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Certified Article Number

Form **990-PF**

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SENDERS RECORD

or Section 4947(a)(1) Trus

Do not enter social security numb Department of the Treasury Internal Revenue Service ▶ Information about Form 990-PF and its sepa

A Employer identification number 26-6254109 26-6254	Ford	aleń	dar year 2014 or tax year beginning		, and ending		
Part Analysis of Revenue and Expenses Controllations, grids, grafts, etc., received 20 20 20 20 20 20 20 2	Nar	ne of	foundation			A Employer identification	number
Day Pitney LLP, One Canterbury Green City or term, state or province, country, and 2IP or foreign postal code Stant Ford, CT 6591 G Check all that apply India return Intal return Intal return Amended return Amended return Address change Return Address change Return Address change Return Return Address change Return Retu						26-6254109	
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Stamford, CT 06901 G Check all that apply Intolate ferum Amended return Amended retu	_D	ay	Pitney LLP, One Canter	bury Green		203-977-73	100
a Check all that apply				ostal code		C If exemption application is p	pending, check here
Final return				Initial return of a fo	ormer public charity	D 1. Foreign organization	s, check here
H. Check type of cryanization Section 501(c) 3 exempt provide foundation Section 4947(2)(1) nonexempt charable trust Other taxable private foundation Tarm marker value of all assets at end of year Accounting method XJ Cash Accounting method Accounting method XJ Cash Accounting method		-		Amended return			
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Section 497(a)(1) nonexempt charable trust Other taxable private foundation	H C	heck	type of organization X Section 501(c)(3) ex	empt private foundation		F. If private foundation sta	itus was terminated
Fart market value of all assets at end of year 1/l. col. (c), hine 16		_			ntion	, .	
Controllations College	1 Fa	ır ma	rket value of all assets at end of year J Accounti	ng method X Cash	Accrual	F. If the foundation is in a	60-month termination
Part	(fr	om F	Part II, col (c), line 16)	ther (specify)			_
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1 Contributions, grifts, grants, etc. received 2 Chear F (X) like boundaries in order audious back Son 8 a flavores on average and desproprising of the son and are shown and and interest from securities 3 Interest order or a section and depletion 2 B Net gan or gloss prome are assets not on line 10 b Gross state less returns 10a and state proce for all 18,719. 3 Ret short-term capital gain 3 Increase state less returns 10a and state proce for all 18,719. 3 Compression of efficiency and through 11 capital gain 3 Increase state less returns 10a and state less returns 10a and state	Pa	ırt İ	(The total of amounts in columns (b), (c), and (d) may not			(c) Adjusted net income	for charitable purposes
2 Concert ►		1	Contributions, gifts, grants, etc., received		,	N/A	
Interest on asurage and temporary							
4 Dividends and interest from securities 5 a Gross rents b Net restal income or (loses) 6 Gross rents 1 Net steat income or (loses) 7 Capitage annet income (tem Part IV, line 2) 8 Net short-term capital gain 9 income modifications 10 Gross profit or (loss) 11 Other income 12 Total. Add lines 1 through 11 13 Compensation of lifficers, directors, trustees, etc 14 Other employee scalaries and wages 15 Pension plans, employee benefits 16 Legal fees C Other professional fees 17 Interest 18 Taxes 18 Taxes 18 Taxes 20 Contributions, grits, grants paid 20 Cocupancy 21 Travel, conferences, and meetings 22 Printing and publications 23 Other expenses 24 Total aperating and administrative appenses. Add lines 13 through 23 25 Total apperating and administrative appenses. Add lines 13 through 23 25 Total apperating and administrative appenses. Add lines 13 through 23 25 Total apperating and administrative appenses. Add lines 24 and 25 27 Subtract line 26 from line 12 2 Excess of revenue ever expenses and disbursements. Add lines 24 and 25 26 Note Investment income of requires, enter-0-) 26 Note Investment income of requires, enter-0-) 27 Subtract line 26 from line 12 28 Excess of revenue ever expenses and disbursements bit Net Investment income of requires, enter-0-) 30 (75 Subtract line 26 from line 12 28 Excess of revenue ever expenses and disbursements bit Net Investment income of requires, enter-0-) 30 (75 Subtract line 26 from line 12 31 Excess of revenue ever expenses and disbursements bit Net Investment income of requires, enter-0-)		1	Interest on savings and temporary	5.	5.		Statement 1
Sa Gross rents Description Sa Net present income or (local)		4		15,380.	15,380.		Statement 2
D Net rental income or (loss)		5a					
Day		b	Net rental income or (loss)				
Description Compensation Compe	- 4	6a	Net gain or (loss) from sale of assets not on line 10	18,719.			
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b Net investment income (if negative, enter -0-)				-16,809.			
77/7					30,758.		
						N/A	

423501 11-24-14 LHA For Paperwork Reduction Act Notice, see instructions.

308. Enter 1% of net investment income (1% of Part I, line 27b) 6 84,413. Add lines 5 and 6 7 46,600. 8 8 Enter qualifying distributions from Part XII, line 4

Form 990-PF (2014)

See the Part VI instructions

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

Part VI		990-PF(2014) Joan F. Dionne Family Foundation 26-6254		F	age 4
Date of ruling or determination letter Do consider, Canadations that meet the section 4940(e) requirements in Part V, check here of Part, Line 270. All other domestic foundations situs 2% of line 270 Exempt foreign organizations enter 4% of Part, Line 12, col (b) 7. All other domestic foundations situs 2% of line 270 Exempt foreign organizations enter 4% of Part, Line 12, col (b) 8. Subtite A (income) tax (domestic section 4947(a)(1) fusits and taxable foundations only Others enter 40-) 8. Subtite A (income) tax (domestic section 4947(a)(1) fusits and taxable foundations only Others enter 40-) 8. Subtite A (income) tax (domestic section 4947(a)(1) fusits and taxable foundations only Others enter 40-) 9. Tax based on investment income. Subtract line 4 from time 3 if zero or lass, enter 40- 9. Tax device the stained tax payments and 2013 overpayment credited to 2014 8. Subtite A (income) tax (domestic section 4947(a)(1) fusits and taxable foundations only Others enter 40-) 9. Exempt foreign organizations - tax withheld at source 9. Exempt foreign organizations - tax withheld at source 9. Exempt foreign organizations - tax withheld at source 9. Exempt foreign organizations - tax withheld at source 9. Exempt foreign organizations - tax withheld at source 9. Exempt foreign organizations - tax withheld at source 10. Exempt foreign organizations - tax withheld at source 11. Tax due if the total of less 5 and 8 is more than the 7 is first manual organization organizations - tax withheld at source 12. Tax due if the total of less 5 and 8 is more than line 7 is rister amount overpaid 13. Company for the 7 is more than the total of less 5 and 8 is enter the amount overpaid 14. Company foreign foreign tax devices and the payment of the amount overpaid 15. Company foreign tax devices of the company of the com			ıstru	ctior	is)
b Domestic foundations that meet the section 4947(a) requirements in Part V, check here	1a				
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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? 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 Ba Enter the states to which the foundation reports or with which it is registered (see instructions) CT 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 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)? If "Yes," complete Part XIV Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses By X Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses By X By In the state is the foundation of the state of the instructions of the state of the stat	5		5		Α
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10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses 10 X	9		0		x
Uiu ally persons decorne substantial continuotors during the tax year in yes, attach a schedule listing their names and addresses				 	
	10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		-DE	

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (contractor) 3 Five highest-paid independent contractors for professional services. If none, enter "NONE." (a) Name and address of each person paid more than \$50,000 (b) Type of service NONE. NONE Total number of others receiving over \$50,000 for professional services 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. N/A Part IX-B Summary of Program-Related Investments Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2 Amount . Amount . All other program-related investments See instructions	Form 990-PF (2014) Joan F. Dionne Family Foundation	n 26–62	54109 Page 7
3 Five highest-paid independent contractors for professional services. If none, enter "NONE." (a) hame 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 Documentary of the professional services Documentary of the professional services Documentary of Direct Charitable Activities			- Jugor
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 N/A Part IX-B Summary of Program-Related Investments Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2 Amount - N/A All other program-related investments. See instructions 3 All other program-related investments. See instructions			
Total number of others receiving over \$50,000 for professional services 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 N/A	(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
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 N/A	NONE		
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number of organizations and other beneficiaries served, conferences convened, research papers produced, etc N/A Part IX-B Summary of Program-Related Investments Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2 Amount N/A All other program-related investments See instructions All other program-related investments See instructions	Part IX-A Summary of Direct Charitable Activities		
Part IX-B Summary of Program-Related Investments Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2 Amount N/A All other program-related investments See instructions All other program-related investments See instructions	List the foundation's four largest direct charitable activities during the tax year. Include relevant station number of organizations and other beneficiaries served, conferences convened, research papers pro	stical information such as the oduced, etc	Expenses
Part IX-B Summary of Program-Related Investments Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2 Amount All other program-related investments See instructions 3			
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Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2 All other program-related investments See instructions 3			
N/A All other program-related investments See instructions 3		a times 4 and 0	Amount
All other program-related investments See instructions 3		Times Tanu 2	Amount -
All other program-related investments. See instructions 3	1N/A		
All other program-related investments. See instructions 3			
3	2		
3			
3			<u> </u>
	All other program-related investments. See instructions		
Fotal, Add lines 1 through 3	3		
Total, Add lines 1 through 3			
	Total Add lines 1 through 3	D	0.

P	art X Minimum Investment Return (All domestic foundations must com	nplete this part. Foreign foun	dations, se	ee instructions.)
1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., pu	irposes	"	
а	Average monthly fair market value of securities		1a	611,142.
b	Average of monthly cash balances		1b	611,142. 55,020.
C	Fair market value of all other assets		10	
d	Total (add lines 1a, b, and c)		1d	666,162.
е	Reduction claimed for blockage or other factors reported on lines 1a and			
	1c (attach detailed explanation) 1e	0.		
2	Acquisition indebtedness applicable to line 1 assets		2	0.
3	Subtract line 2 from line 1d		3	666,162.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instr	ructions)	4	9,992. 656,170.
5	Net value of noncharitable-use assets Subtract line 4 from line 3. Enter here and on Part V, li		5	656,170.
6	Minimum investment return. Enter 5% of line 5		6	32,809.
P	art XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) p foreign organizations check here and do not complete this part)	rivate operating foundations and	d certain	
1	Minimum investment return from Part X, line 6		1	32,809.
2a	Tax on investment income for 2014 from Part VI, line 5	615.		<u> </u>
b	Income tax for 2014 (This does not include the tax from Part VI)			
C	Add lines 2a and 2b		2c	615.
3	Distributable amount before adjustments Subtract line 2c from line 1		3	32,194.
4	Recoveries of amounts treated as qualifying distributions		4	0.
5	Add lines 3 and 4		5	32,194.
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	32,194.
P	art XII Qualifying Distributions (see Instructions)		······	
1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes			
а	Expenses, contributions, gifts, etc total from Part I, column (d), line 26		1a	46,600.
b	Program-related investments - total from Part IX-B		1b	<u> </u>
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., p	ourposes	2	
3	Amounts set aside for specific charitable projects that satisfy the			
а	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 XI	III, line 4	4	46,600.
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	ļ	5	0.
6	Adjusted qualifying distributions. Subtract line 5 from line 4		6	46,600.
	Note The amount on line 6 will be used in Part V, column (b), in subsequent years when calcuted 4940(e) reduction of tax in those years	ulating whether the foundation q	ualifies for t	he section

Page 9

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	waterown r rithmentur - r c	,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,		32,194.
2 Undistributed income, if any, as of the end of 2014			•	
a Enter amount for 2013 only		·	0.	//
h Total for prior years		0		
	·	0.	raman rahahaanaran	daladahinaadhinaa
3 Excess distributions carryover, if any, to 2014				
a From 2009 148,686.	1			
b From 2010 9,013.				
c From 2011 16,993.				
d From 2012 27, 316.	1			
e From 2013 19,612.	221 620			
f Total of lines 3a through e	221,620.			
4 Qualifying distributions for 2014 from				
Part XII, line 4 > \$ 46,600.			0.	
a Applied to 2013, but not more than line 2a				, , , , , , , , , , , , , , , , , , ,
b Applied to undistributed income of prior		0.		
years (Election required - see instructions)		V •	l. iiro lallianon dadi	HH
c Treated as distributions out of corpus	0.			
(Election required - see instructions)			mand or it was not be a first	32,194.
d Applied to 2014 distributable amount	14,406.			32/1310
e Remaining amount distributed out of corpus	0.	·	,,,, , ,,,, , ,	0.
5 Excess distributions carryover applied to 2014 (If an amount appears in column (d), the same amount must be shown in column (a))	0.			
6 Enter the net total of each column as indicated below:				
2 Corpus Add lines 3f, 4c, and 4e Subtract line 5	236,026.			
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 instr			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	140 606			
not applied on line 5 or line 7	148,686.		, ,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	
9 Excess distributions carryover to 2015.	07 240			
Subtract lines 7 and 8 from line 6a	87,340.			
10 Analysis of line 9		•		
a Excess from 2010 9,013. b Excess from 2011 16,993.				
07 016				
10 (10				
14 400				
e Excess from 2014 14, 406.			<u> </u>	Form 990-PF (2014)

Form 990-PF (2014) Joan F. Part XIV Private Operating F		ily Foundat		26-6 N/A	254109 Page 10
			-A, question 9)	N/A	
1 a If the foundation has received a ruling o					
foundation, and the ruling is effective fo		- · · · · · · · · · · · · · · · · · · ·	▶ \		
b Check box to indicate whether the found		ng foundation described i		4942(j)(3) or	4942(j)(5)
2 a Enter the lesser of the adjusted net	Tax year		Prior 3 years		
income from Part I or the minimum	(a) 2014	(b) 2013	(c) 2012	(d) 2011	(e) Total
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				1	
d Amounts included in line 2c not					
used directly for active conduct of			1		
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		į			
(4) Gross investment income					
Part XV Supplementary Info	rmation (Comple	te this part only	f the foundation	n had \$5,000 or n	nore in assets
at any time during t					
1 Information Regarding Foundation					······································
a List any managers of the foundation wh		than 2% of the total cont	ributions received by th	e foundation before the c	lose of any tax
year (but only if they have contributed r			ilbuttons received by th	e louituation belove the c	1030 of any tax
None	(0,000)	(0)(-//			
	400/			una of the eventual of a	
b List any managers of the foundation who other entity) of which the foundation ha			or an equally large port	ion of the ownership of a	parmersinp or
• •	3 a 10 % of greater interes	J.			
None					
2 Information Regarding Contribut					
Check here ► X if the foundation of	inly makes contributions	to preselected charitable	organizations and does	not accept unsolicited re	quests for funds If
the foundation makes gifts, grants, etc					110 0
a The name, address, and telephone num	ber or e-mail address of t	the person to whom appli	cations should be addre	essed	
					
b The form in which applications should t	e submitted and informat	tion and materials they sh	rould include		
			·		
c Any submission deadlines	_				
d Any restrictions or limitations on award	s, such as by geographica	al areas, charitable fields,	kinds of institutions, or	other factors	
-	·				
<u> </u>					
400004 44 04 44					Form 000 DE (2014)

3 Grants and Contributions Paid During the Y	ear or Approved for Future	Payment		
Recipient	If recipient is an individual, show any relationship to	Foundation status of	Purpose of grant or contribution	Amount
Name and address (home or business)	any foundation manager or substantial contributor	recipient	Contribution	
a Paid during the year				
Visiting Nurse & Hospice of Fairfield County 761 Main Avenue	None	Public Charity	Unrestricted	
Norwalk, CT 06851				500
Staying Put in New Canaan/Jane Nyce Fund 58 Pine Street	None	Public Charity	Unrestricted	
New Canaan, CT 06840				200
First Presbyterian Church of New Canaan	None	Public Charity	Unrestricted	
178 Oenoke Ridge New Canaan, CT 06840				30,000
Long Wharf Theatre 22 Sargent Drive	None	Public Charity	Budget	
New Haven, CT 06511				4,500
Star, Inc. 182 Wolfpit Avenue	None	Public Charity	Budget	
Norwalk, CT 06851	<u> </u>	1		5,900
to Approved for future payment	ntinuation she	et(s)	▶ 3a	46,600
None				
Total			▶ 3b	orm 990-PF (2014

423621 11-24-14

er gross amounts unless otherwise indicated	Unrelated b	usiness income		section 512, 513, or 514	(e)
Program service revenue	(a) Business code	(b) Amount	(C) Exclu- sion code	(d) Amount	Related or exempt function income
·					
	l i				-
Fees and contracts from government agencies	;				
lembership dues and assessments					
nterest on savings and temporary cash				_	
vestments			14	5.	
evidends and interest from securities			14	15,380.	energe in the control of the control
let rental income or (loss) from real estate					
Debt-financed property					
Not debt-financed property					
Net rental income or (loss) from personal property					
Other investment income					
Gain or (loss) from sales of assets other				10 710	
han inventory			14	18,719.	
Net income or (loss) from special events	ļ				
Gross profit or (loss) from sales of inventory					
Other revenue					
a	l l				
b					
;					
1					
B				24 104	
Subtotal Add columns (b), (d), and (e)			0.	34,104.	34,10
Total. Add line 12, columns (b), (d), and (e)				13	34,10
worksheet in line 13 instructions to verify calculart XVI-B Relationship of Activations (Control of Activation)		nlichment of	Evennt Pi	irnosas	
ne No Explain below how each activity for w					plishment of
the foundation's exempt purposes (o					

Form 990-PF (2 Part XVII	Information Re	egarding Trans		y Foundation and Transactions a	nd Relations	26-62! ships With Nonch			ge 13
1 Did the org	Exempt Organ ganization directly or indirectly or indirect		of the following	g with any other organization	n described in sec	tion 501(c) of		Yes	No
				7, relating to political organ	ızatıons?			- 1	
a Transfers	from the reporting found	ation to a noncharitab	le exempt org	janization of				-	
(1) Cash							1a(1)		<u>X</u>
(2) Other							1a(2)		<u> </u>
b Other tran							15/4		Х
	of assets to a noncharita						1b(1) 1b(2)		X
* *	nases of assets from a no il of facilities, equipment,	•	rgamzation				1b(3)		X
	bursement arrangements						1b(4)		X
, ,	s or loan guarantees						1b(5)		Х
• •	rmance of services or me	embership or fundrais	ına solicitatio	ns			1b(6)		X
	f facilities, equipment, ma	•	-				10		X
				dule Column (b) should alv	vays show the fair	market value of the goods	s, other ass	ets,	
				ed less than fair market valu					
	I) the value of the goods,	other assets, or servi	ces received						
(a) Line no	(b) Amount involved	(c) Name of		exempt organization	(d) Description	on of transfers, transactions, a	nd sharing arr	angeme	nts
			N/A						
		<u> </u>							
						· · · · · · · · · · · · · · · · · · ·			
									
			-						
	•	· ·		or more tax-exempt organi	zations described				No
	501(c) of the Code (othe		(ತ)) or in sect	ion 5277			Yes	ĹĀ	_ 140
b it Yes, c	omplete the following sch (a) Name of org			(b) Type of organization		(c) Description of relatio	nshin		
	N/A	Janization		(b) Type of organization		(e) Econption of folding			
	N/A		····						
									
Sign Here		mplete Declaration of pre		g accompanying schedules and n taxpayer) is based on all inform 1/2/// Date		rer has any knowledge	May the IRS of return with the shown below X Yes	e prepar (see ins	rer 1
Joigi	Print/Type preparer's na		Preparer's s		Date	Check If PTI	N		
	I mile type preparer s in	utilo	. Tupater 3 3	4 1 -	1 /	self- employed			
Paid	Robert J.	Miller	/ /	Mili	4/27/11	7	00836	026	
Preparer	Firm's name ► Day		L//		1,-//1	Firm's EIN ► 06-			
Use Only	rimis maine > Day	True y				riiii s Liiv P 00-	701/1	~ ~	
Juc Only	Firm's address ► On	e Canterh	iirv Gr	een					
		amford, C				Риопе по 203-	977-7	300	
		<u></u>				1	Form 990		

Part XV **Supplementary Information** Grants and Contributions Paid During the Year (Continuation) If recipient is an individual, Recipient Foundation Purpose of grant or show any relationship to Amount status of contribution any foundation manager Name and address (home or business) recipient or substantial contributor None Public Charity Budget New Canaan Nature Center 144 Oenoke Ridge New Canaan, CT 06840 500. Waveny Care Network None Public Charity Unrestricted 3 Farm Road New Canaan, CT 06840 5,000. 5,500. Total from continuation sheets

Yacktman Fund

Service Class

To Part I, line 4

702.

15,380.

702.

15,380.

Form 990-PF Interes	st on Saving	gs and Tempor	ary Cash In	vestments S	tatement 1
Source		(a) Revenue Per Book		(b) vestment come	(c) Adjusted Net Income
Fidelity Account No. 679-755834	•		5.	5.	
Total to Part I, lin	ne 3		5.	5.	
Form 990-PF	Dividends	and Interest	from Secur	ities S	tatement 2
Source	Gross Amount	Capital Gains Dividends	(a) Revenue Per Books	(b) Net Invest- ment Income	_
Class Action Settlement Grandeur Peak	880.	0.	880.	880.	
Global Opportunities Ivy Science &	2,268.	1,849.	419.	419.	
Technology Fund Loomis Sayles	701.	701.	0.	0.	
Invst Grade Bond Mairs & Power	2,671.	516.	2,155.	2,155.	
Balanced Fund Matthews Pacific	1,371.	56.	1,315.		
Tiger Fund Perkins Mid Cap	2,170.	•	261.		
Value Invst	11,677.	9,499.	2,178.		
Pfizer Inc. TCW Emerging Mkts	1,560.	0.	1,560.	1,560.	
Income CL 1 Vanguard Dividend	2,515.	0.	2,515.	2,515.	
Growth Investor Vanguard/Wellesley	2,444.	818.	1,626.	1,626.	
Income Investor Wasatch	2,673.	917.	1,756.	1,756.	
International Growth	404.	391.	13.	13.	

2,063.

18,719.

2,765.

34,099.

Expenses Net Invest Net Income Pur	nt :	Statement			Fees	Legal	m 990-PF
To Fm 990-PF, Pg 1, ln 16a 3,291. 3,291. Form 990-PF Taxes Stateme Ca	itable		Adjusted		Net Inve	Expenses	cription
Taxes	0			291.	3,	3,291.	Pitney LLP
(a) Expenses Net Invest	0			291.	3,	3,291.	Fm 990-PF, Pg 1, ln 16a
Expenses Per Books ment Income Net Income Pur 2013 Excise Tax 2014 Estimated Tax Payment 864 0. Foreign Tax 55. 55. To Form 990-PF, Pg 1, ln 18 1,022. 55. Form 990-PF Corporate Stock Stateme Description Book Value Value 1,500 shs. Pfizer Inc. 42,905. 4 Total to Form 990-PF, Part II, line 10b 42,905. 4 Form 990-PF Other Investments Stateme Valuation Method Book Value Value 1,634.703 shs. Matthews Pacific COST Tiger Fund 2,732.964 shs. Perkins Mid Cap COST Value 4,528.705 shs. Loomis Sayles Invst COST	nt '	Statement			es	Tax	m 990-PF
2014 Estimated Tax Payment 864. 0. Foreign Tax 55. 55. 55. To Form 990-PF, Pg 1, ln 18 1,022. 55. Form 990-PF Corporate Stock Stateme Description Book Value Value 1,500 shs. Pfizer Inc. 42,905. 4 Total to Form 990-PF, Part II, line 10b 42,905. 4 Form 990-PF Other Investments Stateme Description Valuation Method Book Value Value 1,634.703 shs. Matthews Pacific COST Tiger Fund 2,732.964 shs. Perkins Mid Cap COST Value 4,528.705 shs. Loomis Sayles Invst COST	itable		Adjusted		Net Inve	Expenses	cription
Form 990-PF Corporate Stock Stateme Description Book Value Fair Ma Valu 1,500 shs. Pfizer Inc. 42,905. 4 Total to Form 990-PF, Part II, line 10b 42,905. 4 Form 990-PF Other Investments Stateme Valuation Method Book Value Valu 1,634.703 shs. Matthews Pacific COST Tiger Fund 34,142. 4 2,732.964 shs. Perkins Mid Cap COST Value 55,901. 5	0 0 0			0.		864.	4 Estimated Tax Payment
Description 1,500 shs. Pfizer Inc. Total to Form 990-PF, Part II, line 10b Fair Ma Value 42,905. 4 Total to Form 990-PF Other Investments Stateme Valuation Method Book Value 1,634.703 shs. Matthews Pacific COST Tiger Fund 2,732.964 shs. Perkins Mid Cap Value 4,528.705 shs. Loomis Sayles Invst COST 55,901. Fair Ma Valuation Book Value Fair Ma Valuation Method Book Value 55,901.	0			55.		1,022.	Form 990-PF, Pg 1, ln 18
Description 1,500 shs. Pfizer Inc. Total to Form 990-PF, Part II, line 10b 42,905. 42,905	nt !	Statement		-	e Stock	Corporat	rm 990-PF
Total to Form 990-PF, Part II, line 10b 42,905. 42,905. 42,905. 42,905. 42,905. 42,905. 42,905. 42,905. 42,905. 42,905. 42,905. 42,905. 42,905. 42,905. 42,905. 42,905. 42,905. Fair Manuel Method Book Value Value 1,634.703 shs. Matthews Pacific COST Tiger Fund 2,732.964 shs. Perkins Mid Cap Value 4,528.705 shs. Loomis Sayles Invst COST		Fair Marke Value		Воо			scription
Form 990-PF Other Investments Stateme Valuation Method Book Value Value 1,634.703 shs. Matthews Pacific COST Tiger Fund 34,142. 4 2,732.964 shs. Perkins Mid Cap COST Value 55,901. 5 4,528.705 shs. Loomis Sayles Invst COST	6,725	46,	42,905.				00 shs. Pfizer Inc.
Description Nethod Note that the series are series as a series are series as a series are series	6,725	46,	42,905.			I, line 10b	al to Form 990-PF, Part I
Description Method Book Value Value 1,634.703 shs. Matthews Pacific COST Tiger Fund 34,142. 4 2,732.964 shs. Perkins Mid Cap COST Value 55,901. 5 4,528.705 shs. Loomis Sayles Invst COST	nt	Statement			estments	Other Inv	m 990-PF
Tiger Fund 34,142. 4 2,732.964 shs. Perkins Mid Cap COST Value 55,901. 5 4,528.705 shs. Loomis Sayles Invst COST		Fair Marke Value	ok Value	Воо			scription
2,732.964 shs. Perkins Mid Cap COST Value 55,901. 54,528.705 shs. Loomis Sayles Invst COST	3,434	43	34 142		COST	fic	
4,528.705 shs. Loomis Sayles Invst COST	4,796		·		COST	ap	32.964 shs. Perkins Mid C
	3,710		·		COST	Invst	28.705 shs. Loomis Sayles
2,615.274 shs. Yacktman Fund COST	5,696		·		COST		515.274 shs. Yacktman Fund

Joan F. Dionne Family Foundation			26-6254109
6,150.493 shs. TCW Emerging Mkts	COST		
Income CL 1		57,205.	49,573.
3,182.152 shs. Vanguard Dividend	COST		
Growth Investor CL		54,506.	73,476.
2,115.559 shs. Wasatch	COST		
International Growth		51,962.	55,465.
10,621.109 shs. Grandeur Peak	COST		
Global Opportunities		33,516.	33,775.
613.508 shs. Ivy Science &	COST		
Technology Fund		31,498.	35,399.
2,194.734 shs. Vanquard/Wellesley	COST	•	
Income		54,847.	56,119.
668.304 shs. Mairs and Power Bal Fd	COST	52,094.	58,002.
Total to Form 990-PF, Part II, line 13		538,292.	579,445.