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EXTENDED TO AUGUST 17, 2015

Return of Private Foundation

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

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OMB No 1545-0052

2014

Open to Public Inspection

Form 990-PF

Department of the Treasury
Internal Revenue Service

For calendar year 2014 or tax year beginning

, and ending

Name of foundation

UD JC & AJ BOWLING FOUNDATION

A Employer identification number

31-1522458

Number and street (or P.O. box number if mail is not delivered to street address)

Room/suite

C/O BLAIR & POTTS, P.O. BOX 1214

B Telephone number

203-327-2333

City or town, state or province, country, and ZIP or foreign postal code

STAMFORD, CT 06904

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 changeD 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 foundationE 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

J Accounting method: ☒ Cash ☐ Accrual

(from Part II, col (c), line 16)

☐ Other (specify) _____F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

>\$ 2,470,715. (Part I, column (d) must be on cash basis)

Part I Analysis of Revenue and Expenses

(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))

(a) Revenue and expenses per books

(b) Net investment income

(c) Adjusted net income

(d) Disbursements for charitable purposes (cash basis only)

Revenue	1 Contributions, gifts, grants, etc., received				
	2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities	23,343.	23,343.		STATEMENT 1
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	52,029.			
	b Gross sales price for all assets on line 6a	100,158.			
	7 Capital gain net income (from Part IV, line 2)		52,029.		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
b Less Cost of goods sold					
c Gross profit or (loss)					
11 Other income	<267.>	0.	<267.>	STATEMENT 2	
12 Total. Add lines 1 through 11	75,105.	75,372.	<267.>		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	0.	0.	0.	0.
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees				
	b Accounting fees				
	c Other professional fees				
	17 Interest				
	18 Taxes	4,073.	0.	0.	0.
	19 Depreciation and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses	10,991.	10,991.	0.	0.
	24 Total operating and administrative expenses. Add lines 13 through 23	15,064.	10,991.	0.	0.
	25 Contributions, gifts, grants paid	140,000.			140,000.
26 Total expenses and disbursements. Add lines 24 and 25	155,064.	10,991.	0.	140,000.	
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements	<79,959.>				
b Net investment income (if negative, enter -0-)		64,381.			
c Adjusted net income (if negative, enter -0-)			0.		

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only		Beginning of year	End of year	
				(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash - non-interest-bearing				
	2	Savings and temporary cash investments		231,770.	153,181.	153,186.
	3	Accounts receivable ▶				
		Less: allowance for doubtful accounts ▶				
	4	Pledges receivable ▶				
		Less: allowance for doubtful accounts ▶				
	5	Grants receivable				
	6	Receivables due from officers, directors, trustees, and other disqualified persons				
	7	Other notes and loans receivable ▶				
		Less: allowance for doubtful accounts ▶				
	8	Inventories for sale or use				
	9	Prepaid expenses and deferred charges				
	10a	Investments - U.S. and state government obligations				
	b	Investments - corporate stock STMT 5		1,094,590.	1,144,980.	2,286,634.
	c	Investments - corporate bonds				
	Liabilities	11	Investments - land, buildings, and equipment, basis ▶			
		Less: accumulated depreciation ▶				
12		Investments - mortgage loans				
13		Investments - other STMT 6		52,205.	445.	30,895.
14		Land, buildings, and equipment, basis ▶				
		Less: accumulated depreciation ▶				
15		Other assets (describe ▶)				
16		Total assets (to be completed by all filers - see the instructions. Also, see page 1, item I)		1,378,565.	1,298,606.	2,470,715.
17		Accounts payable and accrued expenses				
18		Grants payable				
Net Assets or Fund Balances	19	Deferred revenue				
	20	Loans from officers, directors, trustees, and other disqualified persons				
	21	Mortgages and other notes payable				
	22	Other liabilities (describe ▶)				
	23	Total liabilities (add lines 17 through 22)		0.	0.	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/>					
	and complete lines 24 through 26 and lines 30 and 31.					
	24	Unrestricted				
	25	Temporarily restricted				
	26	Permanently restricted				
	Foundations that do not follow SFAS 117, check here ▶ <input checked="" type="checkbox"/>					
	and complete lines 27 through 31.					
	27	Capital stock, trust principal, or current funds		1,639,475.	1,639,475.	
28	Paid-in or capital surplus, or land, bldg., and equipment fund		0.	0.		
29	Retained earnings, accumulated income, endowment, or other funds		<260,910.>	<340,869.>		
30	Total net assets or fund balances		1,378,565.	1,298,606.		
31	Total liabilities and net assets/fund balances		1,378,565.	1,298,606.		

Part III Analysis of Changes in Net Assets or Fund Balances

1	Total net assets or fund balances at beginning of year - Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	1,378,565.
2	Enter amount from Part I, line 27a	2	<79,959.>
3	Other increases not included in line 2 (itemize) ▶	3	0.
4	Add lines 1, 2, and 3	4	1,298,606.
5	Decreases not included in line 2 (itemize) ▶	5	0.
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	1,298,606.

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 713.61 SH HC CAPITAL TR. GROWTH PORTFOLIO FD	P	03/31/14	09/24/14
b 533.54 SH VANGUARD FIXED INC SEC	P	09/19/13	04/03/14
c 115.81 SH VANGUARD FIXED INC SEC	P	11/26/13	04/03/14
d 647.85 SH VANGUARD FIXED INC SEC	P	11/26/13	04/11/14
e CAPITAL GAINS DIVIDENDS			

(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 15,000.		14,129.	871.
b 13,808.		14,000.	<192.>
c 2,997.		3,033.	<36.>
d 16,987.		16,967.	20.
e 51,366.			51,366.

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a			871.
b			<192.>
c			<36.>
d			20.
e			51,366.

2 Capital gain net income or (net capital loss)	<div style="display: flex; align-items: center;"> <div style="border-left: 1px solid black; border-right: 1px solid black; padding: 0 5px;"> If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 </div> <div style="margin: 0 5px;">}</div> </div>	2	52,029.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8	<div style="display: flex; align-items: center;"> <div style="border-left: 1px solid black; border-right: 1px solid black; padding: 0 5px;"> If gain, also enter in Part I, line 8 If (loss), enter -0- in Part I, line 8 </div> <div style="margin: 0 5px;">}</div> </div>	3	N/A

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?

☐ Yes ☒ No

If "Yes," the foundation does not qualify under section 4940(e). Do not complete this part.

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2013	143,000.	2,449,816.	.058372
2012	143,000.	2,324,071.	.061530
2011	144,200.	2,334,522.	.061769
2010	140,689.	2,078,915.	.067674
2009	143,883.	1,928,336.	.074615

2 Total of line 1, column (d)	2	.323960
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	.064792
4 Enter the net value of noncharitable-use assets for 2014 from Part X, line 5	4	2,527,993.
5 Multiply line 4 by line 3	5	163,794.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	644.
7 Add lines 5 and 6	7	164,438.
8 Enter qualifying distributions from Part XII, line 4	8	140,000.

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

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

1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)			
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b		1	1,288.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b).			
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		2	0.
3 Add lines 1 and 2		3	1,288.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		4	0.
5 Tax based on investment income Subtract line 4 from line 3. If zero or less, enter -0-		5	1,288.
6 Credits/Payments:			
a 2014 estimated tax payments and 2013 overpayment credited to 2014	6a	2,217.	
b Exempt foreign organizations - tax withheld at source	6b		
c Tax paid with application for extension of time to file (Form 8868)	6c	1,100.	
d Backup withholding erroneously withheld	6d		
7 Total credits and payments. Add lines 6a through 6d	7	3,317.	
8 Enter any penalty for underpayment of estimated tax. Check here <input checked="" type="checkbox"/> if Form 2220 is attached	8		
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9		
10 Overpayment If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	2,029.	
11 Enter the amount of line 10 to be: Credited to 2015 estimated tax <input type="checkbox"/> 2,029. Refunded <input type="checkbox"/> 0.	11	0.	

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for the definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. \$ 0. (2) On foundation managers. \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), and Part XV	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) <input type="checkbox"/> NONE		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2014 or the taxable year beginning in 2014 (see instructions for Part XIV)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

N/A

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Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► <u>N/A</u>	13	X	
14	The books are in care of ► <u>BLAIR & POTTS</u> Telephone no. ► <u>(203) 327-2333</u> Located at ► <u>P.O. BOX 1214, STAMFORD, CT</u> ZIP+4 ► <u>06904</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 <u>N/A</u>			
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
				X

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

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

		Yes	No
1a	During the year did the foundation (either directly or indirectly):		
(1)	Engage in the sale or exchange, or leasing of property with a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(2)	Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(3)	Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(4)	Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No		
(5)	Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(6)	Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b	If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here ► <input type="checkbox"/>	1b	X
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2014?	1c	X
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):		
a	At the end of tax year 2014, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2014? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years: _____, _____, _____		
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.) <u>N/A</u>	2b	
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ► _____, _____, _____		
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b	If "Yes," did it have excess business holdings in 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? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2014.) <u>N/A</u>	3b	
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	X
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2014?	4b	X

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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)?

N/A

5b

Organizations relying on a current notice regarding disaster assistance check here

☒

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

N/A

☐ Yes ☐ No

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

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

☐ Yes ☒ No

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

6b

X

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?

N/A

7b

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

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

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
ANN J. BOWLING	TRUSTEE			
3315 WINDSOR BLVD.				
VERO BEACH, FL 32963	0.00	0.	0.	0.
BELINDA BEWKES METZGER	TRUSTEE			
36 OX RIDGE LANE				
DARIEN, CT 06820	0.00	0.	0.	0.
NANCY BOWLING GRAMPS	TRUSTEE			
18 OAK PARK AVENUE				
DARIEN, CT 06820	0.00	0.	0.	0.
STEPHANIE B. ZIEGLER	TRUSTEE			
1 SUNWICH ROAD				
ROWAYTON, CT 06853	0.00	0.	0.	0.

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

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

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

0

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Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)**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	(c) Compensation
NONE		

Total number of others receiving over \$50,000 for professional services

0

Part IX-A Summary of Direct Charitable Activities

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

	Expenses
1 N/A	
2	
3	
4	

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
1 N/A	
2	
All other program-related investments. See instructions.	
3 NONE	
Total. Add lines 1 through 3	0.

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	2,348,915.
b	Average of monthly cash balances	1b	217,575.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	2,566,490.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	2,566,490.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	38,497.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	2,527,993.
6	Minimum investment return. Enter 5% of line 5	6	126,400.

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	126,400.
2a	Tax on investment income for 2014 from Part VI, line 5	2a	1,288.
b	Income tax for 2014. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	1,288.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	125,112.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	125,112.
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	125,112.

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	140,000.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	140,000.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	0.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	140,000.

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.

Form 990-PF (2014)

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				125,112.
2 Undistributed income, if any, as of the end of 2014				
a Enter amount for 2013 only			0.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2014:				
a From 2009	48,100.			
b From 2010	37,765.			
c From 2011	28,896.			
d From 2012	27,925.			
e From 2013	22,089.			
f Total of lines 3a through e	164,775.			
4 Qualifying distributions for 2014 from Part XII, line 4: ► \$	140,000.			
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				125,112.
e Remaining amount distributed out of corpus	14,888.			
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	179,663.			
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 not applied on line 5 or line 7	48,100.			
9 Excess distributions carryover to 2015. Subtract lines 7 and 8 from line 6a	131,563.			
10 Analysis of line 9:				
a Excess from 2010	37,765.			
b Excess from 2011	28,896.			
c Excess from 2012	27,925.			
d Excess from 2013	22,089.			
e Excess from 2014	14,888.			

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)

- [illegible]

10280724	783372	BOWFAMFOUND	2014.03040	UD JC & AJ BOWLING FOUNDATI	BOWFAMF1
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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 Paid during the year				
NEW CANAAN COUNTRY SCHOOL P.O. BOX 997 NEW CANAAN, CT 06840	NONE	PUBLIC	GENERAL EXEMPT PURPOSE	15,000.
BEREA COLLEGE CPO 2182 BEREA, KY 40404	NONE	PUBLIC	GENERAL EXEMPT PURPOSE	5,000.
VARIOUS CHARITIES SEE ATTACHED C/O BLAIR & POTTS, PO BOX 1214 STAMFORD, CT 06904-1214	NONE	PUBLIC	GENERAL EXEMPT PURPOSE	20,000.
VARIOUS CHARITIES SEE ATTACHED C/O BLAIR & POTTS, PO BOX 1214 STAMFORD, CT 06904-1214	NONE	PUBLIC	GENERAL EXEMPT PURPOSE	20,000.
VARIOUS CHARITIES SEE ATTACHED C/O BLAIR & POTTS, PO BOX 1214 STAMFORD, CT 06904-1214	NONE	PUBLIC	GENERAL EXEMPT PURPOSE	80,000.
Total			3a	140,000.
b Approved for future payment				
NONE				
Total			3b	0.

Part XVII

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



- | | | Yes | No |
|----------|--|--------------|----------|
| 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? | | |
| a | Transfers from the reporting foundation to a noncharitable exempt organization of: | | |
| | (1) Cash | 1a(1) | X |
| | (2) Other assets | 1a(2) | X |
| b | Other transactions: | | |
| | (1) Sales of assets to a noncharitable exempt organization | 1b(1) | X |
| | (2) Purchases of assets from a noncharitable exempt organization | 1b(2) | X |
| | (3) Rental of facilities, equipment, or other assets | 1b(3) | X |
| | (4) Reimbursement arrangements | 1b(4) | X |
| | (5) Loans or loan guarantees | 1b(5) | X |
| | (6) Performance of services or membership or fundraising solicitations | 1b(6) | X |
| c | Sharing of facilities, equipment, mailing lists, other assets, or paid employees | 1c | X |
| 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		

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.

Sign Here  Aime J. Borokup | 8.10.15  **TRUSTEE**

Signature of officer or trustee Date Title

☒ Yes ☐ No

May the IRS discuss this return with the preparer shown below (see instr.)?

☒ Yes ☐ No

**Paid
Preparer
Use Only**

Print/Type preparer's name JEROME D. LEVY	Preparer's signature <i>Jerome Levy</i>	Date 8/2/15	Check <input type="checkbox"/> if self-employed	PTIN P01026658
Firm's name ► BLAIR & POTTS, P.O. BOX 1214			Firm's EIN ► 13-1357173	
Firm's address ► 107 ELM STREET, FOUR STAMFORD PLAZA STAMFORD, CT 06904-1214			Phone no. (203)327-2333	

FORM 990-PF		DIVIDENDS AND INTEREST FROM SECURITIES			STATEMENT	1
SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	
DEUTSCHE BANK TRUST CO. AMERICA 651429	34,675.	51,366.	<16,691.>	<16,691.>	<16,691.>	
DEUTSCHE BANK TRUST CO. AMERICA 651430	40,034.	0.	40,034.	40,034.	40,034.	
TO PART I, LINE 4	74,709.	51,366.	23,343.	23,343.	23,343.	

FORM 990-PF		OTHER INCOME		STATEMENT	2
DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME		
K-1 EXCELSIOR VENTURE INVESTORS III	<267.>	0.	<267.>		
TOTAL TO FORM 990-PF, PART I, LINE 11	<267.>	0.	<267.>		

FORM 990-PF		TAXES		STATEMENT	3
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
FOREIGN TAXES PAID	1,856.	0.	0.	0.	
IRS TAX REFUNDS	2,217.	0.	0.	0.	
TO FORM 990-PF, PG 1, LN 18	4,073.	0.	0.	0.	

FORM 990-PF	OTHER EXPENSES			STATEMENT	4
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
ADVISORY FEES HIRTLE CALLAGHAN MANAGEMENT DEUTSCHE BANK TRUST CO.	4,628.	4,628.	0.	0.	
AMERICA FEE	1,283.	1,283.	0.	0.	
BLAIR & POTTS FEES	5,080.	5,080.	0.	0.	
TO FORM 990-PF, PG 1, LN 23	10,991.	10,991.	0.	0.	

FORM 990-PF	CORPORATE STOCK		STATEMENT	5
DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE		
INVESTMENTS: DEUTSCHE BANK	1,144,980.	2,286,634.		
TOTAL TO FORM 990-PF, PART II, LINE 10B	1,144,980.	2,286,634.		

FORM 990-PF	OTHER INVESTMENTS		STATEMENT	6
DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE	
EXCELSIOR VENTURE INVESTORS III, LLC	FMV	445.	30,895.	
TOTAL TO FORM 990-PF, PART II, LINE 13		445.	30,895.	

The Bowling Family Foundation
2014 Gifts Designated by Belinda Bowling Bewkes Metzger, Trustee

<u>Name & Address</u>	<u>Amount</u>	<u>Name & Address</u>	<u>Amount</u>
1. Inspirica 141 Franklin Street Stamford, CT 06901-1014.....	\$ 3,000	9. The Darien Police Association P.O. Box 53 Darien, CT 06820-9861.....	\$ 1,000
2. St. Luke's Church 1864 Post Road Darien, CT 06820	\$ 3,000	10. Noroton Heights Fire Department 209 Noroton Avenue Darien, CT 06820	\$ 1,000
3. Eaglebrook School Pine Nook Road Deerfield, MA 01342.....	\$ 3,000	11. The Community Fund of Darien P.O. Box 926 Darien, CT 06820	\$ 1,000
4. Skidmore College Alumni Giving 815 North Broadway Saratoga Springs, NY 12866.....	\$ 1,000	12. Berea College 103 Jackson Street Berea, KY 40403	\$ 500
5. University of Kentucky UK Office of Development Attn: Gift Receiving Office William B. Sturgill Development Building Lexington, KY 40506-0015 Memo: J. C. Bowling Lecture Series.....	\$ 1,000	13. The Land Trust of Darien P.O. Box 1074 Darien, CT 06820	\$ 500
6. The Wee Burn Scholarship Fund The Wee Burn Country Club P.O. Box 1046 Darien, CT 06820-1046	\$ 1,000	14. Stamford Hospital Foundation 1351 Washington Boulevard Suite 202 Stamford, CT 06820 Memo: Bennett Cancer Center	\$ 500
7. The Lustgarten Foundation 1111 Stewart Avenue Bethpage, NY 11714 Memo: In Memory of James Chandler Bowling.....	\$ 1,000	15. The Susan G. Komen Breast Cancer Foundation P.O. Box 650309 Dallas, TX 75265-0309.....	\$ 500
8. Post 53 P.O. Box 2066 Darien, CT 06820	\$ 1,000	16. Long Warf Theater 222 Sargent Drive New Haven, CT 06511	\$ 500
		17. The Darien Historical Society 45 Old Kings Hwy North Darien, CT 06820	\$ 500
		Total	\$20,000

BOWLING FAMILY FOUNDATION
Designations of Nancy Gramps
2014

Inspirica 141 Franklin Street Stamford, CT 06901	\$ 6,000	Cumberland College Mr. Jim Taylor Office of the President Cumberland College 816 Walnut Street Williamsburg, KY 40769-9983	\$ 1,000
St. Luke's Parish The Reverend David Anderson St. Luke's Parish 1864 Post Road Darien, CT 06820	\$ 3,000	Coalition for the Homeless Ms. Mary B. Sullivan Coalition for the Homeless 129 Fulton Street New York, New York 10038	\$ 1,000
King School 1450 Newfield Avenue Stamford, CT 06913-0671	\$ 1,000	Neighbor's Link Stamford 74 Selleck Ave Stamford, CT 06902	\$ 1,000
Skidmore College Ms. Lori Eastman Skidmore College 815 North Broadway Saratoga Springs, NY 12866-1632	\$ 1,000	Joshua House Fund, Inc. P.O. Box 1792 Darien, CT 06820	\$ 500
University of Kentucky Ms. Janice Birdwhistle Development Officer College of Communications and Information Studies University of Kentucky Lexington, KY 40506-0042	\$ 1,000	Rowayton Arts Center 145 Rowayton Avenue Rowayton, CT 06853	\$ 500
Water for People Caitlin Harris, Coordinator, Donation Relations 6666 West Quincy Avenue Denver, CO 80235	\$ 1,000	Compassion & Choices P.O. Box 101810 Denver, CO 80250-1810	\$ 500
Post 53 Darien Emergency Medical Services P.O. Box 2066 Darien, CT 06820	\$ 1,000	Person-To-Person 1864 Post Road Darien, CT 06820	\$ 500
Noroton Heights Fire Department Mr. Christian Schneider – President Noroton Heights Fire Dept., Inc. P.O. Box 2124 Darien, CT 06820	\$ 1,000		

\$20,000.00

FOUNDATION 2014

UNIVERSITY OF LOUISVILLE Development Office Louisville, Kentucky 40292 (Designated for James Bowling Scholarships School of Business)	\$15,000
UNIVERSITY OF LOUISVILLE SCHOOL OF MEDICINE HSC Development & Alumni 132 East Gray Street Louisville, Kentucky 40202 (Designated for the Dr. Norman S. Fisher, Jr. Scholarship Fund)	2,000
BEREA COLLEGE Development Berea, Kentucky 40404	15,000
UNIVERSITY OF KENTUCKY Development Office 356 Peterson Service Building Lexington, Kentucky 40506 (Designated for the James Bowling Lecture Series)	15,000
PERSON-TO-PERSON P.O. Box 3128 1864 Post Road Darien, Connecticut 06820	1,500
UNITED WAY OF INDIAN RIVER COUNTY ATT. Mr. and Mrs. Robert Hoffmann P.O. Box 1960 Vero Beach, Florida 32961	3,000
COMMUNITY FUND of DARIEN P.O. Box 926 Darien, Connecticut 06820	3,000
DEPARTMENT OF OPHTHALMOLOGY Columbia University 365 West 165 th Street	500
INSPIRICA 141 Franklin Street Stamford, Connecticut 06913	1,000

INDIAN RIVER HOSPITAL FOUNDATION (GOLDEN EAGLE) 1000 36 th Street Vero Beach, Florida 32963 (in my name only, Ann J. Bowling)	1,000
NATURE CONSERVANCY, KENTUCKY CHAPTER 642 West Main Street 114 Woodland Ave Lexington, Kentucky 40508 40502	500
Shaker Village at Pleasant Hill SHAKERTOWN AT PLEASANT HILL, KENTUCKY, INC. 3501 Lexington Road Harrodsburg, Kentucky 40330	500
PADUCAH JUNIOR COLLEGE JAMES C. BOWLING ENDOWED SCHOLARSHIP Alben Barkley Drive P.O. Box 7380 Paducah, Kentucky 42002	1,700
COLGATE UNIVERSITY 13 Oak Drive Hamilton, New York 13346 (designated for the James C. Bowling Library Endowed Book Fund)	1,000
INDIAN RIVER HABITAT FOR HUMANITY 4568 U. S. Highway 1 Vero Beach, Florida 32967	700
THE HOTCHKISS SCHOOL Annual Fund Office 11 Interlaken Road Lakeville, Connecticut 06039-08001,000	1,000
NEW CANAAN COUNTRY SCHOOL P.O. Box 997 New Canaan, Connecticut 06840 (from Ann Bowling, - Rett, and Bo Zeigler's grandmother) (donated to the Grandparents' Fund)	3,000
BREWSTER ACADEMY 80 Academy Drive Wolfeboro, New Hampshire 03894 (from Ann Bowling - Grey Zeigler's grandmother)	1,000

DARIEN LIBRARY 1441 Post Road Darien, Connecticut 06820	500
BOY SCOUTS OF AMERICA 1325 Walnut Hill Lane P.O. Box 152079 Irving, Texas 75015	300
POST 53 P.O. Box 2066 Darien, Connecticut 06820	500
LAYMAN'S NATIONAL BIBLE ASSOCIATION 1865 Broadway 12th floor 488 Madison Ave 24 th Fl New York, New York 10023 10022	500
WORLD PRESS INSTITUTE MacAlester College 1635 Summit Avenue Saint Paul, Minnesota 55105	200
KEEP AMERICA BEAUTIFUL 1010 Washington Boulevard Stamford, Connecticut 06901	300
SIGMA KAPPA FOUNDATION 8733 Founder's Road Indianapolis, Indiana 46268 (in name of Ann Jones Bowling, Alpha Theta '49)	500
DOCTORS WITHOUT BORDERS/ MEDCINS SANS FRONTIERES PO BOX 5022 Hagerstown, Maryland 21471	500
CONVENT OF SAINT BRIGITTA 4 Runkenhage Darien, Connecticut 06820	500
VNA & HOSPICE FOUNDATION, INC. 1110 35 th Lane Vero Beach, Florida 32960	500
THE CHRISTOPHERS 12 East 48 th Street New York, New York 10017	300

GIDDEONS INTERNATIONAL P.O. Box 440244 Nashville, Tennessee 37244	500
AMERICAN RED CROSS P. O. Box 4002018 Des Moines, Iowa 50340 (where need is greatest for children in USA)	300
DISABLED AMERICAN VETERANS P.O. Box 14301 Cincinnati, Ohio 45250	500
DARIEN FIRE DEPARTMENT ANNUAL FUND 848 Post Road Darien, Connecticut 06820	300
DARIEN POLICE ASSOCIATION P.O. Box 53 Darien, Connecticut 06820	300
RIVERSIDE THEATRE 3250 Riverside Park Drive Vero Beach, Florida 32963	500
SHAKESPEARE ON THE SOUND P.O. Box 15 Norwalk, Connecticut 06853	300
REGAN RANCH HISTORICAL TRUST 217 State Street Santa Barbara, California 93101	300
SALVATION ARMY P.O. Box 509 Hartford, Connecticut 06141	500
THE EDUCATION FOUNDATION OF INDIAN RIVER COUNTY P. O. Box 7046 Vero Beach, Florida 32961	300
SPECIAL OLYMPICS CONNECTICUT P.O. Box 6607 Hamden, Connecticut 06507	300

MAKE-A-WISH 500
P.O. Box 97104
Washington, D.C. 20090

SMILE TRAIN 500
P.O. BOX 96231
WASHINGTON D.C. 20090-6231

LEADERSHIP INSTITUTE 300
Stephen P. J. Wood Building
1101 North Highland Street
Arlington, Virginia 22308

CHILDREN'S AID SOCIETY 500
Church Street Station
PO Box 29517
New York, New York 10277

MENTAL HEALTH ASSOCIATION 300
2001 9th Avenue Suite 301
Vero Beach, Florida 32960

CHRISTIAN APPALACHIAN PROJECT 500
P. O. Box 511
Lancaster, Kentucky 40444

COVENANT HOUSE 500
P. O. Box 96708
Washington, DC 20090

FEED THE CHILDREN 500
P. O. Box 36
Oklahoma City, Oklahoma 73101

THE FRESH AIR FUND 300
633 Third Avenue 14th floor
New York, New York 10164

TOYS FOR TOTS FOUNDATION 500
Marine Corps Base
P. O. Box 227
Quantico, Virginia 22134

LAMBDA CHI ALPHA EDUCATIONAL FOUNDATION 500
~~8741 Founder's Road~~
~~Indianapolis, Indiana 46209-6882~~

*Address changed
as of 1/20/15*

*117 North Pennsylvania St.
Ste 250
Carmel, IN 46032
317-872-8000*

\$ 80,000

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
Type or print	Name of exempt organization or other filer, see instructions	Employer identification number (EIN) or
	UD JC & AJ BOWLING FOUNDATION	31-1522458
File by the due date for filing your return. See instructions	Number, street, and room or suite no. If a P.O. box, see instructions.	Social security number (SSN)
	C/O BLAIR & POTTS, P.O. BOX 1214	
	City, town or post office, state, and ZIP code. For a foreign address, see instructions	
	STAMFORD, CT 06904	

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

04

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

BLAIR & POTTS

- The books are in the care of ► P.O. BOX 1214 - STAMFORD, CT 06904

Telephone No ► (203) 327-2333

Fax No ►

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

1 I request an automatic 3-month (6 months for a corporation required to file Form 990-T) extension of time until AUGUST 15, 2015, to file the exempt organization return for the organization named above. The extension is for the organization's return for
 ► ☒ calendar year 2014 or
 ► ☐ tax year beginning _____, and ending _____

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

3a If this application is for Forms 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	3a	\$	3,317.
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	\$	2,217.
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	\$	1,100.

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