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Form **990-PF****Return of Private Foundation**
or Section 4947(a)(1) Trust Treated as Private Foundation

OMB No 1545-0052

2014Department of the Treasury
Internal Revenue Service▶ 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.

Open to Public Inspection

For calendar year 2014 or tax year beginning

, 2014, and ending

, 20

Name of foundation Kennebunk Savings Bank Foundation		A Employer identification number 01-0547392
Number and street (or P O box number if mail is not delivered to street address) 104 Main Street, PO Box 28		B Telephone number (see instructions) (207) 985-4903
City or town, state or province, country, and ZIP or foreign postal code Kennebunk, ME 04043		C If exemption application is pending, check here ☐
G Check all that apply: ☐ Initial return ☐ Initial return of a former public charity ☐ Final return ☐ Amended return ☐ Address change ☐ Name change		D 1. Foreign organizations, check here ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ☐
H Check type of organization. ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here ☐
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ▶ \$ \$4,260,954	J Accounting method: ☒ Cash ☐ Accrual ☐ Other (specify) _____	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))		(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)	219,612			
	2 Check ☐ if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments	3,987	3,987	0	
	4 Dividends and interest from securities	78,171	78,171	0	
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	46,308			
	b Gross sales price for all assets on line 6a				
	7 Capital gain net income (from Part IV, line 2)		46,308		
	8 Net short-term capital gain			75	
	9 Income modifications				
	10a Gross sales less returns and allowances				
b Less Cost of goods sold					
c Gross profit or (loss) (attach schedule)					
11 Other income (attach schedule)					
12 Total. Add lines 1 through 11	348,078	128,466	75		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc.				
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)	2,748	0	0	2,748
	b Accounting fees (attach schedule)				
	c Other professional fees (attach schedule) STMT 1	17,895	17,895	0	0
	17 Interest				
	18 Taxes (attach schedule) (see instructions) STMT 1	6,232	1,034	0	0
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule) STMT 1	215	215	0	0
	24 Total operating and administrative expenses. Add lines 13 through 23	27,090	19,144	0	2,748
25 Contributions, gifts, grants paid	319,513			319,513	
26 Total expenses and disbursements. Add lines 24 and 25	346,603	19,144	0	322,261	
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements	1,475				
b Net investment income (if negative, enter -0-)		109,322			
c Adjusted net income (if negative, enter -0-)			75		

For Paperwork Reduction Act Notice, see instructions.

Cat No 11289X

Form **990-PF** (2014)

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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	66,290	77,911	77,911
	2	Savings and temporary cash investments	718,458	714,021	716,450
	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)	0	0	0
	b	Investments—corporate stock (attach schedule) . STMT. 2	1,765,976	1,768,346	2,593,862
	c	Investments—corporate bonds (attach schedule) STMT. 2.	867,493	869,914	872,731
	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)	3,418,217	3,430,192	4,260,954	
Liabilities	17	Accounts payable and accrued expenses			
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶)			
23	Total liabilities (add lines 17 through 22)	None	None		
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ ☐				
	24	Unrestricted			
	25	Temporarily restricted			
	26	Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ ☒				
	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	3,418,217	3,430,192	
	30	Total net assets or fund balances (see instructions)	3,418,217	3,430,192	
	31	Total liabilities and net assets/fund balances (see instructions)	3,418,217	3,430,192	

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	3,418,217
2	Enter amount from Part I, line 27a	2	1,475
3	Other increases not included in line 2 (itemize) ▶ <u>Prior Year Grant Recoveries</u>	3	10,500
4	Add lines 1, 2, and 3	4	3,430,192
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	3,430,192

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 Publicly Traded Securities				
b Vanguard LTCG (Capital Gains Distributions)				
c Vanguard STCG				
d				
e				
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)	
a 212,145		166,210	45,935	
b 298		0	298	
c 75		0	75	
d				
e				
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69				
(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))	
a			45,935	
b			298	
c			75	
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	46,308	
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	75	

Part V Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income.)

If section 4940(d)(2) applies, leave this part blank.

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☒ No
 If "Yes," the foundation does not qualify under section 4940(e). Do not complete this part.

1 Enter the appropriate amount in each column for each year; see the instructions before making any entries.

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2013	216,772	3,913,926	.05538479777
2012	227,772	3,610,090	.06309316388
2011	210,748	3,676,433	.05732404208
2010	268,139	3,464,369	.07739908768
2009	448,709	3,413,375	.13145611015
2 Total of line 1, column (d)		2	38465720156
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	07693144031
4 Enter the net value of noncharitable-use assets for 2014 from Part X, line 5		4	4,274,811
5 Multiply line 4 by line 3		5	328,867
6 Enter 1% of net investment income (1% of Part I, line 27b)		6	1,093
7 Add lines 5 and 6		7	329,960
8 Enter qualifying distributions from Part XII, line 4 If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions.		8	322,261

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

1a	Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1. Date of ruling or determination letter. (attach copy of letter if necessary—see instructions)			
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☐ and enter 1% of Part I, line 27b	1		2,186
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		2,186
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		2,186
6	Credits/Payments:			
a	2014 estimated tax payments and 2013 overpayment credited to 2014	6a	3,525	
b	Exempt foreign organizations—tax withheld at source	6b	0	
c	Tax paid with application for extension of time to file (Form 8868)	6c	0	
d	Backup withholding erroneously withheld	6d	0	
7	Total credits and payments. Add lines 6a through 6d	7		3,525
8	Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached	8		0
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9		0
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10		1,339
11	Enter the amount of line 10 to be Credited to 2015 estimated tax 1,339 Refunded	11		

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	Yes	No
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for the definition)? <i>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</i>	1b		✓
c	Did the foundation file Form 1120-POL for this year?	1c		✓
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. ▶ \$ <u>0</u> (2) On foundation managers ▶ \$ <u>0</u>			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ▶ \$ <u>0</u>			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If "Yes," attach a detailed description of the activities.</i>	2		✓
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? <i>If "Yes," attach a conformed copy of the changes</i>	3		✓
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a		✓
b	If "Yes," has it filed a tax return on Form 990-T for this year?	4b	n/a	
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If "Yes," attach the statement required by General Instruction T.</i>	5		✓
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	✓	
7	Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col. (c), and Part XV</i>	7	✓	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ Maine			
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 <i>General Instruction G</i> ? <i>If "No," attach explanation</i>	8b	✓	
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 2014 or the taxable year beginning in 2014 (see instructions for Part XIV)? <i>If "Yes," complete Part XIV</i>	9		✓
10	Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses</i>	10		✓

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		✓
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		✓
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► <u>www.kennebunksavings.com/community</u>	13	✓	
14	The books are in care of ► <u>Stephen A. Soubble</u> Telephone no. ► <u>(207) 985-4903</u> Located at ► <u>104 Main Street, Kennebunk, Maine</u> ZIP+4 ► <u>04043</u>			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here. and enter the amount of tax-exempt interest received or accrued during the year	15		15
16	At any time during calendar year 2014, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for FinCEN Form 114, (formerly TD F 90-22.1). If "Yes," enter the name of the foreign country ►	16	Yes	No
				✓

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? ☐ Yes ☒ No		
(2)	Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No		
(3)	Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☒ Yes ☐ No		
(4)	Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☒ No		
(5)	Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☒ No		
(6)	Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) ☐ Yes ☒ No		
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? ☐ Yes ☒ No Organizations relying on a current notice regarding disaster assistance check here ☐	1b	✓
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 2014?	1c	✓
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 2014, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2014? ☐ Yes ☒ No 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	n/a
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? ☐ Yes ☒ No		
b	If "Yes," did it have excess business holdings in 2014 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 2014.</i>)	3b	n/a
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	✓
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 2014?	4b	✓

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

- 5a** During the year did the foundation pay or incur any amount to:
- (1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☒ No
- (2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☒ No
- (3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☒ No
- (4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? (see instructions) ☐ Yes ☒ No
- (5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☒ No
- b** If any answer is "Yes" to 5a(1)–(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)? ☐ Yes ☒ No
Organizations relying on a current notice regarding disaster assistance check here ☐
- c** If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? ☐ Yes ☒ No
If "Yes," attach the statement required by Regulations section 53.4945–5(d).
- 6a** Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? ☐ Yes ☒ No
- b** Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? ☐ Yes ☒ 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? ☐ Yes ☒ No
- b** If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction? ☐ Yes ☒ No

5b	n/a	
6b	✓	
7b	n/a	

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
See Statement 3				

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 ☐ **None**

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

None

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	None	
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	None	
2		
3	All other program-related investments See instructions	

All other program-related investments See instructions

Total. Add lines 1 through 3

None

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	3,596,912
b	Average of monthly cash balances	1b	742,998
c	Fair market value of all other assets (see instructions)	1c	0
d	Total (add lines 1a, b, and c)	1d	4,339,910
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	
2	Acquisition indebtedness applicable to line 1 assets	2	0
3	Subtract line 2 from line 1d	3	4,339,910
4	Cash deemed held for charitable activities. Enter 1 1/2 % of line 3 (for greater amount, see instructions)	4	65,099
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	4,274,811
6	Minimum investment return. Enter 5% of line 5	6	213,741

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	213,741
2a	Tax on investment income for 2014 from Part VI, line 5	2a	2,186
b	Income tax for 2014 (This does not include the tax from Part VI.)	2b	0
c	Add lines 2a and 2b	2c	2,186
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	211,555
4	Recoveries of amounts treated as qualifying distributions	4	10,500
5	Add lines 3 and 4	5	222,055
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	222,055

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	322,261
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	0
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	0
b	Cash distribution test (attach the required schedule)	3b	0
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	322,261
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	322,261

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 2013	(c) 2013	(d) 2014
1 Distributable amount for 2014 from Part XI, line 7				222,055
2 Undistributed income, if any, as of the end of 2014:				
a Enter amount for 2013 only			0	
b Total for prior years 20__, 20__, 20__		0		
3 Excess distributions carryover, if any, to 2014:				
a From 2009	279,423			
b From 2010	96,245			
c From 2011	28,117			
d From 2012	49,101			
e From 2013	24,599			
f Total of lines 3a through e	477,485			
4 Qualifying distributions for 2014 from Part XII, line 4. \$ <u>322,261</u>				
a Applied to 2013, 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 2014 distributable amount				222,055
e Remaining amount distributed out of corpus	100,206			
5 Excess distributions carryover applied to 2014 (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	577,691			
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 2013. Subtract line 4a from line 2a. Taxable amount—see instructions			0	
f Undistributed income for 2014. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2015				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required—see instructions)	0			
8 Excess distributions carryover from 2009 not applied on line 5 or line 7 (see instructions)	279,423			
9 Excess distributions carryover to 2015. Subtract lines 7 and 8 from line 6a	298,268			
10 Analysis of line 9:				
a Excess from 2010	96,245			
b Excess from 2011	28,117			
c Excess from 2012	49,101			
d Excess from 2013	24,599			
e Excess from 2014	100,206			

Part XIV Private 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 2014, enter the date of the ruling N/A

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

	Tax year	Prior 3 years			(e) Total
	(a) 2014	(b) 2013	(c) 2012	(d) 2011	
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon					
a "Assets" alternative test—enter					
(1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test—enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed					
c "Support" alternative test—enter					
(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

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

- 1 Information Regarding Foundation Managers:**
- a** List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000) (See section 507(d)(2).)

None

- b** List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest.

None

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

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

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

Kennebunk Savings Bank Foundation - Community Investment Program, PO Box 28, Kennebunk, Maine 04043

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

See Statement 4

- c** Any submission deadlines:

See Statement 4

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

See Statement 4

Part XV **Supplementary Information** (continued)**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a <i>Paid during the year</i>				
See Statement 5	n/a	n/a	See Statement 5	See Statement 5
Total			3a	319,513
b <i>Approved for future payment</i>				
See Statement 6	n/a	n/a	See Statement 6	See Statement 6
Total			3b	122,000

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.

Enter gross amounts unless otherwise indicated.		Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions.)
		(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1	Program service revenue:					
a						
b						
c						
d						
e						
f						
g	Fees and contracts from government agencies					
2	Membership dues and assessments					
3	Interest on savings and temporary cash investments			14	3,987	
4	Dividends and interest from securities			14	78,171	
5	Net rental income or (loss) from real estate:					
a	Debt-financed property					
b	Not debt-financed property					
6	Net rental income or (loss) from personal property					
7	Other investment income					
8	Gain or (loss) from sales of assets other than inventory			14	46,308	
9	Net income or (loss) from special events					
10	Gross profit or (loss) from sales of inventory					
11	Other revenue: a					
b						
c						
d						
e						
12	Subtotal. Add columns (b), (d), and (e)		0		128,466	0
13	Total. Add line 12, columns (b), (d), and (e)				13	128,466

(See worksheet in line 13 instructions to verify calculations.)

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

[illegible]

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

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

**Sign
Here**

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

Signature of officer or trustee

Date 8/6/15

Treasurer
Title

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

**Paid
Preparer
Use Only**

Print/Type preparer's name

Barbara I. Belik

Preparer's signature

Tabas D. Blev

Date _____

8/5/15

Check ☐ if self-employed

PTIN

P01459740

Firm's name ▶ **Bergen & Parkinson, LLC**

Firm's EIN ▶ 01-513838

Firm's address ► 62 Portland Road, Suite 25, Kennebunk, Maine 04043

Phone no	(207) 985-7000
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Schedule B(Form 990, 990-EZ,
or 990-PF)Department of the Treasury
Internal Revenue Service**Schedule of Contributors**

OMB No 1545-0047

2014

▶ Attach to Form 990, Form 990-EZ, or Form 990-PF.

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

Kennebunk Savings Bank Foundation

Employer identification number

01-0547392

Organization type (check one).**Filers of:****Section:**

Form 990 or 990-EZ

☐ 501(c)() (enter number) organization☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation☐ 527 political organization

Form 990-PF

☒ 501(c)(3) exempt private foundation☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation☐ 501(c)(3) taxable private foundationCheck 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, contributions totaling \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions.

Special Rules

- ☐ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33 $\frac{1}{3}$ % support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions 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 an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *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 an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled 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 totaling \$5,000 or more during the year ▶ \$

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

Name of organization Kennebunk Savings Bank Foundation	Employer identification number 01-0547392
--	---

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

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	Kennebunk Savings Bank 104 Main Street, PO Box 28 Kennebunk, Maine 04043	\$ 219,112	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
			Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
			Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
			Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
			Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
			Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
			Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
			Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)

Name of organization Kennebunk Savings Bank Foundation	Employer identification number 01-0547392
---	--

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

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
1	None ----- ----- -----	\$ -----	-----
(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
-----	----- ----- -----	\$ -----	-----

Kennebunk Savings Bank Foundation
Form 990-PF
Tax Year Ended 12/31/14

EIN # 01-0547392

Part I, Analysis of Revenue and Expenses

Line 16a, Legal Fees

Tax Compliance and Consulting Fees	<u>\$2,748</u>
------------------------------------	----------------

Line 16c, Other Professional Fees

Investment Management Fees	<u>\$17,895</u>
----------------------------	-----------------

Line 18, Taxes

\$4940 Tax on Net Investment Income	\$ 5,198
-------------------------------------	----------

Foreign Taxes Paid on Dividends	<u>1,034</u>
	<u>\$ 6,232</u>

Line 23, Other Expenses

ADR Pass-thru Fees	<u>\$ 215</u>
--------------------	---------------

Kennebunk Savings Bank Foundation
Form 990-PF
Tax Year Ended 12/31/14

EIN # 01-0547392

Part II, Balance Sheets
Line 10b, Investments – Corporate Stock

Quantity	Security	Adj Unit Cost	Total Adjusted Cost	Price	Market Value
COMMON STOCK					
Consumer Staples					
825	Nestle S A Reg B ADR	59.32	48,939.95	72.95	60,183.75
800	PepsiCo	59.09	47,273.95	94.56	75,648.00
825	Procter & Gamble	55.82	46,053.20	91.09	75,149.25
1,450	Unilever NV	31.75	46,033.84	39.04	56,608.00
600	Walgreens Boots Alliance Inc	35.10	21,062.76	76.20	45,720.00
			209,363.70		313,309.00
Health Care					
225	C R Bard	86.97	19,569.07	166.62	37,489.50
1,500	Dentsply Intl	29.58	44,370.35	53.27	79,905.00
1,300	Medtronic	43.14	56,082.30	72.20	93,860.00
1,500	Novo-Nordisk	10.56	15,841.54	42.32	63,480.00
1,350	Roche Hldg Ltd Spon ADR	36.73	49,580.95	33.99	45,886.50
700	Waters	45.57	31,898.79	112.72	78,904.00
			217,343.00		399,525.00
Industrials					
475	3M Company	87.07	41,356.02	164.32	78,052.00
2,500	ABB Ltd ADR	24.17	60,436.04	21.15	52,875.00
900	Denaher Corp	30.21	27,185.53	85.71	77,139.00
1,100	Emerson Electric	46.78	51,455.43	61.73	67,903.00
725	United Parcel Service	83.70	60,680.90	111.17	80,598.25
			241,113.92		356,567.25
Materials					
550	BHP Billiton Ltd ADR	51.84	28,514.45	47.32	26,026.00
600	Praxair	56.50	33,902.97	129.56	77,736.00
1,400	Vale SA ADR	33.37	46,724.10	8.18	11,452.00
			109,141.52		115,214.00
Information Technology					
675	Accenture Plc	57.52	38,826.65	89.31	60,284.25
2,800	Cisco Systems	20.96	58,698.65	27.81	77,882.00
1,200	Fiserv	27.44	32,923.41	70.97	85,164.00
525	Intuit	62.81	32,975.22	92.19	48,399.75
1,700	Microsoft	30.00	51,003.66	46.45	78,965.00
1,000	Oracle	32.54	32,541.13	44.97	44,970.00
700	Qualcomm	51.00	35,703.42	74.33	52,031.00
1,600	Texas Instruments	35.05	56,073.95	53.46	85,544.00
			338,746.10		533,240.00
Energy					
800	Cenovus Energy	24.94	19,954.47	20.62	16,496.00
825	ConocoPhillips	51.59	42,561.93	69.06	56,974.50
675	Devon Energy	64.15	43,298.48	61.21	41,316.75
2,094	Kinder Morgan Inc	16.60	34,767.31	42.31	88,597.14
650	Occidental Pete	83.55	54,307.70	80.61	52,396.50
600	Schlumberger Ltd	52.51	31,505.23	85.41	51,246.00
			226,395.12		307,026.89
Financials					
750	American Express	53.97	40,477.00	93.04	69,780.00
1,400	MetLife	34.90	48,865.72	54.09	75,726.00
			89,342.72		145,506.00
Exchange Traded Funds					
3,000	Vanguard FTSE Emerging Market	41.64	124,928.15	40.02	120,060.00
1,800	iShares: MSCI EAFE Index	73.95	133,116.72	60.84	109,512.00
1,700	iShares S&P Small Cap 600 Idx	46.39	78,854.80	114.06	193,902.00
			336,899.67		423,474.00
COMMON STOCK Total			1,768,345.75		2,593,862.14

Statement 2

Kennebunk Savings Bank Foundation
Form 990-PF
Tax Year Ended 12/31/14

EIN # 01-0547392

Part II, Balance Sheets
Line 10c, Investments – Corporate Bonds

Quantity	Security	Adj Unit Cost	Total Adjusted Cost	Price	Market Value
CORPORATE BONDS					
50,000	Boeing Company 3.500% Due 02-15-15	102.18	51,089.00	100.32	50,160.05
50,000	Emerson Electric 4.125% Due 04-15-15	104.22	52,112.50	101.01	50,503.25
50,000	Hewlett Packard 2.125% Due 09-13-15	97.52	48,758.00	100.78	50,389.10
50,000	Merck & Co Inc 2.250% Due 01-15-16	97.77	48,887.00	101.70	50,850.85
50,000	Caterpillar Inc 5.700% Due 08-15-16	99.47	49,736.67	107.78	53,888.15
50,000	Royal Bank of Canada StrNt Stp Cpn Mat 8/12/22 2.500% Due 08-22-16	99.92	49,962.50	100.70	50,349.35
20,000	General Electric Cap 3.300% Due 10-15-17	107.42	21,483.80	103.57	20,713.20
25,000	General Electric Cap 3.250% Due 11-15-17	107.57	26,892.50	103.53	25,883.07
10,000	General Electric Cap 3.250% Due 11-15-17	107.32	10,732.50	103.53	10,353.23
50,000	National Rural Utilities 3.000% Due 06-15-18	105.47	52,735.00	99.18	49,590.75
50,000	Caterpillar Finl Svcs 2.200% Due 10-15-18	102.95	51,474.50	100.20	50,102.25
50,000	Amgen Inc 3.450% Due 10-01-20	104.41	52,207.50	103.95	51,976.30
50,000	Berkshire Hathaway 2.900% Due 10-15-20	102.53	51,263.50	102.44	51,218.50
50,000	Pepsico 3.125% Due 11-01-20	105.09	52,545.50	103.80	51,898.95
50,000	National Rural Utilities 3.000% Due 03-15-21	100.05	50,025.00	100.78	50,387.65
	Accrued Interest				5,391.35
			669,905.47		673,656.00
FIXED INCOME EXCHANGE TRADED FUNDS					
2,500	Vanguard Short-Term Corp Bd Index	80.00	200,008.42	79.63	199,075.00
			200,008.42		199,075.00
CORPORATE BONDS					
	Total		869,914		872,731

Kennebunk Savings Bank Foundation
Form 990-PF
Tax Year Ended 12/31/14

EIN # 01-0547392

Part VIII., Information About Officers, Directors, etc.

Line 1, List of All Officers, Directors, Etc.

(a)	(b)	(c) (d) (e)
Bradford C. Paige 16 Paddock View Lane Kennebunk, ME 04043	President and Director Less than 1 hr./wk.	None
Dennis Byrd 185 Mosher Road Gorham, ME 04038	Exec. Vice President Less than 1 hr./wk.	None
Stephen A. Soubble 4 Rays Circle Scarborough, ME 04074	Sr. Vice President Less than 1 hr./wk.	None
Robyn LeBuff 183 Storey Avenue Newburyport, MA 01950	Vice President 20 hrs/annually	None
Heather Harris 67 Port Road Kennebunk, ME 04043	Vice President 120 hrs/annually	None
Alexander O. Meagher 68 High Street, Apt. 102 Saco, ME 04072	Clerk Less than 1 hr./wk.	None
Andrew T. Furlong, Jr. 48 Sunrise Terrace York, ME 03909	Director Less than 1 hr./wk.	None
Richard V. Bibber 11 Merrifield Drive Kennebunk, ME 04043	Director (Chairman) Less than 1 hr./wk.	None
James J. Keating, III 60 High Street Kennebunk, ME 04043	Director Less than 1 hr./wk.	None
Raymond E. Mailhot 13 Rivers Edge Road Kennebunk, ME 04043	Director Less than 1 hr./wk.	None

Kennebunk Savings Bank Foundation
Form 990-PF
Tax Year Ended 12/31/14

EIN # 01-0547392

Geoffrey Titherington 148 Grammar Street Sanford, ME 04073	Director Less than 1 hr./wk.	None
Stephen A. Morris 200 Goose Rocks Road Kennebunkport, ME 04046	Director Less than 1 hr./wk.	None
Milda Castner 104 River Run Arundel, ME 04046	Director Less than 1 hr/wk	None
Matthew Chase 365 Horace Mills Road Wells, ME 04090	Director Less than 1 hr/wk	None



Grants & Sponsorships

Kennebunk Savings invests in community development programs with a long term and lasting impact. Our Community Investment Program offers direct grants as well as sponsorships, and encourages our employees to be active volunteers throughout our community.

Our financial support focuses on five key categories:

Arts programs that preserve and enhance the cultural opportunities and infrastructures

Civic Initiatives that promote economic development, improve quality of life, and strengthen the basic foundation of our community

Education programs that enhance academic achievements and aspirations

Environmental Programs that protect and preserve the unique landscapes and wildlife habitats

Human Services organizations and initiatives that enhance the quality of life, especially those most in need

Huntington Common Charitable Fund for Seniors

Kennebunk Savings Bank Foundation's Huntington Common Charitable Fund for Seniors was established with the proceeds from the conversion and sale of Huntington Common Retirement Living Community in 2006. Each year, the Kennebunk Savings Bank Foundation allocates earnings of the Huntington Common Fund to qualified organizations serving York County residents ages 65 and older.

Direct Request

Organizations may request funding online or through a banking office or lending officer. Our Community Investment Committee meets monthly to review requests submitted by non-profit and charitable organizations. Decisions are based on potential impact in the community, support from others in the private and public sector, and relevance to the Community Investment goals within our five key categories.

[Request a grant or sponsorship](#)

Ask us today

Call 1.800.339.6573

Kennebunk Savings Bank - Member FDIC Equal Housing Lender
Insurance and Investment Products are.

- Not FDIC Insured
- Not Bank Guaranteed

Requesting a Grant or Sponsorship

If you would like Kennebunk Savings or the Kennebunk Savings Bank Foundation to consider funding your organization through a grant or sponsorship, please complete our online Request for Funding form.

Upon completion of the eligibility questionnaire, you will be directed to the appropriate fund or sponsorship form. You will then be asked to provide the following information to finalize your request:

Name, address and telephone number of the organization

Contact name and daytime telephone number

A complete program/project description including expected outcomes, whom it will benefit, and what impact it will have on the community

Detailed budget, including the total program project budget, the amount you are requesting, gifts you have received so far for this project, and your additional fundraising plans

Your organization's Section 501(c)(3) tax exempt number

A list of the organization's volunteer board of directors

Your organization's most recent annual report or financial statements

Deadlines that could affect the timing of our decision (if applicable)

Our Community Investment Committee usually meets monthly to review requests for funding. We give top priority to requests from organizations located in York County Maine and Seacoast New Hampshire that do not have state or national affiliations. Please note that Kennebunk Savings and the Kennebunk Savings Bank Foundation do not provide funding for individuals, religious or political organizations.



Grant Request Form

Each year, the Kennebunk Savings' Community Investment Program invests 10% of our annual earnings to those non-profit and charitable organizations that to help make York County a better place to live, work and do business.

To apply for a grant, from either Kennebunk Savings Bank sponsorship, please complete the following:

CONTACT & ORGANIZATION INFORMATION

Organization Contact Name _____ Title _____

Organization Requesting Funds _____

Organization Background (300 word max/separate sheet may be used), if applicable

Street Address _____

City _____ State _____ Zip Code _____

Telephone _____ E-mail _____

GRANT INFORMATION

Please check one: ☐ Contribution ☐ Sponsorship *** (see page 2)

Project Title _____ Amount Requested _____

Purpose of the Grant _____

Project Start/End Date) _____ -- _____

of People to Benefit from Event _____

Marketing Strategy (i.e. press releases, website placement, program journals, annual reports, newsletters, etc.)

*****Sponsorship Only**

Event/Sponsorship Date _____ (*IMPORTANT - 3 Week Notice Needed*)

Materials Required:

****IMPORTANT – Please let marketing know specifications/deadlines**

a. Advertisement:

Height (Inches) _____ Width (Inches) _____

Email to: _____

b. Banners:

Height (Inches) _____ Width (Inches) _____

c. Other: _____

BRANCH CONTACT

Manager _____

Manager's Recommendation:

CONFIRMATION OF CHARITABLE INTENT (To be signed by nonprofit)

We certify that none of the proposed grant funds will be used to provide any direct benefit to Kennebunk Savings Bank or a Kennebunk Savings Bank employee or any employee's family member (except in the provision of charitable services or education available to the public at large), or to any staff member, board member, or donor to the Organization. No goods or services have been offered or promised in consideration for this charitable contribution. I further certify that to the best of my knowledge, information, and belief, the purpose of this grant is charitable and for the good of the community and limited to offset, sales, or procurement commitments.

Signature _____ Date _____

STATEMENT 4 CONT'D.

Kennebunk Savings Bank Foundation
Form 990-PF
Tax Year Ended 12/31/14

Part XV, Supplementary Information
Line 3a, Grants and Contributions Paid During the Year

<u>RECIPIENT</u>	<u>PURPOSE</u>	<u>AMOUNT</u>
WABAN PROJECTS, INC. 5 DUNAWAY DRIVE SANFORD ME 04073 US	2014 Commons Center Capital Support Project	\$ 25,000 00
UNITED WAY OF THE GREATER SEACOAST 112 CORPORATE DR STE 3 PORTSMOUTH NH 03801-6890 US	Employee Match	\$ 1,292 00
BIDDEFORD HIGH SCHOOL 25 MAPLEWOOD AVENUE BIDDEFORD ME 040052109 US	Scholarship	\$ 1,000 00
DOVER HIGH SCHOOL AKA DHS 61 LOCUST STREET, SUITE 409 DOVER NH 03820 US	Scholarship	\$ 1,000 00
KENNEBUNK HIGH SCHOOL 89 FLETCHER STREET KENNEBUNK ME 04043 US	Scholarship	\$ 1,000 00
MARSHWOOD HIGH SCHOOL 260 ROUTE 236 SOUTH BERWICK ME 03908 US	Scholarship	\$ 1,000 00
NOBLE HIGH SCHOOL AKA NOBLE HIGH SCHOOL 388 SOMERSWORTH ROAD NORTH BERWICK ME 03906 US	Scholarship	\$ 1,000 00
PORTSMOUTH HIGH SCHOOL AKA PHS 50 ANDREW JARVIS DRIVE PORTSMOUTH NH 03801 US	Scholarship	\$ 1,000 00
SANFORD HIGH SCHOOL 917 MAIN STREET SUITE 200 SANFORD ME 04073 US	Scholarship	\$ 1,000 00
TRAIP ACADEMY AKA R W TRAIP ACADEMY 12 WILLIAMS AVENUE KITTEERY ME 03904 US	Scholarship	\$ 1,000 00
WELLS HIGH SCHOOL P O BOX 579, 200 SANFORD ROAD WELLS ME 04090 US	Scholarship	\$ 1,000 00
YORK HIGH SCHOOL 286 LONG SANDS ROAD YORK ME 03909 US	Scholarship	\$ 1,000 00
SWEETSER 50 MOODY STREET SACO ME 04072 US	Scholarship	\$ 1,000 00
UNITED WAY OF YORK COUNTY P O BOX 727 KENNEBUNK ME 04043 US	Kitchen Capital Campaign	\$ 10,000 00
TOWN OF HAMPTON 100 WINNACUNNET ROAD HAMPTON NH 03842 US	Employee Matching Funds	\$ 51,060 00
LAMPREY ARTS AND CULTURE ALLIANCE 35 MAIN ST STE G01 NEWMARKET NH 03857-1217 US	Hampton Town Clock matching grant	\$ 7,500 00
TOWN OF KENNEBUNK 1 SUMMER STREET KENNEBUNK ME 04043 US	Millspace sponsor	\$ 25,000 00
SOUTHERN MAINE HEALTH CARE PO BOX 626 BIDDEFORD ME 04104 US	Waterhouse Pavilion Rink Year 1 of 3	\$ 25,000 00
RIVER TREE CENTER FOR THE ARTS AKA RIVER TREE ARTS 35 WESTERN AVENUE KENNEBUNK ME 04043 US	Mayflower Place Activities Department Expansion	\$ 11,436 00
ANIMAL WELFARE SOCIETY POST OFFICE BOX 43 WEST KENNEBUNK ME 04094 US	Life Long Learning Lecture Series and Visiting Arts Series	\$ 4,000 00
LAUDHOLM TRUST 342 LAUDHOLM FARM ROAD WELLS ME 04090-0000 US	Keep Pets at Home	\$ 10,000 00
YORK COUNTY COMMUNITY ACTION CORPORATION 6 SPRUCE STREET SANFORD ME 04073 US	Grey Foxes, A New Senior Volunteer Program at the Wells Reserve at Laudholm	\$ 3,000 00
GOOD SHEPHERD FOOD BANK AKA GOOD SHEPHERD FOOD BANK PO BOX 1807 AUBURN ME 04211-1807 US	Keeping Seniors at Home V	\$ 15,000 00
SOUTH COAST SENIOR COLLEGE, A PROJECT OF YORK COUNTY COMMUNITY COLLEGE 112 COLLEGE DRIVE, WELLS ME 04090 US	Senior Food Mobile	\$ 20,000 00
HOSPICE OF SOUTHERN MAINE 180 U S ROUTE #1 SCARBOROUGH ME 04074 US	South Coast Senior College Capacity Building	\$ 6,000 00
SOUTHERN MAINE AGENCY ON AGING 136 US ROUTE ONE SCARBOROUGH ME 04074-9055 US	Wireless Integrated Bed Alarms for Increased Patient Safety	\$ 8,850 00
THE OPPORTUNITY ALLIANCE AKA PROP & YOUTH ALTERNATIVES INGRAHAM 50 MONUMENT SQ 6TH FL PORTLAND ME 04101 US	A Better Day Capital Campaign -Year 1 of 5	\$ 40,000 00
CENTER FOR WILDLIFE, INC AKA CENTER FOR WILDLIFE (CFW) P O BOX 620 CAPE NEDDICK ME 03902-0620 US	Senior Volunteer Programs	\$ 2,500 00
KENNEBUNK FREE LIBRARY AKA KFL 112 MAIN ST KENNEBUNK ME 04043 7036 US	Wildlife as Teachers and Healers for Seniors	\$ 4,000 00
HOMEHEALTH VISITING NURSES 15 INDUSTRIAL PARK RD SACO ME 04072-1804 US	Improving Genealogy Research and Support for Seniors at KFL	\$ 13,125 00
YORK PUBLIC LIBRARY ASSOCIATION 15 LONG SANDS ROAD YORK ME 03909 US	Community Health & Wellness Clinics	\$ 10,000 00
YORK COUNTY SHERIFF'S OFFICE AKA YORK COUNTY SHERIFF J LAYMAN WAY ALFRED ME 04002 US	Enriching the Lives of Our Seniors	\$ 6,750 00
THE OPPORTUNITY ALLIANCE AKA PROP & YOUTH ALTERNATIVES INGRAHAM 50 MONUMENT SQ 6TH FL PORTLAND ME 04101 US	Fraud Awareness	\$ 1,500 00
LAUDHOLM TRUST 342 LAUDHOLM FARM ROAD WELLS ME 04090-0000 US	Senior Volunteer Program	\$ 2,500 00
VOLUNTEERS OF AMERICA NORTHERN NEW ENGLAND 14 MAINE ST SUITE 301 BRUNSWICK ME 04011 US	Grey Foxes, A New Senior Volunteer Program at the Wells Reserve at Laudholm	\$ 4,000 00
	"Let's Eat"	\$ 2,000 00
		TOTAL \$319,513 00

Kennebunk Savings Bank Foundation
Form 990-PF
Tax Year Ended 12/31/14

EIN: 01-0547392

Part XV, Supplementary Information
Line 3b, Grants & Contributions Approved for Future Payment

<u>Recipient</u>	<u>Category/ Purpose</u>	<u>Year to be Paid</u>	<u>Amount</u>
United Way of York County 36 Water Street Kennebunk, ME 04043	Employee Match	2015	\$55,000
United Way of the Greater Seacoast 112 Corporate Drive, #3 Portsmouth, NH 03801	Employee Match	2015	\$2,000
Cocheco Valley Humane Society 262 County Farm Road Dover, NH 03820	Challenge grant	2015	\$25,000
Town of Kennebunk 1 Summer Street Kennebunk, ME 04043	Waterhouse Center Pavilion	2015	\$25,000
York Hospital 15 Hospital Drive York, ME 03909	Obstetrics Capital campaign	2015	\$15,000
TOTAL APPROVED FOR FUTURE PAYMENT			<u>\$122,000</u>

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

OMB No 1545-1709

► File a separate application for each return.

► Information about Form 8868 and its instructions is at www.irs.gov/form8868.

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

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

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

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

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

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

Enter filer's identifying number, see instructions

Type or print File by the due date for filing your return. See instructions.	Name of exempt organization or other filer, see instructions. Kennebunk Savings Bank Foundation	Employer identification number (EIN) or 01-0547392
	Number, street, and room or suite no. If a P.O. box, see instructions. 62 Portland Road, Suite 25	Social security number (SSN)
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. Kennebunk, ME 04043	

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

0 4

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

- The books are in the care of ► **Stephen A. Souble, Kennebunk Savings Bank, 104 Main St., Kennebunk, ME 04043**

Telephone No. ► **(207) 985-4903**Fax No. ► **n/a**

- If the organization does not have an office or place of business in the United States, check this box ☐
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) _____ . If this is for the whole group, check this box ☐ . If it is for part of the group, check this box ☐ and attach a list with the names and EINs of all members the extension is for

- 1 I request an automatic 3-month (6 months for a corporation required to file Form 990-T) extension of time until **August 17**, 20 **15**, to file the exempt organization return for the organization named above. The extension is for the organization's return for:
- ☒ calendar year 20 **14** or

► ☐ tax year beginning _____, 20 _____, and ending _____, 20 _____

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

3a If this application is for Forms 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	3a	\$	3,525
b If this application is for Forms 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit.	3b	\$	3,525
c Balance due. Subtract line 3b from line 3a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	3c	\$	0

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