food Bank P.O. Box 8686 New Haven, CT 06531 501 (c) (3) "Annual Contrıbutıon"	(2,000.00)
2024	Easter Seals Waterbury 22 Tompkıns St Waterbury, CT 06708 501 (c) (3) "Annual Contrıbutıon"	(2,000.00)
2025	Ecumenıcal Food Bank P.O. Box 796 Naugatuck CT 06770 501 (c) (3) "Annual Contrıbutıon"	(3,000.00)
2026	Famıly Servıces of Gr. Wtby 34 Murray st. Waterbury 501 (c) (3) "Annual Contrıbutıon"	(4,000.00)
2027	Greater Wtby Interfaıth Mınıstrıes 16 Church St Waterbury CT 06702 501 (c) (3) "Annual Contrıbutıon"	(3,000 00)
2028	Grıffin Hospıtal 130 Dıvisıon st Derby, CT 06418 501 (c) (3) "Annual Contrıbutıon"	(2,500 00)

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Num	Description	Amount
2029	Literacy Volunteers of Greater Waterbury 267 Grand St Waterbury CT 06702 501 (c) (3) "Annual Contribution"	(1,500.00)
2030	MidState Medical Center 435 Lewis Ave Meriden, CT 06451 501 (c) (3) "Annual Contribution"	(2,500 00)
2031	Operation Fuel One Regency Drive, Suite 200, Bloomfield, CT 06002 501 (c) (3) "Annual Contribution"	(3,000.00)
2032	Safe Haven of Greater 29 Central Ave. Waterbury CT 06702 501 (c) (3) "Annual Contribution"	(2,500.00)
2033	T.E.A.M.-Vita Program Elizabeth St Derby, CT 06418 501 (c) (3) "Annual Contribution"	(2,500.00)
2034	United Way of Gr.Waterbury P.O Box 2688 Waterbury, CT 06723 501 (c) (3) "Annual Contribution"	(14,400.00)
2035	United Way of Meriden & Wallingford 35 Pleasant Street Suite 1E Meriden CT 06450 501 (c) (3) "Annual Contribution"	(4,000.00)
2036	United Way of Naugatuck & Beacon Falls 284 Church St Naugatuck CT 501 (c) (3) "Annual Contribution"	(50,000.00)
2038	Wellmore, Inc 141 East Main St Waterbury CT 501 (c) (3) "Annual Contribution"	(2,500 00)
2039	Children's Law Center 30 Arbur St Hartford, CT 06106 501 (c) (3) "Annual Contribution"	(2,500.00)
2040	Valley United Way P.O. Box 418 Ansonia, CT 06407 501 (c) (3) "Annual Contribution"	(4,400.00)
2041	United Way of Greater New Haven 900 Chapel St New Haven CT 06510 501 (c) (3) "Annual Contribution"	(1,000.00)
2043	Beat the Street Community Center, Inc 121 So. Colony Street, Meriden, CT 06450 501 (c) (3) "Career Development Program"	(3,500 00)
2044	Boys & Girls Club of Greater Waterbury 1037 E. Main Street Waterbury CT 501 (c) (3) "Project Learn"	(5,000 00)
2045	Brass City Harvest P.O. Box 11115, Waterbury CT 06703 501 (c) (3) "Mobile Farmers Market"	(10,000.00)
2046	Connecticut Food Bank P.O. Box 8686 New Haven, CT 06531 501 (c) (3) "Waterbury Mobile Pantry"	(1,000.00)
2047	Girls, Inc Southwestern CT 35 Park Place Waterbury CT 06702 501 (c) (3) "Friday Night Events"	(1,000.00)
2048	Greater Waterbury Interfaith Ministries 16 Church St Waterbury CT 06702 501 (c) (3) "Food Stamp Outreach"	(4,000.00)
2049	Habit for Humanity of Greater Waterbury P.O. Box 1881 Waterbury CT 06722 501 (c) (3) "New House Buld"	(5,000.00)
2050	Housatonic Valey Association 24 Main St, Salisbury, CT 06068 501 (c) (3) "Naugatuck River Website"	(1,188 00)
2051	Literacy Volunteers of Greater Waterbury 267 Grand St Waterbury CT 06702 501 (c) (3) "Waterbury Reads Program"	(2,100.00)
2052	Meriden Children First 105 Miller Street, Meriden CT 501 (c) (3) "Meriden Zone"	(10,000.00)
2053	Meriden Dept. Of Police 50 W Main St, Meriden, CT 06451 501 (c) (3) "Cellebrite Kit-Forensic Tech"	(5,000.00)
2054	Partnerships In Learning & Creative Exploration 2781 Dixwell Ave, Hamden, CT06518 501 (c) (3) "After School Art & Film Workshop"	(1,000 00)
2055	Taft School 110 Woodbury Rd. Watertown CT 06795 501 (c) (3) "Center for Global Leadership & Service"	(4,400 00)
2056	Women's Business Development 888 Washington Blvd Stamford, CT 06901 501 (c) (3) "Access to Cap., Bus Sustain, & Fin. Educ."	(2,500.00)
2057	Mattatuck Museum 144 West Main St Waterbury CT 06702 501 (c) (3) "Community Room Naming"	(3,000.00)
2058	Saint Mary's Hospital Foundation 56 Franklin Street Waterbury CT 06706 501 (c) (3) "Annual Contribution"	(5,000.00)
2059	Waterbury Hospital 64 Robbins St Waterbury, CT 06721 501 (c) (3) "Annual Contribution"	(5,000.00)
		(496,360.03)

Form **8868**
(Rev. January 2014)
Department of the Treasury
Internal Revenue Service

Application for Extension of Time To File an Exempt Organization Return

▶ File a separate application for each return.
▶ Information about Form 8868 and its instructions is at *www.irs.gov/form8868*

OMB No. 1545-1709

- 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* 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

Enter filer's identifying number

Type or print	Name of exempt organization or other filer, see instructions. Ion Bank Foundation, Inc.	Employer identification number (EIN) or 06-1513293
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. 251 Church Street	Social security number (SSN)
	City, town or post office, state, and ZIP code For a foreign address, see instructions. Naugatuck, CT 06770	

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

- The books are in the care of ▶ Ion Bank
  251 Church St - Naugatuck, CT 06770
  Telephone No. ▶ (203)729-5291 Fax No. ▶
- If the organization does not have an office or place of business in the United States, check this box ▶ [ ]
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) ____. If this is for the whole group, check this box ▶ [ ]. If it is for part of the group, check this box ▶ [ ] and attach a list with the names and EINs of all members the extension is for.

1 I request an automatic 3-month (6 months for a corporation required to file Form 990-T) extension of time until August 15, 2014, to file the exempt organization return for the organization named above The extension is for the organization's return for:
▶ [X] 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

3a	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.	3a	$ 17,795.
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.	3b	$ 5,295.
c	**Balance due.** Subtract line 3b from line 3a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	3c	$ 12,500.

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.