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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

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

OMB No 1545-0052

2013

Open to Public Inspection

For calendar year 2013, or tax year beginning 10-01-2013 , and ending 09-30-2014

Name of foundation CHERYL CHASE & STUART BEAR FAMILY FOUNDATION INC		A Employer identification number 06-1562154	
Number and street (or P O box number if mail is not delivered to street address) C/O CHASE ENTERPRISES 225 ASYLUM ST FL 29		B Telephone number (see instructions) (860) 549-1674	
City or town, state or province, country, and ZIP or foreign postal code HARTFORD, CT 06103		C If exemption application is pending, check here <input type="checkbox"/>	
G Check all that apply <div><input type="checkbox"/> Initial return <input type="checkbox"/> Final return <input type="checkbox"/> Address change</div> <div><input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Amended return <input type="checkbox"/> Name change</div>		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) <input type="checkbox"/> \$ 1,947,977		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>	
J Accounting method <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ (Part I, column (d) must be on cash basis.)			

Part I Analysis of Revenue and Expenses <small>(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))</small>		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)	223,440			
	2 Check <input type="checkbox"/> if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities.	95,040	95,040		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10				
	b Gross sales price for all assets on line 6a _____				
	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				
Operating and Administrative Expenses	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)				
	12 Total. Add lines 1 through 11	318,480	95,040		
	13 Compensation of officers, directors, trustees, etc	0	0		0
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)	8,250	7,425		825
	c Other professional fees (attach schedule)				
	17 Interest	9,990	0		0
	18 Taxes (attach schedule) (see instructions)				
	19 Depreciation (attach schedule) and depletion . . .				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	300	300		0
	24 Total operating and administrative expenses.				
	Add lines 13 through 23	18,540	7,725		825
	25 Contributions, gifts, grants paid	299,178			299,178
	26 Total expenses and disbursements. Add lines 24 and 25	317,718	7,725		300,003
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	762			
	b Net investment income (if negative, enter -0-)		87,315		
	c Adjusted net income (if negative, enter -0-)				

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)	Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing	108	181	181
	2	Savings and temporary cash investments	57	796	796
	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 (attach schedule) (see instructions)			
	7	Other notes and loans receivable (attach schedule) ▶ _____ 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 (attach schedule)			
	b	Investments—corporate stock (attach schedule)	1,319,310	1,319,310	1,947,000
	c	Investments—corporate bonds (attach schedule).			
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)			
	14	Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
15	Other assets (describe ▶ _____)				
16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	1,319,475	1,320,287	1,947,977	
Liabilities	17	Accounts payable and accrued expenses	8,200	8,250	
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons	3,158,390	3,158,390	
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶ _____)			
	23	Total liabilities (add lines 17 through 22)	3,166,590	3,166,640	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ <input checked="" type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.				
	24	Unrestricted	-1,847,115	-1,846,353	
	25	Temporarily restricted			
	26	Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ <input type="checkbox"/> and complete lines 27 through 31.				
	27	Capital stock, trust principal, or current funds			
	28	Paid-in or capital surplus, or land, bldg , and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds			
	30	Total net assets or fund balances (see page 17 of the instructions)	-1,847,115	-1,846,353	
	31	Total liabilities and net assets/fund balances (see page 17 of the instructions)	1,319,475	1,320,287	

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 -1,847,115
2	Enter amount from Part I, line 27a	2 762
3	Other increases not included in line 2 (itemize) ▶ _____	3 0
4	Add lines 1, 2, and 3	4 -1,846,353
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 -1,846,353

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)		(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
1a				
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)	
a				
b				
c				
d				
e				
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				
b				
c				
d				
e				
2	Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }		2	
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) (see instructions) If (loss), enter -0- in Part I, line 8 }		3	

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 page 18 of 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	533,593	2,073,240	0 257372
2011	326,743	1,903,283	0 171673
2010	526,430	1,714,298	0 307082
2009	464,487	1,614,736	0 287655
2008	425,027	1,800,592	0 236048
2 Total of line 1, column (d).			2 1 259830
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 0 251966
4 Enter the net value of noncharitable-use assets for 2013 from Part X, line 5.			4 2,036,541
5 Multiply line 4 by line 3.			5 513,139
6 Enter 1% of net investment income (1% of Part I, line 27b).			6 873
7 Add lines 5 and 6.			7 514,012
8 Enter qualifying distributions from Part XII, line 4.			8 300,003

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate See the Part VI instructions

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the instructions)			
1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1		1	1,746
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 type="checkbox"/> and enter 1% of Part I, line 27b			
c All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)			
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		2	0
3 Add lines 1 and 2.		3	1,746
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	1,746
6 Credits/Payments			
a 2013 estimated tax payments and 2012 overpayment credited to 2013	6a	892	
b Exempt foreign organizations—tax withheld at source	6b		
c Tax paid with application for extension of time to file (Form 8868)	6c	1,000	
d Backup withholding erroneously withheld	6d		
7 Total credits and payments Add lines 6a through 6d.		7	1,892
8 Enter any penalty for underpayment of estimated tax Check here <input type="checkbox"/> if Form 2220 is attached		8	
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed		9	
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid.		10	146
11 Enter the amount of line 10 to be Credited to 2014 estimated tax 146 Refunded		11	0

Part VII-A Statements Regarding Activities			
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		1a	No
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)?		1b	No
If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.			
c Did the foundation file Form 1120-POL for this year?.		1c	No
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation \$ 0 (2) On foundation managers \$ 0			
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers \$ 0			
2 Has the foundation engaged in any activities that have not previously been reported to the IRS?		2	No
If "Yes," attach a detailed description of the activities.			
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		3	No
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?.		4a	No
b If "Yes," has it filed a tax return on Form 990-T for this year?.		4b	
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year?		5	No
If "Yes," attach the statement required by General Instruction T.			
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either			
• By language in the governing instrument, or			
• By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?		6	Yes
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV.		7	Yes
8a Enter the states to which the foundation reports or with which it is registered (see instructions)			
CT			
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation .		8b	Yes
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2013 or the taxable year beginning in 2013 (see instructions for Part XIV)?			
If "Yes," complete Part XIV		9	No
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses.		10	No

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		No
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		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Yes	
Website address N/A				
14	The books are in care of JOHN P REDDING Telephone no (860) 549-1674 Located at GOODWIN SQ 225 ASYLUM ST 29TH FL HARTFORD CT ZIP+4 06103			
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		
16	At any time during calendar year 2013, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?	16	Yes	No
See instructions for exceptions and filing requirements for Form TD F 90-22.1 If "Yes", enter the name of the foreign country				

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			Yes	No
1a	During the year did the foundation (either directly or indirectly) (1) Engage in the sale or exchange, or leasing of property with a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?. <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input checked="" type="checkbox"/> Yes <input 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 page 20 of the instructions)?. Organizations relying on a current notice regarding disaster assistance check here.	1b		No
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		No
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 20____, 20____, 20____, 20____			
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).	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 20____, 20____, 20____, 20____			
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? (<i>Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2013.</i>)	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
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		No

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))?		<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?		<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
(3) Provide a grant to an individual for travel, study, or other similar purposes?		<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> 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)? (see instructions).		<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> 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?		<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> 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)?		5b		
Organizations relying on a current notice regarding disaster assistance check here.		<input checked="" type="checkbox"/>		
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?		<input type="checkbox"/> Yes	<input type="checkbox"/> 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?		<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?		6b		No
If "Yes" to 6b, file Form 8870.				
7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?		<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
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 (see instructions).				
(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
CHERYL A CHASE	PRESIDENT/CHAIRMAN 5 00	0	0	0
C/O CHASE ENT 225 ASYLUM ST29TH FL HARTFORD,CT 06103				
JOHN P REDDING	SECRETARY/DIRECTOR 1 00	0	0	0
C/O CHASE ENT 225 ASYLUM ST29TH FL HARTFORD,CT 06103				
DAVID T CHASE	DIRECTOR 1 00	0	0	0
C/O CHASE ENT 225 ASYLUM ST29TH FL HARTFORD,CT 06103				
2 Compensation of five highest-paid employees (other than those included on line 1—see instructions). If none, enter "NONE."				
(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				
Total number of other employees paid over \$50,000.				0

Part VIII

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

3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE".		
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
Total number of others receiving over \$50,000 for professional services.		0

Part IX-A

Summary of Direct Charitable Activities

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

Part IX-B

Summary of Program-Related Investments (see instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1	
2	
All other program-related investments. See page 24 of the instructions.	
3	0
Total. Add lines 1 through 3.	0

Part X

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes		
a	Average monthly fair market value of securities.	1a	2,058,696
b	Average of monthly cash balances.	1b	8,858
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	2,067,554
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	0
2	Acquisition indebtedness applicable to line 1 assets.	2	0
3	Subtract line 2 from line 1d.	3	2,067,554
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	31,013
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	2,036,541
6	Minimum investment return. Enter 5% of line 5.	6	101,827

Part XI

Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ☐ and do not complete this part.)

1	Minimum investment return from Part X, line 6.	1	101,827
2a	Tax on investment income for 2013 from Part VI, line 5.	2a	1,746
b	Income tax for 2013 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	1,746
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	100,081
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	100,081
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	100,081

Part XII

Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc , purposes		
a	Expenses, contributions, gifts, etc —total from Part I, column (d), line 26.	1a	300,003
b	Program-related investments—total from Part IX-B.	1b	0
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes.	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required).	3a	
b	Cash distribution test (attach the required schedule).	3b	
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	300,003
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 (see instructions).	5	0
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	300,003
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				100,081
2 Undistributed income, if any, as of the end of 2013				
a Enter amount for 2012 only.			0	
b Total for prior years 20____, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2013				
a From 2008.	337,021			
b From 2009.	385,528			
c From 2010.	442,481			
d From 2011.	233,333			
e From 2012.	431,673			
f Total of lines 3a through e.	1,830,036			
4 Qualifying distributions for 2013 from Part XII, line 4 ▶ \$ 300,003				
a Applied to 2012, but not more than line 2a			0	
b Applied to undistributed income of prior years (Election required—see instructions).		0		
c Treated as distributions out of corpus (Election required—see instructions).	0			
d Applied to 2013 distributable amount.				100,081
e Remaining amount distributed out of corpus	199,922			
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	2,029,958			
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 instructions			0	
f Undistributed income for 2013 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2014				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions).	0			
8 Excess distributions carryover from 2008 not applied on line 5 or line 7 (see instructions). . . .	337,021			
9 Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a	1,692,937			
10 Analysis of line 9				
a Excess from 2009. . . .	385,528			
b Excess from 2010. . . .	442,481			
c Excess from 2011. . . .	233,333			
d Excess from 2012. . . .	431,673			
e Excess from 2013. . . .	199,922			

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

1a

If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2013, enter the date of the ruling.

b

Check box to indicate whether the organization is a private operating foundation described in section 4942(j)(3) or 4942(j)(5)

☐ 4942(j)(3) or ☐ 4942(j)(5)

2a	Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed.	Tax year	Prior 3 years			(e) Total
		(a) 2013	(b) 2012	(c) 2011	(d) 2010	
b	85% of line 2a					
c	Qualifying distributions from Part XII, line 4 for each year listed.					
d	Amounts included in line 2c not used directly for active conduct of exempt activities.					
e	Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c.					
3	Complete 3a, b, or c for the alternative test relied upon.					
a	"Assets" alternative test—enter					
	(1) Value of all assets.					
	(2) Value of assets qualifying under section 4942(j)(3)(B)(i).					
b	"Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed.					
c	"Support" alternative test—enter					
	(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties).					
	(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii).					
	(3) Largest amount of support from an exempt organization.					
	(4) Gross investment income.					

Part XVSupplementary Information (Complete this part only if the organization had \$5,000 or more in assets at any time during the year—see instructions.)

1

Information Regarding Foundation Managers:

a

List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000) (See section 507(d)(2))

See Additional Data Table

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

2

Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:

Check here ☐ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. (see instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d.

a

The name, address, and telephone number or e-mail address of the person to whom applications should be addressed

JOHN P REDDING CO CHASE ENTERPRISES
GOODWIN SQ 225 ASYLUM ST
HARTFORD,CT 06103
(860) 549-1674

b

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

NO SPECIFIC FORM

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

NONE

Form 990-PF (2013)

Part XV

Supplementary Information (continued)

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year See Additional Data Table				
Total			3a	299,178
b Approved for future payment				
Total			3b	0

Enter gross amounts unless otherwise indicated

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

Form **990-PF** (2013)

4. Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?

a Transfers from the reporting foundation to a noncharitable exempt organization of

(1) Cash.	1a(1)		No
(2) Other assets.	1a(2)		No

b Other transactions

(1) Sales of assets to a noncharitable exempt organization.	1b(1)	No
---	-------	----

(2) Purchases of assets from a noncharitable exempt organization.	1b(2)	No
--	--------------	-----------

(3) Rental of facilities, equipment, or other assets.	1b(3)		No
---	-------	--	----

(4) Reimbursement arrangements	1b(4)	No
--------------------------------	-------	----

(5) Loans or loan guarantees	1b(5)		No
------------------------------	-------	--	----

(6) Performance of services or membership or fundraising solicitations	1b(6)		No
--	-------	--	----

(7)	(8)	(9)
Shareholder's full name	1	N/A

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

[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


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 or fiduciary) is based on all information of which preparer has any knowledge.		
	***** _____ Signature of officer or trustee	2015-08-14 _____ Date	<div style="display: flex; align-items: center;"> <div> ***** _____ Title </div> <div style="border: 1px solid black; padding: 5px; margin-left: 10px; font-size: 0.8em;"> May the IRS discuss this return with the preparer shown below (see instr)? <input type="checkbox"/> Yes <input type="checkbox"/> No </div> </div>

Paid Preparer Use Only	Print/Type preparer's name	Preparer's Signature	Date	Check if self-employed <input type="checkbox"/>	PTIN
	Firm's name <input type="checkbox"/>			Firm's EIN <input type="checkbox"/>	
	Firm's address <input type="checkbox"/>			Phone no	


Form 990PF Part XV Line 1a - 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).

CHERYL A CHASE
DAVID T CHASE


Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
AMERICAN LIVER FOUNDATION 127 WASHINGTON AVE NORTH HAVEN,CT 064731715	N/A	PUBLIC CHARITY	LIVER LIFE WALK	1,000
AMERICAN SCHOOL FOR THE DEAF 139 NORTH MAIN ST WEST HARTFORD,CT 061071269	N/A	PUBLIC CHARITY	UNRESTRICTED PURPOSE	1,000
ANTI-DEFAMATION LEAGUE 605 THIRD AVE NEW YORK,NY 101583560	N/A	PUBLIC CHARITY	UNRESTRICTED PURPOSE	3,333
AURORA FOUNDATION PO BOX 271035 WEST HARTFORD,CT 061271035	N/A	PUBLIC CHARITY	SIGNATURE BREAKFAST FUNDRAISER	500
BETH EL TEMPLE 2626 ALBANY AVE WEST HARTFORD,CT 061172331	N/A	PUBLIC CHARITY	UNRESTRICTED PURPOSE	500
BROOKLYN MUSEUM 200 EASTERN PARKWAY BROOKLYN,NY 112386052	N/A	PUBLIC CHARITY	UNRESTRICTED PURPOSE	150
BUSHNELL THE 166 CAPITOL AVE HARTFORD,CT 061061621	N/A	PUBLIC CHARITY	ANNUAL FUND	15,000
CHILDREN'S MUSEUM 950 TROUT BROOK DRIVE WEST HARTFORD,CT 061191437	N/A	PUBLIC CHARITY	ANNUAL FUND	100
CHOATE ROSEMARY HALL FOUNDATION 333 CHRISTIAN ST WALLINGFORD,CT 064923818	N/A	PUBLIC CHARITY	PARENTS & GRANDPARENTS GIVING	1,000
CLARK MUSEUM 225 SOUTH ST WILLIAMSTOWN,MA 012679951	N/A	PUBLIC CHARITY	UNRESTRICTED PURPOSE	90
CONGREGATION BETH ISRAEL 701 FARMINGTON AVE WEST HARTFORD,CT 061193818	N/A	PUBLIC CHARITY	MEMORY OF HARRIET E GIDDON	200
CONGREGATION BETH ISRAEL 701 FARMINGTON AVE WEST HARTFORD,CT 061193818	N/A	PUBLIC CHARITY	HIGH HOLY DAY APPEAL FUND	1,800
CONNECTICUT BAR FOUNDATION 31 PRATT ST HARTFORD,CT 061031631	N/A	PUBLIC CHARITY	SUSTAINING LIFE FELLOW	250
CONNECTICUT CHILDREN'S MEDICAL CENTER 282 WASHINGTON ST HARTFORD,CT 061063322	N/A	PUBLIC CHARITY	ACES FOR KIDS CHARITY GOLF TOURNAMENT	500
CONNECTICUT FOOD BANK PO BOX 8686 NEW HAVEN,CT 065310686	N/A	PUBLIC CHARITY	UNRESTRICTED PURPOSE	100
Total  3a				299,178


Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
CONNECTICUT SCIENCE CENTER 250 COLUMBUS BOULEVARD HARTFORD, CT 061032802	N/A	PUBLIC CHARITY	GREEN GALA	5,000
CONNECTICUT SCIENCE CENTER 250 COLUMBUS BOULEVARD HARTFORD, CT 061032802	N/A	PUBLIC CHARITY	UNRESTRICTED PURPOSE	27,700
CONNECTICUT SCIENCE CENTER 250 COLUMBUS BOULEVARD HARTFORD, CT 061032802	N/A	PUBLIC CHARITY	UNRESTRICTED PURPOSE	50,000
CONNECTICUT WOMEN'S EDUCATION AND LEGAL FUND ONE HARTFORD SQUARE WEST SUITE 1-300 HARTFORD, CT 061061953	N/A	PUBLIC CHARITY	ONE WOMAN MAKES A DIFFERENCE DINNER	325
CONNECTICUT WOMEN'S HALL OF FAME 320 FITCH ST NEW HAVEN, CT 065151306	N/A	PUBLIC CHARITY	ANNUAL FUND	500
DC FIREFIGHTERS BURN FOUNDATION PO BOX 4565 WASHINGTON, DC 200170565	N/A	PUBLIC CHARITY	UNRESTRICTED PURPOSE	250
EMANUEL SYNAGOGUE 160 MOHEGAN DRIVE WEST HARTFORD, CT 061171421	N/A	PUBLIC CHARITY	RABBI LAZOWSKI'S DISCRETIONARY FUND	250
FIDELCO GUIDE DOG FOUNDATION 103 VISION WAY BLOOMFIELD, CT 060025322	N/A	PUBLIC CHARITY	HONOR OF BURT SCHWEITZER'S 75TH BIRTHDAY	100
FLORENCE GRISWOLD MUSEUM 96 LYME STREET OLD LYME, CT 063711426	N/A	PUBLIC CHARITY	UNRESTRICTED PURPOSE	500
FOODSHARE 450 WOODLAND AVE BLOOMFIELD, CT 060021342	N/A	PUBLIC CHARITY	CONGREGATION BETH ISRAEL'S FOOD DRIVE	500
GRACE ACADEMY 277 MAIN STREET HARTFORD, CT 060321818	N/A	PUBLIC CHARITY	SPONSOR A GRACE ACADEMY STUDENT	1,000
GREATER ARTS COUNCIL 100 PEARL ST HARTFORD, CT 061231436	N/A	PUBLIC CHARITY	UNRESTRICTED PURPOSE	5,000
GREATER HARTFORD JEWISH COMMUNITY CENTER 335 BLOOMFIELD AVE WEST HARTFORD, CT 061171543	N/A	PUBLIC CHARITY	SPONSOR OF 15TH ANNUAL GOLF TOURNAMENT	1,500
GREATER HARTFORD JEWISH COMMUNITY CENTER 335 BLOOMFIELD AVE WEST HARTFORD, CT 061171543	N/A	PUBLIC CHARITY	PILLARS SOCIETY	10,000
HARTFORD ART SCHOOL INC 200 BLOOMFIELD AVE WEST HARTFORD, CT 061171545	N/A	PUBLIC CHARITY	WALTER HODES SCHOLARSHIP	500
Total  3a				299,178


Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
HARTFORD COURANT 285 BROAD ST HARTFORD,CT 061153719	N/A	PUBLIC CHARITY	250TH ANNIVERSARY GALA	2,100
HARTFORD STAGE 50 CHURCH ST HARTFORD,CT 061031201	N/A	PUBLIC CHARITY	2014 GALA	4,275
HARTFORD STAGE 50 CHURCH ST HARTFORD,CT 061031201	N/A	PUBLIC CHARITY	BELLE'S 50TH ANNIVERSARY YEAR END CHALLENGE	10,000
HARTFORD SYMPHONY ORCHESTRA 99 PRATT STREET HARTFORD,CT 061031629	N/A	PUBLIC CHARITY	ANNUAL FUND	5,000
HEBREW HIGH SCHOOL OF NEW ENGLAND 300 BLOOMFIELD AVE WEST HARTFORD,CT 061171505	N/A	PUBLIC CHARITY	UNRESTRICTED PURPOSE	5,000
HOLE IN THE WALL GANG CAMP 555 LONG WHARF DRIVE NEW HAVEN,CT 065116107	N/A	PUBLIC CHARITY	UNRESTRICTED PURPOSE	250
HOUSE OF BREAD 1453 MAIN ST HARTFORD,CT 061202726	N/A	PUBLIC CHARITY	TOAST OF THE TOWN 35TH ANNIVERSARY CELEBRATION	3,333
HOUSE OF BREAD 1453 MAIN ST HARTFORD,CT 061202726	N/A	PUBLIC CHARITY	UNRESTRICTED PURPOSE	250
JEWISH FAMILY SERVICES 333 BLOOMFIELD AVE WEST HARTFORD,CT 061171500	N/A	PUBLIC CHARITY	MEMORY OF CALVIN ZIEKY	250
JEWISH FEDERATION OF GREATER HARTFORD 333 BLOOMFIELD AVE WEST HARTFORD,CT 061171500	N/A	PUBLIC CHARITY	UNRESTRICTED PURPOSE	7,000
JEWISH MUSEUM 1109 FIFTH AVE NEW YORK,NY 101280118	N/A	PUBLIC CHARITY	UNRESTRICTED PURPOSE	1,000
JOSLIN DIABETES CENTER ONE JOSLIN PLACE BOSTON,MA 022155306	N/A	PUBLIC CHARITY	MEMORY OF HARRIET GIDDON	400
JUNIOR ACHIEVEMENT 11 ASYLUM ST SUITE 601 HARTFORD,CT 061031538	N/A	PUBLIC CHARITY	BUSINESS HALL OF FAME HARTFORD EVENT	1,500
KINGSWOOD OXFORD SCHOOL 170 KINGSWOOD ROAD WEST HARTFORD,CT 061191430	N/A	PUBLIC CHARITY	KO FUND	5,100
LITERACY VOLUNTEERS OF GREATER HARTFORD 30 ARBOR STREET HARTFORD,CT 061061374	N/A	PUBLIC CHARITY	UNRESTRICTED PURPOSE	250
Total  3a				299,178

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
MARK TWAIN HOUSE & MUSEUM 351 FARMINGTON AVE HARTFORD,CT 061054401	N/A	PUBLIC CHARITY	UNRESTRICTED PURPOSE	1,000
MERCY HOUSING AND SHELTER CORP 211 WETHERSFIELD AVE HARTFORD,CT 061141148	N/A	PUBLIC CHARITY	DREAMS GALA	3,500
METROPOLITAN MUSEUM OF ART 1000 FIFTH AVE NEWYORK,NY 100280198	N/A	PUBLIC CHARITY	UNRESTRICTED PURPOSE	550
MUSEUM OF FINE ARTS BOSTON 465 HUNTINGTON AVE BOSTON,MA 021155523	N/A	PUBLIC CHARITY	UNRESTRICTED PURPOSE	3,000
MUSEUM OF JEWISH HERITAGE 36 BATTERY PLACE NEWYORK,NY 102801502	N/A	PUBLIC CHARITY	UNRESTRICTED PURPOSE	180
MUSEUM OF MODERN ART 11 WEST 53 ST NEWYORK,NY 100195401	N/A	PUBLIC CHARITY	UNRESTRICTED PURPOSE	600
NATIONAL MUSEUM OF WOMEN IN THE ARTS 1250 NEWYORK AVENUE NW WASHINGTON,DC 200053970	N/A	PUBLIC CHARITY	UNRESTRICTED PURPOSE	250
NATIONAL CONFERENCE FOR COMMUNITY & JUSTICE 820A PROSPECT HILL ROAD WINDSOR,CT 060951559	N/A	PUBLIC CHARITY	ANNUAL HUMAN RELATIONS AWARD BANQUET	1,667
NEW BRITAIN MUSEUM OF AMERICAN ART 56 LEXINGTON ST NEWBRITAIN,CT 060521412	N/A	PUBLIC CHARITY	SPRING GALA	3,333
NEW BRITAIN MUSEUM OF AMERICAN ART 56 LEXINGTON ST NEWBRITAIN,CT 060521412	N/A	PUBLIC CHARITY	UNRESTRICTED PURPOSE	10,000
NEW ENGLAND AIR MUSEUM 36 PERIMETER ROAD WINDSOR LOCKS,CT 060961069	N/A	PUBLIC CHARITY	UNRESTRICTED PURPOSE	250
PROTECTOR OF ANIMALS INC 144 MAIN ST UNIT O EAST HARTFORD,CT 061183239	N/A	PUBLIC CHARITY	MEMORY OF JOSEPH C BORAWSKI	500
SAVE THE CHILDREN 52 WILTON ROAD WESTPORT,CT 068803108	N/A	PUBLIC CHARITY	UNRESTRICTED PURPOSE	216
SIMON WIESENTHAL CENTER 1399 SOUTH ROXBURY DRIVE LOS ANGELES,CA 900354709	N/A	PUBLIC CHARITY	UNRESTRICTED PURPOSE	600
SMITHSONIAN INSTITUTION PO BOX 37012 WASHINGTON,DC 200137012	N/A	PUBLIC CHARITY	UNRESTRICTED PURPOSE	75
Total  3a				299,178

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
SOLOMON SCHECHTER DAY SCHOOL 26 BUENA VISTA ROAD WEST HARTFORD,CT 061073216	N/A	PUBLIC CHARITY	HONOR THE GELLES FAMILY	834
ST JUDE CHILDREN'S RESEARCH HOSPITAL 262 DANNY THOMAS PLACE MEMPHIS,TN 381053678	N/A	PUBLIC CHARITY	UNRESTRICTED PURPOSE	500
SAINT MARY HOME 2021 ALBANY AVE WEST HARTFORD,CT 061172789	N/A	PUBLIC CHARITY	MEMORY OF ALICE GRUSSE	500
THEATHER WORKS 233 PEARL ST HARTFORD,CT 061031201	N/A	PUBLIC CHARITY	FREUD'S LAST SESSION	5,000
TUFTS UNIVERSITY 80 GEORGE ST MEDFORD,MA 021555519	N/A	PUBLIC CHARITY	FUND OF ARTS & SCIENCES	25,000
UNITED WAY 30 LAUREL STREET HARTFORD,CT 061061374	N/A	PUBLIC CHARITY	UNRESTRICTED PURPOSE	10,000
UNIVERSITY OF CONNECTICUT FOUNDATION INC 2390 ALUMNI DRIVE STORRS,CT 062693206	N/A	PUBLIC CHARITY	ANNUAL WHITE COAT GALA	1,667
UNIVERSITY OF CONNECTICUT LAW SCHOOL FOUNDATION INC 45 ELIZABETH ST HARTFORD,CT 061052213	N/A	PUBLIC CHARITY	ANNUAL FUND 2013-2014	5,000
WADSWORTH ATHENEUM MUSEUM OF ART 600 MAIN ST HARTFORD,CT 061032990	N/A	PUBLIC CHARITY	ANNUAL FUND	45,000
WADSWORTH ATHENEUM MUSEUM OF ART 600 MAIN ST HARTFORD,CT 061032990	N/A	PUBLIC CHARITY	CONTEMPORARY COALITION	5,000
WESTFIELD STATE UNIVERSITY 577 WESTERN AVE WESTFIELD,MA 010862580	N/A	PUBLIC CHARITY	DANCE TEAM	100
WHITNEY MUSEUM OF AMERICAN ART 945 MADISON AVE AT 75TH ST NEW YORK,NY 100212790	N/A	PUBLIC CHARITY	UNRESTRICTED PURPOSE	250
WOUNDED WARRIOR PROJECT PO BOX 758512 TOPEKA,KS 666758512	N/A	PUBLIC CHARITY	IN HONOR OF BURT SCHWEITZER	100
YWCA 135 BROAD STREET HARTFORD,CT 061053718	N/A	PUBLIC CHARITY	UNRESTRICTED PURPOSE	150
Total  3a				299,178

<div>Schedule B</div> <div>(Form 990, 990-EZ, or 990-PF)</div> <div>Department of the Treasury Internal Revenue Service</div>	<div>Schedule of Contributors</div> <div>▶ Attach to Form 990, 990-EZ, or 990-PF.</div> <div>▶ Information about Schedule B (Form 990, 990-EZ, or 990-PF) and its instructions is at www.irs.gov/form990.</div>	<div>OMB No 1545-0047</div> <div>2013</div>

<div>Name of the organization</div> <div>CHERYL CHASE & STUART BEAR FAMILY FOUNDATION INC</div>	<div>Employer identification number</div> <div>06-1562154</div>
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Organization type (check one)

Filers of:	Section:
Form 990 or 990-EZ	<div><input type="checkbox"/> 501(c)() (enter number) organization</div> <div><input type="checkbox"/> 4947(a)(1) nonexempt charitable trust not treated as a private foundation</div> <div><input type="checkbox"/> 527 political organization</div>
Form 990-PF	<div><input checked="" type="checkbox"/> 501(c)(3) exempt private foundation</div> <div><input type="checkbox"/> 4947(a)(1) nonexempt charitable trust treated as a private foundation</div> <div><input type="checkbox"/> 501(c)(3) taxable private foundation</div>

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

General Rule

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

Special Rules

- ☐ For a section 501(c)(3) organization filing Form 990 or 990-EZ that met the 33¹/₃% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi) and received from any one contributor, during the year, a contribution of the greater of **(1)** \$5,000 or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 for use *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I, II, and III.
- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions for use *exclusively* for religious, charitable, etc., purposes, but these contributions did not total more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Do not complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions of \$5,000 or more during the year. ▶ \$ _____

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

Schedule B (Form 990, 990-EZ, or 990-PF) (2013)

Name of organization CHERYL CHASE & STUART BEAR FAMILY FOUNDATION INC	Employer identification number 06-1562154
---	---

Part II	Noncash Property (see instructions) Use duplicate copies of Part II if additional space is needed		
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	_____ _____ _____ _____	\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	_____ _____ _____ _____	\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	_____ _____ _____ _____	\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	_____ _____ _____ _____	\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	_____ _____ _____ _____	\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	_____ _____ _____ _____	\$ _____	_____

Name of organization CHERYL CHASE & STUART BEAR FAMILY FOUNDATION INC	Employer identification number 06-1562154
---	---

Part III

Exclusively religious, charitable, etc., individual contributions to section 501(c)(7), (8), or (10) organizations that total more than \$1,000 for the year. Complete columns (a) through (e) and the following line entry

For organizations completing Part III, enter the total of *exclusively* religious, charitable, etc , contributions of **\$1,000 or less** for the year (Enter this information once See instructions) ▶ \$

Use duplicate copies of Part III if additional space is needed

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
—	<div></div> <div></div> <div></div>	<div></div> <div></div> <div></div>	<div></div> <div></div> <div></div>
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4		Relationship of transferor to transferee
<div></div> <div></div>		<div></div> <div></div> <div></div>	

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
—	<div></div> <div></div> <div></div>	<div></div> <div></div> <div></div>	<div></div> <div></div> <div></div>
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4		Relationship of transferor to transferee
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(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
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	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4		Relationship of transferor to transferee
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(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
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	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4		Relationship of transferor to transferee
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TY 2013 Accounting Fees Schedule

Name: CHERYL CHASE & STUART BEAR FAMILY FOUNDATION INC

EIN: 06-1562154

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
RETURN PREPARATION FEE	8,250	7,425		825

**TY 2013 All Other Program
Related Investments Schedule**

Name: CHERYL CHASE & STUART BEAR FAMILY FOUNDATION INC
EIN: 06-1562154

Category	Amount
N/A	0

**TY 2013 Investments Corporate
Stock Schedule**

Name: CHERYL CHASE & STUART BEAR FAMILY FOUNDATION INC
EIN: 06-1562154

Name of Stock	End of Year Book Value	End of Year Fair Market Value
UIL HOLDINGS CORPORATION	1,319,310	1,947,000

TY 2013 Loans from Officers Schedule**Name:** CHERYL CHASE & STUART BEAR FAMILY FOUNDATION INC**EIN:** 06-1562154

Item No.	1
Lender's Name	CHERYL A CHASE
Lender's Title	OFFICER
Original Amount of Loan	2934390
Balance Due	3151590
Date of Note	
Maturity Date	
Repayment Terms	DEMAND
Interest Rate	0.000000000000
Security Provided by Borrower	NONE
Purpose of Loan	TO FUND CHARITABLE EXPENDITURES
Description of Lender Consideration	CASH
Consideration FMV	

TY 2013 Other Expenses Schedule

Name: CHERYL CHASE & STUART BEAR FAMILY FOUNDATION INC

EIN: 06-1562154

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT RELATED FEES	300	300		0