

EXTENDED TO NOVEMBER 15, 2016

Return of Private Foundation

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

OMB No 1545-0052

2015

Open to Public Inspection

Form 990-PF

Department of the Treasury
Internal Revenue ServiceDo 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.

For calendar year 2015 or tax year beginning

, and ending

Name of foundation

A Employer identification number

THE WELLER FOUNDATION, INC.

EXTENSION ATTACHED

06-6068987

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

Room/suite

B Telephone number

203-263-0229

P.O. BOX 1145

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

C If exemption application is pending, check here ☐

WOODBURY, CT 06798

D 1. Foreign organizations, check here ☐2. Foreign organizations meeting the 85% test, check here and attach computation ☐

G Check all that apply:

☐ Initial return☐ Initial return of a former public charity☐ Final return☐ Amended return☐ Address change☐ Name changeE If private foundation status was terminated under section 507(b)(1)(A), check here ☐F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

H Check type of organization.

☒ Section 501(c)(3) exempt private foundation☐ Section 4947(a)(1) nonexempt charitable trust☐ Other taxable private foundation

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)

\$ 2,799,955. (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 | | | N/A | |
| | 2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch. B | | | | |
| | 3 Interest on savings and temporary cash investments | 7. | 7. | | STATEMENT 1 |
| | 4 Dividends and interest from securities | 85,740. | 85,740. | | STATEMENT 2 |
| | 5a Gross rents | | | | |
| | b Net rental income or (loss) | | | | |
| | 6a Net gain or (loss) from sale of assets not on line 10 | 90,221. | | | |
| | b Gross sales price for all assets on line 6a | 527,911. | | | |
| | 7 Capital gain net income (from Part IV, line 2) | | 90,221. | | |
| | 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 | 40. | 40. | | STATEMENT 3 | |
| 12 Total Add lines 1 through 11 | 176,008. | 176,008. | | | |
| Operating and Administrative Expenses | 13 Compensation of officers, directors, trustees, etc | 42,281. | 500. | | 41,781. |
| | 14 Other employee salaries and wages | | | | |
| | 15 Pension plans, employee benefits | | | | |
| | 16a Legal fees | | | | |
| | b Accounting fees | 9,903. | 0. | | 9,903. |
| | c Other professional fees | | | | |
| | 17 Interest | | | | |
| | 18 Taxes | 6,750. | 0. | | 0. |
| | 19 Depreciation and depletion | | | | |
| | 20 Occupancy | 955. | 0. | | 955. |
| | 21 Travel, conferences, and meetings | 1,199. | 0. | | 1,199. |
| | 22 Printing and publications | | | | |
| 23 Other expenses | 9,215. | 0. | | 9,215. | |
| 24 Total operating and administrative expenses. Add lines 13 through 23 | 70,303. | 500. | | 63,053. | |
| 25 Contributions, gifts, grants paid | 79,414. | | | 79,414. | |
| 26 Total expenses and disbursements. Add lines 24 and 25 | 149,717. | 500. | | 142,467. | |
| 27 Subtract line 26 from line 12: | | | | | |
| a Excess of revenue over expenses and disbursements | 26,291. | | | | |
| b Net investment income (if negative, enter -0-) | | 175,508. | | | |
| c Adjusted net income (if negative, enter -0-) | | | N/A | | |

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LHA For Paperwork Reduction Act Notice, see instructions.

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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 | 161,420. | 134,587. | 134,587. |
| | 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 STMT 7 | 23,626. | 23,304. | 25,930. |
| | b Investments - corporate stock STMT 8 | 1,647,720. | 1,645,443. | 2,154,408. |
| | c Investments - corporate bonds STMT 9 | 410,584. | 466,307. | 485,030. |
| | 11 Investments - land, buildings, and equipment basis ▶ Less accumulated depreciation ▶ | | | |
| | 12 Investments - mortgage loans | | | |
| | 13 Investments - other | | | |
| | 14 Land, buildings, and equipment: basis ▶ Less accumulated depreciation ▶ | | | |
| 15 Other assets (describe ▶) | | | | |
| 16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item I) | 2,243,350. | 2,269,641. | 2,799,955. | |
| 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 | | | |
| | 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 | 2,243,350. | 2,269,641. | |
| | 28 Paid-in or capital surplus, or land, bldg., and equipment fund | 0. | 0. | |
| | 29 Retained earnings, accumulated income, endowment, or other funds | 0. | 0. | |
| | 30 Total net assets or fund balances | 2,243,350. | 2,269,641. | |
| 31 Total liabilities and net assets/fund balances | 2,243,350. | 2,269,641. | | |

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 | 2,243,350. |
| 2 Enter amount from Part I, line 27a | 2 | 26,291. |
| 3 Other increases not included in line 2 (itemize) ▶ | 3 | 0. |
| 4 Add lines 1, 2, and 3 | 4 | 2,269,641. |
| 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 | 2,269,641. |

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 | P | | |
| b CAPITAL GAIN DISTRIBUTIONS | | | |
| c THE BLACKSTONE GROUP L.P. | | | |
| 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 527,911. | | 461,841. | 66,070. |
| b | | | 23,612. |
| c | | | 539. |
| d | | | |
| e | | | |

| Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69 | | | (i) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h)) |
|---------------------------------------------------------------------------------------------|--------------------------------------|-------------------------------------------------|-------------------------------------------------------------------------------------------------|
| (i) F.M.V. as of 12/31/69 | (j) Adjusted basis as of 12/31/69 | (k) Excess of col. (i) over col. (j), if any | |
| a | | | 66,070. |
| b | | | 23,612. |
| c | | | 539. |
| 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 | 90,221. |
| 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 | { } | 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)) |
|----------------------------------------------------------------------|------------------------------------------|----------------------------------------------|-------------------------------------------------------------|
| 2014 | 123,037. | 2,913,209. | .042234 |
| 2013 | 133,082. | 2,732,676. | .048700 |
| 2012 | 120,303. | 2,559,765. | .046998 |
| 2011 | 101,244. | 2,409,034. | .042027 |
| 2010 | 99,353. | 2,274,386. | .043683 |

| | | |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|-------------------|
| 2 Total of line 1, column (d) | 2 | .223642 |
| 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 | .044728 |
| 4 Enter the net value of noncharitable-use assets for 2015 from Part X, line 5 | 4 | 2,850,371. |
| 5 Multiply line 4 by line 3 | 5 | 127,491. |
| 6 Enter 1% of net investment income (1% of Part I, line 27b) | 6 | 1,755. |
| 7 Add lines 5 and 6 | 7 | 129,246. |
| 8 Enter qualifying distributions from Part XII, line 4 | 8 | 142,467. |

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 checked="" type="checkbox"/> and enter 1% of Part I, line 27b | | 1 | 1,755. |
| 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 | 1,755. |
| 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 | 1,755. |
| 6 Credits/Payments: | | | |
| a 2015 estimated tax payments and 2014 overpayment credited to 2015 | 6a | 3,977. | |
| b Exempt foreign organizations - tax withheld at source | 6b | | |
| c Tax paid with application for extension of time to file (Form 8868) | 6c | | |
| d Backup withholding erroneously withheld | 6d | | |
| 7 Total credits and payments. Add lines 6a through 6d | 7 | 3,977. | |
| 8 Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached | 8 | 2. | |
| 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 | 2,220. | |
| 11 Enter the amount of line 10 to be Credited to 2016 estimated tax <input checked="" type="checkbox"/> 2,220. Refunded <input type="checkbox"/> | 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 |
| b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for the definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities. | | 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. <input checked="" type="checkbox"/> \$ 0. (2) On foundation managers. <input checked="" type="checkbox"/> \$ 0. | | |
| e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. <input checked="" type="checkbox"/> \$ 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 checked="" type="checkbox"/> CT | | |
| b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation | 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 2015 or the taxable year beginning in 2015 (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

Part VII-A Statements Regarding Activities (continued)

| | Yes | No |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----|---------------|
| 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) | | 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) | | X |
| 13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? | X | |
| Website address ► N/A | | |
| 14 The books are in care of ► THE FOUNDATION Telephone no. ► 203-263-0229 | | |
| Located at ► P.O. BOX 1145, WOODBURY, CT | | ZIP+4 ► 06798 |
| 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 | N/A |
| 16 At any time during calendar year 2015, 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? | | X |
| See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country ► | | |

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

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

| | Yes | No |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------|----|
| 1a During the year did the foundation (either directly or indirectly): | | |
| (1) Engage in the sale or exchange, or leasing of property with a disqualified person? | <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No | |
| (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? | <input 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 | 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 2015? | 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 2015, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2015? | <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.) | N/A | 2b |
| c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. | ► , , , | |
| 3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? | <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No | |
| b If "Yes," did it have excess business holdings in 2015 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 2015.) | N/A | 3b |
| 4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? | | 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 2015? | 4b | X |

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)?

Organizations relying on a current notice regarding disaster assistance check here

☐

5b

X

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

6b

X

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

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

7b

b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?

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.

| (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 10 | | 42,281. | 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 NOT APPLICABLE | |
| | 0. |
| 2 | |
| | |
| All other program-related investments. See instructions. | |
| 3 | |
| | |
| 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 | 2,733,246. |
| b | Average of monthly cash balances | 1b | 160,532. |
| c | Fair market value of all other assets | 1c | |
| d | Total (add lines 1a, b, and c) | 1d | 2,893,778. |
| 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 | 2,893,778. |
| 4 | Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions) | 4 | 43,407. |
| 5 | Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4 | 5 | 2,850,371. |
| 6 | Minimum investment return. Enter 5% of line 5 | 6 | 142,519. |

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 | 142,519. |
| 2a | Tax on investment income for 2015 from Part VI, line 5 | 2a | 1,755. |
| b | Income tax for 2015. (This does not include the tax from Part VI.) | 2b | |
| c | Add lines 2a and 2b | 2c | 1,755. |
| 3 | Distributable amount before adjustments. Subtract line 2c from line 1 | 3 | 140,764. |
| 4 | Recoveries of amounts treated as qualifying distributions | 4 | 0. |
| 5 | Add lines 3 and 4 | 5 | 140,764. |
| 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 | 140,764. |

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 | 142,467. |
| 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 | 142,467. |
| 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 | 1,755. |
| 6 | Adjusted qualifying distributions. Subtract line 5 from line 4 | 6 | 140,712. |

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 2014 | (c) 2014 | (d) 2015 |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------|----------------------------|-------------|-------------|
| 1 Distributable amount for 2015 from Part XI, line 7 | | | | 140,764. |
| 2 Undistributed income, if any, as of the end of 2015 | | | | |
| a Enter amount for 2014 only | | | 140,889. | |
| b Total for prior years: | | 0. | | |
| 3 Excess distributions carryover, if any, to 2015: | | | | |
| a From 2010 | | | | |
| b From 2011 | | | | |
| c From 2012 | | | | |
| d From 2013 | | | | |
| e From 2014 | | | | |
| f Total of lines 3a through e | 0. | | | |
| 4 Qualifying distributions for 2015 from Part XII, line 4: ▶ \$ 142,467. | | | | |
| a Applied to 2014, but not more than line 2a | | | 140,889. | |
| 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 2015 distributable amount | | | | 1,578. |
| e Remaining amount distributed out of corpus | 0. | | | |
| 5 Excess distributions carryover applied to 2015 (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: | 0. | | | |
| a Corpus Add lines 3f, 4c, and 4e Subtract line 5 | 0. | | | |
| b Prior years' undistributed income. Subtract line 4b from line 2b | | 0. | | |
| c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed | | 0. | | |
| d Subtract line 6c from line 6b. Taxable amount - see instructions | | 0. | | |
| e Undistributed income for 2014. Subtract line 4a from line 2a. Taxable amount - see instr. | | | 0. | |
| f Undistributed income for 2015. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2016 | | | | 139,186. |
| 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 2010 not applied on line 5 or line 7 | 0. | | | |
| 9 Excess distributions carryover to 2016. Subtract lines 7 and 8 from line 6a | 0. | | | |
| 10 Analysis of line 9: | | | | |
| a Excess from 2011 | | | | |
| b Excess from 2012 | | | | |
| c Excess from 2013 | | | | |
| d Excess from 2014 | | | | |
| e Excess from 2015 | | | | |

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 SCHEDULE ATTACHED | | | | 79,414. |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| Total | | | ▶ 3a | 79,414. |
| 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 | | |
| | | |
| | | |
| | | |
| | | |

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.

 11/14/16 **TREASURER**

Signature of officer or trustee Date 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 | Preparer's signature | Date | Check <input type="checkbox"/> if self-employed | PTIN |
| | BRIAN E. SKINNER |  | 11/14/16 | | P01378030 |
| | Firm's name ▶ WILLIAM H. PARR & COMPANY, LLP | | | Firm's EIN ▶ 06-0727429 | |
| | Firm's address ▶ 381 POST ROAD DARIEN, CT 06820 | | | Phone no. 203-655-8261 | |

Form **990-PF** (2015)

FORM 990-PF INTEREST ON SAVINGS AND TEMPORARY CASH INVESTMENTS STATEMENT 1

| SOURCE | (A) REVENUE PER BOOKS | (B) NET INVESTMENT INCOME | (C) ADJUSTED NET INCOME |
|-------------------------|-----------------------------|---------------------------------|-------------------------------|
| PEOPLE'S BANK | 7. | 7. | |
| TOTAL TO PART I, LINE 3 | 7. | 7. | |

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

| SOURCE | GROSS AMOUNT | CAPITAL GAINS DIVIDENDS | (A) REVENUE PER BOOKS | (B) NET INVEST- MENT INCOME | (C) ADJUSTED NET INCOME |
|------------------------------|-----------------|-------------------------------|-----------------------------|-----------------------------------|-------------------------------|
| MORGAN STANLEY | 85,578. | 0. | 85,578. | 85,578. | |
| THE BLACKSTONE GROUP L.P. | 162. | 0. | 162. | 162. | |
| TO PART I, LINE 4 | 85,740. | 0. | 85,740. | 85,740. | |

FORM 990-PF OTHER INCOME STATEMENT 3

| DESCRIPTION | (A) REVENUE PER BOOKS | (B) NET INVEST- MENT INCOME | (C) ADJUSTED NET INCOME |
|---------------------------------------|-----------------------------|-----------------------------------|-------------------------------|
| THE BLACKSTONE GROUP L.P. | 40. | 40. | |
| TOTAL TO FORM 990-PF, PART I, LINE 11 | 40. | 40. | |

FORM 990-PF ACCOUNTING FEES STATEMENT 4

| DESCRIPTION | (A) EXPENSES PER BOOKS | (B) NET INVEST- MENT INCOME | (C) ADJUSTED NET INCOME | (D) CHARITABLE PURPOSES |
|------------------------------|------------------------------|-----------------------------------|-------------------------------|-------------------------------|
| TAX RETURN | 9,903. | 0. | | 9,903. |
| TO FORM 990-PF, PG 1, LN 16B | 9,903. | 0. | | 9,903. |

FORM 990-PF

TAXES

STATEMENT

5

| DESCRIPTION | (A) EXPENSES PER BOOKS | (B) NET INVEST- MENT INCOME | (C) ADJUSTED NET INCOME | (D) CHARITABLE PURPOSES |
|------------------------------------------------|------------------------------|-----------------------------------|-------------------------------|-------------------------------|
| 2014 FEDERAL EXTENSION PYMT- 5/15/2015 | 3,750. | 0. | | 0. |
| 2015 FEDERAL ESTIMATED TAX PYMT- 11/17/2015 | 3,000. | 0. | | 0. |
| TO FORM 990-PF, PG 1, LN 18 | 6,750. | 0. | | 0. |

FORM 990-PF

OTHER EXPENSES

STATEMENT

6

| DESCRIPTION | (A) EXPENSES PER BOOKS | (B) NET INVEST- MENT INCOME | (C) ADJUSTED NET INCOME | (D) CHARITABLE PURPOSES |
|-------------------------------------------|------------------------------|-----------------------------------|-------------------------------|-------------------------------|
| INSURANCE | 2,441. | 0. | | 2,441. |
| JUDGING FEES | 1,200. | 0. | | 1,200. |
| SCHOLARSHIP AWARD PROMOTION, BROCHURES | 1,170. | 0. | | 1,170. |
| MISCELLANEOUS | 1,952. | 0. | | 1,952. |
| SUPPLIES | 2,452. | 0. | | 2,452. |
| TO FORM 990-PF, PG 1, LN 23 | 9,215. | 0. | | 9,215. |

FORM 990-PF

U.S. AND STATE/CITY GOVERNMENT OBLIGATIONS

STATEMENT

7

| DESCRIPTION | U.S. GOV'T | OTHER GOV'T | BOOK VALUE | FAIR MARKET VALUE |
|--------------------------------------------------|---------------|----------------|------------|----------------------|
| GINNIE MAE POOLS | X | | 714. | 770. |
| ILLINOIS ST GENERAL OBLIGATIONS 4.950% | | X | 22,590. | 25,160. |
| TOTAL U.S. GOVERNMENT OBLIGATIONS | | | 714. | 770. |
| TOTAL STATE AND MUNICIPAL GOVERNMENT OBLIGATIONS | | | 22,590. | 25,160. |
| TOTAL TO FORM 990-PF, PART II, LINE 10A | | | 23,304. | 25,930. |

FORM 990-PF

CORPORATE STOCK

STATEMENT 8

| DESCRIPTION | BOOK VALUE | FAIR MARKET VALUE |
|--------------------------------------|------------|-------------------|
| AMEREN CORP | 31,663. | 43,230. |
| BANK OF AMERICA | 27,219. | 20,196. |
| BERKSHIRE HATHAWAY B | 30,063. | 66,020. |
| CHEVRON TEXACO CORP | 24,154. | 55,415. |
| CITIGROUP INC. | 36,177. | 15,525. |
| COMCAST CORP (NEW) | 11,077. | 27,312. |
| DOW CHEMICAL | 19,408. | 30,888. |
| GENERAL ELECTRIC | 35,527. | 52,955. |
| INTEL CORP | 0. | 0. |
| I.B.M. | 20,974. | 27,524. |
| JOHNSON & JOHNSON | 5,476. | 51,360. |
| JPMORGAN CHASE & CO | 38,617. | 66,030. |
| MEXICO FUND | 0. | 0. |
| PEPSICO, INC | 13,705. | 79,936. |
| PFIZER INC | 29,283. | 32,280. |
| PROCTOR & GAMBLE | 26,896. | 79,410. |
| PROGRESS ENERGY | 245. | 158. |
| SMUCKER JM CO | 13,812. | 49,336. |
| UNITEDHEALTH GP INC | 8,494. | 44,703. |
| WAL MART STORES | 12,513. | 61,300. |
| JP MORGAN MID-CAP VALUE C | 86,335. | 122,498. |
| AMERICAN WA MUTUAL | 45,355. | 63,054. |
| FIRST EAGLE GLOBAL C | 79,614. | 99,683. |
| PRUDENTIAL JENNISON UTILITY A | 100,154. | 100,977. |
| BARCLAYS PLC | 9,522. | 2,592. |
| DEUTSCHE HIGH INCOME OPPORTUNITIES | 24,997. | 8,162. |
| HEALTH CARE SEL SECT | 20,129. | 43,218. |
| MICROSOFT CORP | 16,985. | 38,836. |
| OPPENHEIMER INTL BOND FD | 0. | 0. |
| AMERICAN ELECTRIC POWER CO | 20,869. | 34,962. |
| VERIZON COMMUNICATIONS | 47,812. | 60,086. |
| AT&T INC | 35,683. | 41,292. |
| METLIFE INC | 35,267. | 37,575. |
| TEMPLETON GLOBAL BOND FD | 0. | 0. |
| PEOPLE'S UNITED FINANCIAL INC | 19,353. | 24,225. |
| VODAFONE GROUP PLC | 46,485. | 32,260. |
| FEDERATED INTL STRAT VAL C | 25,000. | 22,715. |
| HARTFORD EQUITY INC C | 20,000. | 23,685. |
| JP MORGAN INCOME BUILDER C | 50,000. | 50,707. |
| GOLDMAN SACHS INC | 18,477. | 20,712. |
| NESTLE SPON ADR | 0. | 0. |
| SDPR S&P REGIONAL BANKING | 0. | 0. |
| FRANKLIN INCOME C | 25,000. | 21,986. |
| JP MORGAN EQUITY INCOME C | 27,388. | 30,313. |
| FIRST TRUST INTL HIGH DIVIDEND | 0. | 0. |
| INVESCO GLOBAL TECH LEADERS 14-2 | 0. | 0. |
| INVESCO SELECT S&P INDUSTRIAL 2014-2 | 0. | 0. |

| | | |
|-----------------------------------------|------------|------------|
| AAM INTL HIGH 30 DIVIDEND 133 | 0. | 0. |
| INVESCO DJ DIVIDEND INDEX 2014-3 | 0. | 0. |
| INVESCO GLOBAL HIGH DIVIDEND 2014-3 | 0. | 0. |
| INVESCO GLOBAL TECH 2014-4 | 0. | 0. |
| AAM INTL HIGH 50 DIVIDEND 14-4Q | 27,547. | 24,195. |
| INVESCO HEALTHCARE 14-3 | 29,596. | 34,901. |
| AMERICAN EXPRESS CO | 23,365. | 17,388. |
| CISCO SYS INC | 19,922. | 21,724. |
| CONOCOPHILLIPS | 35,132. | 23,345. |
| WALGREENS BOOTS ALLIANCE INC | 24,558. | 34,062. |
| WISDOM TREE TRUST JAPN HEDGE | 33,178. | 26,905. |
| BLACKSTONE GROUP L.P. | 14,864. | 11,696. |
| KRAFT HEINZ CO | 15,710. | 14,552. |
| PJT PARTNERS INC | 38. | 283. |
| THE FINANCIAL SEL SECT SPDR | 25,430. | 23,830. |
| INVESCO GLBL TECH LEADERS 2015-2 | 31,233. | 29,342. |
| INVESCO SELECT S&P INDUSTRIAL 2015-2 | 41,346. | 41,291. |
| INVESCO GLBL HIGH DIVIDEND 2015-3 | 15,276. | 15,300. |
| FIRST TRUST ENERGY SELECT 53 | 24,997. | 18,622. |
| INVESCO GLOBAL TECH 2015-4 | 18,425. | 18,965. |
| INVESCO DIVERSIFIED HEALTH 2015-1 | 37,825. | 34,632. |
| FIRST TRUST BANKING OPPORTUNITY 17 | 51,652. | 46,880. |
| FIRST TRUST BANKING OPPORTUNITY 18 | 20,621. | 18,992. |
| FIRST TRUST STRATEGIC INC ADVAN | 15,000. | 14,387. |
| TOTAL TO FORM 990-PF, PART II, LINE 10B | 1,645,443. | 2,154,408. |

| | | | |
|-------------|-----------------|-----------|---|
| FORM 990-PF | CORPORATE BONDS | STATEMENT | 9 |
|-------------|-----------------|-----------|---|

| DESCRIPTION | BOOK VALUE | FAIR MARKET VALUE |
|---------------------------------|------------|-------------------|
| JOHN HANCOCK LIFE INC CO 2.74% | 0. | 0. |
| BANK OF AMERICA 5.42% | 17,509. | 21,137. |
| GENERAL ELECTRIC 5.625% | 24,410. | 27,071. |
| WELLS FARGO 5.625% | 24,221. | 26,899. |
| PRUDENTIAL FINANCIAL 8.875% | 17,755. | 22,579. |
| AMERICAN EXPRESS 6.800% | 0. | 0. |
| FPL GROUP CAPT INC 6.350% | 0. | 0. |
| PNC FIN SVCS 6.750% | 14,924. | 16,378. |
| GE CAPITAL CORP 6.375% | 0. | 0. |
| CITIGROUP INC 5.90% | 20,509. | 20,096. |
| MORGAN STANLEY 5.50% | 24,459. | 28,594. |
| NATIONWIDE FINL SVCS 6.75% | 19,388. | 20,172. |
| PRUDENTIAL FINANCIAL 5.875% | 31,065. | 31,704. |
| PRUDENTIAL FINANCIAL 5.625% | 25,698. | 25,625. |
| BARCLAYS BK PLC 6.86% | 19,539. | 23,062. |
| JPMORGAN CHASE 5.15% | 24,486. | 23,840. |
| JPMORGAN CHASE 6.00% | 29,382. | 30,708. |
| GENERAL ELECTRIC CAP CORP 5.25% | 19,336. | 20,934. |
| WACHOVIA CAP TRUST III 5.569% | 29,765. | 28,972. |

| | | |
|-----------------------------------------|----------|----------|
| CITIGROUP INC 5.95% FIXED | 10,002. | 9,701. |
| CITIGROUP INC 5.90% FIXED | 20,006. | 19,661. |
| FIFTH THIRD BANCORP 5.10% | 24,359. | 22,344. |
| FIFTH THIRD BANCORP 5.10% | 19,692. | 17,875. |
| JP MORGAN CHASE 5.15% FIXED | 24,869. | 23,839. |
| JP MORGAN CHASE 5.15% FIXED | 24,933. | 23,839. |
| TOTAL TO FORM 990-PF, PART II, LINE 10C | 466,307. | 485,030. |

| | | |
|-------------|-----------------------------------------------------------------------------|--------------|
| FORM 990-PF | PART VIII - LIST OF OFFICERS, DIRECTORS TRUSTEES AND FOUNDATION MANAGERS | STATEMENT 10 |
|-------------|-----------------------------------------------------------------------------|--------------|

| NAME AND ADDRESS | TITLE AND AVRG HRS/WK | COMPEN- SATION | EMPLOYEE BEN PLAN CONTRIB | EXPENSE ACCOUNT |
|-------------------------------------------------------------------|---------------------------------------|-------------------|------------------------------|--------------------|
| BRIAN E. SKINNER 176 MICHIGAN ROAD NEW CANAAN, CT 06840 | VICE CHAIRMAN, TREASURER & VARIOUS | 4,500. | 0. | 0. |
| MICHAEL J. SMITH 151 WILTON ROAD EAST RIDGEFIELD, CT 06877 | CHAIRMAN & TRUSTEE VARIOUS | 4,500. | 0. | 0. |
| LOUIS J. LACROCE 14 DIAMOND DRIVE NEWTOWN, CT 06470 | TRUSTEE VARIOUS | 4,500. | 0. | 0. |
| ALEXANDER FRASER 3 SEALAND DRIVE NEWTOWN, CT 06470 | SECRETARY & TRUSTEE VARIOUS | 4,500. | 0. | 0. |
| MICHAEL P. ZABINSKI 102 SHOREFRONT STREET MILFORD, CT 06460 | TRUSTEE VARIOUS | 4,500. | 0. | 0. |
| JOANN E. DAVIES 57 HESSEKY MEADOW ROAD WOODBURY, CT 06798 | FOUNDATION MANAGER & TRUST VARIOUS | 19,781. | 0. | 0. |
| TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII | | 42,281. | 0. | 0. |

2015

SCHEDULE ATTACHED TO FORM 990-PF

Part XV, Line 2 - Information Regarding Scholarship Programs

The Foundation administers award and scholarship programs designed to provide benefits to high school students in five communities in Connecticut: Newtown, Monroe, Trumbull, Shelton, Easton and Redding.

Three of the programs, the Senior Science Award, the Eleanor F. Moore Business Award and Paul W. Broggi Communications Award, are presented annually in each of the five high schools, honoring students who have excelled in science, business studies and communications, and the recipients are chosen by the faculties of the individual high schools. No application is required.

A fourth program, the Vincent Voccia Vocational Award, is currently presented annually to high school students who have selected a vocational-technical career. The recipient is chosen according to the rules and regulations as described in the attached summary of the program.

The fifth program, the annual choice of a Barton L. Weller scholar, who must be a student in one of the five high schools, is chosen according to the rules and regulations established by the Foundation, which are described in the attached brochure regarding the program.

2015

SCHEDULE ATTACHED TO FORM 990-PF

Part XV, Line 2 - Information Regarding Scholarship Programs (continued)

A sixth program, The Weller Collegiate Scholarship, is presented annually to incoming freshman students at local colleges who are from one of the five communities. The recipients are chosen by the local colleges based on financial need. No application form is required.

The seventh program, The Weller Instrumental Music Scholarship, is presented annually to high school students who have enrolled in a conservatory or college as a music major with a concentration in instrumental music. The recipient is chosen according to the rules and regulations as described in the attached summary of the program. There was no program in 2015.

The eighth program, the Weller Medical/Health Sciences Scholarship, is presented annually based on the rules and regulations as described in the attached summary of the program.

The ninth program, the Weller Education Scholarship, is presented annually to a high school senior planning to pursue a teaching career in public or private elementary or secondary schools. The recipient is chosen according to the rules described in the attached summary.

The tenth program, the Weller Computer Science/Technology Scholarship, is presented annually to a high school senior planning to pursue a career in computer science or computer engineering. The recipient is chosen according rules in the attached summary. There was no program in 2015.

2015

SCHEDULE ATTACHED TO FORM 990-PF

Part XV, Line 2 - Information Regarding Scholarship Programs

The eleventh program, the Weller Engineering Scholarship, is presented annually to a high school senior planning to pursue a career in engineering. The recipient is chosen according rules in the attached summary.

In addition to the award or scholarship programs for high school students described above, the

Foundation also grants an annual award to teachers in the public school systems of Monroe,

Trumbull and Newtown, Connecticut. The Weller Excellence in Teaching Award is an award for kindergarten through fifth grade teachers in recognition of teaching quality and innovation. The recipients are selected according to the rules described in the attached summary.

The above award programs have been approved by the Internal Revenue Service under Section 4945 of the Internal Revenue Code.

THE WELLER FOUNDATION, INCORPORATED

Box 1145, Woodbury, Connecticut 06798 / Telephone (203) 263-0229

2015

THE VINCENT VOCCIA VOCATIONAL AWARD

The purpose of this award is to provide financial assistance to students planning a career in the skilled trades.

AWARD:

Each participating school will be eligible for one* award recipient to receive a grant equal to the lesser of \$3,000 or 50% of the cost of tuition and fees of the vocational-technical program proposed. Payment will be paid for the benefit of the recipient directly to the institution giving the vocational program. Normally, one-half of the award will be paid on proof of enrollment and one-half after receipt of an official transcript from the institution indicating satisfactory completion of the first half of the program and verification of continued enrollment for the second half of the program or in the case of four-year programs after completion of the first three years. In no case will more than two payments be made. The program must begin within nine months of the date the award is granted or it shall be forfeited.

* If for any reason there is no eligible winner from a participating school(s), the Trustees may, at their discretion, select an alternate winner from the remaining schools.

ELIGIBILITY:

Applicants must be full-time students at Masuk, Newtown, Trumbull, Joel Barlow, or Shelton High School at the time the award is made and must not be a relative of a Trustee of The Weller Foundation, Incorporated. Applicants must be U.S. citizens, nationals, or permanent residents. The applicant shall demonstrate interest and talent in his or her chosen field and must be able to satisfy the admission requirements of the school selected.

There are no tests, quizzes, projects to complete, or interviews. A properly completed application form, submitted on or prior to the due date, will establish eligibility.

Financial need will not be a factor in determining the award recipient.

APPLICATION:

Application forms will be provided by The Weller Foundation, Incorporated and shall be available through and later returned to the School's Guidance Office. The application form **must include** an attached copy of the student's transcript. Completed applications must be submitted to the Foundation's High School Representative by the below listed deadline date or they will not be accepted. Questions may be directed to the person in charge of distributing and collecting applications.

**THE DEADLINE FOR SUBMITTING APPLICATIONS IS WEDNESDAY,
MARCH 18, 2015.**

THE VINCENT VOCCIA VOCATIONAL AWARD – 2015
PAGE 2 OF 3

All applications must be returned to the Foundation. Award recipients will be selected by a committee of Foundation Trustees.

A minimum of three qualified applications from your high school will ensure granting of an award recipient. In the event that less than three qualified applications are received, any award granted will be at the discretion of the Foundation.

AWARD RECIPIENTS:

The award recipients will be announced on or about Tuesday, April 1, 2015. The award recipients and their parents will be invited to attend the Foundation's Annual Awards Banquet to be held at 6:00 P.M. at Fairfield University on Wednesday, April 29, 2015. In order to receive the award, students **must attend** the Awards Banquet.

PROGRAM REQUIREMENTS:

The institution selected shall possess whatever accreditations/approvals/licenses are necessary to insure that the student receives a meaningful training program.

To be acceptable, the program shall provide a minimum of twenty weeks full-time (or equivalent) instruction and be in one of the following fields:

| | |
|------------------------------------|--------------------------------------|
| Auto/Truck Maintenance | Electrical or Electronic Technicians |
| Aircraft Maintenance | Culinary Arts |
| Air Conditioning and Refrigeration | Barbering/Hairdressing |
| Plumbing and Fitting | Carpentry |
| Masonry | Secretarial |
| Machine, Design (CAD) | Photography |
| | Manufacturing Trades |

Correspondence schools courses are not acceptable under this program.

The decision of the Foundation regarding program eligibility and award recipient will be final.

THE VINCENT VOCCIA VOCATIONAL AWARD –2015
PAGE 3 OF 3

PROGRESS REPORTS:

The institution will be requested to verify the recipient's program and tuition. The student will be required to submit to the Foundation copies of the bills that will be used to determine the final payment. The institution will be required to submit an official transcript verifying the student's satisfactory completion of the first half of the award program (or in the case of a four-year program, after the first three years) and verification of continued enrollment for the second half of the program.

In order to receive this award, the recipient must attend the Awards Banquet on Wednesday, April 29, 2015.

The Trustees reserve the right to exercise their discretion on all matters.

AF:jed
07-24-14

THE WELLER FOUNDATION, INCORPORATED

Box 1145, Woodbury, Connecticut 06798 / Telephone (203) 263-0229

2015 THE VINCENT VOCCIA VOCATIONAL AWARD APPLICATION FORM

DEADLINE FOR SUBMISSION IS: MARCH 18, 2015

*(To be filled in by the applicant. Please **PRINT** or **TYPE** all data.)*

Applicant's Full Name: _____

Father's Name: _____ **Mother's Name:** _____

Home Address: _____

Home Telephone #: _____ **High School:** _____

Cell Phone #: _____ **E-mail :** _____

Guidance Counselor: _____

PROPOSED PROGRAM DETAILS

1. Future School Name: _____

Address: _____

Telephone #: _____

2. Name of anticipated future program (as shown in school's catalog): _____

3. Length of program: _____ **Begins** _____ **Ends** _____

4. Full-Time Part-Time Evenings

5. Cost of program – Do NOT include lodging, meals, or commute expenses:

| | <u>YEAR 1</u> | <u>YEAR 2</u> | <u>YEAR 3 & 4</u> | <u>TOTAL</u> |
|-----------------------------|---------------|---------------|-----------------------|--------------|
| Tuition (Your Cost): | \$ _____ | \$ _____ | \$ _____ | _____ |
| Fees: | _____ | _____ | _____ | _____ |
| (Other) | _____ | _____ | _____ | _____ |
| <u>Supplies</u> | _____ | _____ | _____ | _____ |
| <u>Books</u> | _____ | _____ | _____ | _____ |
| TOTALS: | \$ _____ | \$ _____ | \$ _____ | \$ _____ |

**THE VINCENT VOCCIA VOCATIONAL AWARD - 2015
APPLICATION FORM – PAGE 2 OF 3**

6. Award at completion of program: Certificate/Diploma Degree
7. Is there an application deadline? _____
8. Have you already applied? _____ Been accepted? _____
9. What are the admission requirements? _____

STUDENT INFORMATION

1. Why do you want to participate in this program? _____

2. List related courses (with grades) you have or are now taking: _____

3. School activities and offices: _____

4. Hobbies and other interests: _____

5. Identify any current jobs(s): _____

6. Describe any other verifiable work experience in your chosen field of study: _____

7. References: If you wish to include written references, attach them to this application and identify attachments below.

**THE VINCENT VOCCIA VOCATIONAL AWARD - 2015
APPLICATION FORM – PAGE 3 OF 3**

STATEMENT: 1. I am not related to any Trustee of The Weller Foundation,
Incorporated.

2. I am currently enrolled at _____ High School.

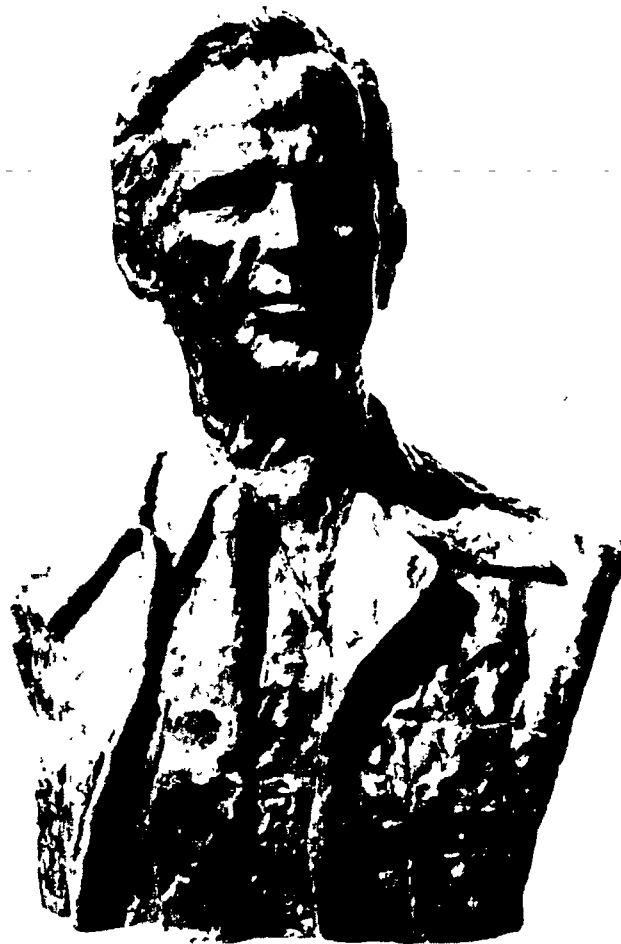
Signed: _____ Date Submitted: _____

Received by School Rep: _____ Date Received: _____

AF:jed:07-24-14

Attachment: Student's Transcript

THE
Barton L. Weller
SCHOLARSHIP
2014 ♦ 2015



Presented by
The Weller Foundation, Incorporated

A \$14,000 Scholarship designed to encourage
independent study or research among area high school seniors

Who is eligible to participate?

Any senior-year student attending Joel Barlow, Masuk, Newtown, Shelton or Trumbull High School on a full-time basis during the entire 2014-2015 academic year. Applicants must be U.S. citizens, nationals, or permanent residents. The award recipient must attend a four-year undergraduate degree program in the United States.

What is required?

To complete a five-month, original independent research or study project... the 2015 Barton L. Weller Scholar will be selected by a panel of judges.

What topics can you pursue?

Any topic—from art to behavioral science to computers to zithers—providing it involves original, independent study or creative endeavor.

What should participants do to enter?

Read the attached Rules...

Submit a one- or two-page proposal on your topic and mail it to the Trustees of the Foundation (see address under Rules). Proposals must be **received** by the Foundation by October 10, 2014. We recommend you allow for possible delays in delivery. Up to five finalists will be selected from all entries and will be notified by October 29, 2014.

If you're selected as a finalist...

You will receive \$200 to help defray expenses... and will have from October 29, 2014 until March 10, 2015 to submit your final project.

When will the scholarship be presented?

The finalists, who have successfully completed and submitted their projects on time, will be invited to a dinner in their honor on April 29, 2015. At that time, the \$14,000 scholarship will be presented to the student whose project is judged to be the best, and all runners-up will receive \$500 for completion and timely submission of their projects.

PROJECT CALENDAR

| | | |
|----------------------------------|-------|-----------------------------------------------------------|
| May 9, 2014 | ..... | Announce scholarship in high schools and local newspapers |
| May 9, 2014 – Oct. 10, 2014 | ..... | Proposal formulation period |
| Oct. 10, 2014 | ..... | Proposals due for evaluation |
| Oct. 29, 2014 | ..... | Finalists announced |
| Oct. 29, 2014 – Mar. 10, 2015 | ..... | Finalists' project development period |
| Nov. 4, 2014 | ..... | Initial check awarded |
| Jan. 15, 2015 | ..... | Mid-project review |
| Mar. 10, 2015 | ..... | Final date for submission of projects |
| Apr. 1, 2015 | ..... | Interview session with judges |
| Apr. 29, 2015 | ..... | Award dinner |

BOARD OF TRUSTEES

Michael J. Smith – Chairman
Brian E. Skinner – Vice Chairman and Treasurer
Alexander Fraser – Secretary

JoAnne E. Davies
Louis J. LaCrocce
Michael P. Zabinski

The Weller Foundation, Incorporated ♦ Barton L. Weller Scholarship

RULES

The Weller Foundation, Incorporated provides an annual scholarship in honor of Barton L. Weller who was the founder of Vitramon, Incorporated and whose generosity has made the award possible. Its purpose is to encourage academic excellence in a substantial independent project.

PROPOSALS

1. The Foundation will accept proposals from seniors who are full-time students at Joel Barlow, Masuk, Newtown, Shelton and Trumbull High Schools, each outlining a project to be developed during academic year 2014-2015. The student must remain a full-time student for the entire academic year.

2. Applicants must be U.S. citizens, nationals, or permanent residents. Winners must attend a four-year undergraduate degree program in the United States.

3. Topics for projects are not limited by content or scholastic field. For example:

A study of economic or political forces influencing the immediate geographic area

A science or engineering project

A study of the effect of environmental factors on the immediate geographic area

A project in the fine arts

A computer system or software project

A mathematics project

Any proposal for a project requiring basic study and originality will be considered. The student must clearly demonstrate in the proposal that the project is logistically and financially feasible. Proposals requiring the use of non-student owned equipment or which necessitate classroom involvement of other students or school facilities must attach written permission from an authorized official for such activities. A student may submit only one proposal. If more than one proposal is received from a student, all his/her proposals will be disqualified.

4. Proposals of no more than 2 pages (not including required attachments) must outline the student's project by including the following sections entitled: Title, Stated Objective, Project Content, and Summary. The proposal will be judged by a committee of the Foundation Trustees for:

- Format of the proposal
- Project potential
- Originality
- Care with which proposal and its planned implementation has been thought through

Up to five proposals will be accepted. Each of the finalists submitting an accepted proposal will be awarded \$200 on November 4, 2014. An alternate finalist will be notified of his/her selection should a finalist withdraw from the program prior to November 4, 2014.

No proposal may contain any identification of the student, town of residence or high school attended.

A separate covering letter provided by the Foundation must be completed and attached to the proposal. Proposals and covering letters are to be mailed to:

**Board of Trustees • The Weller Foundation, Incorporated
P.O. Box 1145 • Woodbury, CT 06798**

Proposals must be received by the Foundation by October 10, 2014. We recommend you allow for possible delays in delivery. Proposals which do not comply with these Rules will be rejected. Late arrivals will be returned unopened.

5. Questions with respect to these Rules may be directed to JoAnne Davies, Foundation Administrator at 203-263-0229.

6. The Scholarship Program will be announced simultaneously at the five area high schools on May 9, 2014 to provide an equal chance for all eligible students to participate in submitting proposals.

PROJECT

1. Up to five finalists become eligible to participate in the project phase, carrying out the proposal submitted.

2. The proposal formulation period runs from May 9, 2014 to October 10, 2014.

3. The scholarship finalists' project development period will run from October 29, 2014 to March 10, 2015 with submission and documentation of the project due to The Weller Foundation, Incorporated before 3:00 P.M. local time on or before March 10, 2015. The Foundation Administrator must be notified if the project cannot be readily mailed.

4. There is no restriction on use of project content for legitimate academic credit or other purposes. For example, a science project may also be entered in another science talent search or local science fair, a study on the area economy may be submitted by the student for credit in an economics course.

5. Each project is expected to be the student's own work without outside assistance in organizing and executing the project. Parents, faculty and other professionals may be consulted and must be acknowledged as resources for reference, but the student is entirely responsible for performing the work. The finalists will be asked to sign a statement to this effect.

A mid-project meeting will be held by the Trustees with the finalists on January 15, 2015 to review progress and answer any procedural question that might arise.

6. Final date for submission of the project will be March 10, 2015. Projects must be complete as submitted. A total of five completed photocopies (except as where deemed inappropriate by the Foundation) must be submitted for judging. (Copies will be distributed to the judges, one copy to be retained by the Foundation). They will be judged by a committee, selected from outside the Foundation's Board of Trustees. Each judge is paid an honorarium for this service.

The primary standards for judgment will be the degree to which, and the skill and care with which, the original proposal is developed into the final project. Changes in content from the original proposal may result in disqualification.

On April 1, 2015 the judges will convene to interview the participants about their projects and select the \$14,000 scholarship recipient. The judges' selection of the scholarship recipient shall be final.

These interviews are not intended to supplement the completed project material submitted on March 10, 2015. They will provide an opportunity for the judges to authenticate the student's knowledge of project content.

7. The scholarship recipient will be announced prior to the dinner of the Board of Trustees, judges, area high school representatives, parents and finalists to be held on April 29, 2015.

8. The student whose project is judged best will receive a \$14,000 scholarship, payable in increments of \$3,500 at the beginning of each of four academic years for which the student is accepted and attends a recognized college or university. Payments will be made directly to the college or university for deposit into the student's account. Subsequent payments will be made after receipt of an official transcript verifying satisfactory completion of studies for that year and that the student remains in "good standing." A maximum of one year out of college attendance will be allowed for substantial reasons such as health or family hardship. Beyond one year, the balance of the award will be forfeited.

9. The Scholarship will be awarded without regard to the student's existing financial status.

10. It is the Foundation's intention to return all but one copy of the material submitted to the student, and will not accept responsibility for loss or damage.

11. To be eligible for the \$14,000 Scholarship or runners-up award, the finalists must attend the required meetings: the Mid-Project Review, the Interview Session, and the Award Dinner.

THE WELLER FOUNDATION, INCORPORATED

Box 1115, Woodbury, Connecticut 06798 Telephone (203) 264-0229

2009

THE WELLER INSTRUMENTAL MUSIC SCHOLARSHIP

The Weller Foundation, Incorporated provides this \$4,000 Scholarship in honor of the late Barton L. Weller, who was the founder of Vitramon, Incorporated and The Weller Foundation, Incorporated. It is through his generosity that this award is made possible.

SCHOLARSHIP TIMETABLE

Student Application Deadline: March 2, 2009

School Submission Deadline: March 6, 2009

Auditions for Weller Judges: April 8, 2009

Award Recipient Announced: April 8, 2009

Awards Banquet: May 4, 2009

RULES

1. Applicants must be seniors who are full-time students at Joel Barlow, Masuk, Newtown, Shelton, or Trumbull High Schools. Applicants must remain full-time students for the entire academic year. Applicants must not be related to a Weller Foundation Trustee or to a Weller Scholarship Judge.
2. Applicants must be U.S. citizens, nationals, or permanent residents. The award recipient must attend a four-year undergraduate degree program in the United States.
3. Applicants must have a minimum GPA of 2.5 out of 4.0. An official high school transcript must be attached to the application form verifying this information.
4. Applicants must be accepted and subsequently enrolled at a four-year fully accredited college or conservatory as a music major with concentration in instrumental music.
5. By March 2nd each applicant must submit to their School's Director of Instrumental Music a fully completed and signed application form including attachments.
6. Financial need is not a requirement and shall not be considered.
7. The Director of Instrumental Music at each school shall select not more than two finalists from the applicant group. In the event an applicant is related to the Director of Instrumental Music, an alternate selection process will be approved by the Foundation. All applicants will be considered regardless of whether or not they participate in the high school music program.

THE WELLER INSTRUMENTAL MUSIC SCHOLARSHIP - 2009
PAGE 2 OF 5

8. The deadline for schools to submit the completed Weller Music Scholarship finalist applications to the Foundation is Friday, March 6, 2009.
9. Each finalist must audition before a team of judges appointed by The Weller Foundation, Incorporated. The judges' selection shall be based on demonstrated talent with due consideration given to other evidence indicating dedication to learning and performance experience. An award recipient will be selected, and at the judges' discretion, an alternate will be chosen. The judges' selection of the scholarship recipient shall be final.
10. The award recipient must start his/her formal education program within six (6) months from the date on which he/she is declared the recipient, or the award is forfeited. Thereafter, a maximum leave of one year from college or conservatory will be allowed for substantial reason such as health or family hardship. Beyond one year, the balance of the award will be forfeited.
11. The award will be paid in four (4) equal installments of \$1,000. Payment will be made to the school and credited to the student's account. The first payment will be made once The Weller Foundation, Incorporated receives proof of enrollment in a qualified program (See Item 2). Subsequent payments will be made at the beginning of each school year following receipt of proof that the student has maintained a cumulative grade point average of 2.3 out of 4.0 ("C+" average or better) and is continuing in his/her original course of study and that the student remains in "good standing". All payments will be made for the benefit of the award recipient directly to the institution providing the education.
12. The Director of Instrumental Music must attach to the application form a statement to the Foundation in support of his/her chosen candidates.

THE WELLER INSTRUMENTAL MUSIC SCHOLARSHIP - 2009
PAGE 3 OF 5

===== AUDITION GUIDELINES AND INFORMATION =====

1. Each finalist is requested to select a piece of music to perform which best displays his/her musical ability. The original music score (not a photocopy) must be attached to the finalist's application form which is submitted on March 2, 2009 to his/her High School's Director of Instrumental Music. The Foundation's Scholarship Judges will review each finalist's music selection prior to the audition. It is the Foundation's intention to return the original music scores to the finalists upon completion of the auditions. Please note that you do not have to memorize the piece and can bring another music score with you to utilize during your performance.
2. The Scholarship Audition will take place on Wednesday, April 8, 2009 in the Alexandria Room at the Edmond Town Hall in Newtown, Connecticut. Each finalist will be allocated a 20-minute period for his/her audition. The first audition will commence at 3:00 P.M. The solo* instrumental music performance should not exceed 10 minutes. The remaining 10 minutes will be utilized as an informal interview session with the Judges and the finalist. It should be noted that the Judges (at their discretion) may request a finalist to perform a second piece of music. Please be prepared should this request be made.
3. Jazz performers will be asked to improvise over three choruses of 12-bar blues in B Flat (tape accompaniment will be supplied by the Foundation).
4. The award recipient will be notified via telephone on April 8, 2009. The award recipient and his/her parents will be invited to attend the Foundation's Annual Awards Banquet to be held at 6:00 P.M. on Monday, May 4, 2009 at Fairfield University. The Awards Banquet will be honoring recipients of several of the Foundation's Award Programs.

* Musical accompanists will not be permitted.

The Trustees reserve the right to exercise their discretion on all matters.

THE WELLER FOUNDATION, INCORPORATED

Box 1145, Woodbury, Connecticut 06798 Telephone (860) 963-0229

2009

THE WELLER INSTRUMENTAL MUSIC SCHOLARSHIP APPLICATION FORM

(Please TYPE or PRINT in black ink all data.)

Applicant's Full Name: _____

Father's Name: _____

Mother's Name: _____

Complete Address: _____

Home Telephone Number: _____ Social Security #: _____

Cell Phone Number: _____ E-Mail: _____

Instrumental Specialty: _____

High School: _____

List the names of non-high school music groups with which you have performed; state when (i.e., Western Regional Music Festival):

CIT Music Educator's Association's (CMEA) All-State Festival Audition, Year, and Instrument

Private Instruction, when and with whom*: _____

Music courses taken in high school and grades received: _____

* Attach statement(s) from your private instructor attesting to your progress and confirming period of study.

**THE WELLER INSTRUMENTAL MUSIC SCHOLARSHIP - 2009
APPLICATION FORM
PAGE 5 OF 5**

**High school and other
music experience;
i.e., band, orchestra,
ensembles, etc.**

**College/Conservatory I
plan to be enrolled in,
(include mailing address):**

**Program enrolled in
(Be specific):**

What are your career goals?

Title of Audition Piece/Composer:

**If asked, would you be willing to perform at the Awards Dinner if you are selected as the
recipient of this Award?**

**I have read the Rules of this program and have met the eligibility requirements. I
confirm that the above and attached information is true and that I am not related to a
Trustee of The Weller Foundation, Incorporated or to a Weller Foundation Judge.**

Signature

Date

**Attachments: Official High School Transcript verifying minimum 2.5 GPA requirement
Statement by Director of Instrumental Music
Statement by Private Music Instructor
Original Music Score**

JF-1) 09-05-08

THE WELLER FOUNDATION, INCORPORATED

Box 1145, Woodbury, Connecticut 06798 / Telephone (203) 263-0229

2015

WELLER MEDICAL/HEALTH SCIENCES SCHOLARSHIP

The purpose of this scholarship is to encourage and financially assist a student upon graduation who has chosen a course of study in the field of Medical/Health Sciences. Healthcare careers acceptable under this Program are Nursing, Therapy, Medical Technology, Paramedics, and other licensed healthcare workers who provide one-on-one healthcare to people. Programs leading to MD or PhD Degrees are **not** eligible. Academic programs shall be a minimum of one (1) year and a maximum of six (6) years in duration with a maximum of four (4) years of payments.

AWARD:

Qualified applicants from the five (5) eligible high schools shall be competing for (1) award.

The Award: A total of \$5,000 or 50% of the cost of tuition for the training program, whichever is less.

Payment: The Award will be paid in equal increments depending upon the number of years required to complete the program. For example,

1 Year Program: $\frac{1}{2}$ upon enrollment; $\frac{1}{2}$ at mid-point

2 Year Program: $\frac{1}{2}$ upon enrollment; $\frac{1}{2}$ at beginning of second school year

3 Year Program: $\frac{1}{3}$ upon enrollment; $\frac{1}{3}$ at the beginning of the second and third school year

4-6 Year Program: 4 equal payments at the beginning of each of the first four school years

The first payment of the award will be made upon the Foundation's receipt of a copy of the recipient's tuition bill. Proof of continuance of enrollment and verification of a 3.0 GPA is necessary for any payment during the subsequent academic period.

All payments will be made for the benefit of the award recipient directly to the institution providing the education.

The program must begin within nine (9) months of the grant date or the award shall be forfeited. An interruption of up to one (1) year will be allowed for substantial reasons such as health or family hardship. Beyond one (1) year, the balance of the award will be forfeited.

WELLER MEDICAL/HEALTH SCIENCES SCHOLARSHIP – 2015
PAGE 2 OF 5

A minimum of three (3) qualified applicants will ensure granting of the award. If there should be less than three (3) qualified applicants, the award will be granted at the discretion of the judges.

ELIGIBILITY:

- Applicants must be seniors who are full-time students at Joel Barlow, Masuk, Newtown, Shelton, or Trumbull High Schools. Applicants must remain full-time students for the entire academic year.
- Applicants must be U.S. citizens, nationals, or permanent residents. The award recipient must attend an undergraduate degree program in the United States.
- Applicants must have a minimum GPA of 3.0 out of a 4.0 during the first three (3) cumulative years of high school and a minimum SAT score of 1600 or an ACT score of 20.
- Applicants must not be related to a Weller Foundation Trustee.
- It is the sole responsibility of the applicant (and not the Weller Foundation and/or its judges) that the college program requirements as to the medical major is adhered to and that the college program qualifies for this scholarship.
- It is the responsibility of the applicant to adhere to the rules of this scholarship program.

REQUIREMENTS:

- A completed application form with all required attachments must be received before the application deadline date, **Monday, March 2, 2015**.
- An essay, 500 to 700 words in length, written by the applicant, must be submitted with the application. ***The essay must be typed, and the word count must be recorded at the end of the essay.*** Essays that are not within the specified range of words may be disqualified. The essay shall be entitled, *"Why I Have Chosen A Career In Medicine (Medical/Health Sciences)"*.
- An **official copy** of the student's transcript must be attached to the application. **Student's GPA and SAT and/or ACT scores must be indicated on the transcript.**
- Those who have submitted acceptable applications must attend a brief interview with the judges. The interview will take place on **Tuesday, March 31, 2015**.

WELLER MEDICAL/HEALTH SCIENCES SCHOLARSHIP – 2015
PAGE 3 OF 5

APPLICATIONS:

Applications must be mailed to the Foundation at: The Weller Foundation, Incorporated
P.O. Box 1145
Woodbury, CT 06798

Applications must be received by the Foundation by Monday, March 2, 2015.
We recommend you allow for possible delays in delivery.

JUDGING:

- A committee of the Foundation's Trustees will rule on eligibility and judge the award recipients. The committee's selection of the award recipient shall be final.
- The award recipient will be chosen based upon the applicant's ability to demonstrate a commitment to the medical/health field as a career and their potential success as a medical/healthcare provider. The following will assist the judges in choosing an award recipient:
 - Volunteer or compensated work at medical facilities. *All work must be verified with an attached letter from an official at the organization noting hours worked.*
 - Academic record in the science disciplines (Biology, Chemistry, General Physics, and Mathematics),
 - Extra curricular activities,
 - Substance and quality of the submitted essay,
 - Applicant's interview with the judges.
- The award recipient will be notified by telephone on **March 31, 2015**. The award recipient and his/her parents will be invited to attend the Foundation's Annual Awards Banquet to be held at 6:00 P.M. on **Wednesday, April 29, 2015**, at Fairfield University.
- Financial need will not be a factor in determining the award recipient.

In order to receive this scholarship, the recipient must attend the Interview Session on Tuesday, March 31st, and the Awards Banquet on Wednesday, April 29, 2015.

Any questions concerning this Scholarship may be directed to the Foundation's Trustee and Administrator, JoAnne Davies, at (203) 263-0229.

The Trustees reserve the right to exercise their discretion on all matters.

AF:LL:jed:07-24-14

THE WELLER FOUNDATION, INCORPORATED

Box 1145, Woodbury, Connecticut 06798 / Telephone (203) 263-0229

2015 WELLER MEDICAL/HEALTH SCIENCES SCHOLARSHIP APPLICATION FORM

Submission Deadline: March 2, 2015

(Please TYPE or PRINT in black ink all data.)

Applicant's Full Name: _____

Father's Name: _____

Mother's Name: _____

Complete Address: _____

Home Telephone: _____ Age: _____ High School: _____

Cell Phone Number: _____ E-Mail: _____

Class of _____

Intended Career: _____

Program Length for Certification/Degree: _____

Institution's Name: _____

Address: _____

Telephone: _____

Program Selected: _____

| Detail Expenses: | <u>YEAR 1</u> | <u>YEAR 2</u> | <u>YEAR 3</u> | <u>YEAR 4</u> |
|------------------|---------------|---------------|---------------|---------------|
| Tuition: | _____ | _____ | _____ | _____ |
| Other: | | | | |
| _____ | _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ | _____ |
| Totals | \$ _____ | \$ _____ | \$ _____ | \$ _____ |

WELLER MEDICAL/HEALTH SCIENCES SCHOLARSHIP – 2015
APPLICATION FORM
PAGE 5 OF 5

Do you have any special medical certifications (i.e., EMT, CPR, First Aid)? Please list below and attach a copy of certification documentation.

Have you participated in any medical-related job shadowing activity? Please specify below and attach documentation.

List extracurricular activities (Where, When, Offices/Positions Held). Please feel free to attach a resume. For jobs or volunteer work, indicate hours/days worked. Attach letters from organizations verifying involvement.

References: If you wish to include written references, attach them to this application and identify attachments below.

I have read the criteria of this program and have met the eligibility requirements. I confirm that the above and attached information is true and that I am not related to a Trustee of The Weller Foundation, Incorporated.

Signature

Date

Attachment Checklist:

- _____ 500-700 Word Essay (*must include word count at end of essay*)
- _____ Official Transcript (indicating GPA)
- _____ Official documentation indicating SAT and/or ACT scores
- _____ Verification of any Work Experience/Job Shadowing (attach signed letter from organization)
- _____ Medical Certifications (if any)

JED:07-24-14

THE WELLER FOUNDATION, INCORPORATED

Box 1145, Woodbury, Connecticut 06798 / Telephone (203) 263-0229

2015

WELLER EDUCATION SCHOLARSHIP

The purpose of this \$5,000 scholarship is to recognize and financially assist a high school senior planning to pursue a teaching career in public or private elementary or secondary schools.

AWARD:

Qualified applicants from the five (5) eligible high schools shall be competing for one (1) scholarship of \$5,000. Payment will be made for the benefit of the recipient in four (4) equal installments of \$1,250 paid directly to the institution providing the education program. Annual payments are contingent upon the recipient's continued pursuit of a degree in education. The first payment of the scholarship will be made upon the Foundation's receipt of a copy of the recipient's tuition bill. Proof of continuance of enrollment and verification (official transcript) of a 3.1 GPA is necessary for a scholarship payment during the subsequent academic years.

A minimum of three (3) qualified applicants will ensure granting of the award. If there should be less than three (3) qualified applicants, the award will be granted at the discretion of the judges.

ELIGIBILITY:

- Applicants must be seniors who are full-time students at Joel Barlow, Masuk, Newtown, Shelton, or Trumbull High Schools. Applicants must remain full-time students for the entire academic year.
- Applicants must be U.S. citizens, nationals, or permanent residents. The award recipient must attend a four-year undergraduate degree program in the United States.
- Applicants must be accepted and subsequently enrolled at a four-year fully accredited college or university majoring in elementary or secondary education.
- Applicants must have a minimum GPA of 3.5 out of 4.0 or a class rank in the top 20% at the end of Grade 11 of high school **and** a minimum SAT score of 1710 and/or an ACT score of 25.
- Applicants must not be related to a Weller Foundation Trustee or a Weller Scholarship Judge.

WELLER EDUCATION SCHOLARSHIP – 2015
PAGE 2 OF 5

ELIGIBILITY – continued:

- It is the sole responsibility of the applicant (and not the Weller Foundation and/or its judges) that the college program requirements as to the education major is adhered to and that the college program qualifies for this scholarship.
- It is the responsibility of the applicant to adhere to the rules of this scholarship program.

REQUIREMENTS:

- A completed application form with all required attachments must be received by the Foundation by **Monday, March 2, 2015**.
- An essay, 500 to 700 words in length, written by the applicant, must be submitted with the application. *The essay must be typed, and the word count must be recorded at the end of the essay.* Essays that are not within the specified range of words may be disqualified. The essay shall be entitled, *“Why I Have Chosen A Career in Education”*. *The essay must focus on the strengths and weaknesses of the applicant’s secondary educational experiences including specific examples and anecdotes along with suggestions for change.*
- An official copy of the student’s high school transcript must be attached to the application. The student’s GPA, SAT and/or ACT scores must be indicated on the transcript.
- Three character references (one each from a classroom teacher, a guidance counselor, and one from another adult) must be written, signed, and attached to the application.
- Those who have submitted acceptable applications must attend an interview with the judges centering around the applicant’s views on education. The interview will take place on **Monday, March 30, 2015**. Time and place for the interview will be announced.

JUDGING:

- A committee of judges will rule on eligibility and judge the award applicants. The committee’s selection of the award recipient shall be final.

WELLER EDUCATION SCHOLARSHIP - 2015
PAGE 3 OF 5

JUDGING – continued:

- The award recipient will be chosen based upon the applicant's ability to demonstrate a commitment to the education field as a career and his/her potential success as an elementary or secondary school teacher. The following will assist the judges in choosing the award recipient.
 - Academic record
 - Documented evidence of dedication to the field of education (for example peer tutoring)
 - Substance and quality of the essay
 - Applicant's interview with the judges
- The award recipient will be notified by telephone on **March 30, 2015**. The award recipient and his/her parents will be invited to attend the Foundation's Annual Awards Banquet to be held at 6:00 P.M. on **Wednesday, April 29, 2015**, at Fairfield University.
- Financial need is not a factor in determining the award recipient.

APPLICATION:

Applications must be mailed to the Foundation at: The Weller Foundation, Incorporated
P.O. Box 1145
Woodbury, CT 06798

Applications must be received by the Foundation by Monday, March 2, 2015.
We recommend you allow for possible delays in delivery.

Any questions concerning this award may be directed to the Foundation's Trustee and Administrator, JoAnne Davies, at (203) 263-0229.

In order to receive this scholarship, the recipient must attend the Interview Session on Monday, March 30th, and the Awards Banquet on Wednesday, April 29, 2015.

The Trustees reserve the right to exercise their discretion on all matters.

JED:07-24-14

THE WELLER FOUNDATION, INCORPORATED

Box 1145, Woodbury, Connecticut 06798 / Telephone (203) 263-0229

**2015
WELLER EDUCATION SCHOLARSHIP
APPLICATION FORM
Submission Deadline: March 2, 2015**

(Please TYPE or PRINT in black ink all data.)

Applicant's Full Name: _____

Father's Name: _____

Mother's Name: _____

Home Address: _____

Home Telephone: _____ High School: _____

Cell Phone Number: _____ E-Mail: _____

Class of _____

Intended Educational Career: _____

List the colleges and universities to which you have applied for admission.

College

Address

Date Applied/Accepted

| | | |
|--|--|--|
| | | |
| | | |
| | | |
| | | |
| | | |

My Intended Major: _____

Degree Upon Completion: _____

WELLER EDUCATION SCHOLARSHIP - 2015
PAGE 5 OF 5

List extracurricular activities. **Please feel free to attach a resume.** For jobs or volunteer work, indicate hours/days worked. Attach letters from organizations verifying involvement.

The application must include the items listed below. Any omission will automatically **disqualify** the applicant.

1. The current high school transcript indicating your grade point average (GPA) of at least 3.5 out of 4.0 or a class rank in the top 20% at the end of Grade 11 of high school **and** a minimum SAT score of 1710 and/or an ACT score of 25.
2. A 500-700 word typed essay, *"Why I Have Chosen A Career In Education"*. **The essay must focus on the strengths and weaknesses of your secondary educational experiences including specific examples and anecdotes along with suggestions for change.**
3. Three character references: one classroom teacher, one guidance counselor, and one other adult.

If applicable, you are encouraged to submit evidence of teaching experience including duties and duration together with supervisor's verification.

SIGNED STATEMENT OF ELIGIBILITY:

I have read the criteria of this program and have met the eligibility requirements. I confirm that the above and attached information is true and that I am not related to a Trustee of The Weller Foundation, Incorporated.

Signature

Date

Attachment Checklist:

- _____ 500-700 Word Essay (*word count must be included at end of essay*)
- _____ Official Transcript with GPA indicated
- _____ Official documentation with SAT and/or ACT scores
- _____ Three Character References
- _____ Verification of Work Experience (attach signed letter from organization)

JED:07-24-14

THE WELLER FOUNDATION, INCORPORATED

Box 1115, Woodbury, Connecticut 06798 Telephone (203) 264-0129

2009

WELLER COMPUTER SCIENCE/TECHNOLOGY SCHOLARSHIP

The Weller Foundation, Incorporated provides this \$4,000 Scholarship in honor of the late Barton L. Weller, who was the founder of Vitramon, Incorporated and The Weller Foundation, Incorporated. It is through his generosity that this award is made possible.

SCHOLARSHIP TIMETABLE

Application Deadline: March 2, 2009
Interviews with Weller Judges: April 6, 2009
Award Recipient Announced: April 6, 2009
Awards Banquet: May 4, 2009

The purpose of this scholarship is to encourage and financially assist a high school senior upon graduation who is planning to major in a career in computer science or computer engineering.

AWARD:

Qualified applicants from the five (5) eligible high schools shall be competing for one (1) scholarship of \$4,000. Payment will be made for the benefit of the recipient in four (4) equal annual installments of \$1,000 paid directly to the college or university providing the education program. Payments are contingent upon the recipient's continued pursuit of a degree in computer science or computer engineering. The first payment of the scholarship will be made upon the Foundation's receipt of a copy of the recipient's tuition bill. Proof of continuance of enrollment and verification (official transcript) of a minimum 3.0 cumulative grade point average out of a possible 4.0 is required for a scholarship payment during the subsequent academic years.

A minimum of three (3) qualified applicants will ensure granting of the award. If there should be less than three (3) qualified applicants, the award will be granted at the discretion of the judges.

2009 WELLER COMPUTER SCIENCE/TECHNOLOGY SCHOLARSHIP
PAGE 2 OF 6

ELIGIBILITY:

- Applicants must be seniors who are full-time students at Joel Barlow, Masuk, Newtown, Shelton or Trumbull High Schools. Applicants must remain full-time students for the entire academic year.
- Applicants must be accepted and subsequently enrolled at a four-year fully accredited college or university majoring in computer science or computer engineering.
- Applicants must have a minimum GPA of 3.3 out of 4.0 or 4.1 out of a possible 5.0.
- Applicants must not be related to a Weller Foundation Trustee.
- Applicants must be U.S. citizens, nationals, or permanent residents. The award recipient must attend an undergraduate degree program in the United States.

REQUIREMENTS:

- A completed application form with all required attachments must be submitted by the application deadline, March 2, 2009.
- An essay, 500 to 700 words in length, written by the applicant, must be submitted with the application. The essay must be typed, and the word count must be recorded at the end of the essay. Essays that are not within the specified range of words may be disqualified. The essay shall be entitled, "*Why I Have Chosen a Career in the Computer Science Field*".
- An official high school transcript must be attached to the application. The student's class rank, GPA, and SAT scores must be included with the transcript.
- Three character references (one each from a classroom teacher, a guidance counselor, and another adult) must be signed and attached to the application.
- Those who have submitted acceptable applications must attend an interview with the judges on Monday, April 6, 2009. Time and place for the interview will be announced.

JUDGING:

- A committee of Foundation judges will rule on eligibility and judge the award applicants. The decision of the judges shall be final.
- The award recipient will be chosen based upon the applicant's academic record, the substance and quality of the essay, verifiable experience in the operation of computers (i.e. software/hardware design, programming, web design, video game design), and the applicant's interview with the judges.
- Financial need is not a factor in determining the award recipient.
- The award recipient will be notified by telephone on April 6, 2009. The award recipient and his/her parents will be invited to attend the Foundation's Annual Awards Banquet to be held at 6:00 P.M. on Monday, May 4, 2009 at Fairfield University.

**2009 WELLER COMPUTER SCIENCE/TECHNOLOGY SCHOLARSHIP
PAGE 3 OF 6**

APPLICATION:

Applications must be mailed to the Foundation at: The Weller Foundation, Incorporated
P.O. Box 1145
Woodbury, CT 06798

Applications must be received by the Foundation by Monday, March 2, 2009.

Any questions concerning this Scholarship may be directed to the Foundation's Trustee and Administrator, JoAnne Davies, at (203) 263-0229.

The Trustees reserve the right to exercise their discretion on all matters.

AFjed:09-05-08

THE WELLER FOUNDATION, INCORPORATED

Box 1115, Woodbury, Connecticut 06798 Telephone (203) 263-0229

2009

WELLER COMPUTER SCIENCE/TECHNOLOGY SCHOLARSHIP APPLICATION FORM

Submission Deadline: March 2, 2009

(Please TYPE or PRINT in black ink all data.)

Applicant's Full Name: _____

Father's Name: _____

Mother's Name: _____

Complete Address: _____

Home Telephone: _____ Cell Phone: _____

E-Mail: _____

High School Attending: _____ Class of: _____

Social Security Number: _____ Age: _____

Intended Career: _____

Program Enrolled in: _____

List the colleges and universities to which you have applied for admission.

| <u>College/University</u> | <u>Address</u> | <u>Date Applied/Accepted</u> |
|---------------------------|----------------|------------------------------|
|---------------------------|----------------|------------------------------|

Degree Upon Graduation: _____

Do you hold any industry certifications? (A+, N+, MCSE, MCSD, etc.) _____

Have you authored a web page? _____ If yes, provide URL _____

WELLER COMPUTER SCIENCE/TECHNOLOGY SCHOLARSHIP - 2009
PAGE 5 OF 6

Describe any other software/hardware designs completed (if possible, attach copies)

List relevant part-time work/internship experience in the field of computer technology:

List computer-related courses taken (including year) and any computer club/organization involvement:

Please feel free to attach a resume. For jobs or volunteer work, indicate hours/days worked. Attach letters from organizations verifying involvement.

The application must include the items listed below. Any omission will disqualify the applicant.

- 1. A current high school official transcript must list your SAT scores and your grade point average (GPA). The cumulative GPA must be at least 3.3 out of 4 or 4.1 out of 5.**
- 2. A 500-700 word typed essay, "*Why I Have Chosen A Career in the Computer Science Field*". The essay must be typed, and the word count must be recorded at the end of the essay.**
- 3. Three character references: one classroom teacher, one guidance counselor, and one adult acquaintance.**

WELLER COMPUTER SCIENCE/TECHNOLOGY SCHOLARSHIP - 2009
PAGE 6 OF 6

SIGNED STATEMENT OF ELIGIBILITY:

I have read and understand the requirements and eligibility criteria for this program. I confirm that the information I provided is true and that I am not related to a Trustee of The Weller Foundation, Incorporated.

Signature

Date

RECEIVED BY SCHOOL REP: _____

DATE RECEIVED: _____

Attachments: 500-700 Word Essay
Official Transcript with GPA, Class Rank, and SAT Scores Indicated
Three Character References
Verification of Work Experience (if any)

JED:09-05-08

THE WELLER FOUNDATION, INCORPORATED

Box 1145, Woodbury, Connecticut 06798 / Telephone (203) 263-0229

2015

THE WELLER EXCELLENCE IN TEACHING AWARD

The Weller Excellence in Teaching Award* is presented annually in recognition of the teaching quality and innovation exhibited by **certified** classroom teachers of grades kindergarten through five. It is hoped that this honor will help encourage the teaching excellence which is so vital to our youth.

AWARD:**

The award recipient will receive **\$1,000** and a Certificate of Honor.

ELIGIBILITY:

Certified teachers in grades kindergarten through five currently teaching in the Monroe Public School System who have developed a successful curriculum project which was **implemented in the classroom** as part of the curriculum during the current or previous academic year are eligible to apply. **Joint applications will not be accepted.** Relatives of past or present Trustees of The Weller Foundation, Incorporated are not eligible. Projects which have previously won this award are not eligible. Projects previously submitted for this award are not eligible for resubmission.

NOTES:

1. ***This award will not be offered unless a minimum of two qualified applicants apply.***
2. ***The 2014 recipient is not eligible to apply for the 2015 award, but can apply in 2016 or in subsequent years.***

APPLICATION:

Application forms are provided by The Weller Foundation, Incorporated and may be obtained through the Office of the Superintendent of Schools (203-452-2860) or by calling the Foundation at 203-263-0229.

Completed applications should be mailed to: **Mr. James C. Agostine
Superintendent of Schools
Monroe Board of Education
375 Monroe Turnpike
Monroe, CT 06468**

*** Effective September 1999; formerly The Weller Outstanding Teacher Award.**

****Awards are subject to all applicable Federal and/or State taxes.**

2015 – THE WELLER EXCELLENCE IN TEACHING AWARD

Page 2

JUDGING:

The award recipient will be selected by a panel of judges coordinated by Mr. Joseph C. Agostine, Superintendent of Schools.

TIMING:

Completed applications must be received no later than **March 2, 2015.**

The award recipient will be determined in early April and invited to receive the award at The Weller Foundation's Annual Awards Banquet on April 29, 2015, at Fairfield University.

In order to receive the Award, the recipient must attend the Awards Banquet on April 29, 2015.

The Trustees reserve the right to exercise their discretion on all matters.

JED:11-03-14

THE WELLER FOUNDATION, INCORPORATED

Box 1145, Woodbury, Connecticut 06798 / Telephone (203) 263-0229

THE WELLER EXCELLENCE IN TEACHING AWARD

2015 Application Form (Please type)

Applicant/Teacher's Name _____

Spouse's Name _____ Social Security Number _____

Home Address _____ Home Tel. # _____

_____ Cell Phone # _____

E-Mail: _____

School Name _____ School Tel. # _____

School Address _____

Currently Teaching Grade: _____ Title: _____

Principal's Name _____

Have you previously won this award? (*circle one*) Yes No
If yes, in what year(s)? _____

PROJECT TITLE _____

Was this project implemented in the classroom? (*circle one*) Yes No

The project was implemented in grade(s) _____ and is suitable for grades(s) _____.

Approximately how many students participated in this project during the academic year? _____ During the previous academic year? _____

Subject Area _____

THE WELLER EXCELLENCE IN TEACHING AWARD – 2015 Application Form
Page 2 of 3

Project Description (concise description of project in two to four sentences):

Project Goals_____

Describe how goal achievement is measured_____

What are the new learning activities of this project?_____

What aspects of this project do you consider to be especially innovative or creative?

THE WELLER EXCELLENCE IN TEACHING AWARD – 2015 Application Form
Page 3 of 3

Why do you believe this was a successful project? _____

Enclosed are the following materials that may help judge the project _____

It is expected that the winning project will be distributed to the academic community. (Preparation of the project for dissemination will be the responsibility of the award recipient.). The project described above has been implemented in my school by the applicant within the current or previous academic year.

Signature of Principal

Date

I verify that I have met the eligibility criteria and that the project was developed by me and was *implemented* successfully in *my classroom* during the current or previous academic year. I agree to allow it to be published and/or distributed to the academic community. While it is expected that any supplementary material being submitted with this application will be returned to me, I understand that The Weller Foundation, Incorporated and the Superintendent of Monroe Public Schools accept no responsibility for it.

Signature of Applicant

Date

THE WELLER FOUNDATION, INCORPORATED

Box 1145, Woodbury, Connecticut 06798 / Telephone (203) 263-0229

2015 WELLER ENGINEERING SCHOLARSHIP

The Weller Foundation, Incorporated provides this \$4,000 Scholarship in honor of the late Barton L. Weller, who was the founder of Vitramon, Incorporated and The Weller Foundation, Incorporated. It is through his generosity that this award is made possible.

SCHOLARSHIP TIMETABLE

Application Deadline: March 2, 2015
Interviews with Weller Judges: April 2, 2015
Award Recipient Announced: April 2, 2015
Awards Banquet: April 29, 2015

The purpose of this scholarship is to encourage and financially assist a high school senior upon graduation who is planning to major in one of the following engineering fields:

| | |
|----------------------------------------|---------------------------|
| Aerospace Engineering | Electrical Engineering |
| Ceramic Engineering | Industrial Engineering |
| Chemical Engineering | Manufacturing Engineering |
| Civil Engineering | Materials Engineering |
| Computer Engineering | Mechanical Engineering |
| Computer Hardware/Software Engineering | Production Engineering |

Applicants are advised to obtain the Foundation's approval before submitting an application in a non-listed engineering field.

AWARD:

Qualified applicants from the five (5) eligible high schools shall be competing for one (1) scholarship of \$4,000. Payment will be made for the benefit of the recipient in four (4) equal annual installments of \$1,000 paid directly to the college or university providing the engineering program. Payments are contingent upon the recipient's continued pursuit of a degree in the specified engineering field. The first payment of the scholarship will be made upon the Foundation's receipt of a copy of the recipient's tuition bill. Proof of continuance of enrollment and verification (official transcript) of a minimum 3.0 cumulative grade point average out of a possible 4.0 is required for a scholarship payment during each of the subsequent academic years.

2015 WELLER ENGINEERING SCHOLARSHIP
PAGE 2 OF 6

A minimum of three (3) qualified applicants will ensure granting of the award. If there should be less than three (3) qualified applicants, the award will be granted at the discretion of the judges.

ELIGIBILITY:

- Applicants must be seniors who are full-time students at Joel Barlow, Masuk, Newtown, Shelton or Trumbull High Schools. Applicants must remain full-time students for the entire academic year.
- Applicants must be accepted and subsequently enrolled at a four-year fully accredited college or university majoring in engineering.
- Applicants must have a minimum GPA of 3.3 out of 4.0 or 4.1 out of a possible 5.0.
- Applicants must not be related to a Weller Foundation Trustee.
- Applicants must be U.S. citizens, nationals, or permanent residents. The award recipient must attend an undergraduate degree program in the United States.
- It is the sole responsibility of the applicant (and not the Weller Foundation and/or its judges) that the college program requirements as to the engineering major is adhered to and that the college program qualifies for this scholarship.
- It is the responsibility of the applicant to adhere to the rules of this scholarship program.

REQUIREMENTS:

- A completed application form with all required attachments must be submitted by the application deadline, **March 2, 2015**.
- An essay, 500 to 700 words in length, written by the applicant, must be submitted with the application. The essay must be typed, and the word count must be recorded at the end of the essay. Essays that are not within the specified range of words may be disqualified. The essay shall be entitled, *"Why I Have Chosen a Career in Engineering"*.
- An official high school transcript must be attached to the application. The student's GPA, SAT and/or ACT scores, and Class Rank (if available) must be included with the transcript.
- Three references, one each from a classroom teacher, a guidance counselor, and a job supervisor (if available; otherwise the third reference from another adult) must be signed and attached to the application.
- Finalists will be selected among those who have submitted qualified applications. Finalists must attend an interview with the judges on **Thursday, April 2, 2015**. Time and place for the interview will be announced.

2015 WELLER ENGINEERING SCHOLARSHIP
PAGE 3 OF 6

JUDGING:

- A committee of Foundation judges will rule on eligibility, select, and interview the finalists. The decision of the judges shall be final.
- The award recipient will be chosen based upon the applicant's academic record, the substance and quality of the essay, verifiable experience in engineering, and the applicant's interview with the judges.
- Financial need is not a factor in determining the award recipient.
- The award recipient will be notified by telephone on April 2, 2015. The award recipient and his/her parents will be invited to attend the Foundation's Annual Awards Banquet to be held at 6:00 P.M. on April 29, 2015 Fairfield University.

APPLICATION:

Applications must be mailed to the Foundation at:

The Weller Foundation, Incorporated
P.O. Box 1145
Woodbury, CT 06798

Applications must be received by the Foundation by March 2, 2015. We recommend you allow for possible delays in delivery. All late submissions will be disqualified.

Any questions concerning this Scholarship may be directed to the Foundation's Trustee and Administrator, JoAnne Davies, at (203) 263-0229.

The Trustees reserve the right to exercise their discretion on all matters.

MZ:jed:07-24-14

THE WELLER FOUNDATION, INCORPORATED

Box 1145, Woodbury, Connecticut 06798 / Telephone (203) 263-0229

2015 WELLER ENGINEERING SCHOLARSHIP APPLICATION FORM

Submission Deadline: March 2, 2015

=====

(Please TYPE or PRINT in black ink all data.)

Applicant's Full

Name: _____

Father's Name: _____

Mother's Name: _____

Complete

Address: _____

Home Telephone: _____ Cell Phone: _____

E-Mail: _____

High School: _____

Intended Engineering Career: _____

My intended Major: _____

Degree Upon Completion: _____

List the colleges and universities to which you have applied for admission.

College/University

Address

Date Applied/Accepted

| | | |
|--|--|--|
| | | |
| | | |
| | | |
| | | |

Do you hold any industry certifications? (A+, N+, MCSE, MCSD, etc.) _____

2015 WELLER ENGINEERING SCHOLARSHIP
PAGE 5 OF 6

List relevant part-time work/internship experience in engineering:

List engineering-related courses taken (including year) and any engineering club/organization involvement:

Please feel free to attach a resume. For jobs or volunteer work, indicate hours/days worked. Attach letters from organizations verifying involvement.

The application must include the items listed below. Any omission will **disqualify** the applicant.

1. A current high school **official transcript** must list your SAT and/or ACT scores, your grade point average (GPA), and Class Rank (if available). The cumulative GPA must be at least 3.3 out of 4 or 4.1 out of 5.
2. A 500-700 word typed essay, *"Why I Have Chosen A Career in Engineering"*. The essay must be typed, and the word count **must be** recorded at the end of the essay.
3. Three references: one classroom teacher, one guidance counselor, and one job supervisor (if available; otherwise the third reference from another adult).

2015 WELLER ENGINEERING SCHOLARSHIP
PAGE 6 OF 6

SIGNED STATEMENT OF ELIGIBILITY:

I have read and understand the requirements and eligibility criteria for this program. I confirm that the information I provided is true and that I am not related to a Trustee of The Weller Foundation, Incorporated.

Signature

Date

RECEIVED BY SCHOOL

REP: _____

DATE

RECEIVED: _____

Attachment Checklist:

- _____ 500-700 Word Essay (with word count at the end of the essay)
- _____ Official Transcript with GPA
- _____ Official document with SAT and/or ACT Scores
- _____ Three References
- _____ Verification of Work Experience (if any)

MZ:JED:07-24-14

THE WELLER FOUNDATION, INCORPORATED2015SCHEDULE ATTACHED TO 990-PF, PART XV, LINE 3(a)Grants and Contributions Paid During the Year

| <u>Contributions</u> | <u>Name</u> | <u>Relationship</u> | <u>Purpose</u> | <u>Amount</u> |
|----------------------|--------------------------------------------|---------------------|-------------------------|-----------------|
| | Junior Achievement | None | Support of organization | \$2,000 |
| | Mark Twain Library | None | Support of organization | 300 |
| | Edith Wheeler Memorial Library | None | Support of organization | 300 |
| | Cyrenius H. Booth Library | None | Support of organization | 300 |
| | Plumb Memorial Library | None | Support of organization | 300 |
| | Trumbull Library | None | Support of organization | 300 |
| | Fairfield University School of Engineering | None | Support of organization | 1,500 |
| | Joel Barlow High School | None | Support of organization | 2,900 |
| | Masuk High School | None | Support of organization | 2,900 |
| | Newtown High School | None | Support of organization | 2,900 |
| | Shelton High School | None | Support of organization | 2,900 |
| | Trumbull High School | None | Support of organization | 2,900 |
| | Total Cash Contributions | | | <u>\$19,500</u> |

Cash Awards

Barton L. Weller Scholarship Award
to each of the following:

| | | | |
|---------------------------------------|------|--------------------------|-------|
| a) Michael Lynders (first payment) | None | Encourage both academic | 3,500 |
| b) Joshua Kreitler (second payment) | None | excellence and a college | 3,500 |
| c) Vishakha Negi (third payment) | None | education | 3,500 |
| d) Nicholas M. Shigo (fourth payment) | None | | 3,000 |

Weller Excellence in Teaching Award
of \$1,000 to each of the following:

| | | | |
|-----------------------|------|----------------------------|-------|
| a) Lisa Martinsky | None | Encourage teaching | |
| b) Jennifer Angelovic | None | excellence in grades | |
| c) Amanda Dempsey | None | kindergarten through fifth | 3,000 |

Weller Collegiate Scholarship of
\$1,000 to the following:

| | | | |
|-----------------|------|-------------------------------------------------------------------|-------|
| a) William Hope | None | Assist local students in obtaining a quality college education | 1,000 |
|-----------------|------|-------------------------------------------------------------------|-------|

Weller Engineering Scholarship of
\$1,000 to the following:

| | | | |
|--------------------------------|------|-----------------------------------------------------|-------|
| a) Eliana Gerb (first payment) | None | Encourage local students in field of engineering | 1,000 |
|--------------------------------|------|-----------------------------------------------------|-------|

(Continued)

THE WELLER FOUNDATION, INCORPORATED2015SCHEDULE ATTACHED TO 990-PF, PART XV, LINE 3(a)Grants and Contributions Paid During the Year (continued)

| <u>Name</u> | <u>Relationship</u> | <u>Purpose</u> | <u>Amount</u> |
|-----------------------------------------------------------------------------------------------------------|---------------------|------------------------------------------------------------------------------------------|---------------|
| <u>Cash Awards (continued)</u> | | | |
| Weller Medical/ Health Sciences Scholarship of \$1,000 (\$1,250 beginning 2015) to each of the following: | | | |
| a) Megan Folchick (first payment) | None | Encourage local students in field of medical/ health sciences | 4,250 |
| b) Katherine Clark (second payment) | None | | |
| c) Emma Briscoe (third payment) | None | | |
| d) Stephanie Vu (fourth payment) | None | | |
| ----- | | | |
| Weller Education Scholarship of \$1,000 (\$1,250 beginning 2015) to each of the following: | | | |
| a) Katelyn Zimmerman (first payment) | None | Encourage and financially assist a local high school senior to pursue a teaching career. | 4,250 |
| b) Julia Lansing (second payment) | None | | |
| c) Natalie Dieckman (third payment) | None | | |
| d) Jessica Lynch (fourth payment) | None | | |
| | | | |
| Vincent Voccia Vocational Award of \$1,500 to each of the following: | | | |
| a) Martin Ohradan (first payment) | None | Encourage vocational skills | 16,500 |
| b) Michael Benson (first payment) | None | | |
| c) Christopher Dedios (first payment) | None | | |
| d) Amanda Davies (first payment) | None | | |
| e) Samuel Lambert (first payment) | None | | |
| f) Julie Montano (second payment) | None | | |
| g) Kyle Squibb (second payment) | None | | |
| h) Tyler Miles (second payment) | None | | |
| i) Rebecca Chapin (second payment) | None | | |
| j) Nicholas Grogin (second payment) | None | | |
| k) Olivia Phenix (second payment) | None | | |
| | | | |
| Barton L. Weller Scholarship Finalist Award of \$500 to each of the following: | | | |
| a) David Corsi | None | Encourage both academic excellence and a college education | 2,000 |
| b) Eunsun Hong | None | | |
| c) Paulina Howard | None | | |
| d) Dakota McDonough | None | | |

(Continued)

THE WELLER FOUNDATION, INCORPORATED2015SCHEDULE ATTACHED TO 990-PF, PART XV, LINE 3(a)Grants and Contributions Paid During the Year (continued)

| <u>Name</u> | <u>Relationship</u> | <u>Purpose</u> | <u>Amount</u> |
|--------------------------------------------------------------------------------------|---------------------|------------------------------------------------------------------|-----------------|
| <u>Cash Awards (continued)</u> | | | |
| Barton L. Weller Scholarship Finalist Selected of \$200 to each of the following: | | | |
| a) Alisha Aggarwal | None | Encourage both academic excellence and a college education | 1,000 |
| b) Nadia V Koltchine | None | | |
| c) Christopher Lafky | None | | |
| d) Anuj SiSodiya | None | | |
| e) Amanda Wall | None | | |
| ----- | | | |
| Eleanor F Moore Awards of \$500 to each of the following: | | | |
| a) Brett Johnson | None | Foster interest in business careers | 2,500 |
| b) Bianca D'Agostino | None | | |
| c) Cassandra Fischer | None | | |
| d) Michael Cowell | None | | |
| e) Ryan Martins | None | | |
| | | | |
| Senior Science Awards of \$500 to each of the following: | | | |
| a) Andrea McGowan | None | Foster interest in business careers | 2,500 |
| b) Thomas Culp | None | | |
| c) Hannah Grant | None | | |
| d) Veina Pillai | None | | |
| e) Caroline Forster | None | | |
| | | | |
| Paul W. Broggi Awards of \$500 to each of the following: | | | |
| a) Rebecca Hermenze | None | Foster interest in communications careers | 2,500 |
| b) Taylor Shaw | None | | |
| c) Margaret Gorman | None | | |
| d) Nicole Romeos | None | | |
| e) Brittany Kubicko | None | | |
| <u>Total Cash Awards and Contributions</u> | | | <u>\$73,500</u> |

(Continued)

06-6068987

THE WELLER FOUNDATION, INCORPORATED

2015

SCHEDULE ATTACHED TO 990-PF, PART XV, LINE 3(a)

Grants and Contributions Paid During the Year (continued)

| <u>Name</u> | <u>Relationship</u> | <u>Purpose</u> | <u>Amount</u> |
|------------------------------------------------------------------------------------------------------------------------------------|---------------------|------------------------------------------------------------|-----------------|
| <u>Non-Cash Awards & Contributions</u> | | | |
| Scholarship Awards Luncheon and dinner for award recipients previously listed | None | Encourage both academic excellence and a college education | 5,414 |
| Five new school Award Plaques for the Eleanor F. Moore, Paul W. Broggi and Senior Science Award winners given to area high schools | None | Encourage both academic excellence and a college education | 500 |
| <u>Total Non-Cash Awards and Contributions</u> | | | <u>5,914</u> |
| <u>Total Contributions and Awards</u> | | | <u>\$79,414</u> |