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Form **990-PF** Department of the Treasury Internal Revenue Service

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

OMB No 1545-0052 Open to Public Inspection

▶ Do not enter Social Security numbers on this form as it may be made public. ▶ Information about Form 990-PF and its separate instructions is at www.irs.gov/form990pf.

Fore	alen	dar year 2013 or tax year beginning		, and ending		
Nar	ne of	foundation			A Employer identification	n number
С	HA	RITABLE TRUST U/W PAULI	NE E.			
F	IT:	ZPATRICK			22-6538192	2
Nun	nber a	nd street (or P O box number if mail is not delivered to street	address)	Room/suite	<b>B</b> Telephone number	
C	/0	JOHN B. DEVINE TRUSTEE	, PO BOX 411		(203)838-0	<u>)665                                   </u>
City	or to	own, state or province, country, and ZIP or foreign p	ostal code		C If exemption application is p	pending, check here
_N	OR	WALK, CT 06852				_
GC	heck	all that apply: Initial return	Initial return of a fo	rmer public charity	D 1. Foreign organization	s, check here
		Final return	Amended return		2 Foreign grannizations m	eeting the 85% test
<del></del>		Address change	Name change		Foreign organizations m check here and attach c	omputation
H_C	_	type of organization: X Section 501(c)(3) ex			E If private foundation sta	
	Se		Other taxable private founda	tion	under section 507(b)(1	)(A), check here
I Fa	ur ma	- I	ng method: X Cash	Accrual	F If the foundation is in a	
(fr	om l	Part II, col. (c), line 16)	her (specify)		under section 507(b)(1	)(B), check here
	\$	1,119,129. (Part I, colu	mn (d) must be on cash b	pasis.)		(4)
Pa	ırt I	→ (The total of amounts in columns (b), (c), and (d) may not	(a) Revenue and	(b) Net investment	(c) Adjusted net	(d) Disbursements for charitable purposes
		necessarily equal the amounts in column (a) )	expenses per books	income	income	(cash basis only)
		, <b></b> , <b></b> , , , ,			N/A	<u> </u>
	2	Check X If the foundation is not required to attach Sch B				G = 1 = 1
	3	Interest on savings and temporary cash investments	50.	50.		STATEMENT 1
	4	Dividends and interest from securities	25,784.	25,784	•	STATEMENT 2
	5a	Gross rents			<u> </u>	<del> </del>
	b	Net rental income or (loss)	14 510		<u> </u>	-
ō	6a	. Net gain or (loss) from sale of assets not on line 10 Gross sales price for all	<14,518.	>		<del></del>
Revenue	b	assets on line 6a			<del> </del>	
ě	7	Capital gain net income (from Part IV, line 2)		0	•	<u></u>
_	8	Net short-term capital gain				
(G)	9	Income modifications Gross sales less returns				-
		and allowances				<del> </del>
		Less Cost of goods sold			<u> </u>	<u> </u>
<b></b>		Gross profit or (loss) Other income				
頭	Į.		11,316.	25,834		
<i>ڪ</i>	12	Total. Add lines 1 through 11  Compensation of officers, directors, trustees, etc	11,000.	5,500		5,500
MAY	13		11,000.	3,300	<u> </u>	3/300
	ı	Pension plans, employee benefits				
es	1	Legal fees				
>=i Sue	h	Accounting fees STMT 3	9,000.	7,250	-	1,750
ýjUŽ Expe	ָן וּ	Other professional fees	3,000			
e 🥰	17	Interest				
$\sqrt[3]{0}$ $\sqrt[3]{0}$	18	Taxes STMT 4	REG99/	ED 399	•	0
ist	19	Depreciation and depletion	T			
Ë	20	Occupancy	12 MAY 1 9 20	SS		
Adr	21	Travel, conferences, and meetings	[중] MAY 제 및 2년	) <del>   </del>	1	
2	22	Printing and publications	2:23:00	- 1 <u>0</u>		
a a	23	Other expenses	OGDEN.	١ .		
atir	24	· · · · · · · · · · · · · · · · · · ·				
je c		expenses. Add lines 13 through 23	20,399.	13,149		7,250
ō	25	Contributions, gifts, grants paid	28,500.			28,500
	26					
		Add lines 24 and 25	48,899.	13,149	•	35,750
	27	Subtract line 26 from line 12:		,		
	1	2 Excess of revenue over expenses and disbursements	<37,583.	>		
		Net investment income (if negative, enter -0-)		12,685		
	,	Adjusted net income (if negative, enter -0-)			N/A_	
323! 10-1	0-13	LHA For Paperwork Reduction Act Notice, see	instructions.	· <del></del>		Form <b>990-PF</b> (2013

CHARITABLE TRUȘT U/W PAULINE E.

Form 990-PF (2013) 22-6538192 Page 2 Part II Balance Sheets Attached schedules and amounts in the description Beginning of year End of year (a) Book Value (b) Book Value (c) Fair Market Value 154,555 177.620 154,555. 1 Cash - non-interest-bearing 2 Savings and temporary cash investments 3 Accounts receivable ► Less; allowance for doubtful accounts 4 Pledges receivable ► Less: allowance for doubtful accounts 5 Grants receivable 6 Receivables due from officers, directors, trustees, and other disqualified persons 7 Other notes and loans receivable Less: allowance for doubtful accounts Inventories for sale or use 9 Prepaid expenses and deferred charges 10a Investments - U.S. and state government obligations 421,969. 407,451. **b** Investments - corporate stock STMT 5 c Investments - corporate bonds 11 Investments - land, buildings, and equipment basis Less accumulated depreciation 12 Investments - mortgage loans 13 Investments - other 14 Land, buildings, and equipment; basis Less accumulated depreciation 15 Other assets (describe ▶ 16 Total assets (to be completed by all filers - see the 562,006. 599.589. 1,119,129. instructions. Also, see page 1, item 1) 17 Accounts payable and accrued expenses Grants payable 19 Deferred revenue 20 Loans from officers, directors, trustees, and other disqualified persons 21 Mortgages and other notes payable 22 Other liabilities (describe 0. 23 Total liabilities (add lines 17 through 22) Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31. or Fund Balances 24 Unrestricted 25 Temporarily restricted 26 Permanently restricted **▶** X Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. 599,589 562,006 27 Capital stock, trust principal, or current funds **Vet Assets** 28 Paid-in or capital surplus, or land, bldg., and equipment fund 29 Retained earnings, accumulated income, endowment, or other funds 599,589. 562,006 30 Total net assets or fund balances 599,589. 562,006 31 Total liabilities and net assets/fund balances **Analysis of Changes in Net Assets or Fund Balances** Part III 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) <u>599,589.</u> <37,5<u>83.</u> 2 Enter amount from Part I, line 27a 0. Other increases not included in line 2 (itemize) 562,006. Add lines 1, 2, and 3 Decreases not included in line 2 (itemize) 6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 562,006.

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Page 3

2-story brick wa	cribe the k arehouse; ———	and(s) of property sold (e or common stock, 200 s	g., real estate, shs MLC Co.)		`P-	ow acc Purch Donai	quired lase tion	(c) Date ac (mo., day		(d) Date sold (mo , day, yr.)
1a 300 SHS EASTMAN KODAK						I	P	VARIO	US	09/11/13
<u> </u>										
<u>,</u>			<del></del>							
<u> </u>								<del></del>		
	(4)	Danasata allamad	( ) 0-							<u> </u>
(e) Gross sales price	(1)	Oepreciation allowed (or allowable)		st or other basis expense of sale		_		(e) plus (	or (loss f) minus	(g)
	ļ			14,51	8.					<14,51
		···								
			-		-					
	ļ — — — · ·				+					
Complete only for assets showing	חם חפוח וח	column (h) and owned h	the foundation	on 12/31/60	+			Couna (Cal	(b) ==:=	
Complete only for assets shown	<del></del>	(i) Adjusted basis	<del>-</del>	(cess of col. (I)				Gains (Col (k), but not		
(i) F.M.V. as of 12/31/69		as of 12/31/69		col. (j), if any				Losses (fr	om col. (	h))
							<u> </u>			<14,51
	<b>†</b>	<del></del>			_			<del></del>		<14,51¢
			1	<del>-</del>	$\dashv$					
					-+					
	L	C I .			$\overline{}$					
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, ,	•	•		,	ᄼᅡ	-				<u> </u>
Net short-term capital gain or (los If gain, also enter in Part I, line 8,			and (6):		٦					
If (loss), enter -0- in Part I, line 8		<i>u)</i> .			1	_			37/3	
and V Ouglitication II					, ,	3			N/A	
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Date for funding or determination letter:			) instru	ıctio	ns)_
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any political campaign?  b Did it spend more than \$100 during the year (either directly) or indirectly) for political purposes (see instructions for the definition)?  If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities and copies of any materials published or distributed by the foundation in connection with the activities and copies of any materials published or distributed by the foundation in connection with the activities and copies of any materials published or distributed by the foundation with the activities and copies of any materials published or distributed by the foundation with the activities and copies of any materials published or distributed by the foundation with the activities and copies of any materials published or distributed by the foundation with the activities and copies of any materials published or distributed by the foundation in connection with the activities and copies of any materials published or distributed by the foundation managers. ▶ \$ 0.  Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ \$ 0.  Enter the reimbursement (if any) paid by the foundation during the year reported to the IRS?  If "Yes," attach a detailed description of the activities.  Has the foundation have unrelated business gross income of \$1,000 or more during the year?  A bit If "Yes," has it filed a tax return on Form 990-T for this year?  N/A  b   1"Yes," attach the statement required by General Instruction T.  Was there a liquidation, termination, dissolution, or substantial contraction during the year?  N/A  Was there a liquidation, termination, dissolution, or substantial contraction during the year?  N/A  By Extending the foundation has activities and provening instrument so that no mandatory directions that conflict with the state law remain in the governing instrument, or  By State leg			$\neg$	Yes	No
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CHARITABLE TRUST U/W PAULINE E. Form 990-PF (2013) FITZPATRICK 22-6538192 Page 5 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 Х 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) X 12 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? 13 Website address ► N/A The books are in care of ▶ JOHN B. DEVINE Telephone no.  $\triangleright 203 - 838 - 0665$ Located at ▶65 EAST AVE., NORWALK, CT ZIP+4 > 06852 - 0411Section 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 N/A At any time during calendar year 2013, did the foundation have an interest in or a signature or other authority over a bank. Yes No securities, or other financial account in a foreign country? X 16 See the instructions for exceptions and filing requirements for Form TD F 90-22.1. If "Yes," enter the name of the foreign Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required Yes No File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. 1a During the year did the foundation (either directly or indirectly): Yes X No (1) Engage in the sale or exchange, or leasing of property with a disqualified person? (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) Yes X No a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? Yes X No (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? Yes X No (5) Transfer any income or assets to a disqualified person (or make any of either available Yes X No for the benefit or use of a disqualified person)? (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 Yes X No termination of government service, if terminating within 90 days.) 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)? 1b Organizations relying on a current notice regarding disaster assistance check here c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2013? Х 10 2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)); a At the end of tax year 2013, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2013? Yes X No If "Yes," list the years b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.) N/A 2b c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. 3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time Yes X No during the year? 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

X

3b

4a

N/A

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,

b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that

Form 4720, to determine if the foundation had excess business holdings in 2013)

had not been removed from jeopardy before the first day of the tax year beginning in 2013?

4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?

CHARITABLE TRUST U/W PAULINE E. FITZPATRICK 22-6538192 Form 990-PF (2013) Page 6 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: Yes X No (1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? (2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, Yes X No any voter registration drive? Yes X No (3) Provide a grant to an individual for travel, study, or other similar purposes? (4) Provide a grant to an organization other than a charitable, etc., organization described in section Yes X No 509(a)(1), (2), or (3), or section 4940(d)(2)? (5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for Yes X No the prevention of cruelty to children or animals? b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)? N/A 5b Organizations relying on a current notice regarding disaster assistance check here c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained N/A Yes \_\_\_\_ No expenditure responsibility for the grant? 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 Yes X No b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? 6b X\_ If "Yes" to 6b, file Form 8870 Yes X No 7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction? 7b Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors 1 List all officers, directors, trustees, foundation managers and their compensation. (d) Contnbutions to employee benefit plans and deferred compensation (b) Title, and average hours per week devoted to position (e) Expense account, other (c) Compensation (If not paid, (a) Name and address enter -0-) allowances JOHN B. DEVINE ESQUIRE TRUSTEE 65 EAST AVENUE NORWALK, CT 068520411 2.00 11,000. 0 0. 2 Compensation of five highest-paid employees (other than those included on line 1). If none, enter "NONE." (d) Contributions to employee benefit plans and deferred (e) Expense account, other (b) Title, and average hours per week devoted to position (a) Name and address of each employee paid more than \$50,000 (c) Compensation allowances compensation NONE

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

CHARITABLE TRUȘT U/W PAULINE E.

orm 990-PF (2013) FITZPATRICK	22-65	38192 Page 7
Part VIII Information About Officers, Directors, Trustees, Foundated Paid Employees, and Contractors (continued)	ation Managers, Highly	
3 Five highest-paid independent contractors for professional services. If none, ente	r "NONE."	
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
		_
Fotal number of others receiving over \$50,000 for professional services		<b>▶</b> 0
Part IX-A Summary of Direct Charitable Activities		<u>-                                    </u>
List the foundation's four largest direct charitable activities during the tax year. Include relevant statis number of organizations and other beneficiaries served, conferences convened, research papers pro		Expenses
ı N/A		
_ <del></del>		
2		
3		
Part IX-B Summary of Program-Related Investments  Describe the two largest program-related investments made by the foundation during the tax year on	lines 1 and 2	Amount
N/A	Times Tanu 2.	Amount
All other program-related investments. See instructions.		

Total. Add lines 1 through 3

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_	Minimum Investment Return (All domestic foundations must complete this part. Foreign four	ndation	s, see instructions.)
1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
а	Average monthly fair market value of securities	1a	855,907.
b	Average of monthly cash balances .	1b	855,907. 188,809.
C	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	1,044,716.
е	Reduction claimed for blockage or other factors reported on lines 1a and		
	1c (attach detailed explanation) 1e 0.		
2	Acquisition indebtedness applicable to line 1 assets	2_	0.
3	Subtract line 2 from line 1d	3	1,044,716.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	15,671.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	1,029,045.
6_	Minimum investment return. Enter 5% of line 5	6_	51,452.
P	art XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations an	d certai	n
	foreign organizations check here 🕨 🔛 and do not complete this part.)		
1	Minimum investment return from Part X, line 6	1	51,452.
2a	Tax on investment income for 2013 from Part VI, line 5		
b	Income tax for 2013. (This does not include the tax from Part VI.)		
C	Add lines 2a and 2b	2c	254.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	51,198.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	51,198.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	51,198.
P	Qualifying Distributions (see instructions)		
1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
а	Expenses, contributions, gifts, etc total from Part I, column (d), line 26	1a	35,750.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	<del></del>
3	Amounts set aside for specific charitable projects that satisfy the:		
а	Suitability test (prior IRS approval required)	3a	
þ	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	35,750.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment		
	income. Enter 1% of Part I, line 27b	5	0.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	35,750.
	Note. The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation of 4940(e) reduction of tax in those years.	qualifies	for the section

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Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2012	(c) 2012	( <b>d</b> ) 2013
4. Out-but-ble amount for 2012 from Bort VI	Острия	Tours prior to 2012	2012	2010
1 Distributable amount for 2013 from Part XI,				E1 100
line 7				51,198.
2 Undistributed income, if any, as of the end of 2013			31,276.	
a Enter amount for 2012 only		_	31,4/0.	<del></del>
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2013:		<u>U•</u>	-	
		•		
a From 2008				
b From 2009				
¢ 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: $\triangleright$ \$ 35,750.			21 006	
a Applied to 2012, but not more than line 2a			31,276.	
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.			4 454
d Applied to 2013 distributable amount				4,474.
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:				
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				46,724.
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				
	<del></del>			Form <b>990-PF</b> (2013)

CHARITABLE TRUST U/W PAULINE E. Form 990-PF (2013) FITZPATRICK 22-6538192 Page 10 Part XIV Private Operating Foundations (see instructions and Part VII-A, question 9) N/A 1 a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2013, enter the date of the ruling 4942(j)(3) or 494<u>2(J)(5)</u> b Check box to indicate whether the foundation is a private operating foundation described in section Prior 3 years 2 a Enter the lesser of the adjusted net Tax year (a) 2013 (b) 2012 (c) 2011 (d) 2010 (e) Total income from Part I or the minimum investment return from Part X for each year listed **b** 85% of line 2a c Qualifying distributions from Part XII, line 4 for each year listed d Amounts included in line 2c not used directly for active conduct of exempt activities e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c Complete 3a, b, or c for the alternative test relied upon: a "Assets" alternative test - enter: (1) Value of all assets (2) Value of assets qualifying under section 4942(j)(3)(B)(i) b "Endowment" alternative test - enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed c "Support" alternative test - enter: (1) Total support other than gross investment income (interest, dividends, rents, payments on Securities loans (section 512(a)(5)), or royalties) (2) Support from general public and 5 or more exempt Organizations as provided in section 4942(j)(3)(B)(iii) (3) Largest amount of support from an exempt organization Gross investment income Part XV | Supplementary Information (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year-see instructions.) **Information Regarding Foundation Managers:** a List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000). (See section 507(d)(2).) NONE b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest. NONE Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs: \_\_\_\_ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. (see instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d. a The name, address, and telephone number or e-mail address of the person to whom applications should be addressed:

# JOHN DEVINE ESQ, CHARITABLE TRUST U/W P. FITZPATRICK, 203 838-0665 65 EAST AVENUE, NORWALK, CT 06851 b The form in which applications should be submitted and information and materials they should include: NO SPECIAL APPLICATION FORM IS REQUIRED c Any submission deadlines: NONE d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors: AGED CITIZENS OF THE GREATER NORWALK, CT AREA OR FOR THEIR BENEFIT AS DETERMINED BY THE TRUSTEE.

Form 990-PF (2013) FITZPATRICK 22-6538192 Page 11 Part XV Supplementary Information (continued) Grants and Contributions Paid During the Year or Approved for Future Payment If recipient is an individual, Recipient Foundation status of Purpose of grant or show any relationship to Amount contribution any foundation manager Name and address (home or business) recipient or substantial contributor a Paid during the year CATHOLIC FAMILY AND SOCIAL SERVICES FOR BENEFIT OF SENIOR 7 CHAPEL ST P.O. BOX 2025 CITIZENS NORWALK, CT 06855 1,000. **ELDERHOUSE** FOR BENEFIT OF SENIOR 7 LEWIS STREET CITIZENS NORWALK, CT 06851 2,500. FAMILY & CHILDREN'S AGENCY INC FOR BENEFIT OF SENIOR 9 MOTT AVENUE CITIZENS NORWALK, CT 06850 1,000. GEORGE WASHINGTON CARVER COMMUNITY FOR BENEFIT OF SENIOR CENTER CITIZENS 7 ACADEMY ST NORWALK, CT 06850 1,000. NORTE DAME CONVALESCENT PROGRAM FOR BENEFIT OF SENIOR 98 WEST ROCKS ROAD CITIZENS NORWALK CT 06851 7 000. SEE CONTINUATION SHEET(S) Total ▶ 3a 28 500. **b** Approved for future payment NONE

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**▶** 3b

Total

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### Part XVI-A **Analysis of Income-Producing Activities**

Enter gross amounts unless otherwise indicated.	Unrelate	ed business income	Exclu	ded by section 512, 513, or 514	(e)
•	(a) Business	(b) Amount	(C) Exclu- sion code	(d) Amount	Related or exempt function income
1 Program service revenue:	code		COGG		
a	ļ		-	<u> </u>	
b			-		
C	ļ		<u> </u>		
d			-		
e			-		
f			-		
g Fees and contracts from government agencies			ļ		
2 Membership dues and assessments					
3 Interest on savings and temporary cash			١.,		
investments			14	50.	
4 Dividends and interest from securities			14	25,784.	
5 Net rental income or (loss) from real estate:			<u> </u>		
a Debt-financed property				·	
b Not debt-financed property					
8 Net rental income or (loss) from personal					
property					
7 Other investment income			ļ		
8 Gain or (loss) from sales of assets other					
than inventory			18	<14,518.	>
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory			<del></del>		
11 Other revenue:					
a			<del> </del>		
b			<u> </u>		.,
<u> </u>			-		
d			<del> </del>		
6(h) (d) and (a)		0.	+	11,316.	0.
12 Subtotal. Add columns (b), (d), and (e)	L	<u> </u>	<u> </u>	13	
13 Total. Add line 12, columns (b), (d), and (e) (See worksheet in line 13 instructions to verify calculations.)		•		13	11,310.
Part XVI-B Relationship of Activities to	n the Ass	omplishment of E		t Durnoss	
relationship of Activities to	o the Acc	omplishment of E	xemp		
Line No. Explain below how each activity for which incom			A contrib	buted importantly to the accon	nplishment of
the foundation's exempt purposes (other than b	by providing tu	inds for such purposes).			
		· · · · · · · · · · · · · · · · · · ·			
					<del></del>
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13) FITZPATRICK 22-6538192
Information Regarding Transfers To and Transactions and Relationships With Noncharitable

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		Exempt Organ	izations					
1	Did the	organization directly or indir	rectly engage in any of the followin	g with any other organization	n described in section 501(c) of		Yes	No
	the Cod	e (other than section 501(c)	)(3) organizations) or in section 52	?7, relating to political organi	zations?	1		
a	Transfe	rs from the reporting founda	ation to a noncharitable exempt or	ganızatıon of:				
	(1) Cas	sh		•	••	1a(1)		_X
	(2) Oth	ner assets				1a(2)		<u>X</u>
b	Other tr	ansactions:						
	(1) Sal	les of assets to a noncharital	ble exempt organization		-	1b(1)		_X_
	(2) Pui	rchases of assets from a nor	ncharitable exempt organization			1b(2)		_X_
	(3) Rer	ntal of facilities, equipment, (	or other assets			1b(3)		_X_
	(4) Rei	mbursement arrangements			•	1b(4)		<u>X</u> _
	(5) Loa	ans or loan guarantees				15(5)		X
	(6) Per	formance of services or me	mbership or fundraising solicitatio	ins		1b(6)	ļ	X
	-		iling lists, other assets, or paid em	• •		10		X
đ		•			vays show the fair market value of the goods, o		ets,	
				ed less than fair market value	e in any transaction or sharing arrangement, sl	10W IN		
-1.		· · · · · · · · · · · · · · · · · · ·	other assets, or services received.	a susmet expensetion	(4)			
a)L	ine no	(b) Amount involved	(c) Name of noncharitable	e exempt organization	(d) Description of transfers, transactions, and s	haring an	rangeme	nts
			N/A	······································				
	_							
	-							
	-							
			<u> </u>					
					·····			
_								
				· · · · · · · · · · · · · · · · · · ·				
		·					-	
2a	Is the fo	oundation directly or indirect	tly affiliated with, or related to, one	or more tax-exempt organiz	ations described			
	ın sectio	on 501(c) of the Code (other	r than section 501(c)(3)) or in sect	tion 527?		Yes	X	] No
b	If "Yes,"	complete the following scho	edule.	·				
		(a) Name of org	anization	(b) Type of organization	(c) Description of relationsh	iib		
		N/A						
	-			<u> </u>				
٠.					statements, and to the best of my knowledge ation of which preparer has any knowledge attention	the IRS	discuss	his
Sig He	gn  👢	\ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \	7/\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\	5/2/21	sho	rn with th wn below	e prepar (see ins	<u>4</u> )?
пе		Much	· (h) //	7/1/9	<del></del>	【 Yes		J No I
	لإلـــ	ignature of officer or trustee		Date / /	Title Check I if DTIN			
	1	Print/Type preparer's na	ame Preparer's s	ignature	Date Check if PTIN			
Pa	id (	V	- IT ()	/ <i>()</i>	self- employed	1025	000	
	epare	MICHAEL AR		menn		<u> </u>		
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			O CANAL STREET,		Dhann (202)	יי כי ג	211	2
		ST	AMFORD, CT 0690	4	Phone no. (203)3			
					FO	rm <b>99</b> 0	7-LL	(2013)

Part XV Supplementary Information Grants and Contributions Paid During the Year (Continuation) If recipient is an individual, show any relationship to any foundation manager or substantial contributor Recipient Foundation Purpose of grant or Amount status of contribution Name and address (home or business) recipient NORWALK SENIOR CENTER FOR BENEFIT OF SENIOR CITIZENS 11 ALLEN ROAD NORWALK, CT 06851 7,000. SOCIETY OF ST. VINCENT PAUL FOR BENEFIT OF SENIOR CITIZENS 4 BERKELEY ST PO BOX 150 NORWALK CT 06852 1 000. ST JEROME CHURCH FOR BENEFIT OF SENIOR 23 HALF MILE ROAD CITIZENS NORWALK CT 06851 1,000. FOR BENEFIT OF SENIOR ST. JOSEPH CHURCH CITIZENS 85 SOUTH MAIN STREET NORWALK CT 06854 1,000. ST. LADISLAUS CHURCH FOR BENEFIT OF SENIOR 25 CLIFF STREET CITIZENS SOUTH NORWALK, CT 06854 1,000. ST. MARY ROMAN CATHOLIC CHURCH FOR BENEFIT OF SENIOR 669 WEST AVENUE CITIZENS 1,000. NORWALK, CT 06850 ST. MATTHEW CHURCH FOR BENEFIT OF SENIOR CITIZENS SCRIBNER AVENUE 1,000. NORWALK, CT 06854 ST. PHILIP CHURCH FOR BENEFIT OF SENIOR CITIZENS 25 FRANCE STREET NORWALK, CT 06851 1,000, FOR BENEFIT OF SENIOR THE SALVATION ARMY 14 BYINGTON PLACE CITIZENS 1 000. NORWALK, CT 06850 FOR BENEFIT OF SENIOR FISH CITIZENS 27 DOUGLAS DRIVE NORWALK, CT 06850 1,000. Total from continuation sheets 16 000

SOURCE  FAIRFIELD COUNTY CHECKING FAIRFIELD COUNTY MM MORGAN STANLEY  TOTAL TO FORM 990-PF, PART I, LINE 3, COLUMN A  FORM 990-PF  DIVIDENDS AND INTEREST FROM SECURITIES  STATEMENT  SOURCE  GROSS AMOUNT  MORGAN STANLEY  25,784.  0. 25,7  TOTAL TO FM 990-PF, PART I, LN 4  25,784.  0. 25,7  TOTAL TO FM 990-PF, PART I, LN 4  25,784.  0. 25,7  TOTAL TO FM 990-PF  ACCOUNTING FEES  STATEMENT  (A) EXPENSES NET INVEST- ADJUSTED CHARLTY  PER BOOKS MENT INCOME NET INCOME PURPOR  ACCOUNTING & TAX PREPARATION  9,000.  7,250.  1,7  FORM 990-PF  TAXES  STATEMENT  (A) EXPENSES NET INVEST- ADJUSTED CHARLTY FORM 990-PF, PG 1, LN 16B 9,000.  7,250.  1,7  FORM 990-PF  TAXES  STATEMENT  (A) EXPENSES NET INVEST- ADJUSTED CHARLTY FORM 990-PF TAXES  STATEMENT  (A) EXPENSES NET INVEST- ADJUSTED CHARLTY FORM 990-PF TAXES  STATEMENT  (B) (C) (D) CHARLTY PER BOOKS MENT INCOME ADJUSTED CHARLTY PURPOR CHARL	<del></del>	<del></del> -						
FAIRFIELD COUNTY MM MORGAN STANLEY  TOTAL TO FORM 990-PF, PART I, LINE 3, COLUMN A  FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT  SOURCE GROSS AMOUNT DIVIDENDS AMOUNT MORGAN STANLEY 25,784. 0. 25,  TOTAL TO FM 990-PF, PART I, LN 4 25,784. 0. 25,  FORM 990-PF ACCOUNTING FEES STATEMENT  (A) (B) (C) (D) EXPENSES NET INVEST- ADJUSTED CHARIT, PER BOOKS MENT INCOME NET INCOME PURPOR  ACCOUNTING & TAX PREPARATION 9,000. 7,250. 1,  TO FORM 990-PF, PG 1, LN 16B 9,000. 7,250. 1,  FORM 990-PF TAXES STATEMENT  (A) (B) (C) (D) CONTROL OF TAXES STATEMENT  (A) (B) (C) (C) CONTROL OF TAXES STATEMENT  (A) (B) (C) (D) CONTROL OF TAXES STATEMENT  (A) (B) (C) (C) (C) (D) CONTROL OF TAXES STATEMENT  (C) (D) CONTRO	FORM 990-PF INTEREST ON S	SAVINGS A	ND TEM	PORARY C	ASH IN	IVESTMENTS	STATEMENT	1
FAIRFIELD COUNTY MM MORGAN STANLEY  TOTAL TO FORM 990-PF, PART I, LINE 3, COLUMN A  FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT  SOURCE GROSS AMOUNT DIVIDENDS COLUMN (A AMOUNT)  MORGAN STANLEY 25,784. 0. 25,7  TOTAL TO FM 990-PF, PART I, LN 4 25,784. 0. 25,7  FORM 990-PF ACCOUNTING FEES STATEMENT  (A) (B) (C) (D)  EXPENSES NET INVEST- ADJUSTED CHARITY  PER BOOKS MENT INCOME NET INCOME PURPOR  ACCOUNTING & TAX  PREPARATION 9,000. 7,250. 1,7  FORM 990-PF, PG 1, LN 16B 9,000. 7,250. 1,7  FORM 990-PF TAXES STATEMENT  (A) (B) (C) (D)  EXPENSES NET INVEST- ADJUSTED CHARITY  FORM 990-PF TAXES STATEMENT  (A) (B) (C) (D)  EXPENSES NET INVEST- ADJUSTED CHARITY  FORM 990-PF TAXES STATEMENT  (A) (B) (C) (D)  EXPENSES NET INVEST- ADJUSTED CHARITY  FORM 990-PF TAXES STATEMENT  (A) (B) (C) (D)  EXPENSES NET INVEST- ADJUSTED CHARITY  PER BOOKS MENT INCOME NET INCOME PURPOR  FEDERAL INCOME TAX 399. 399.	SOURCE						AMOUNT	
FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT  SOURCE GROSS AMOUNT DIVIDENDS COLUMN (A AMOUNT DIVIDENDS AMOUNT DIVIDENDS AMOUNT OF COLUMN (A AMOUNT DIVIDENDS AMOUNT DIVIDENDS AMOUNT OF COLUMN (A AMOUNT DIVIDENDS AMOUNT DIVIDENDS AMOUNT DIVIDENDS AMOUNT OF COLUMN (A AMOUNT DIVIDENDS AMOUNT DIVIDENDS AMOUNT DIVIDENDS AMOUNT DIVIDENDS AMOUNT DESCRIPTION PER BOOKS MENT INCOME NET INCOME PURPOSE ACCOUNTING & TAX PREPARATION 9,000. 7,250. 1,7  TO FORM 990-PF, PG 1, LN 16B 9,000. 7,250. 1,7  FORM 990-PF TAXES STATEMENT DESCRIPTION PER BOOKS NET INVEST- ADJUSTED CHARITY DESCRIPTION PROPOSES NET INVEST- ADJUSTED CHARITY DESCRIPTION PER BOOKS MENT INCOME NET INCOME PURPOSE ADJUSTED CHARITY PER BOOKS MENT INCOME NET INCOME PURPOSE PURPOSE NET INVEST- ADJUSTED CHARITY PER BOOKS MENT INCOME NET INCOME PURPOSE PURPOSE NET INVEST- ADJUSTED CHARITY PER BOOKS MENT INCOME NET INCOME PURPOSE PURPOSE NET INCOME NET INCOME NET INCOME PURPOSE PURPOSE NET INCOME NET INCOME NET INCOME PURPOSE PURPOSE NET INCOME NET INCOME NET INCOME PURPOSE PURPOSE PURPOSE NET INCOME NET INCOME PURPOSE PURPOSE PURPOSE NET INCOME NET INCOME PURPOSE	FAIRFIELD COUNTY MM							2. 19. 29.
SOURCE GROSS AMOUNT DIVIDENDS AMOUNT  MORGAN STANLEY 25,784. 0. 25,7  TOTAL TO FM 990-PF, PART I, LN 4 25,784. 0. 25,7  FORM 990-PF ACCOUNTING FEES STATEMENT  (A) (B) (C) (D)  EXPENSES NET INVEST- ADJUSTED CHARITY  PER BOOKS MENT INCOME NET INCOME PURPOR  ACCOUNTING & TAX PREPARATION 9,000. 7,250. 1,7  TO FORM 990-PF, PG 1, LN 16B 9,000. 7,250. 1,7  FORM 990-PF TAXES STATEMENT  (A) (B) (C) (D)  EXPENSES NET INVEST- ADJUSTED CHARITY  FORM 990-PF PG 1, LN 16B 9,000. 7,250. 1,7  FORM 990-PF PG 1, LN 16B 9,000. 7,250. 1,7  FORM 990-PF PG 1, LN 16B 9,000. 7,250. 1,7  FORM 990-PF PG 1, LN 16B 9,000. 7,250. 1,7  FORM 990-PF TAXES STATEMENT  (A) (B) (C) (D)  EXPENSES NET INVEST- ADJUSTED CHARITY  PER BOOKS MENT INCOME NET INCOME PURPOR  FEDERAL INCOME TAX 399. 399.	TOTAL TO FORM 990-PF, PAR	r I, LINE	3, CO	LUMN A				50.
SOURCE         GROSS AMOUNT         DIVIDENDS         AMOUNT           MORGAN STANLEY         25,784.         0.         25,7           TOTAL TO FM 990-PF, PART I, LN 4         25,784.         0.         25,7           FORM 990-PF         ACCOUNTING FEES         STATEMENT           LEXPENSES NET INVEST- ADJUSTED PER BOOKS MENT INCOME NET INCOME PURPOR         CHARITY PURPOR           ACCOUNTING & TAX PREPARATION         9,000.         7,250.         1,7           TO FORM 990-PF, PG 1, LN 16B         9,000.         7,250.         1,7           FORM 990-PF         TAXES         STATEMENT           LESCRIPTION         EXPENSES NET INVEST- ADJUSTED CHARITY         CHARITY ADJUSTED CHARITY           PER BOOKS MENT INCOME NET INCOME PURPOR         PURPOR           FEDERAL INCOME TAX         399.         399.	FORM 990-PF DIVI	DENDS AND	INTER	EST FROM	SECUE	RITIES	STATEMENT	2
TOTAL TO FM 990-PF, PART I, LN 4 25,784. 0. 25,7  FORM 990-PF ACCOUNTING FEES STATEMENT  (A) (B) (C) (D)  EXPENSES NET INVEST- ADJUSTED CHARITY PER BOOKS MENT INCOME NET INCOME PURPOS  ACCOUNTING & TAX PREPARATION 9,000. 7,250. 1,7  TO FORM 990-PF, PG 1, LN 16B 9,000. 7,250. 1,7  FORM 990-PF TAXES STATEMENT  (A) (B) (C) (D)  EXPENSES NET INVEST- ADJUSTED CHARITY PER BOOKS MENT INCOME NET INCOME PURPOS  FEDERAL INCOME TAX 399. 399.	SOURCE		GROSS	AMOUNT			COLUMN (A	۲)
FORM 990-PF  ACCOUNTING FEES  STATEMENT  (A) (B) (C) (D)  EXPENSES NET INVEST- ADJUSTED CHARITY  PER BOOKS MENT INCOME NET INCOME PURPO  ACCOUNTING & TAX  PREPARATION  9,000. 7,250. 1,  TO FORM 990-PF, PG 1, LN 16B 9,000. 7,250. 1,  FORM 990-PF  TAXES  STATEMENT  (A) (B) (C) (D)  EXPENSES NET INVEST- ADJUSTED CHARITY  PER BOOKS MENT INCOME NET INCOME PURPO  FEDERAL INCOME TAX  399. 399.	MORGAN STANLEY			25,784.		0.	25,7	84.
(A) (B) (C) (D) EXPENSES NET INVEST- ADJUSTED CHARITY PER BOOKS MENT INCOME NET INCOME PURPOS  ACCOUNTING & TAX PREPARATION 9,000. 7,250. 1,  TO FORM 990-PF, PG 1, LN 16B 9,000. 7,250. 1,  FORM 990-PF TAXES STATEMENT  (A) (B) (C) (D) EXPENSES NET INVEST- ADJUSTED CHARITY PER BOOKS MENT INCOME NET INCOME PURPOS  FEDERAL INCOME TAX 399. 399.	TOTAL TO FM 990-PF, PART	I, LN 4		25,784.		0.	25,7	84.
DESCRIPTION  EXPENSES NET INVEST- ADJUSTED CHARITY PER BOOKS MENT INCOME NET INCOME PURPOS  ACCOUNTING & TAX PREPARATION  9,000.  7,250.  1,'  TO FORM 990-PF, PG 1, LN 16B  9,000.  7,250.  1,'  FORM 990-PF  TAXES  STATEMENT  (A) (B) (C) (D) EXPENSES NET INVEST- ADJUSTED CHARITY PER BOOKS MENT INCOME NET INCOME PURPOS  FEDERAL INCOME TAX  399.  399.	FORM 990-PF	AC	COUNTI	NG FEES	-:-	· · · · · · · · · · · · · · · · · · ·	STATEMENT	3
PREPARATION         9,000.         7,250.         1,7           TO FORM 990-PF, PG 1, LN 16B         9,000.         7,250.         1,7           FORM 990-PF         TAXES         STATEMENT           (A) (B) (C) (D) (D) (D) (D) (D) (D) (D) (D) (D) (D	DESCRIPTION	EXPE	ENSES	NET INV		ADJUSTED	CHARITA	
FORM 990-PF  (A)  (B)  (C)  EXPENSES NET INVEST- ADJUSTED CHARITA  PER BOOKS MENT INCOME NET INCOME PURPOS  FEDERAL INCOME TAX  399.  399.			9,000.	7	,250.		1,7	50.
DESCRIPTION  (A)  EXPENSES  NET INVEST-  PER BOOKS  MENT INCOME  NET INCOME  PURPOS  FEDERAL INCOME TAX  399.  399.	TO FORM 990-PF, PG 1, LN	16B	9,000.	7	,250.		1,7	50.
DESCRIPTION EXPENSES NET INVEST- ADJUSTED CHARITY PER BOOKS MENT INCOME NET INCOME PURPOS FEDERAL INCOME TAX 399. 399.	FORM 990-PF		TAX	ES			STATEMENT	4
	DESCRIPTION	EXPE	ENSES	NET INV		ADJUSTEI	CHARITA	
TO FORM 990 DE DC 1 IN 18 399 399	FEDERAL INCOME TAX		399.		399.			0.
10 FORM 330-FF, FG 1, MM 10 333. 333.	TO FORM 990-PF, PG 1, LN	18	399.		399.			0.

FORM 990-PF C	ORPORATE STOCK		STATEMENT	<u>=</u> 5
DESCRIPTION		BOOK VALUE	FAIR MARKET VALUE	
CORPORATE STOCKS		407,451.	964,574	
TOTAL TO FORM 990-PF, PART II, LI	NE 10B	407,451.	964,574	