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ON EXTENSION TO NOVEMBER 17, 2014

## Return of Private Foundation

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

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OMB No 1545-0052

2013

Open to Public Inspection

Form 990-PF

Department of the Treasury  
Internal Revenue Service

For calendar year 2013 or tax year beginning

, and ending

Name of foundation <b>THE WELLER FOUNDATION, INC.</b>		A Employer identification number <b>06-6068987</b>
Number and street (or P.O. box number if mail is not delivered to street address) <b>P.O. BOX 1145</b>	Room/suite	B Telephone number <b>203-263-0229</b>
City or town, state or province, country, and ZIP or foreign postal code <b>WOODBURY, CT 06798</b>		C If exemption application is pending, check here <input type="checkbox"/>
G Check all that apply: <input type="checkbox"/> Initial return <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Final return <input type="checkbox"/> Amended return <input type="checkbox"/> Address change <input type="checkbox"/> Name change		D 1 Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
H Check type of organization <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col (c), line 16) <b>\$ 2,871,221.</b>	J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received				N/A	
2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch. B					
3 Interest on savings and temporary cash investments		11.	11.		STATEMENT 1
4 Dividends and interest from securities		88,377.	88,377.		STATEMENT 2
5a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10		-1,071.			
b Gross sales price for all assets on line 6a		556,864.			
7 Capital gain net income (from Part IV, line 2)			0.		
8 Net short-term capital gain					
9 Income modifications					
10a Gross sales less returns and allowances					
b Less Cost of goods sold					
c Gross profit or (loss)					
11 Other income		216.	216.		STATEMENT 3
12 Total. Add lines 1 through 11		87,533.	88,604.		
13 Compensation of officers, directors, trustees, etc.		36,881.	500.		36,381.
14 Other employee salaries and wages					
15 Pension plans, employee benefits					
16a Legal fees					
b Accounting fees STMT 4		8,997.	0.		8,997.
c Other professional fees					
17 Interest					
18 Taxes STMT 5		8,916.	0.		0.
19 Depreciation and depletion					
20 Occupancy		1,127.	0.		1,127.
21 Travel, conferences, and meetings		1,454.	0.		1,454.
22 Printing and publications					
23 Other expenses STMT 6		6,746.	0.		6,746.
24 Total operating and administrative expenses. Add lines 13 through 23		64,121.	500.		54,705.
25 Contributions, gifts, grants paid		79,258.			79,258.
26 Total expenses and disbursements. Add lines 24 and 25		143,379.	500.		133,963.
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements		-55,846.			
b Net investment income (if negative, enter -0-)			88,104.		
c Adjusted net income (if negative, enter -0-)				N/A	

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LHA For Paperwork Reduction Act Notice, see instructions.

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Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only		
		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing			
	2 Savings and temporary cash investments	251,940.	264,502.	264,502.
	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 STMT 7	119,777.	24,226.	26,668.
	b Investments - corporate stock STMT 8	1,393,493.	1,498,889.	2,170,464.
	c Investments - corporate bonds STMT 9	458,306.	380,053.	409,587.
Liabilities	11 Investments - land, buildings, and equipment basis ▶			
	Less: accumulated depreciation ▶			
	12 Investments - mortgage loans			
	13 Investments - other			
	14 Land, buildings, and equipment, basis ▶			
	Less: accumulated depreciation ▶			
	15 Other assets (describe ▶)			
	16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item 1)	2,223,516.	2,167,670.	2,871,221.
	17 Accounts payable and accrued expenses			
	18 Grants payable			
Net Assets or Fund Balances	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe ▶)			
	23 Total liabilities (add lines 17 through 22)	0.	0.	
	Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/>			
	and complete lines 24 through 26 and lines 30 and 31			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ <input checked="" type="checkbox"/>			
	and complete lines 27 through 31			
	27 Capital stock, trust principal, or current funds	2,223,516.	2,167,670.	
	28 Paid-in or capital surplus, or land, bldg, and equipment fund	0.	0.	
	29 Retained earnings, accumulated income, endowment, or other funds	0.	0.	
	30 Total net assets or fund balances	2,223,516.	2,167,670.	
	31 Total liabilities and net assets/fund balances	2,223,516.	2,167,670.	

## 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	2,223,516.
2 Enter amount from Part I, line 27a	2	-55,846.
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	2,167,670.
5 Decreases not included in line 2 (itemize) ▶	5	0.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	2,167,670.

**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.)
<b>1a PUBLICLY TRADED SECURITIES</b>		<b>P</b>		
b				
c				
d				
e				
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)	
a 556,864.		557,935.	-1,071.	
b				
c				
d				
e				
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))	
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any		
a			-1,071.	
b				
c				
d				
e				
2 Capital gain net income or (net capital loss)		<div style="display: flex; align-items: center;"> <div style="border-left: 1px solid black; padding-left: 5px;">           { If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7         </div> <div style="margin-left: 10px;">2</div> </div>		-1,071.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8		<div style="display: flex; align-items: center;"> <div style="border-left: 1px solid black; padding-left: 5px;">           { If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8         </div> <div style="margin-left: 10px;">3</div> </div>		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	120,303.	2,559,765.	.046998
2011	101,244.	2,409,034.	.042027
2010	99,353.	2,274,386.	.043683
2009	108,165.	2,057,076.	.052582
2008	122,371.	2,441,294.	.050125
2 Total of line 1, column (d)			2 .235415
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 .047083
4 Enter the net value of noncharitable-use assets for 2013 from Part X, line 5			4 2,732,676.
5 Multiply line 4 by line 3			5 128,663.
6 Enter 1% of net investment income (1% of Part I, line 27b)			6 881.
7 Add lines 5 and 6			7 129,544.
8 Enter qualifying distributions from Part XII, line 4 If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions.			8 133,963.

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

1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)			
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b		1	881.
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	881.
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	881.
6 Credits/Payments:			
a 2013 estimated tax payments and 2012 overpayment credited to 2013	6a	1,500.	
b Exempt foreign organizations - tax withheld at source	6b		
c Tax paid with application for extension of time to file (Form 8868)	6c	500.	
d Backup withholding erroneously withheld	6d		
7 Total credits and payments. Add lines 6a through 6d	7	2,000.	
8 Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8	7.	
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9		
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	1,112.	
11 Enter the amount of line 10 to be: Credited to 2014 estimated tax <input checked="" type="checkbox"/> 1,112. Refunded <input type="checkbox"/>	11	0.	

**Part VII-A Statements Regarding Activities**

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for the definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. <input checked="" type="checkbox"/> \$ 0. (2) On foundation managers. <input checked="" type="checkbox"/> \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input checked="" type="checkbox"/> \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), and Part XV	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) <input checked="" type="checkbox"/> CT		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2013 or the taxable year beginning in 2013 (see instructions for Part XIV)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

N/A

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

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	
Website address ► N/A				
14	The books are in care of ► THE FOUNDATION Telephone no. ► 203-263-0229			
Located at ► P.O. BOX 1145, WOODBURY, CT		ZIP+4 ► 06798		
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year	15	N/A	
16	At any time during calendar year 2013, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for Form TD F 90-22.1. If "Yes," enter the name of the foreign country ►	16	Yes	No
				X

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

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

	Yes	No
1a During the year did the foundation (either directly or indirectly):		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here	1b	X
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2013?	1c	X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):		
a At the end of tax year 2013, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2013? If "Yes," list the years ►	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.)	N/A	2b
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ►		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b If "Yes," did it have excess business holdings in 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

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

5a During the year did the foundation pay or incur any amount to:

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☒ Yes ☐ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

Organizations relying on a current notice regarding disaster assistance check here

☒

5b

X

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

N/A

☐ Yes ☐ No

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

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?

☐ Yes ☒ No

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

If "Yes" to 6b, file Form 8870

6b

X

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?

☐ Yes ☒ No

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

N/A

7b

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

1 List all officers, directors, trustees, foundation managers and their compensation.

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
SEE STATEMENT 10		36,881.	0.	0.

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

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

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

0

Form 990-PF (2013)





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

<b>1</b>	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
<b>a</b>	Average monthly fair market value of securities	<b>1a</b>	2,518,195.
<b>b</b>	Average of monthly cash balances	<b>1b</b>	256,095.
<b>c</b>	Fair market value of all other assets	<b>1c</b>	
<b>d</b>	<b>Total</b> (add lines 1a, b, and c)	<b>1d</b>	2,774,290.
<b>e</b>	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	<b>1e</b>	0.
<b>2</b>	Acquisition indebtedness applicable to line 1 assets	<b>2</b>	0.
<b>3</b>	Subtract line 2 from line 1d	<b>3</b>	2,774,290.
<b>4</b>	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	<b>4</b>	41,614.
<b>5</b>	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. Enter here and on Part V, line 4	<b>5</b>	2,732,676.
<b>6</b>	<b>Minimum investment return.</b> Enter 5% of line 5	<b>6</b>	136,634.

**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.)

<b>1</b>	Minimum investment return from Part X, line 6	<b>1</b>	136,634.
<b>2a</b>	Tax on investment income for 2013 from Part VI, line 5	<b>2a</b>	881.
<b>b</b>	Income tax for 2013. (This does not include the tax from Part VI.)	<b>2b</b>	
<b>c</b>	Add lines 2a and 2b	<b>2c</b>	881.
<b>3</b>	Distributable amount before adjustments. Subtract line 2c from line 1	<b>3</b>	135,753.
<b>4</b>	Recoveries of amounts treated as qualifying distributions	<b>4</b>	0.
<b>5</b>	Add lines 3 and 4	<b>5</b>	135,753.
<b>6</b>	Deduction from distributable amount (see instructions)	<b>6</b>	0.
<b>7</b>	<b>Distributable amount as adjusted.</b> Subtract line 6 from line 5. Enter here and on Part XIII, line 1	<b>7</b>	135,753.

**Part XII****Qualifying Distributions** (see instructions)

<b>1</b>	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
<b>a</b>	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	<b>1a</b>	133,963.
<b>b</b>	Program-related investments - total from Part IX-B	<b>1b</b>	0.
<b>2</b>	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	<b>2</b>	
<b>3</b>	Amounts set aside for specific charitable projects that satisfy the:		
<b>a</b>	Suitability test (prior IRS approval required)	<b>3a</b>	
<b>b</b>	Cash distribution test (attach the required schedule)	<b>3b</b>	
<b>4</b>	<b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	<b>4</b>	133,963.
<b>5</b>	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	<b>5</b>	881.
<b>6</b>	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4	<b>6</b>	133,082.

**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				135,753.
2 Undistributed income, if any, as of the end of 2013				
a Enter amount for 2012 only			115,382.	
b Total for prior years.		0.		
3 Excess distributions carryover, if any, to 2013:				
a From 2008				
b From 2009				
c From 2010				
d From 2011				
e From 2012				
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2013 from Part XII, line 4: ▶ \$ 133,963.				
a Applied to 2012, but not more than line 2a			115,382.	
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				18,581.
e Remaining amount distributed out of corpus	0.			
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:	0.			
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	0.			
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				117,172.
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	0.			
9 Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a	0.			
10 Analysis of line 9:				
a Excess from 2009				
b Excess from 2010				
c Excess from 2011				
d Excess from 2012				
e Excess from 2013				

## N/A

- 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 |          |          | (e) Total |
|----------|---------------|----------|----------|-----------|
| (a) 2013 | (b) 2012      | (c) 2011 | (d) 2010 |           |

- (4) Gross investment income**

Form **990-PF** (2013)

3 Grants and Contributions Paid During the Year or Approved for Future Payment



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

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

[illegible]

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

(a) Name of organization	(b) Type of organization	(c) Description of relationship
N/A		

**Sign  
Here**

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

~~Signature of officer or trustee~~

Date \_\_\_\_\_

Title

May the IRS discuss this return with the preparer

☒ Yes    ☐ No

**Paid  
Preparer  
Use Only**

Print/Type preparer's name

Preparer's signature

Date

Check ☐  
self-employed

PTIN

BRIAN E. SKINNER

Firm's name ► **WILLIAM H. PARR & COMPANY, LLP**

Firm's EIN ► 06-0727429

Firm's address ► 381 POST ROAD  
DARIEN, CT 06820

Phone no. 203-655-8261

## 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
PEOPLE'S BANK	11.	11.	
TOTAL TO PART I, LINE 3	11.	11.	

## FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
MORGAN STANLEY	88,377.	0.	88,377.	88,377.	
TO PART I, LINE 4	88,377.	0.	88,377.	88,377.	

## FORM 990-PF OTHER INCOME STATEMENT 3

DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
MISCELLANEOUS	216.	216.	
TOTAL TO FORM 990-PF, PART I, LINE 11	216.	216.	

## FORM 990-PF ACCOUNTING FEES STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
TAX RETURN	8,997.	0.		8,997.
TO FORM 990-PF, PG 1, LN 16B	8,997.	0.		8,997.

FORM 990-PF	TAXES	STATEMENT	5
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
2012 FEDERAL EXTENSION PYMT- 5/14/2013	2,000.	0.		0.
BALANCE DUE 2012 FORM 990-PF	5,416.	0.		0.
FEDERAL TAX ESTIMATE - 11/15/2013	1,500.	0.		0.
TO FORM 990-PF, PG 1, LN 18	8,916.	0.		0.

FORM 990-PF	OTHER EXPENSES	STATEMENT	6
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
INSURANCE	1,475.	0.		1,475.
JUDGING FEES	900.	0.		900.
SCHOLARSHIP AWARD PROMOTION, BROCHURES	965.	0.		965.
MISCELLANEOUS	969.	0.		969.
SUPPLIES	2,437.	0.		2,437.
TO FORM 990-PF, PG 1, LN 23	6,746.	0.		6,746.

FORM 990-PF	U.S. AND STATE/CITY GOVERNMENT OBLIGATIONS	STATEMENT	7
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DESCRIPTION	U.S. GOV'T	OTHER GOV'T	BOOK VALUE	FAIR MARKET VALUE
U.S. TREASURY STRIPS	X		0.	0.
GINNIE MAE POOLS	X		1,636.	1,719.
ILLINOIS ST GENERAL OBLIGATIONS 4.950%		X	22,590.	24,949.
TOTAL U.S. GOVERNMENT OBLIGATIONS			1,636.	1,719.
TOTAL STATE AND MUNICIPAL GOVERNMENT OBLIGATIONS			22,590.	24,949.
TOTAL TO FORM 990-PF, PART II, LINE 10A			24,226.	26,668.



FORM 990-PF

CORPORATE STOCK

STATEMENT 8

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
AMEREN CORP	31,663.	36,160.
BANK OF AMERICA	27,219.	18,684.
BARRICK GOLD CORP	0.	0.
BERKSHIRE HATHAWAY B	30,063.	59,280.
CHEVRON TEXACO CORP	24,154.	76,945.
CITIGROUP INC.	36,177.	15,633.
COMCAST CORP (NEW)	11,077.	25,151.
DOW CHEMICAL	32,269.	44,400.
GENERAL ELECTRIC	35,527.	47,651.
INTEL CORP	11,883.	38,932.
I.B.M.	20,974.	37,514.
JOHNSON & JOHNSON	5,476.	45,795.
JPMORGAN CHASE & CO	38,617.	58,480.
MEXICO FUND	22,905.	27,102.
PEPSICO, INC	13,705.	66,352.
PFIZER INC	29,283.	30,630.
PROCTOR & GAMBLE	36,993.	146,538.
PROGRESS ENERGY	245.	146.
SMUCKER JM CO	13,812.	41,448.
UNITEDHEALTH GP INC	8,494.	28,614.
WAL MART STORES	12,513.	78,690.
JP MORGAN MID-CAP VALUE C	69,897.	111,129.
AMERICAN WA MUTUAL	37,485.	56,867.
FIRST EAGLE GLOBAL C	74,083.	99,247.
PRUDENTIAL JENNISON UTILITY A	76,742.	95,942.
ALLIANCEBER LARGE-CAP GRWTH FD C	0.	0.
ALLIANCEBER GLOBAL TECH C	0.	0.
BARCLAYS PLC	9,522.	3,626.
DWS HIGH INCOME OPPORTUNITIES	25,000.	9,000.
TRANSOCEAN INC NEW	21,021.	15,617.
HEALTH CARE SEL SECT	20,129.	33,264.
MICROSOFT CORP	16,986.	26,187.
SPDR GOLD TR	0.	0.
OPPENHEIMER INTL BOND FD	40,851.	37,882.
AMERICAN ELECTRIC POWER CO	20,869.	28,044.
VERIZON COMMUNICATIONS	23,701.	39,312.
PIMCO REAL RETURN BOND	0.	0.
AT&T INC	35,682.	42,192.
METLIFE INC	35,267.	31,575.
TEMPLETON GLOBAL BOND FD	40,736.	38,727.
CATERPILLAR INC	0.	0.
SPROUTT PHYSICAL SILVER TRUST	0.	0.
FORD MOTOR CO NEW	7,813.	9,258.
PEOPLE'S UNITED FINANCIAL INC	19,353.	22,680.
VODAFONE GP PLC	29,600.	39,310.
FEDERATED INTL STRAT VAL C	25,000.	27,676.
HARTFORD EQUITY INC C	20,000.	25,345.

JP MORGAN INCOME BUILDER C	50,000.	53,798.
AAM HIGH DIVIDEND STRATEGY 12-4Q	0.	0.
FIRST TRUST INTL HIGH DIVIDEND	0.	0.
VAN KAMPEN DIVERSIFIED HEALTHCARE PORT 61	21,187.	29,944.
VAN KAMPEN DOW JONES DIVIDEND 2012-3	0.	0.
VAN KAMPEN SELECT S & P INDUST 2012-2	0.	0.
VAN KAMPEN TECHNOLOGY 2012-2	0.	0.
ABBVIE CORP	15,138.	21,124.
GOLDMAN SACHS INC	18,477.	17,832.
NESTLE SPON ADR	13,699.	14,718.
SDPR S&P REGIONAL BANKING	13,933.	16,244.
FRANKLIN INCOME C	25,000.	25,408.
JP MORGAN EQUITY INCOME C	25,651.	27,609.
OPPENHEIMER SR FLOATING RATE C	30,000.	30,172.
AAM HIGH DIVIDEND STRATEGY 13-4Q	26,745.	27,774.
FIRST TRUST INTL HIGH DIVIDEND	25,862.	26,265.
INVESCO DOW JONES DIVIDEND INDEX	28,106.	32,096.
INVESCO GLOBAL HIGH DIVIDEND 2013-3	14,996.	15,248.
INVESCO SELECT S&P INDUSTRIAL 2013-2	58,360.	70,374.
INVESCO TECHNOLOGY 2013-2	23,959.	29,015.
INVESCO TECHNOLOGY 2013-4	14,990.	15,818.
TOTAL TO FORM 990-PF, PART II, LINE 10B	1,498,889.	2,170,464.

FORM 990-PF	CORPORATE BONDS	STATEMENT	9
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
CITIGROUP CAP VII 7.125%	0.	0.
CITIGROUP CAP XVI 6.45%	0.	0.
JOHN HANCOCK LIFE INC CO 2.74%	28,471.	30,564.
BANK OF AMERICA 5.42%	17,509.	22,307.
GENERAL ELECTRIC 5.625%	24,410.	28,854.
WELLS FARGO 5.625%	24,221.	28,733.
PRUDENTIAL FINANCIAL 8.875%	17,755.	24,404.
AMERICAN EXPRESS 6.800%	9,956.	10,882.
FPL GROUP CAPT INC 6.350%	19,556.	20,318.
GMAC 7.000%	0.	0.
WACHOVIA CAPITAL 5.569%	0.	0.
METLIFE INC 6.400%	0.	0.
LINCOLN NATL CORP 7.000%	18,570.	20,546.
PNC FIN SVCS 6.750%	14,924.	16,029.
GE CAPITAL CORP 6.375%	10,155.	10,931.
CITIGROUP INC 5.90%	20,509.	19,146.
MORGAN STANLEY 5.50%	24,459.	28,521.
NATIONWIDE FINL SVCS 6.75%	19,388.	19,973.
PRUDENTIAL FINANCIAL 5.875%	31,065.	31,006.
PRUDENTIAL FINANCIAL 5.625%	25,698.	24,562.
BARCLAYS BK PLC 6.86%	19,539.	20,711.
JPMORGAN CHASE 5.15%	24,486.	22,652.

THE WELER FOUNDATION, INC.

06-6068987

JPMORGAN CHASE 6.00%

29,382.

29,448.

TOTAL TO FORM 990-PF, PART II, LINE 10C

380,053.

409,587.

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
BRIAN E. SKINNER 176 MICHIGAN ROAD NEW CANAAN, CT 06840	VICE CHAIRMAN, TREASURER & VARIOUS	3,600.	0.	0.
MICHAEL J. SMITH 151 WILTON ROAD EAST RIDGEFIELD, CT 06877	CHAIRMAN & TRUSTEE VARIOUS	3,600.	0.	0.
LOUIS J. LACROCE 14 DIAMOND DRIVE NEWTOWN, CT 06470	TRUSTEE VARIOUS	3,600.	0.	0.
ALEXANDER FRASER 3 SEALAND DRIVE NEWTOWN, CT 06470	SECRETARY & TRUSTEE VARIOUS	3,600.	0.	0.
MICHAEL P. ZABINSKI 102 SHOREFRONT STREET MILFORD, CT 06460	TRUSTEE VARIOUS	3,600.	0.	0.
JOANN E. DAVIES 57 HESSEKY MEADOW ROAD WOODBURY, CT 06798	FOUNDATION MANAGER & TRUST VARIOUS	18,881.	0.	0.
TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII		36,881.	0.	0.

2013

SCHEDULE ATTACHED TO FORM 990-PF

Part XV, Line 2 - Information Regarding Scholarship Programs

The Foundation administers award and scholarship programs designed to provide benefits to high school students in five communities in Connecticut: Newtown, Monroe, Trumbull, Shelton, Easton and Redding.

Three of the programs, the Senior Science Award, the Eleanor F. Moore Business Award and Paul W. Broggi Communications Award, are presented annually in each of the five high schools, honoring students who have excelled in science, business studies and communications, and the recipients are chosen by the faculties of the individual high schools. No application is required.

A fourth program, the Vincent Voccia Vocational Award, is currently presented annually to high school students who have selected a vocational-technical career. The recipient is chosen according to the rules and regulations as described in the attached summary of the program.

The fifth program, the annual choice of a Barton L. Weller scholar, who must be a student in one of the five high schools, is chosen according to the rules and regulations established by the Foundation, which are described in the attached brochure regarding the program.

2013

SCHEDULE ATTACHED TO FORM 990-PF

Part XV, Line 2 - Information Regarding Scholarship Programs (continued)

A sixth program, The Weller Collegiate Scholarship, is presented annually to incoming freshman students at local colleges who are from one of the five communities. The recipients are chosen by the local colleges based on financial need. No application form is required.

The seventh program, The Weller Instrumental Music Scholarship, is presented annually to high school students who have enrolled in a conservatory or college as a music major with a concentration in instrumental music. The recipient is chosen according to the rules and regulations as described in the attached summary of the program. There was no program in 2013.

The eighth program, the Weller Medical/Health Sciences Scholarship, is presented annually based on the rules and regulations as described in the attached summary of the program.

The ninth program, the Weller Education Scholarship, is presented annually to a high school senior planning to pursue a teaching career in public or private elementary or secondary schools. The recipient is chosen according to the rules described in the attached summary.

The tenth program, the Weller Computer Science/Technology Scholarship, is presented annually to a high school senior planning to pursue a career in computer science or computer engineering. The recipient is chosen according rules in the attached summary. There was no program in 2013.

THE WELLER FOUNDATION, INCORPORATED

06-6068987

2013

SCHEDULE ATTACHED TO FORM 990-PF

Part XV, Line 2 - Information Regarding Scholarship Programs

In addition to the award or scholarship programs for high school students described above, the Foundation also grants an annual award to teachers in the public school systems of Monroe, Trumbull and Newtown, Connecticut. The Weller Excellence in Teaching Award is an award for kindergarten through fifth grade teachers in recognition of teaching quality and innovation. The recipients are selected according to the rules described in the attached summary.

The above award programs have been approved by the Internal Revenue Service under Section 4945 of the Internal Revenue Code.

# THE WELLER FOUNDATION, INCORPORATED

Box 1145, Woodbury, Connecticut 06798 / Telephone (203) 263-0229

2013

## THE VINCENT VOCCIA VOCATIONAL AWARD

---

The purpose of this award is to provide financial assistance to students planning a career in the skilled trades.

### **AWARD:**

Each participating school will be eligible for one\* award recipient to receive a grant equal to the lesser of \$3,000 or 50% of the cost of tuition and fees of the vocational-technical program proposed. Payment will be paid for the benefit of the recipient directly to the institution giving the vocational program. Normally, one-half of the award will be paid on enrollment and one-half after receipt of an official transcript from the institution indicating satisfactory completion of the first half of the program and verification of continued enrollment for the second half of the program. In no case will more than two payments be made, nor will any payment be made more than two years after the grant date. The program must begin within nine months of the date the award is granted or it shall be forfeited.

---

\* If for any reason there is no eligible winner from a participating school(s), the Trustees may, at their discretion, select an alternate winner from the remaining schools.

### **ELIGIBILITY:**

Applicants must be full-time students at Masuk, Newtown, Trumbull, Joel Barlow, or Shelton High School at the time the award is made and must not be a relative of a Trustee of The Weller Foundation, Incorporated. Applicants must be U.S. citizens, nationals, or permanent residents. The applicant shall demonstrate interest and talent in his or her chosen field and must be able to satisfy the admission requirements of the school selected.

There are no tests, quizzes, projects to complete, or interviews. A properly completed application form, submitted on or prior to the due date, will establish eligibility.

Financial need will not be a factor in determining the award recipient.

### **APPLICATION:**

Application forms will be provided by The Weller Foundation, Incorporated and shall be available through and later returned to the School's Guidance Office. The application form **must include** an attached copy of the student's transcript. Completed applications must be submitted to the Foundation's High School Representative by the below listed deadline date or they will not be accepted. Questions may be directed to the person in charge of distributing and collecting applications.

**THE DEADLINE FOR SUBMITTING APPLICATIONS IS WEDNESDAY,  
MARCH 20, 2013.**

**THE VINCENT VOCCIA VOCATIONAL AWARD – 2013**  
**PAGE 2 OF 3**

A committee composed of school staff members will recommend and rank the top three applicants. All applications must be returned to the Foundation.

A minimum of three qualified applications is necessary for each high school to select one recipient. In the event that less than three qualified applications are received, the applications received will be forwarded to the Foundation. Any award granted will be at the discretion of the Foundation.

**AWARD RECIPIENTS:**

The award recipients will be announced on or about Monday, April 1, 2013. The award recipients and their parents will be invited to attend the Foundation's Annual Awards Banquet to be held at 6:00 P.M. at Fairfield University on Wednesday, May 1, 2013. In order to receive the award, students must attend the Awards Banquet.

**PROGRAM REQUIREMENTS:**

The institution selected shall possess whatever accreditations/approvals/licenses are necessary to insure that the student receives a meaningful training program.

To be acceptable, the program shall provide a minimum of twenty weeks full-time (or equivalent) instruction. Examples of acceptable programs are:

Auto/Truck Maintenance	Electrical or Electronic Technicians
Aircraft Maintenance	Culinary Arts
Air Conditioning and	Barbering/Hairdressing
Refrigeration	Carpentry
Plumbing and Fitting	Secretarial
Masonry	Photography
Machine, Design (CAD)	

Certain non-listed programs may be acceptable. Applicants are advised to obtain the Foundation's approval before submitting an application for assistance in a non-listed program.

Correspondence schools courses are not acceptable under this program.

The decision of the Foundation regarding program eligibility and award recipient will be final.



**THE VINCENT VOCCIA VOCATIONAL AWARD -2013**  
**PAGE 3 OF 3**

**PROGRESS REPORTS:**

The institution will be requested to verify the recipient's program and tuition. The student will be required to submit to the Foundation copies of the bills that will be used to determine the second half payment. The institution will be required to submit an official transcript verifying the student's satisfactory completion of the first half of the award program and verification of continued enrollment for the second half of the program.

*In order to receive this award, the recipient must attend the Awards Banquet on Wednesday, May 1, 2013.*

*The Trustees reserve the right to exercise their discretion on all matters.*

AF:jed  
09-07-12

# THE WELLER FOUNDATION, INCORPORATED

Box 1145, Woodbury, Connecticut 06798 / Telephone (203) 263-0229

2013

## THE VINCENT VOCCIA VOCATIONAL AWARD APPLICATION FORM

**DEADLINE FOR SUBMISSION IS: MARCH 20, 2013**

*(To be filled in by the applicant. Please PRINT or TYPE all data.)*

**Applicant's Full Name:** \_\_\_\_\_

**Name of Parent(s) or Guardian:** \_\_\_\_\_

**Home Address:** \_\_\_\_\_

**Telephone #:** \_\_\_\_\_ **Age:** \_\_\_\_\_ **High School:** \_\_\_\_\_ **Class of 20** \_\_\_\_\_

**Cell Phone #:** \_\_\_\_\_ **E-mail :** \_\_\_\_\_

**Guidance Counselor:** \_\_\_\_\_

### PROPOSED PROGRAM DETAILS

**1. Future School Name:** \_\_\_\_\_

**Address:** \_\_\_\_\_

**Telephone #:** \_\_\_\_\_

**2. Name of anticipated future program (as shown in school's catalog):** \_\_\_\_\_

**3. Length of program:** \_\_\_\_\_ **Begins** \_\_\_\_\_ **Ends** \_\_\_\_\_

**4. Full-Time**                      **Part-Time**                      --- **Evenings**

**5. Cost of program – Do NOT include lodging, meals, or commute expenses:**

	<u>YEAR 1</u>	<u>YEAR 2</u>	<u>TOTAL</u>
<b>Tuition (Your Cost):</b>	<u>\$</u> _____	<u>\$</u> _____	<u>\$</u> _____
<b>Fees:</b>	_____	_____	_____
<b>(Other)</b>	_____	_____	_____
<u>Supplies</u>	_____	_____	_____
<u>Books</u>	_____	_____	_____
<b>TOTALS:</b>	<u>\$</u> _____	<u>\$</u> _____	<u>\$</u> _____

**THE VINCENT VOCCIA VOCATIONAL AWARD - 2013  
APPLICATION FORM – PAGE 2 OF 3**

6. Award at completion of program: Certificate/Diploma                      Degree
7. Is there an application deadline? \_\_\_\_\_
8. Have you already applied? \_\_\_\_\_ Been accepted? \_\_\_\_\_
9. What are the admission requirements? \_\_\_\_\_

**STUDENT INFORMATION**

1. Why do you want to participate in this program? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
2. List related courses (with grades) you have or are now taking: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
3. School activities and offices: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
4. Hobbies and other interests: \_\_\_\_\_  
\_\_\_\_\_
5. Identify any current jobs(s): \_\_\_\_\_  
\_\_\_\_\_
6. Describe any other work experience: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
7. References: If you wish to include written references, attach them to this application and identify attachments below.

**THE VINCENT VOCCIA VOCATIONAL AWARD - 2013**  
**APPLICATION FORM – PAGE 3 OF 3**

**STATEMENT:** 1. I am not related to any Trustee of The Weller Foundation,  
Incorporated.

2. I am currently enrolled at \_\_\_\_\_ High School.

**Signed:** \_\_\_\_\_ **Date Submitted:** \_\_\_\_\_

**Received by School Rep:** \_\_\_\_\_ **Date Received:** \_\_\_\_\_

**AF:jed**  
**09-07-12**

**Attachment: Student's Transcript**

THE  
**Barton L. Weller**

SCHOLARSHIP  
2012 ♦ 2013



Presented by  
The Weller Foundation, Incorporated

A \$14,000 Scholarship designed to encourage  
independent study or research among area high school seniors

## ***Who is eligible to participate?***

Any senior-year student attending Joel Barlow, Masuk, Newtown, Shelton or Trumbull High School on a full-time basis during the entire 2012-2013 academic year. Applicants must be U.S. citizens, nationals, or permanent residents. The award recipient must attend a four-year undergraduate degree program in the United States.

## ***What is required?***

To complete a five-month, original independent research or study project... the 2013 Barton L. Weller Scholar will be selected by a panel of judges.

## ***What topics can you pursue?***

Any topic—from art to behavioral science to computers to zithers—providing it involves original, independent study or creative endeavor.

## ***What should participants do to enter?***

### ***Read the attached Rules...***

Submit a one- or two-page proposal on your topic and mail it to the Trustees of the Foundation (see address under Rules). Proposals must be **received** by the Foundation by October 15, 2012. We recommend you allow for possible delays in delivery. Up to five finalists will be selected from all entries and will be notified by November 2, 2012.

## ***If you're selected as a finalist...***

You will receive \$200 to help defray expenses... and will have from November 2, 2012 until March 20, 2013 to submit your final project.

## ***When will the scholarship be presented?***

The finalists, who have successfully completed and submitted their projects on time, will be invited to a dinner in their honor on May 1, 2013. At that time, the \$14,000 scholarship will be presented to the student whose project is judged to be the best, and all runners-up will receive \$500 for completion and timely submission of their projects.

### **PROJECT CALENDAR**

Sept. 7, 2012	.....	Announce scholarship in high schools and local newspapers
Oct. 15, 2012	.....	Proposals due for evaluation
Nov. 2, 2012	.....	Finalists announced
Nov. 2, 2012 – Mar. 20, 2013	.....	Project period
Nov. 13, 2012	.....	Initial check awarded
Jan. 17, 2013	.....	Mid-project review
Mar. 20, 2013	.....	Final date for submission of projects
Apr. 11, 2013	.....	Interview session with judges
May 1, 2013	.....	Award dinner

### **BOARD OF TRUSTEES**

Michael J. Smith – Chairman  
Brian E. Skinner – Vice Chairman and Treasurer  
Alexander Fraser – Secretary

JoAnne E. Davies  
Louis J. LaCroce  
Michael P. Zabinski

# The Weller Foundation, Incorporated ♦ Barton L. Weller Scholarship

## RULES

The Weller Foundation, Incorporated provides an annual scholarship in honor of Barton L. Weller who was the founder of Vitramon, Incorporated and whose generosity has made the award possible. Its purpose is to encourage academic excellence in a substantial independent project.

### PROPOSALS

1 The Foundation will accept proposals from seniors who are full-time students at Joel Barlow, Masuk, Newtown, Shelton and Trumbull High Schools, each outlining a project to be developed during academic year 2012–2013. The student must remain a full-time student for the entire academic year.

2. Applicants must be U.S. citizens, nationals, or permanent residents. Winners must attend a four-year undergraduate degree program in the United States.

3 Topics for projects are not limited by content or scholastic field. For example.

A study of economic or political forces influencing the immediate geographic area.

A science or engineering project.

A study of the effect of environmental factors on the immediate geographic area.

A project in the fine arts.

A computer system or software project.

A mathematics project.

Any proposal for a project requiring basic study and originality will be considered. The student must clearly demonstrate in the proposal that the project is logistically and financially feasible. Proposals requiring the use of non-student owned equipment or which necessitate classroom involvement of other students or school facilities must attach written permission from an authorized official for such use. A student may submit only one proposal. If more than one proposal is received from a student, all his/her proposals will be disqualified.

4 Proposals of no more than 2 pages (not including required attachments) must outline the student's project by including the following sections entitled: Title, Stated Objective, Project Content, and Summary. The proposal will be judged by a committee of the Foundation Trustees for:

- Format of the proposal
- Project potential
- Originality
- Care with which proposal and its planned implementation has been thought through

Up to five proposals will be accepted. Each of the finalists submitting an accepted proposal will be awarded \$200 on November 13, 2012. An alternate finalist will be notified of his/her selection should a finalist withdraw from the program prior to November 13, 2012.

**No proposal may contain any identification of the student, town of residence or high school attended.**

A separate covering letter provided by the Foundation must be completed and attached to the proposal. Proposals and covering letters are to be mailed to:

**Board of Trustees • The Weller Foundation, Incorporated  
P.O. Box 1145 • Woodbury, CT 06798**

**Proposals must be received by the Foundation by October 15, 2012. We recommend you allow for possible delays in delivery. Proposals which do not comply with these Rules will be rejected. Late arrivals will be returned unopened.**

5 Questions with respect to these Rules may be directed to JoAnne Davies, Foundation Administrator at 203-263-0229.

6 The Scholarship Program will be announced simultaneously at the five area high schools on September 7, 2012 to provide an equal chance for all eligible students to participate in submitting proposals.

### PROJECT

1 Up to five finalists become eligible to participate in the project phase, carrying out the proposal submitted.

2. The project period will run from November 2, 2012 to March 20, 2013 with submission and documentation of the project due to The Weller Foundation, Incorporated before 3:00 P.M. local time on or before March 20, 2013. The Foundation Administrator must be notified if the project cannot be readily mailed.

3. There is no restriction on use of project content for legitimate academic credit or other purposes. For example, a science project may also be entered in another science talent search or local science fair; a study on the area economy may be submitted by the student for credit in an economics course.

4 All aspects of the project must be performed during the current academic year (September 2012 through March 2013).

5. Each project is expected to be the student's own work without outside assistance in organizing and executing the project. Parents, faculty and other professionals may be consulted and must be acknowledged as resources for reference, but the student is entirely responsible for performing the work. The finalists will be asked to sign a statement to this effect.

A mid-project meeting will be held by the Trustees with the finalists on January 17, 2013 to review progress and answer any procedural question that might arise.

6. Final date for submission of the project will be March 20, 2013. Projects must be complete as submitted. A total of six completed photocopies (except as where deemed inappropriate by the Foundation) must be submitted for judging. (Copies will be distributed to the judges; one copy to be retained by the Foundation). They will be judged by a committee, selected from outside the Foundation's Board of Trustees. Each judge is paid an honorarium for this service.

The primary standards for judgment will be the degree to which, and the skill and care with which, the original proposal is developed into the final project. Changes in content from the original proposal may result in disqualification.

On April 11, 2013 the judges will convene to interview the participants about their projects and select the \$14,000 scholarship recipient. The judges' selection of the scholarship recipient shall be final.

These interviews are not intended to supplement the completed project material submitted on March 20, 2013. They will provide an opportunity for the judges to authenticate the student's knowledge of project content.

7 The scholarship recipient will be announced prior to the dinner of the Board of Trustees, judges, area high school representatives, parents and finalists to be held on May 1, 2013.

8 The student whose project is judged best will receive a \$14,000 scholarship, payable in increments of \$3,500 at the beginning of each of four academic years for which the student is accepted and attends a recognized college or university. Payments will be made directly to the college or university for deposit into the student's account. Subsequent payments will be made after receipt of an official transcript verifying satisfactory completion of studies for that year and that the student remains in "good standing". A maximum of one year out of college attendance will be allowed for substantial reasons such as health or family hardship. Beyond one year, the balance of the award will be forfeited.

9 The Scholarship will be awarded without regard to the student's existing financial status.

10 It is the Foundation's intention to return all but one copy of the material submitted to the student, and will not accept responsibility for loss or damage.

11 To be eligible for the \$14,000 Scholarship or runners-up award, the finalists must attend the required meetings: the Mid-Project Review; the Interview Session; and the Award Dinner.

## Previous Recipients and Projects

- |  |  |
|--|--|
| <p><b>1978</b><br/>David Macdonald, Newtown High School<br/><i>"Solar Heating with Concentrating Collectors"</i><br/>Princeton University</p> <p><b>1979</b><br/>Cynthia Shope, Newtown High School<br/><i>"Landscape Murals"</i><br/>Rochester Institute of Technology</p> <p><b>1980</b><br/>James E. Bresnahan, Jr., Masuk High School<br/><i>"Experimental Animation"</i><br/>New York University</p> <p><b>1981</b><br/>Elene Minopoli, Trumbull High School<br/><i>"Study of Enzymes"</i><br/>Yale University</p> <p><b>1982</b><br/>Scott Moody, Masuk High School<br/><i>"Computer Program for Handicapped"</i><br/>The University of Rochester</p> <p><b>1983</b><br/>Elizabeth Wilson, Newtown High School<br/><i>"Changing Role of Women in Contemporary American Society"</i><br/>Smith College</p> <p><b>1984</b><br/>Ronald J. Paproski, Newtown High School<br/><i>"Dig into the Past"</i><br/>The University of Connecticut</p> <p><b>1985</b><br/>Kane M. Larin, Newtown High School<br/><i>"A Study of the Frequency and Origin of Acid Rainfall in Western Connecticut"</i><br/>The University of Rochester</p> <p><b>1986</b><br/>David S. Polgar, Newtown High School<br/><i>"A Comparison of American Editorial Cartoons of World War II and the Vietnam War"</i><br/>Bowdoin College</p> <p><b>1987</b><br/>Heather E. Mangam, Joel Barlow High School<br/><i>"Does Inflammation of the Placental Membranes and Amniotic Fluid Predispose a Baby to Distress During Delivery?"</i><br/>Vanderbilt University</p> <p><b>1988</b><br/>Heather J. Talt, Masuk High School<br/><i>"Teenage Alcoholism: A Play"</i><br/>Ithaca College</p> <p><b>1989</b><br/>Callista K. Cleary, Joel Barlow High School<br/><i>"Little Egypt: Black History in a New England Town"</i><br/>Transylvania University</p> <p><b>1990</b><br/>Jason Peter Zolov, Newtown High School<br/><i>"Kumquat High School Humor Magazine"</i><br/>Wesleyan University</p> <p><b>1991</b><br/>Michael Edward Rosenbush, Masuk High School<br/><i>"Instructional Training Computer Aided Design Program for High School Students"</i><br/>Boston University</p> <p><b>1992</b><br/>Jennifer Gall Thompson, Masuk High School<br/><i>"A Bilingual Approach to Whole Language"</i><br/>Fairfield University</p> <p><b>1993</b><br/>Andrea L. Blackwell, Masuk High School<br/><i>"Connecticut History and Geography Computer Game for Elementary Students"</i><br/>Tufts University</p> <p><b>1994</b><br/>Aaron Nelson, Trumbull High School<br/><i>"The Creation of a Biographical Play Based on the Life and Works of Dylan Thomas"</i><br/>Cornell University</p> | <p><b>1995</b><br/>Peter J. Photos, Shelton High School<br/><i>"A Practical Approach to Fuzzy Logic"</i><br/>Princeton University</p> <p><b>1996</b><br/>Katherine H. Zimmerman, Newtown High School<br/><i>"Star Selectors of the Hubble Space Telescope"</i><br/>Massachusetts Institute of Technology</p> <p><b>1997</b><br/>Christopher James Bassett, Newtown High School<br/><i>"The Portrayal of Emotions and Scenes Through Music"</i><br/>New York University</p> <p><b>1998</b><br/>Kathryn L. Curran, Shelton High School<br/><i>"When Virtue Becomes Vice: My Battle with Anorexia"</i><br/>Barnard College</p> <p><b>1999</b><br/>Irfana Majumdar, Trumbull High School<br/><i>"Hello People! I'm Irfana."</i><br/>University of Chicago</p> <p><b>2000</b><br/>Denise A. Froatz, Trumbull High School<br/><i>"The Effect of Prozac Versus the Effect of Zoloft on the Amount of Serotonin Re-uptake in a Crayfish's Brain"</i><br/>The University of Pennsylvania</p> <p><b>2001</b><br/>Mathew R. Ackerman, Joel Barlow High School<br/><i>"Engineering Optimum Performance"</i><br/>Dartmouth College</p> <p><b>2002</b><br/>Joshua David Gersen, Masuk High School<br/><i>"America's Darkest Day: A Musical Composition"</i><br/>New England Conservatory of Music</p> <p><b>2003</b><br/>Scott A. Denenberg, Trumbull High School<br/><i>"Engineering an Energy Efficient, Adaptable Hybrid Bicycle Motor System"</i><br/>Harvard College</p> <p><b>2004</b><br/>Monoswita Saha, Trumbull High School<br/><i>"Tulsi Tree"</i><br/>University of Connecticut</p> <p><b>2005</b><br/>Margaret Boushell, Newtown High School<br/><i>"The Effects of a Home-Heating Oil Spill on the Local Environment"</i><br/>Tufts University</p> <p><b>2006</b><br/>Alexa Ray Corriea, Shelton High School<br/><i>"Augury: A Novel"</i><br/>Boston University</p> <p><b>2007</b><br/>Carly Parkins, Masuk High School<br/><i>"What Goes Around Comes Around: A Boomerang Manual"</i><br/>University of Colorado</p> <p><b>2008</b><br/>Kyle Horton, Masuk High School<br/><i>"Music: The Art of Science"</i><br/>University of Connecticut</p> <p><b>2009</b><br/>David E. Furnes, Masuk High School<br/><i>"Promoting Town Communication in the 21st Century"</i><br/>University of Connecticut</p> <p><b>2010</b><br/>Rachel Ordway, Joel Barlow High School<br/><i>"A Comic Book: Madness in a Box: Angstbuckets Anonymous"</i><br/>Savannah College of Art &amp; Design - Atlanta</p> <p><b>2011</b><br/>Michael P. Brown, Masuk High School<br/><i>"Solar Panel Plethora: A Sunny Way to Brighten our Schools"</i><br/>University of Virginia</p> <p><b>2012</b><br/>Nicholas M. Shigo, Shelton High School<br/><i>"The Hunter Chronicles: Nightfall"</i><br/>The University of Vermont</p> |
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# THE WELLER FOUNDATION, INCORPORATED

Box 1115, Woodbury, Connecticut 06798 Telephone (203) 261-0229

2009

## THE WELLER INSTRUMENTAL MUSIC SCHOLARSHIP

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The Weller Foundation, Incorporated provides this \$4,000 Scholarship in honor of the late Burton L. Weller, who was the founder of Vitramon, Incorporated and The Weller Foundation, Incorporated. It is through his generosity that this award is made possible.

### SCHOLARSHIP TIMETABLE

Student Application Deadline: March 2, 2009  
School Submission Deadline: March 6, 2009  
Auditions for Weller Judges: April 8, 2009  
Award Recipient Announced: April 8, 2009  
Awards Banquet: May 4, 2009

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### RULES

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1. Applicants must be seniors who are full-time students at Joel Barlow, Masuk, Newtown, Shelton, or Trumbull High Schools. Applicants must remain full-time students for the entire academic year. Applicants must not be related to a Weller Foundation Trustee or to a Weller Scholarship Judge.
2. Applicants must be U.S. citizens, nationals, or permanent residents. The award recipient must attend a four-year undergraduate degree program in the United States.
3. Applicants must have a minimum GPA of 2.5 out of 4.0. An official high school transcript must be attached to the application form verifying this information.
4. Applicants must be accepted and subsequently enrolled at a four-year fully accredited college or conservatory as a music major with concentration in instrumental music.
5. By March 2<sup>nd</sup> each applicant must submit to their School's Director of Instrumental Music a fully completed and signed application form including attachments.
6. Financial need is not a requirement and shall not be considered.
7. The Director of Instrumental Music at each school shall select not more than two finalists from the applicant group. In the event an applicant is related to the Director of Instrumental Music, an alternate selection process will be approved by the Foundation. All applicants will be considered regardless of whether or not they participate in the high school music program.

**THE WELLER INSTRUMENTAL MUSIC SCHOLARSHIP - 2009**  
**PAGE 2 OF 5**

8. The deadline for schools to submit the completed Weller Music Scholarship finalist applications to the Foundation is Friday, March 6, 2009.
9. Each finalist must audition before a team of judges appointed by The Weller Foundation, Incorporated. The judges' selection shall be based on demonstrated talent with due consideration given to other evidence indicating dedication to learning and performance experience. An award recipient will be selected, and at the judges' discretion, an alternate will be chosen. The judges' selection of the scholarship recipient shall be final.
10. The award recipient must start his/her formal education program within six (6) months from the date on which he/she is declared the recipient, or the award is forfeited. Thereafter, a maximum leave of one year from college or conservatory will be allowed for substantial reason such as health or family hardship. Beyond one year, the balance of the award will be forfeited.
11. The award will be paid in four (4) equal installments of \$1,000. Payment will be made to the school and credited to the student's account. The first payment will be made once The Weller Foundation, Incorporated receives proof of enrollment in a qualified program (See Item 2). Subsequent payments will be made at the beginning of each school year following receipt of proof that the student has maintained a cumulative grade point average of 2.3 out of 4.0 ("C+" average or better) and is continuing in his/her original course of study and that the student remains in "good standing". All payments will be made for the benefit of the award recipient directly to the institution providing the education.
12. The Director of Instrumental Music must attach to the application form a statement to the Foundation in support of his/her chosen candidates.

**THE WELLER INSTRUMENTAL MUSIC SCHOLARSHIP - 2009**  
**PAGE 3 OF 5**

**=====AUDITION GUIDELINES AND INFORMATION=====**

1. Each finalist is requested to select a piece of music to perform which best displays his/her musical ability. The original music score (not a photocopy) must be attached to the finalist's application form which is submitted on March 2, 2009 to his/her High School's Director of Instrumental Music. The Foundation's Scholarship Judges will review each finalist's music selection prior to the audition. It is the Foundation's intention to return the original music scores to the finalists upon completion of the auditions. Please note that you do not have to memorize the piece and can bring another music score with you to utilize during your performance.
2. The Scholarship Audition will take place on **Wednesday, April 8, 2009** in the Alexandria Room at the Edmond Town Hall in Newtown, Connecticut. Each finalist will be allocated a 20-minute period for his/her audition. The first audition will commence at 3:00 P.M. The solo\* instrumental music performance should not exceed 10 minutes. The remaining 10 minutes will be utilized as an informal interview session with the Judges and the finalist. It should be noted that the Judges (at their discretion) may request a finalist to perform a second piece of music. Please be prepared should this request be made.
3. Jazz performers will be asked to improvise over three choruses of 12-bar blues in B Flat (tape accompaniment will be supplied by the Foundation).
4. The award recipient will be notified via telephone on April 8, 2009. The award recipient and his/her parents will be invited to attend the Foundation's Annual Awards Banquet to be held at 6:00 P.M. on Monday, May 4, 2009 at Fairfield University. The Awards Banquet will be honoring recipients of several of the Foundation's Award Programs.

\* Musical accompanists will not be permitted.

*The Trustees reserve the right to exercise their discretion on all matters.*

# THE WELLER FOUNDATION, INCORPORATED

Box 1145 Woodbury Connecticut 06798 Telephone (203) 261-0229

2009

## THE WELLER INSTRUMENTAL MUSIC SCHOLARSHIP APPLICATION FORM

*(Please TYPE or PRINT in black ink all data.)*

Applicant's Full Name: \_\_\_\_\_

Father's Name: \_\_\_\_\_

Mother's Name: \_\_\_\_\_

Complete Address: \_\_\_\_\_

Home Telephone Number: \_\_\_\_\_ Social Security #: \_\_\_\_\_

Cell Phone Number: \_\_\_\_\_ E-Mail: \_\_\_\_\_

Instrumental Specialty: \_\_\_\_\_

High School: \_\_\_\_\_

List the names of non-high school music groups with which you have performed; state when (i.e., Western Regional Music Festival):  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

CT Music Educator's Association's (CMEA) All-State Festival Audition, Year, and Instrument  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Private Instruction, when and with whom\*  
\_\_\_\_\_  
\_\_\_\_\_

Music courses taken in high school and grades received:  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

\* Attach statement(s) from your private instructor attesting to your progress and confirming period of study.

**THE WELLER INSTRUMENTAL MUSIC SCHOLARSHIP - 2009**  
**APPLICATION FORM**  
**PAGE 3 OF 3**

High school and other  
music experience;  
i.e., band, orchestra,  
ensembles, etc.

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College/Conservatory I  
plan to be enrolled in,  
(include mailing address):

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Program enrolled in  
(Be specific):

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What are your career goals?

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Title of Audition Piece/Composer: \_\_\_\_\_

If asked, would you be willing to perform at the Awards Dinner if you are selected as the  
recipient of this Award? \_\_\_\_\_

\*\*\*\*\*

I have read the Rules of this program and have met the eligibility requirements. I  
confirm that the above and attached information is true and that I am not related to a  
Trustee of The Weller Foundation, Incorporated or to a Weller Foundation Judge.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

Attachments: Official High School Transcript verifying minimum 2.5 GPA requirement  
Statement by Director of Instrumental Music  
Statement by Private Music Instructor  
Original Music Score

11-11-09-05-08

# THE WELLER FOUNDATION, INCORPORATED

Box 1145, Woodbury, Connecticut 06798 / Telephone (203) 263-0229

2013

## WELLER MEDICAL/HEALTH SCIENCES SCHOLARSHIP

The purpose of this scholarship is to encourage and financially assist a student upon graduation who has chosen a course of study in the field of Medical/Health Sciences. Healthcare careers acceptable under this Program are Nursing, Therapy, Medical Technology, Paramedics, and other licensed healthcare workers who provide one-on-one healthcare to people. Programs leading to MD or PhD Degrees are **not** acceptable. Academic programs shall be a minimum of one (1) year and a maximum of six (6) years in duration with a maximum of four (4) years of payments.

### AWARD:

Qualified applicants from the five (5) eligible high schools shall be competing for (1) award.

The Award: A total of \$4,000 or 50% of the cost of tuition for the training program, whichever is less.

Payment: The Award will be paid in equal increments depending upon the number of years required to complete the program. For example,

1 Year Program:  $\frac{1}{2}$  upon enrollment;  $\frac{1}{2}$  at mid-point

2 Year Program:  $\frac{1}{2}$  upon enrollment;  $\frac{1}{2}$  at beginning of second school year

3 Year Program:  $\frac{1}{3}$  upon enrollment;  $\frac{1}{3}$  at the beginning of the second and third school year

4-6 Year Program: 4 equal payments at the beginning of each of the first four school years

The first payment of the award will be made upon the Foundation's receipt of a copy of the recipient's tuition bill. Proof of continuance of enrollment and verification of a 3.0 GPA is necessary for any payment during the subsequent academic period.

All payments will be made for the benefit of the award recipient directly to the institution providing the education.

The program must begin within nine (9) months of the grant date or the award shall be forfeited. An interruption of up to one (1) year will be allowed for substantial reasons such as health or family hardship. Beyond one (1) year, the balance of the award will be forfeited.

**WELLER MEDICAL/HEALTH SCIENCES SCHOLARSHIP – 2013**  
**PAGE 2 OF 5**

A minimum of three (3) qualified applicants will ensure granting of the award. If there should be less than three (3) qualified applicants, the award will be granted at the discretion of the judges.

**ELIGIBILITY:**

- Applicants must be seniors who are full-time students at Joel Barlow, Masuk, Newtown, Shelton, or Trumbull High Schools. Applicants must remain full-time students for the entire academic year.
- Applicants must be U.S. citizens, nationals, or permanent residents. The award recipient must attend an undergraduate degree program in the United States.
- Applicants must have a minimum GPA of 3.0 out of a 4.0 during the first three (3) cumulative years of high school and a minimum SAT score of 1460 or an ACT score of 20.
- Applicants must not be related to a Weller Foundation Trustee.
- It is the sole responsibility of the applicant (and not the Weller Foundation and/or its judges) that the college program requirements as to the medical major is adhered to and that the college program qualifies for this scholarship.
- It is the responsibility of the applicant to adhere to the rules of this scholarship program.

**REQUIREMENTS:**

- A completed application form with all required attachments must be received before the application deadline date, **Friday, March 1, 2013**.
- An essay, 500 to 700 words in length, written by the applicant, must be submitted with the application. *The essay must be typed, and the word count must be recorded at the end of the essay.* Essays that are not within the specified range of words may be disqualified. The essay shall be entitled, *"Why I Have Chosen A Career In Medicine (Medical/Health Sciences)"*.
  - An official copy of the student's transcript must be attached to the application. Student's class rank, GPA, SAT and/or ACT scores must be indicated on the transcript.
  - Those who have submitted acceptable applications must attend a brief interview with the judges. The interview will take place on **Tuesday, April 2, 2013**.

**WELLER MEDICAL/HEALTH SCIENCES SCHOLARSHIP – 2013**  
**PAGE 3 OF 5**

**APPLICATIONS:**

Applications must be mailed to the Foundation at: The Weller Foundation, Incorporated  
P.O. Box 1145  
Woodbury, CT 06798

**Applications must be received by the Foundation by Friday, March 1, 2013.**  
*We recommend you allow for possible delays in delivery.*

**JUDGING:**

- A committee of the Foundation's Trustees will rule on eligibility and judge the award recipients. The committee's selection of the award recipient shall be final.
- The award recipient will be chosen based upon the applicant's ability to demonstrate a commitment to the medical/health field as a career and their potential success as a medical/healthcare provider. The following will assist the judges in choosing an award recipient:
  - Volunteer or compensated work at medical facilities. *All work must be verified with an attached letter from an official at the organization noting hours worked.*
  - Academic record in the science disciplines (Biology, Chemistry, General Physics, and Mathematics),
  - Extra curricular activities,
  - Substance and quality of the submitted essay,
  - Applicant's interview with the judges.
- The award recipient will be notified by telephone on **April 2, 2013**. The award recipient and his/her parents will be invited to attend the Foundation's Annual Awards Banquet to be held at 6:00 P.M. on **Wednesday, May 1, 2013**, at Fairfield University.
- Financial need will not be a factor in determining the award recipient.

***In order to receive this scholarship, the recipient must attend the Interview Session on Tuesday, April 2<sup>nd</sup>, and the Awards Banquet on Wednesday, May 1<sup>st</sup>.***

Any questions concerning this Scholarship may be directed to the Foundation's Trustee and Administrator, JoAnne Davies, at (203) 263-0229.

***The Trustees reserve the right to exercise their discretion on all matters.***

AF:LL:jed:09-07-12



# THE WELLER FOUNDATION, INCORPORATED

Box 1145, Woodbury, Connecticut 06798 / Telephone (203) 263-0229

2013

## WELLER MEDICAL/HEALTH SCIENCES SCHOLARSHIP APPLICATION FORM

**Submission Deadline: March 1, 2013**

*(Please TYPE or PRINT in black ink all data.)*

Applicant's Full Name: \_\_\_\_\_

Father's Name: \_\_\_\_\_

Mother's Name: \_\_\_\_\_

Complete Address: \_\_\_\_\_

Home Telephone: \_\_\_\_\_ Age: \_\_\_\_\_ High School: \_\_\_\_\_

Cell Phone Number: \_\_\_\_\_ E-Mail: \_\_\_\_\_

Class of \_\_\_\_\_

Intended Career: \_\_\_\_\_

Program Length for Certification/Degree: \_\_\_\_\_

Institution's Name: \_\_\_\_\_

Address: \_\_\_\_\_

Telephone: \_\_\_\_\_

Program Selected: \_\_\_\_\_

Detail Expenses:	<u>YEAR 1</u>	<u>YEAR 2</u>	<u>YEAR 3</u>	<u>YEAR 4</u>
Tuition:	_____	_____	_____	_____
Other:				
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
Totals	\$ _____	\$ _____	\$ _____	\$ _____

**WELLER MEDICAL/HEALTH SCIENCES SCHOLARSHIP – 2013**  
**APPLICATION FORM**  
**PAGE 5 OF 5**

List extracurricular activities (Where, When, Offices/Positions Held). **Please feel free to attach a resume.** For jobs or volunteer work, indicate hours/days worked. Attach letters from organizations verifying involvement.

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References: If you wish to include written references, attach them to this application and identify attachments below.

I have read the criteria of this program and have met the eligibility requirements. I confirm that the above and attached information is true and that I am not related to a Trustee of The Weller Foundation, Incorporated.

\_\_\_\_\_  
*Signature*

\_\_\_\_\_  
*Date*

Attachments: 500-700 Word Essay (must include word count at end of essay)  
Transcript with Class Rank, GPA, SAT and/or ACT scores indicated  
Verification of Work Experience

JED:09-07-12

# THE WELLER FOUNDATION, INCORPORATED

Box 1145, Woodbury, Connecticut 06798 / Telephone (203) 263-0229

2013

## WELLER EDUCATION SCHOLARSHIP

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The purpose of this \$4,000 scholarship is to recognize and financially assist a high school senior planning to pursue a teaching career in public or private elementary or secondary schools.

### **AWARD:**

Qualified applicants from the five (5) eligible high schools shall be competing for one (1) scholarship of \$4,000. Payment will be made for the benefit of the recipient in four (4) equal installments of \$1,000 paid directly to the institution providing the education program. Annual payments are contingent upon the recipient's continued pursuit of a degree in education. The first payment of the scholarship will be made upon the Foundation's receipt of a copy of the recipient's tuition bill. Proof of continuance of enrollment and verification (official transcript) of a 3.1 GPA is necessary for a scholarship payment during the subsequent academic years.

A minimum of three (3) qualified applicants will ensure granting of the award. If there should be less than three (3) qualified applicants, the award will be granted at the discretion of the judges.

### **ELIGIBILITY:**

- Applicants must be seniors who are full-time students at Joel Barlow, Masuk, Newtown, Shelton, or Trumbull High Schools. Applicants must remain full-time students for the entire academic year.
- Applicants must be U.S. citizens, nationals, or permanent residents. The award recipient must attend a four-year undergraduate degree program in the United States.
- Applicants must be accepted and subsequently enrolled at a four-year fully accredited college or university majoring in elementary or secondary education.
- Applicants must have a minimum GPA of 3.5 out of 4.0 or a class rank in the top 20% at the end of Grade 11 of high school **and** a minimum SAT score of 1710 and/or an ACT score of 25.
- Applicants must not be related to a Weller Foundation Trustee or a Weller Scholarship Judge.

**WELLER EDUCATION SCHOLARSHIP – 2013**  
**PAGE 2 OF 5**

**ELIGIBILITY – continued:**

- It is the sole responsibility of the applicant (and not the Weller Foundation and/or its judges) that the college program requirements as to the education major is adhered to and that the college program qualifies for this scholarship.
- It is the responsibility of the applicant to adhere to the rules of this scholarship program.

**REQUIREMENTS:**

- A completed application form with all required attachments must be received by the Foundation by **Friday, March 1, 2013**.
- An essay, 500 to 700 words in length, written by the applicant, must be submitted with the application. ***The essay must be typed, and the word count must be recorded at the end of the essay.*** Essays that are not within the specified range of words may be disqualified. The essay shall be entitled, ***“Why I Have Chosen A Career in Education”***. **The essay must focus on the strengths and weaknesses of the applicant’s secondary educational experiences including specific examples and anecdotes along with suggestions for change.**
- An **official copy** of the student’s high school transcript must be attached to the application. **The student’s class rank, GPA, SAT and/or ACT scores must be indicated on the transcript.**
- Three character references (one each from a classroom teacher, a guidance counselor, and one from another adult) must be written, signed, and attached to the application.
- Those who have submitted acceptable applications must attend an interview with the judges centering around the applicant’s views on education. The interview will take place on **Monday, April 1, 2013**. Time and place for the interview will be announced.

**JUDGING:**

- A committee of judges will rule on eligibility and judge the award applicants. The committee’s selection of the award recipient shall be final.

## **WELLER EDUCATION SCHOLARSHIP - 2013**

**PAGE 3 OF 5**

### **JUDGING – continued:**

- The award recipient will be chosen based upon the applicant's ability to demonstrate a commitment to the education field as a career and his/her potential success as an elementary or secondary school teacher. The following will assist the judges in choosing the award recipient.
  - Academic record
  - Documented evidence of dedication to the field of education (for example peer tutoring)
  - Substance and quality of the essay
  - Applicant's interview with the judges
- The award recipient will be notified by telephone on **April 1, 2013**. The award recipient and his/her parents will be invited to attend the Foundation's Annual Awards Banquet to be held at 6:00 P.M. on **Wednesday, May 1, 2013**, at Fairfield University.
- Financial need is not a factor in determining the award recipient.

### **APPLICATION:**

Applications must be mailed to the Foundation at:   The Weller Foundation, Incorporated  
P.O. Box 1145  
Woodbury, CT 06798

**Applications must be received by the Foundation by Friday, March 1, 2013.**

***We recommend you allow for possible delays in delivery.***

Any questions concerning this award may be directed to the Foundation's Trustee and Administrator, JoAnne Davies, at (203) 263-0229.

***In order to receive this scholarship, the recipient must attend the Interview Session on Monday, April 1<sup>st</sup>, and the Awards Banquet on Wednesday, May 1<sup>st</sup>.***

***The Trustees reserve the right to exercise their discretion on all matters.***

JED:09-07-12

# THE WELLER FOUNDATION, INCORPORATED

Box 1145, Woodbury, Connecticut 06798 / Telephone (203) 263-0229

**2013  
WELLER EDUCATION SCHOLARSHIP  
APPLICATION FORM  
Submission Deadline: March 1, 2013**

*(Please TYPE or PRINT in black ink all data.)*

Applicant's Full Name: \_\_\_\_\_

Father's Name: \_\_\_\_\_

Mother's Name: \_\_\_\_\_

Home Address: \_\_\_\_\_  
\_\_\_\_\_

Home Telephone: \_\_\_\_\_ High School: \_\_\_\_\_

Cell Phone Number: \_\_\_\_\_ E-Mail: \_\_\_\_\_

Class of \_\_\_\_\_

Intended Educational Career: \_\_\_\_\_

List the colleges and universities to which you have applied for admission.

<u>College</u>	<u>Address</u>	<u>Date Applied/Accepted</u>
----------------	----------------	------------------------------

_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

My Intended Major: \_\_\_\_\_

Degree Upon Completion: \_\_\_\_\_

**WELLER EDUCATION SCHOLARSHIP - 2013**  
**PAGE 5 OF 5**

List extracurricular activities. **Please feel free to attach a resume.** For jobs or volunteer work, indicate hours/days worked. Attach letters from organizations verifying involvement.

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The application must include the items listed below. Any omission will automatically **disqualify** the applicant.

1. The current high school transcript indicating your grade point average (GPA) of at least 3.5 out of 4.0 or a class rank in the top 20% at the end of Grade 11 of high school **and** a minimum SAT score of 1710 and/or an ACT score of 25.
2. A 500-700 word typed essay, "*Why I Have Chosen A Career In Education*". **The essay must focus on the strengths and weaknesses of your secondary educational experiences including specific examples and anecdotes along with suggestions for change.**
3. Three character references: one classroom teacher, one guidance counselor, and one other adult.

If applicable, you are encouraged to submit evidence of teaching experience including duties and duration together with supervisor's verification.

**SIGNED STATEMENT OF ELIGIBILITY:**

I have read the criteria of this program and have met the eligibility requirements. I confirm that the above and attached information is true and that I am not related to a Trustee of The Weller Foundation, Incorporated.

---

*Signature*

---

*Date*

Attachments: 500-700 Word Essay (word count must be included at end of essay)  
Transcript with Class Rank, GPA, SAT and/or ACT scores indicated  
Three Character References  
Verification of Work Experience (if any)

JED:09-07-12

# THE WELLER FOUNDATION, INCORPORATED

Box 1115, Woodbury, Connecticut 06798 Telephone (203) 264-0100

2009

## **WELLER COMPUTER SCIENCE/TECHNOLOGY SCHOLARSHIP**

The Weller Foundation, Incorporated provides this \$4,000 Scholarship in honor of the late Barton L. Weller, who was the founder of Vitramon, Incorporated and The Weller Foundation, Incorporated. It is through his generosity that this award is made possible.

### **SCHOLARSHIP TIMETABLE**

Application Deadline: March 2, 2009  
Interviews with Weller Judges: April 6, 2009  
Award Recipient Announced: April 6, 2009  
Awards Banquet: May 4, 2009

The purpose of this scholarship is to encourage and financially assist a high school senior upon graduation who is planning to major in a career in computer science or computer engineering.

### **AWARD:**

Qualified applicants from the five (5) eligible high schools shall be competing for one (1) scholarship of \$4,000. Payment will be made for the benefit of the recipient in four (4) equal annual installments of \$1,000 paid directly to the college or university providing the education program. Payments are contingent upon the recipient's continued pursuit of a degree in computer science or computer engineering. The first payment of the scholarship will be made upon the Foundation's receipt of a copy of the recipient's tuition bill. Proof of continuance of enrollment and verification (official transcript) of a minimum 3.0 cumulative grade point average out of a possible 4.0 is required for a scholarship payment during the subsequent academic years.

A minimum of three (3) qualified applicants will ensure granting of the award. If there should be less than three (3) qualified applicants, the award will be granted at the discretion of the judges.



**2009 WELLER COMPUTER SCIENCE/TECHNOLOGY SCHOLARSHIP**  
**PAGE 2 OF 6**

**ELIGIBILITY:**

- Applicants must be seniors who are full-time students at Joel Barlow, Masuk, Newtown, Shelton or Trumbull High Schools. Applicants must remain full-time students for the entire academic year.
- Applicants must be accepted and subsequently enrolled at a four-year fully accredited college or university majoring in computer science or computer engineering.
- Applicants must have a minimum GPA of 3.3 out of 4.0 or 4.1 out of a possible 5.0.
- Applicants must not be related to a Weller Foundation Trustee.
- Applicants must be U.S. citizens, nationals, or permanent residents. The award recipient must attend an undergraduate degree program in the United States.

**REQUIREMENTS:**

- A completed application form with all required attachments must be submitted by the application deadline, March 2, 2009.
- An essay, 500 to 700 words in length, written by the applicant, must be submitted with the application. The essay must be typed, and the word count must be recorded at the end of the essay. Essays that are not within the specified range of words may be disqualified. The essay shall be entitled, *"Why I Have Chosen a Career in the Computer Science Field"*.
- An official high school transcript must be attached to the application. The student's class rank, GPA, and SAT scores must be included with the transcript.
- Three character references (one each from a classroom teacher, a guidance counselor, and another adult) must be signed and attached to the application.
- Those who have submitted acceptable applications must attend an interview with the judges on Monday, April 6, 2009. Time and place for the interview will be announced.

**JUDGING:**

- A committee of Foundation judges will rule on eligibility and judge the award applicants. The decision of the judges shall be final.
- The award recipient will be chosen based upon the applicant's academic record, the substance and quality of the essay, verifiable experience in the operation of computers (i.e. software/hardware design, programming, web design, video game design), and the applicant's interview with the judges.
- Financial need is not a factor in determining the award recipient.
- The award recipient will be notified by telephone on April 6, 2009. The award recipient and his/her parents will be invited to attend the Foundation's Annual Awards Banquet to be held at 6:00 P.M. on Monday, May 4, 2009 at Fairfield University.

**2009 WELLER COMPUTER SCIENCE/TECHNOLOGY SCHOLARSHIP  
PAGE 3 OF 6**

**APPLICATION:**

Applications must be mailed to the Foundation at: The Weller Foundation, Incorporated  
P.O. Box 1145  
Woodbury, CT 06798

**Applications must be received by the Foundation by Monday, March 2, 2009.**

Any questions concerning this Scholarship may be directed to the Foundation's Trustee and Administrator, JoAnne Davies, at (203) 263-0229.

*The Trustees reserve the right to exercise their discretion on all matters.*

AFjed:09-05-08

# THE WELLER FOUNDATION, INCORPORATED

Box 1115, Woodbury, Connecticut 06798 Telephone (203) 263-0229

2009

## WELLER COMPUTER SCIENCE/TECHNOLOGY SCHOLARSHIP APPLICATION FORM

**Submission Deadline: March 2, 2009**

**(Please TYPE or PRINT in black ink all data.)**

Applicant's Full Name: \_\_\_\_\_

Father's Name: \_\_\_\_\_

Mother's Name: \_\_\_\_\_

Complete Address: \_\_\_\_\_

Home Telephone: \_\_\_\_\_ Cell Phone: \_\_\_\_\_

E-Mail: \_\_\_\_\_

High School Attending: \_\_\_\_\_ Class of: \_\_\_\_\_

Social Security Number: \_\_\_\_\_ Age: \_\_\_\_\_

Intended Career: \_\_\_\_\_

Program Enrolled in: \_\_\_\_\_

List the colleges and universities to which you have applied for admission.

<u>College/University</u>	<u>Address</u>	<u>Date Applied/Accepted</u>
---------------------------	----------------	------------------------------

_____	_____	_____
_____	_____	_____
_____	_____	_____

Degree Upon Graduation: \_\_\_\_\_

Do you hold any industry certifications? (A+, N+, MCSE, MCSA, etc.) \_\_\_\_\_

Have you authored a web page? \_\_\_\_\_ If yes, provide URL \_\_\_\_\_

**WELLER COMPUTER SCIENCE/TECHNOLOGY SCHOLARSHIP - 2009**  
**PAGE 5 OF 6**

**Describe any other software/hardware designs completed (if possible, attach copies)**

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**List relevant part-time work/internship experience in the field of computer technology:**

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**List computer-related courses taken (including year) and any computer club/organization involvement:**

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**Please feel free to attach a resume. For jobs or volunteer work, indicate hours/days worked. Attach letters from organizations verifying involvement.**

**The application must include the items listed below. Any omission will disqualify the applicant.**

- 1. A current high school official transcript must list your SAT scores and your grade point average (GPA). The cumulative GPA must be at least 3.3 out of 4 or 4.1 out of 5.**
- 2. A 500-700 word typed essay, "Why I Have Chosen A Career in the Computer Science Field". The essay must be typed, and the word count must be recorded at the end of the essay.**
- 3. Three character references: one classroom teacher, one guidance counselor, and one adult acquaintance.**

**WELLER COMPUTER SCIENCE/TECHNOLOGY SCHOLARSHIP – 2009**  
**PAGE 6 OF 6**

**SIGNED STATEMENT OF ELIGIBILITY:**

I have read and understand the requirements and eligibility criteria for this program. I confirm that the information I provided is true and that I am not related to a Trustee of The Weller Foundation, Incorporated.

\_\_\_\_\_  
*Signature*

\_\_\_\_\_  
*Date*

**RECEIVED BY SCHOOL REP:** \_\_\_\_\_

**DATE RECEIVED:** \_\_\_\_\_

Attachments: 500-700 Word Essay  
Official Transcript with GPA, Class Rank, and SAT Scores Indicated  
Three Character References  
Verification of Work Experience (if any)

JED:09-05-08

# THE WELLER FOUNDATION, INCORPORATED

Box 1145, Woodbury, Connecticut 06798 / Telephone (203) 263-0229

2013

## THE WELLER EXCELLENCE IN TEACHING AWARD

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The Weller Excellence in Teaching Award\* is presented annually in recognition of the teaching quality and innovation exhibited by **certified** classroom teachers of grades kindergarten through five. It is hoped that this honor will help encourage the teaching excellence which is so vital to our youth.

### **AWARD\*\*:**

The award recipient will receive \$500 and a Certificate of Honor.

### **ELIGIBILITY:**

**Certified** teachers in grades kindergarten through five currently teaching in the Easton Public School System who have developed a successful curriculum project which was **implemented in the classroom** as part of the curriculum during the current or previous academic year are eligible to apply. **Joint applications will not be accepted.** Relatives of past or present Trustees of The Weller Foundation, Incorporated are not eligible. Projects which have previously won this award are not eligible. Projects previously submitted for this award are not eligible for resubmission.

### **NOTES:**

1. ***This award will not be offered unless a minimum of two qualified applicants apply.***
2. ***The 2012 recipient is not eligible to apply for the 2013 award, but can apply in 2014 or in subsequent years.***

### **APPLICATION:**

Application forms are provided by The Weller Foundation, Incorporated and may be obtained through the Office of the Superintendent of Schools (203-261-2513) or by calling the Foundation at 203-263-0229.

Completed applications should be mailed to: **Dr. Bernard Josefsberg**  
Superintendent of Schools  
Board of Education  
654 Morehouse Road  
P.O. Box 500  
Easton, CT 06612

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\* ***Effective September 1999; formerly The Weller Outstanding Teacher Award.***

\*\****Awards are subject to all applicable Federal and/or State taxes.***

**2013 – THE WELLER EXCELLENCE IN TEACHING AWARD**

**Page 2**

**JUDGING:**

The award recipient will be selected by a panel of judges coordinated by Dr. Bernard Josefsberg, Superintendent of Schools.

**TIMING:**

Completed applications must be received no later than **March 1, 2013.**

The award recipient will be determined in early April and invited to receive the award at The Weller Foundation's Annual Awards Banquet on May 1, 2013, at Fairfield University.

*In order to receive the Award, the recipient must attend the Awards Banquet on May 1<sup>st</sup>.*

*The Trustees reserve the right to exercise their discretion on all matters.*

# THE WELLER FOUNDATION, INCORPORATED

Box 1145, Woodbury, Connecticut 06798 / Telephone (203) 263-0229

## THE WELLER EXCELLENCE IN TEACHING AWARD

### 2013 Application Form (Please type)

Applicant/Teacher's Name \_\_\_\_\_

Spouse's Name \_\_\_\_\_ Social Security Number \_\_\_\_\_

Home Address \_\_\_\_\_ Home Tel. # \_\_\_\_\_

\_\_\_\_\_ Cell Phone # \_\_\_\_\_

E-Mail: \_\_\_\_\_

School Name \_\_\_\_\_ School Tel. # \_\_\_\_\_

School Address \_\_\_\_\_

Currently Teaching Grade: \_\_\_\_\_ Title: \_\_\_\_\_

Principal's Name \_\_\_\_\_

Have you previously won this award? (*circle one*)      Yes      No

If yes, in what year(s)? \_\_\_\_\_

PROJECT TITLE \_\_\_\_\_

Was this project implemented in the classroom? (*circle one*)      Yes      No

The project was implemented in grade(s) \_\_\_\_\_ and is suitable for grades(s) \_\_\_\_\_.

Approximately how many students participated in this project during the academic year? \_\_\_\_\_ During the previous academic year? \_\_\_\_\_

Subject Area \_\_\_\_\_



**THE WELLER EXCELLENCE IN TEACHING AWARD – 2013 Application Form**  
**Page 2 of 3**

**Project Description (concise description of project in two to four sentences):**

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**Project Goals** \_\_\_\_\_

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**Describe how goal achievement is measured** \_\_\_\_\_

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**What are the new learning activities of this project?** \_\_\_\_\_

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**What aspects of this project do you consider to be especially innovative or creative?**

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**THE WELLER EXCELLENCE IN TEACHING AWARD – 2013 Application Form**  
**Page 3 of 3**

**Why do you believe this was a successful project?** \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

**Enclosed are the following materials that may help judge the project** \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

**It is expected that the winning project will be distributed to the academic community. (Preparation of the project for dissemination will be the responsibility of the award recipient.). The project described above has been implemented in my school by the applicant within the current or previous academic year.**

\_\_\_\_\_  
*Signature of Principal*

\_\_\_\_\_  
*Date*

**I verify that I have met the eligibility criteria and that the project was developed by me and was *implemented* successfully in *my classroom* during the current or previous academic year. I agree to allow it to be published and/or distributed to the academic community. While it is expected that any supplementary material being submitted with this application will be returned to me, I understand that The Weller Foundation, Incorporated and the Superintendent of Easton Public Schools accept no responsibility for it.**

\_\_\_\_\_  
*Signature of Applicant*

\_\_\_\_\_  
*Date*

**JED:11-05-12**

THE WELLER FOUNDATION, INCORPORATED2013SCHEDULE ATTACHED TO 990-PF, PART XV, LINE 3(a)Grants and Contributions Paid During the Year

<u>Name</u>	<u>Relationship</u>	<u>Purpose</u>	<u>Amount</u>
Junior Achievement	None	Support of organization	\$2,000
Edith Wheeler Memorial Library	None	Support of organization	1,000
Sandy Hook Elementary School Library	None	Support of organization	1,000
Yale New Haven Hospital	None	Support of organization	1,000
Dolan School of Business, Fairfield University	None	Support of organization	2,500
Danbury Grassroots Tennis & Enrichment	None	Support of organization	1,000
Joel Barlow High School	None	Support of organization	3,500
Masuk High School	None	Support of organization	3,500
Newtown High School	None	Support of organization	3,500
Shelton High School	None	Support of organization	3,500
Trumbull High School	None	Support of organization	3,500
Helen Keller Middle School	None	Support of organization	250
Jockey Hollow Middle School	None	Support of organization	250
Newtown Middle School Library/ Media Center	None	Support of organization	250
Reed Intermediate School Library/ Media Center	None	Support of organization	250
Shelton Intermediate School Library/ Media Center	None	Support of organization	250
Hillcrest Middle School Library/ Media Center	None	Support of organization	250
Madison Middle School Library/ Medica Center	None	Support of organization	250
Samuel Staples Elementary School Library	None	Support of organization	100
Fawn Hollow Elementary School Library	None	Support of organization	100
Monroe Elementary School Library	None	Support of organization	100
Stepney Elementary School Library	None	Support of organization	100
Hawley Elementary School Library	None	Support of organization	100
Head O'Meadow Elementary School Library	None	Support of organization	100
Middle Gate Elementary School Library	None	Support of organization	100
Sandy Hook Elementary School Library	None	Support of organization	100
Booth Hill Elementary School Library	None	Support of organization	100
Daniels Farm Elementary School Library	None	Support of organization	100
Jane Ryan Elementary School Library	None	Support of organization	100
Middlebrook Elementary School Library	None	Support of organization	100
Tashua Elementary School Library	None	Support of organization	100
Frenchtown Elementary School Library	None	Support of organization	100
Booth Hill Elementary School Library	None	Support of organization	100
Elizabeth Shelton Elementary School Library	None	Support of organization	100
Long Hill Elementary School Library	None	Support of organization	100
Mohegan Elementary School Library	None	Support of organization	100
Perry Hill Elementary School Library	None	Support of organization	100
Sunnyside Elementary School Library	None	Support of organization	100
Total Cash Contributions			<u>\$29,750</u>

(Continued)

THE WELLER FOUNDATION, INCORPORATED2013SCHEDULE ATTACHED TO 990-PF, PART XV, LINE 3(a)Grants and Contributions Paid During the Year (continued)

<u>Name</u>	<u>Relationship</u>	<u>Purpose</u>	<u>Amount</u>
<u>Cash Awards</u>			
Barton L. Weller Scholarship Award to each of the following:			
a) Rachel Ordway (fourth payment)	None	Encourage both academic	3,000
b) Vishakha Negi (first payment)	None	excellence and a college	3,500
d) Nicholas M. Shigo (second payment)	None	education	3,000
d) Michael P. Brown (third payment)	None		3,000
Weller Excellence in Teaching Award of \$500 to each of the following:			
a) Rebecca Coppola	None	Encourage teaching	
b) Pamela DeCesare	None	excellence in grades	
c) Andrea D'Aiuto	None	kindergarten through fifth	1,500
Weller Collegiate Scholarship of \$1,000 to the following			
a) Patrick Haggerty	None	Assist local students in obtaining a quality college education	1,000
Weller Medical/ Health Sciences Scholarship of \$1,000 to each of the following:			
a) Lauren Taylor (third payment)	None	Encourage local students in	
b) Emma Briscoe (first payment)	None	field of medical/ health sciences	
c) Stephanie Vu (second payment)	None		
d) Brittany Horton (fourth payment)	None		4,000
Weller Education Scholarship of \$1,000 to each of the following:			
a) Stephanie Colasante (fourth payment)	None	Encourage and financially assist a	
b) Natalie Dieckman (first payment)	None	local high school senior to pursue a	
c) Jacqueline Baril (third payment)	None	teaching career.	4,000
d) Jessica Lynch (second payment)	None		

(Continued)

THE WELLER FOUNDATION, INCORPORATED2013SCHEDULE ATTACHED TO 990-PF, PART XV, LINE 3(a)Grants and Contributions Paid During the Year (continued)

<u>Name</u>	<u>Relationship</u>	<u>Purpose</u>	<u>Amount</u>
<u>Cash Awards (continued)</u>			
Vincent Voccia Vocational Award to each of the following:			
a) Samantha Beauchamp (second payment)	None	Encourage vocational skills	1,250
b) Alexis DeNigris (second payment)	None		1,250
c) John Dance (second payment)	None		1,250
d) Alex Russell (second payment)	None		1,250
e) Sarah Meehan (first payment)	None		1,500
f) Christopher McCauley (first payment)	None		1,500
g) Olivia Phenix (first payment)	None		1,500
h) Jose Cruz (first payment)	None		1,500
i) Devane Taffe (first payment)	None		1,500
Barton L. Weller Scholarship Finalist Award of \$500 to each of the following:			
a) Danielle Bishop	None	Encourage both academic	
b) Kelsey Brown	None	excellence and a college education	1,500
c) Talia Fappiano	None		
Barton L. Weller Scholarship Finalist Selected of \$200 to each of the following:			
a) Rebecca DeVos	None	Encourage both academic	
b) Charlotte Gray	None	excellence and a college	
c) Joshua Kretler	None	education	
d) Casey Maffucci	None		
e) Sonya Stanczyk	None		1,000
Eleanor F. Moore Awards of \$500 to each of the following:			
a) Grayson Kramer	None	Foster interest	
b) Julia Rotella	None	in business careers	
c) Grace Winans	None		
d) Thomas Wilczynski III	None		
e) Jacob Jordan	None		2,500

(Continued)

THE WELLER FOUNDATION, INCORPORATED2013SCHEDULE ATTACHED TO 990-PF, PART XV, LINE 3(a)Grants and Contributions Paid During the Year (continued)

<u>Name</u>	<u>Relationship</u>	<u>Purpose</u>	<u>Amount</u>
<u>Cash Awards (continued)</u>			
Senior Science Awards of \$500 to each of the following:			
a) Christina Johnson	None	Foster interest	
b) Noah Kreski	None	in business careers	
c) Pieter Martino	None		
d) Sara MacNeill	None		
e) Melissa Giblin	None		2,500
Paul W. Broggi Awards of \$500 to each of the following:			
a) Samantha Tomaszewski	None	Foster interest	
b) Dara Rubin	None	in communications	
c) Emily Morrell	None	careers	
d) Adam Zhitomi	None		
e) John Delfino	None		2,500
<u>Total Cash Awards and Contributions</u>			<u>\$75,250</u>
<u>Non-Cash Awards &amp; Contributions</u>			
Scholarship Awards Luncheon and dinner for award recipients previously listed	None	Encourage both academic excellence and a college education	3,458
Five new school Award Plaques for the Eleanor F. Moore, Paul W. Broggi and Senior Science Award winners given to area high schools	None	Encourage both academic excellence and a college education	550
<u>Total Non-Cash Awards and Contributions</u>			<u>4,008</u>
<u>Total Contributions and Awards</u>			<u>\$79,258</u>

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

OMB No. 1545-1709

► File a separate application for each return.

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

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

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

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

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

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

Part I only ☐

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

Type or print	Name of exempt organization or other filer, see instructions.	Enter filer's identifying number
	<b>THE WELLER FOUNDATION, INC.</b>	Employer identification number (EIN) or <b>06-6068987</b>
	Number, street, and room or suite no. If a P.O. box, see instructions. <b>P.O. BOX 1145</b>	Social security number (SSN)
File by the due date for filing your return. See instructions.	City, town or post office, state, and ZIP code. For a foreign address, see instructions. <b>WOODBURY, CT 06798</b>	

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

**0 4**

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

### THE FOUNDATION

- The books are in the care of ► **P.O. BOX 1145 - WOODBURY, CT 06798**

Telephone No. ► **203-263-0229**

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:
- ☒ 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	\$	<b>2,000.</b>
b If this application is for Forms 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit.	3b	\$	<b>1,500.</b>
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	\$	<b>500.</b>

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

- If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only **Part II** and check this box ☒ **X**

**Note.** Only complete Part II if you have already been granted an automatic 3-month extension on a previously filed Form 8868

- If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** (on page 1)

**Part II Additional (Not Automatic) 3-Month Extension of Time.** Only file the original (no copies needed).

Enter filer's identifying number, see instructions

Type or print  File by the due date for filing your return. See instructions	Name of exempt organization or other filer, see instructions	Employer identification number (EIN) or
	THE WELLER FOUNDATION, INC.	06-6068987
	Number, street, and room or suite no. If a P O box, see instructions	Social security number (SSN)
	P.O. BOX 1145	
	City, town or post office, state, and ZIP code. For a foreign address, see instructions.	
	WOODBURY, CT 06798	

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

04

Application Is For	Return Code	Application Is For	Return Code
Form 990 or Form 990-EZ	01		
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

**STOP! Do not complete Part II if you were not already granted an automatic 3-month extension on a previously filed Form 8868.**

**THE FOUNDATION**

- The books are in the care of ☒ **P.O. BOX 1145 - WOODBURY, CT 06798**

Telephone No **203-263-0229**

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

4 I request an additional 3-month extension of time until **NOVEMBER 15, 2014**

5 For calendar year **2013**, or other tax year beginning \_\_\_\_\_, and ending \_\_\_\_\_

6 If the tax year entered in line 5 is for less than 12 months, check reason ☐ Initial return ☐ Final return  
☐ Change in accounting period

7 State in detail why you need the extension

**IN ORDER TO PREPARE A COMPLETE AND ACCURATE RETURN, MORE TIME IS REQUIRED TO GATHER THE NECESSARY INFORMATION.**

8a 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	8a	\$	2,000.
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 and any amount paid previously with Form 8868	8b	\$	2,000.
c <b>Balance due.</b> Subtract line 8b from line 8a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions	8c	\$	0.

**Signature and Verification must be completed for Part II only.**

Under penalties of perjury, I declare that I have examined this form, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete, and that I am authorized to prepare this form.

Signature

Title **TREASURER**

Date