

For calendar year 2015, or tax year beginning 10-01-2015 , and ending 09-30-2016

Name of foundation CHERYL CHASE & STUART BEAR FAMILY FOUNDATION INC		A Employer identification number 06-1562154	
Number and street (or P O box number if mail is not delivered to street address) CHASE ENTERPRISES225 ASYLUM STFL 29		Room/suite 	
City or town, state or province, country, and ZIP or foreign postal code HARTFORD, CT 06103		B Telephone number (see instructions) (860) 549-1674	
G Check all that apply ☐ Initial return ☐ Final return ☐ Address change ☐ Initial return of a former public charity ☐ Amended return ☐ Name change		C If exemption application is pending, check here ☐ D 1. Foreign organizations, check here ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ☐ E 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 (from Part II, col (c), line 16) \$ 2,362,882		J Accounting method ☐ Cash ☒ Accrual ☐ Other (specify) _____ (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) (see instructions))	Revenue and expenses per books (a)	Net investment income (b)	Adjusted net income (c)	Disbursements for charitable purposes (d) (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)	1,012,904			
	2 Check ☐ if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	2	2		
	4 Dividends and interest from securities	95,192	95,192		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10 _____	577,500			
	b Gross sales price for all assets on line 6a _____ 577,500				
	7 Capital gain net income (from Part IV, line 2)		577,500		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances _____				
Operating and Administrative Expenses	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)				
	12 Total. Add lines 1 through 11	1,685,598	672,694		
	13 Compensation of officers, directors, trustees, etc	0	0		0
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule).				
	b Accounting fees (attach schedule).	8,300	7,470		825
	c Other professional fees (attach schedule)				
	17 Interest	12,904	0		0
	18 Taxes (attach schedule) (see instructions)	2,000	0		0
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings.				
	22 Printing and publications				
	23 Other expenses (attach schedule).	300	300		0
	24 Total operating and administrative expenses. Add lines 13 through 23	23,504	7,770		825
	25 Contributions, gifts, grants paid	682,768			682,768
	26 Total expenses and disbursements. Add lines 24 and 25	706,272	7,770		683,593
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	979,326			
	b Net investment income (if negative, enter -0-)		664,924		
	c Adjusted net income (if negative, enter -0-)				

Part II		Balance Sheets	Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)	Beginning of year	End of year	
				(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing		318	16,050	16,050
	2	Savings and temporary cash investments		538	48,932	48,932
	3	Accounts receivable ▶ _____ Less allowance for doubtful accounts ▶ _____				
	4	Pledges receivable ▶ _____ Less allowance for doubtful accounts ▶ _____				
	5	Grants receivable				
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions).				
	7	Other notes and loans receivable (attach schedule) ▶ _____ Less allowance for doubtful accounts ▶ _____				
	8	Inventories for sale or use				
	9	Prepaid expenses and deferred charges				
	10a	Investments—U S and state government obligations (attach schedule)				
	b	Investments—corporate stock (attach schedule)	1,319,310	1,319,310	2,297,900	
	c	Investments—corporate bonds (attach schedule)				
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____				
	12	Investments—mortgage loans				
	13	Investments—other (attach schedule)				
	14	Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____				
15	Other assets (describe ▶ _____)					
16	Total assets(to be completed by all filers—see the instructions Also, see page 1, item I)	1,320,166	1,384,292	2,362,882		
Liabilities	17	Accounts payable and accrued expenses	8,250	8,300		
	18	Grants payable				
	19	Deferred revenue				
	20	Loans from officers, directors, trustees, and other disqualified persons	2,158,390	1,243,140		
	21	Mortgages and other notes payable (attach schedule).				
	22	Other liabilities (describe ▶ _____)				
	23	Total liabilities(add lines 17 through 22)	2,166,640	1,251,440		
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ ☒ and complete lines 24 through 26 and lines 30 and 31.					
	24	Unrestricted	-846,474	132,852		
	25	Temporarily restricted				
	26	Permanently restricted				
	Foundations that do not follow SFAS 117, check here ▶ ☐ and complete lines 27 through 31.					
	27	Capital stock, trust principal, or current funds				
	28	Paid-in or capital surplus, or land, bldg, and equipment fund				
	29	Retained earnings, accumulated income, endowment, or other funds				
	30	Total net assets or fund balances(see instructions)	-846,474	132,852		
31	Total liabilities and net assets/fund balances(see instructions)	1,320,166	1,384,292			

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	-846,474
2	Enter amount from Part I, line 27a	2	979,326
3	Other increases not included in line 2 (itemize) ▶ _____	3	0
4	Add lines 1, 2, and 3	4	132,852
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	132,852

Part IV

Capital Gains and Losses for Tax on Investment Income

List and describe the kind(s) of property sold (e g , real estate, (a) 2-story brick warehouse, or common stock, 200 shs MLC Co)		How acquired P—Purchase (b) D—Donation	Date acquired (c) (mo , day, yr)	Date sold (d) (mo , day, yr)
1 a	55,000 SH OF UIL HOLDINGS CORPORATION	P	2000-03-16	2015-12-17
b				
c				
d				
e				

(e) Gross sales price	Depreciation allowed (f) (or allowable)	Cost or other basis (g) plus expense of sale	Gain or (loss) (h) (e) plus (f) minus (g)
a 577,500			577,500
b			
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h)) (l)
(i) F M V as of 12/31/69	Adjusted basis (j) as of 12/31/69	Excess of col (i) (k) over col (j), if any	
a			577,500
b			
c			
d			
e			

2	Capital gain net income or (net capital loss)	If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7	2	577,500
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8		3	

Part V

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

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income)
If section 4940(d)(2) applies, leave this part blank

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

1 Enter the appropriate amount in each column for each year, see 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	354,119	2,544,274	0 139183
2013	300,003	2,036,541	0 147310
2012	533,593	2,073,240	0 257372
2011	326,743	1,903,283	0 171673
2010	526,430	1,714,298	0 307082

2	Total of line 1, column (d).	2	1 022620
3	Average distribution ratio for the 5-year base period—divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	0 204524
4	Enter the net value of noncharitable-use assets for 2015 from Part X, line 5.	4	2,617,068
5	Multiply line 4 by line 3.	5	535,253
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	6,649
7	Add lines 5 and 6.	7	541,902
8	Enter qualifying distributions from Part XII, line 4.	8	683,593

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 VII

Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the instructions)

1a		Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1 Date of ruling or determination letter _____ (attach copy of letter if necessary—see instructions)			
b		Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☒ and enter 1% of Part I, line 27b		1	6,649
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	6,649
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	6,649
6		Credits/Payments			
a		2015 estimated tax payments and 2014 overpayment credited to 2015	6a	2,200	
b		Exempt foreign organizations—tax withheld at source	6b		
c		Tax paid with application for extension of time to file (Form 8868).	6c	12,000	
d		Backup withholding erroneously withheld	6d		
7		Total credits and payments. Add lines 6a through 6d.		7	14,200
8		Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached.		8	
9		Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed		9	
10		Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid.		10	7,551
11		Enter the amount of line 10 to be Credited to 2015 estimated tax ☐ 7,551 Refunded ☐		11	0

Part VII-A

Statements Regarding Activities

1a		During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?			Yes	No
		1a				No
b		Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for 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		1b		No
c		Did the foundation file Form 1120-POL for this year?		1c		No
d		Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation ☐ \$ _____ 0 (2) On foundation managers ☐ \$ _____ 0				
e		Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ☐ \$ _____ 0				
2		Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities		2		No
3		Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		3		No
4a		Did the foundation have unrelated business gross income of \$1,000 or more during the year?		4a		No
b		If "Yes," has it filed a tax return on Form 990-T for this year?		4b		
5		Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T		5		No
6		Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?		6	Yes	
7		Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), and Part XV		7	Yes	
8a		Enter the states to which the foundation reports or with which it is registered (see instructions) ☐ CT				
b		If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation .		8b	Yes	
9		Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2015 or the taxable year beginning in 2015 (see instructions for Part XIV)? If "Yes," complete Part XIV		9		No
10		Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		10		No

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions).	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► <u>N/A</u>	13	Yes	
14	The books are in care of ► <u>JOHN P REDDING</u> Telephone no ► <u>(860) 549-1674</u> Located at ► <u>GOODWIN SQ 225 ASYLUM ST 29TH FL HARTFORD CT</u> ZIP+4 ► <u>06103</u>			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here ► ☐ and enter the amount of tax-exempt interest received or accrued during the year ► 15			
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?	16	Yes	No
See instructions for exceptions and filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR) 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? ☐ Yes ☒ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☒ Yes ☐ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☒ Yes ☐ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☒ Yes ☐ No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☒ No			
	(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days). ☐ Yes ☒ No			
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? 1b			No
	Organizations relying on a current notice regarding disaster assistance check here. ► ☐			
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			No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2015, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2015? ☐ Yes ☒ No If "Yes," list the years ► 20____, 20____, 20____, 20____			
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions). 2b			
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ► 20____, 20____, 20____, 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☒ No			
b	If "Yes," did it have excess business holdings in 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? (<i>Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2015</i>). 3b			
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2015?	4b		No

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

5a During the year did the foundation pay or incur any amount to

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☒ No

(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☒ No

(3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☒ No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? (see instructions). ☐ Yes ☒ No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☒ No

b If any answer is "Yes" to 5a(1)–(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)? ☐ Yes ☒ No **5b**

Organizations relying on a current notice regarding disaster assistance check here. ☐

c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? ☐ Yes ☒ No

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

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? ☐ Yes ☒ No

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? ☐ Yes ☒ No **6b** **No**

If "Yes" to 6b, file Form 8870

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☒ No

b If yes, did the foundation receive any proceeds or have any net income attributable to the transaction? ☐ Yes ☒ No **7b**

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors**1 List all officers, directors, trustees, foundation managers and their compensation (see instructions).**

(a) Name and address	Title, and average hours per week (b) devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances
CHERYL A CHASE	PRESIDENT/CHAIRMAN	0	0	0
C/O CHASE ENT 225 ASYLUM ST29TH FL HARTFORD, CT 06103	5 00			
JOHN P REDDING	SECRETARY/DIRECTOR	0	0	0
C/O CHASE ENT 225 ASYLUM ST29TH FL HARTFORD, CT 06103	1 00			
DAVID T CHASE DECEASED	DIRECTOR	0	0	0
C/O CHASE ENT 225 ASYLUM ST29TH FL HARTFORD, CT 06103	1 00			

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

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

Total number of other employees paid over \$50,000. ☐ **0**

Part VIII

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

3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE".

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		

Total number of others receiving over \$50,000 for professional services. 0

Part IX-A

Summary of Direct Charitable Activities

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

Part IX-B

Summary of Program-Related Investments (see instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1	
2	
All other program-related investments. See instructions.	
3	

Total. Add lines 1 through 3 0

Part X Minimum Investment Return

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes		
a	Average monthly fair market value of securities.	1a	2,357,163
b	Average of monthly cash balances.	1b	299,759
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	2,656,922
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	2,656,922
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	39,854
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	2,617,068
6	Minimum investment return. Enter 5% of line 5.	6	130,853

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	130,853
2a	Tax on investment income for 2015 from Part VI, line 5.	2a	6,649
b	Income tax for 2015 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	6,649
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	124,204
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	124,204
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	124,204

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	683,593
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	683,593
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see instructions).	5	6,649
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	676,944

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				124,204
2 Undistributed income, if any, as of the end of 2015				
a Enter amount for 2014 only.			0	
b Total for prior years 20____, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2015				
a From 2010.	442,481			
b From 2011.	233,333			
c From 2012.	431,673			
d From 2013.	199,922			
e From 2014.	228,651			
f Total of lines 3a through e.	1,536,060			
4 Qualifying distributions for 2015 from Part XII, line 4 ► \$ 683,593				
a Applied to 2014, but not more than line 2a			0	
b Applied to undistributed income of prior years (Election required—see instructions).		0		
c Treated as distributions out of corpus (Election required—see instructions).	0			
d Applied to 2015 distributable amount.				124,204
e Remaining amount distributed out of corpus	559,389			
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:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	2,095,449			
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 instructions			0	
f Undistributed income for 2016 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2015				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions).	0			
8 Excess distributions carryover from 2010 not applied on line 5 or line 7 (see instructions). . .	442,481			
9 Excess distributions carryover to 2016. Subtract lines 7 and 8 from line 6a	1,652,968			
10 Analysis of line 9				
a Excess from 2011. . . .	233,333			
b Excess from 2012. . . .	431,673			
c Excess from 2013. . . .	199,922			
d Excess from 2014. . . .	228,651			
e Excess from 2015. . . .	559,389			

Part XIV

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b Check box to indicate whether the organization

Tax year	Prior 3 years			(e) Total
(a) 2015	(b) 2014	(c) 2013	(d) 2012	

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Part XV

1 Information Regarding Foundation Managers

Contributed more than 2% of the total contributions received by the foundation
 (or have contributed more than \$5,000) (See section 507(d)(2))

10% or more of the stock of a corporation (or an equally large portion of the
which the foundation has a 10% or greater interest

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

Contributions to preselected charitable organizations and does not accept
makes gifts, grants, etc (see instructions) to individuals or organizations under

-mail address of the person to whom applications should be addressed

mitted and information and materials they should include

as by geographical areas, charitable fields, kinds of institutions, or other

Part XV

Supplementary Information(continued)

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year See Additional Data Table				
Total			3a	682,768
b Approved for future payment				
Total			3b	0

Enter gross amounts unless otherwise indicated

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

Form **990-PF** (2015)

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)	No
(2) Other assets.	1a(2)	No
b Other transactions		
(1) Sales of assets to a noncharitable exempt organization.	1b(1)	No
(2) Purchases of assets from a noncharitable exempt organization.	1b(2)	No
(3) Rental of facilities, equipment, or other assets.	1b(3)	No
(4) Reimbursement arrangements.	1b(4)	No
(5) Loans or loan guarantees.	1b(5)	No
(6) Performance of services or membership or fundraising solicitations.	1b(6)	No
c Sharing of facilities, equipment, mailing lists, other assets, or paid employees.	1c	No
d If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received		

[illegible]

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? ☐ Yes
☒ No

b If "Yes," complete the following schedule

(a) Name of organization	(b) Type of organization	(c) Description of relationship

Sign Here	Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.		
	***** 2017-05-15 *****	▶	Title
	Signature of officer or trustee	Date	May the IRS discuss this return with the preparer shown below? (see instr.)? ☐ Yes ☐ No

Paid Preparer Use Only	Print/Type preparer's name	Preparer's Signature	Date	Check if self-employed ☐	PTIN
	Firm's name ▶			Firm's EIN ▶	
	Firm's address ▶			Phone no	

Form 990PF Part XV Line 1a - List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000).

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
AMERICAN HEART ASSOCIATION 7272 GREENVILLE AVENUE DALLAS, TX 752315129	N/A	PUBLIC CHARITY	2016 GREATER HARTFORD GALA	3,000
AMERICAN LIVER FOUNDATION 127 WASHINGTON AVENUE NORTH HAVEN, CT 064731715	N/A	PUBLIC CHARITY	LIVER LIFE WALK - HARTFORD	1,500
ANTI-DEFAMATION LEAGUE 1952 WHITNEY AVENUE 3RD FLOOR HAMDEN, CT 065171209	N/A	PUBLIC CHARITY	UNRESTRICTED PURPOSE	3,333
BROADWAY CARES 165 WEST 46TH STREET NEW YORK, NY 100143807	N/A	PUBLIC CHARITY	UNRESTRICTED PURPOSE	150
BROOKLYN MUSEUM 200 EASTERN PARKWAY BROOKLYN, NY 112386052	N/A	PUBLIC CHARITY	UNRESTRICTED PURPOSE	125
Total ▶ 3a				682,768

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
CHOATE ROSEMARY HALL 333 CHRISTIAN STREET WALLINGFORD, CT 064923818	N/A	PUBLIC CHARITY	PARENTS AND GRANDPARENTS GIVING	1,000
CONGREGATION BETH ISRAEL 701 FARMINGTON AVENUE WEST HARTFORD, CT 061191799	N/A	PUBLIC CHARITY	RABBI'S LIFELONG LEARNING FUND	250
CONGREGATION BETH ISRAEL 701 FARMINGTON AVENUE WEST HARTFORD, CT 061191799	N/A	PUBLIC CHARITY	HIGH HOLIDAY FUNDRAISING APPEAL	1,800
CONGREGATION BETH ISRAEL-SISTERHOOD 701 FARMINGTON AVENUE WEST HARTFORD, CT 061191799	N/A	PUBLIC CHARITY	YES FUND	54
CONNECTICUT APPLESEED 25 DUDLEY ROAD WILTON, CT 068973508	N/A	PUBLIC CHARITY	IN HONOR OF CHARLES KLIPPEL	833
Total ▶ 3a				682,768

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
CONNECTICUT BAR FOUNDATION 31 PRATT STREET HARTFORD,CT 061031631	N/A	PUBLIC CHARITY	2016 SUSTAINING LIFE FELLOW	250
CONNECTICUT CHILDREN'S MEDICAL CENTER 282 WASHINGTON STREET HARTFORD,CT 061063322	N/A	PUBLIC CHARITY	HOLDING ACCOUNT	230,000
CONNECTICUT CHILDREN'S MEDICAL CENTER 282 WASHINGTON STREET HARTFORD,CT 061063322	N/A	PUBLIC CHARITY	CAPITAL EQUIPMENT-RESTRICTED	20,000
CONNECTICUT FOOD BANK PO BOX 8686 NEW HAVEN,CT 065310686	N/A	PUBLIC CHARITY	UNRESTRICTED PURPOSE	450
CONNECTICUT SCIENCE CENTER 250 COLUMBUS BOULEVARD HARTFORD,CT 061032802	N/A	PUBLIC CHARITY	SCIENCE FORWARD CAMPAIGN,DNA AND GENOMICS EXHIBIT	150,000
Total ▶ 3a				682,768

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a <i>Paid during the year</i>				
CONNECTICUT SCIENCE CENTER 250 COLUMBUS BOULEVARD HARTFORD, CT 061032802	N/A	PUBLIC CHARITY	GREEN GALA	7,000
CONNECTICUT WOMEN'S EDUCATION AND LEGAL FUND ONE HARTFORD SQUARE WEST SUITE 1-300 HARTFORD, CT 061061953	N/A	PUBLIC CHARITY	ONE WOMAN MAKES A DIFFERENCE	325
CONNECTICUT WOMEN'S EDUCATION AND LEGAL FUND ONE HARTFORD SQUARE WEST SUITE 1-300 HARTFORD, CT 061061953	N/A	PUBLIC CHARITY	UNRESTRICTED PURPOSE	500
CONNECTICUT WOMEN'S HALL OF FAME 320 FITCH STREET NEW HAVEN, CT 065151306	N/A	PUBLIC CHARITY	ANNUAL FUND	500
FIDELCO GUIDE DOG FOUNDATION 103 VISION WAY BLOOMFIELD, CT 060025322	N/A	PUBLIC CHARITY	UNRESTRICTED PURPOSE	100
Total ▶ 3a				682,768

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
FLORENCE GRISWOLD MUSEUM 96 LYME STREET OLD LYME, CT 063711426	N/A	PUBLIC CHARITY	UNRESTRICTED PURPOSE	500
FOODSHARE 450 WOODLAND AVENUE BLOOMFIELD, CT 060021342	N/A	PUBLIC CHARITY	ANNUAL FOOD DRIVE	1,000
GREATER HARTFORD ARTS COUNCIL 100 PEARL STREET HARTFORD, CT 061034509	N/A	PUBLIC CHARITY	UNRESTRICTED PURPOSE	2,500
HARTFORD HOSPITAL 80 SEYMOUR STREET HARTFORD, CT 061025037	N/A	PUBLIC CHARITY	HELEN & HARRY GRAY CANCER CENTER FUND	250
HARTFORD STAGE 50 CHURCH STREET HARTFORD, CT 061031201	N/A	PUBLIC CHARITY	PRODUCTION SPONSORSHIP OF ANASTASIA	25,000
Total ▶ 3a				682,768

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
HARTFORD SYMPHONY ORCHESTRA 166 CAPITOL AVENUE HARTFORD,CT 061061629	N/A	PUBLIC CHARITY	ANNUAL FUND	5,000
HUDSON RIVER MUSEUM 511 WARBURTON AVENUE YONKERS,NY 107011801	N/A	PUBLIC CHARITY	GALA - LIGHTER THAN AIR	1,000
JEWISH FEDERATION OF GREATER HARTFORD 333 BLOOMFIELD AVENUE SUITE C WEST HARTFORD,CT 061171500	N/A	PUBLIC CHARITY	UNRESTRICTED PURPOSE	5,000
JORDAN PORCO FUNDATION 225 ASYLUM ST 12TH FLOOR HARTFORD,CT 061031534	N/A	PUBLIC CHARITY	UNRESTICTED PURPOSE	500
JUNIOR ACHIEVEMENT OF SOUTHWEST NEW ENGLAND 70 FARMINGTON AVENUE HARTFORD,CT 061051538	N/A	PUBLIC CHARITY	GOLDEN FUND	500
Total ▶ 3a				682,768

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
JUNIOR ACHIEVEMENT OF SOUTHWEST NEW ENGLAND 70 FARMINGTON AVENUE HARTFORD,CT 061051538	N/A	PUBLIC CHARITY	HARTFORD HALL OF FAME	1,500
JUVENILE DIABETES RESEARCH FOUNDATION 20 BATTERSON PARK ROAD 3RD FLOOR FARMINGTON,CT 060324502	N/A	PUBLIC CHARITY	UNRESTRICTED PURPOSE	3,334
KINGSWOOD OXFORD 170 KINGSWOOD ROAD WEST HARTFORD,CT 061191430	N/A	PUBLIC CHARITY	KO FUND	5,000
LITERACY VOLUNTEERS OF GREATER HARTFORD 30 ARBOR STREET HARTFORD,CT 061061374	N/A	PUBLIC CHARITY	2015-16 ANNUAL FUND	250
LOAVES AND FISHES MINISTRIES INC 649 PROSPECT AVENUE HARTFORD,CT 061051230	N/A	PUBLIC CHARITY	THANKSGIVING CERTIFICATE	100
Total ▶ 3a				682,768

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
MERCY HOUSING AND SHELTER CORPORATION 211 WETHERSFIELD AVENUE HARTFORD,CT 061141148	N/A	PUBLIC CHARITY	2016 DREAMS CAN COME TRUE GALA	3,500
MUSEUM OF FINE ARTS BOSTON 465 HUNTINGTON AVENUE BOSTON,MA 021155523	N/A	PUBLIC CHARITY	PATRON PROGRAM	3,000
MUSEUM OF JEWISH HERITAGE 36 BATTERY PLACE NEW YORK,NY 102801502	N/A	PUBLIC CHARITY	UNRESTRICTED PURPOSE	180
NATIONAL CONFERENCE FOR COMMUNITY AND JUSTICE 820A PROSPECT HILL ROAD WINDSOR,CT 060951559	N/A	PUBLIC CHARITY	ANNUAL HUMAN RELATIONS AWARD BANQUET	1,667
NATIONAL MUSEUM OF WOMEN IN THE ARTS 1250 NEW YORK AVENUE NW WASHINGTON,DC 200053970	N/A	PUBLIC CHARITY	UNRESTRICTED PURPOSE	550
Total ▶ 3a				682,768

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
NEW BRITAIN MUSEUM OF AMERICAN ART 56 LEXINGTON STREET NEW BRITAIN, CT 060521412	N/A	PUBLIC CHARITY	SPRING GALA SPONSORSHIP	3,333
NEW BRITAIN MUSEUM OF AMERICAN ART 56 LEXINGTON STREET NEW BRITAIN, CT 060521412	N/A	PUBLIC CHARITY	UNRESTRICTED PURPOSE	10,000
NEW BRITAIN MUSEUM OF AMERICAN ART 56 LEXINGTON STREET NEW BRITAIN, CT 060521412	N/A	PUBLIC CHARITY	THE ART OF WINE & FOOD EVENT	900
NEW YORK-PRESBYTERIAN HOSPITAL 654 WEST 170TH STREET NEW YORK, NY 100323501	N/A	PUBLIC CHARITY	UNRESTRICTED PURPOSE	250
PANCREATIC CANCER ACTION NETWORK 1500 ROSECRANS AVENUE SUITE 200 MANHATTAN BEACH, CA 902663721	N/A	PUBLIC CHARITY	UNRESTRICTED PURPOSE	500
Total ▶ 3a				682,768

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
PARKINSON'S DISEASE FOUNDATION 1359 BROADWAY SUITE 1509 NEW YORK, NY 100187867	N/A	PUBLIC CHARITY	UNRESTRICTED PURPOSE	500
PEABODY ESSEX MUSEUM 161 ESSEX STREET SALEM, MA 019703726	N/A	PUBLIC CHARITY	UNRESTRICTED PURPOSE	400
PLANNED PARENTHOOD FEDERATION OF AMERICA 123 WILLIAM STREET NEW YORK, NY 100383804	N/A	PUBLIC CHARITY	UNRESTRICTED PURPOSE	250
RABBI EMERITUS DISCRETIONARY FUND 15 LEWIS STREET HARTFORD, CT 061031201	N/A	PUBLIC CHARITY	PUBLISHING OF THE BOOK "THE SABBATH"	1,000
RONALD MCDONALD HOUSE OF SPRINGFIELD 34 CHAPIN TERRACE SPRINGFIELD, MA 011071704	N/A	PUBLIC CHARITY	UNRESTRICTED PURPOSE	100
Total ▶ 3a				682,768

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
SIMON WIESENTHAL CENTER 1399 SOUTH ROXBURY DRIVE LOS ANGELES, CA 900354709	N/A	PUBLIC CHARITY	UNRESTRICTED PURPOSE	600
THE BUSHNELL CENTER FOR THE PERFORMING ARTS 166 CAPITOL AVENUE HARTFORD, CT 061061621	N/A	PUBLIC CHARITY	2015-2016 ANNUAL FUND	15,000
THE CHILDREN'S LAW CENTER OF CONNECTICUT 30 ARBOR STREET 4TH FLOOR HARTFORD, CT 061061215	N/A	PUBLIC CHARITY	IMAGINE 2015 CELEBRATING CHILDREN	1,500
THE FIRST TEE CONNECTICUT 55 GOLF CLUB ROAD CROMWELL, CT 064161539	N/A	PUBLIC CHARITY	SCHOLARSHIP FUND	250
THE GAYLORD FUND PO BOX 400 WALLINGFORD, CT 064927048	N/A	PUBLIC CHARITY	UNRESTRICTED PURPOSE	500
Total ▶ 3a				682,768

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
THE HOLE IN THE WALL GANG CAMP 555 LONG WHARF DRIVE NEW HAVEN,CT 065116107	N/A	PUBLIC CHARITY	UNRESTRICTED PURPOSE	250
THE HOUSE OF BREAD 1453 MAIN STREET HARTFORD,CT 061202726	N/A	PUBLIC CHARITY	UNRESTRICTED PURPOSE	500
THE JEWISH MUSEUM 1109 FIFTH AVENUE NEW YORK,NY 101280118	N/A	PUBLIC CHARITY	UNRESTRICTED PURPOSE	1,000
THE MANDELL JEWISH COMMUNITY CENTER 335 BLOOMFIELD AVENUE WEST HARTFORD,CT 061171500	N/A	PUBLIC CHARITY	JCC SCHOLARSHIP TOURNAMENT REFRESHMENT CART SPONSOR	1,000
THE MANDELL JEWISH COMMUNITY CENTER 335 BLOOMFIELD AVENUE WEST HARTFORD,CT 061171500	N/A	PUBLIC CHARITY	PILLARS SOCIETY	10,000
Total ▶ 3a				682,768

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
THE MARK TWAIN HOUSE & MUSEUM 351 FARMINGTON AVENUE HARTFORD,CT 061054401	N/A	PUBLIC CHARITY	UNRESTRICTED PURPOSE	1,000
THE METROPOLITAN MUSEUM OF ART 1000 FIFTH AVENUE NEW YORK,NY 100280198	N/A	PUBLIC CHARITY	UNRESTRICTED PURPOSE	600
THE MUSEUM OF MODERN ART 11 WEST 53 STREET NEW YORK,NY 100195401	N/A	PUBLIC CHARITY	UNRESTRICTED PURPOSE	600
THE SOCIETY OF THE FOUR ARTS 2 FOUR ARTS PLAZA PALM BEACH,FL 334804102	N/A	PUBLIC CHARITY	LIBRARY RENOVATION PROJECT	250
THE SOLOMON SCHECHTER DAY SCHOOL OF GREATER HARTFORD 26 BUENA VISTA ROAD WEST HARTFORD,CT 061073216	N/A	PUBLIC CHARITY	F O S S CAMPAIGN	250
Total ▶ 3a				682,768

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
THE STERLING AND FRANCINE CLARK ART INSTITUTE 225 SOUTH STREET WILLIAMSTOWN,MA 012679951	N/A	PUBLIC CHARITY	UNRESTRICTED PURPOSE	100
THEATERWORKS 233 PEARL STREET HARTFORD,CT 061031201	N/A	PUBLIC CHARITY	HOFFMAN STUDIO	1,000
THEATERWORKS 233 PEARL STREET HARTFORD,CT 061031201	N/A	PUBLIC CHARITY	PRODUCTION OF "RELATIVITY"	10,000
THEATERWORKS 233 PEARL STREET HARTFORD,CT 061031201	N/A	PUBLIC CHARITY	PRODUCTION OF "BUYER & CELLAR"	5,000
TUFTS UNIVERSITY 80 GEORGE STREET MEDFORD,MA 021555519	N/A	PUBLIC CHARITY	FUND FOR ARTS & SCIENCES	50,000
Total ▶ 3a				682,768

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
UCONN FOUNDATION 2390 ALUMNI DRIVE UNIT 3206 STORRS,CT 062693206	N/A	PUBLIC CHARITY	UNRESTRICTED PURPOSE	250
UCONN FOUNDATION 2390 ALUMNI DRIVE UNIT 3206 STORRS,CT 062693206	N/A	PUBLIC CHARITY	UCONN HEALTH CENTER GALA (ANNUAL WHITE COAT GALA)	1,667
UCONN LAW SCHOOL FOUNDATION 45 ELIZABETH STREET HARTFORD,CT 061052213	N/A	PUBLIC CHARITY	LAW SCHOOL ANNUAL FUND	5,000
UNITED STATES HOLOCAUST MEMORIAL MUSEUM 100 RAOUL WALLENBERG PLACE SW WASHINGTON,DC 200242126	1667	PUBLIC CHARITY	UNRESTRICTED PURPOSE	1,667
UNITED WAY OF CENTRAL AND NORTHEASTERN CONNECTICUT 30 LAUREL STREET HARTFORD,CT 061061374	N/A	PUBLIC CHARITY	UNRESTRICTED PURPOSE	10,000
Total ▶ 3a				682,768

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
WADSWORTH ATHENEUM MUSEUM OF ART 600 MAIN STREET HARTFORD,CT 061032990	N/A	PUBLIC CHARITY	UNRESTRICTED PURPOSE	50,000
WADSWORTH ATHENEUM MUSEUM OF ART 600 MAIN STREET HARTFORD,CT 061032990	N/A	PUBLIC CHARITY	SPLENDOR IX GALA	5,000
WADSWORTH ATHENEUM MUSEUM OF ART 600 MAIN STREET HARTFORD,CT 061032990	N/A	PUBLIC CHARITY	DIRECTOR'S DISCRETIONARY FUND	10,000
WHITE PLAINS HOSPITAL FOUNDATION 41 EAST POST ROAD WHITE PLAINS,NY 106014607	N/A	PUBLIC CHARITY	UNRESTRICTED PURPOSE	500
WHITNEY MUSEUM OF AMERICAN ART 99 GANSEVOORT STREET NEW YORK,NY 100142790	N/A	PUBLIC CHARITY	UNRESTRICTED PURPOSE	250
Total ▶ 3a				682,768

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
WORLD VISION PO BOX 70102 TACOMA,WA 984810102	N/A	PUBLIC CHARITY	AFRICA WATER	200
WOUNDED WARRIOR PROJECT PO BOX 758540 TOPEKA,KS 666758540	N/A	PUBLIC CHARITY	UNRESTRICTED PURPOSE	100
Total ▶ 3a				682,768

TY 2015 Accounting Fees Schedule

Name: CHERYL CHASE & STUART BEAR FAMILY
FOUNDATION INC

EIN: 06-1562154

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
RETURN PREPARATION FEE	8,300	7,470		825

TY 2015 All Other Program Related Investments Schedule

Name: CHERYL CHASE & STUART BEAR FAMILY
FOUNDATION INC

EIN: 06-1562154

Category	Amount
N/A	0

TY 2015 General Explanation Attachment

Name: CHERYL CHASE & STUART BEAR FAMILY
FOUNDATION INC

EIN: 06-1562154

Identifier	Return Reference	Explanation
	FORM 990-PF - STATEMENT PURSUANT TO 1 368-3(B)	STATEMENT PURSUANT TO 1 368-3(B) BY CHERYL CHASE & STUART BEAR FAMILY FOUNDATION, INC ,EMPLOYER IDENTIFICATION NUMBER 06-1562154, A SIGNIFICANT HOLDER(1) NAMES AND EMPLOYER IDENTIFICATION NUMBERS OF ALL OF THE PARTIES TO THE REORGANIZATION TARGET CORPORATION STOCK SURRENDERED UIL HOLDINGS CORPORATION, EMPLOYER IDENTIFICATION NUMBER 06-1541045COMBINED COMPANY STOCK RECEIVED AVANGRID, INC , EMPLOYER IDENTIFICATION NUMBER 14-1798693MERGER SUB GREEN MERGER SUB, INC (A WHOLLY OWNED SUBSIDIARY OF AVANGRID, INC)(2) DATE OF THE REORGANIZATION DECEMBER 16, 2015(3) FAIR MARKET VALUE, DETERMINED IMMEDIATELY BEFORE THE EXCHANGE, OF ALL THE STOCK OF THE TARGET CORPORATION THAT WAS TRANSFERRED IN THE TRANSACTION 2,755,500BASIS, DETERMINED IMMEDIATELY BEFORE THE EXCHANGE,IN THE STOCK OF THE TARGET CORPORATION 1,319,310

TY 2015 Investments Corporate Stock Schedule

Name: CHERYL CHASE & STUART BEAR FAMILY
FOUNDATION INC

EIN: 06-1562154

Name of Stock	End of Year Book Value	End of Year Fair Market Value
UIL HOLDINGS CORPORATION	0	0
AVANGRID, INC.	1,319,310	2,297,900

TY 2015 Loans from Officers Schedule

Name: CHERYL CHASE & STUART BEAR FAMILY
FOUNDATION INC

EIN: 06-1562154

Item No.	1
Lender's Name	CHERYL A CHASE
Lender's Title	OFFICER
Original Amount of Loan	1243140
Balance Due	1243140
Date of Note	
Maturity Date	
Repayment Terms	DEMAND
Interest Rate	0.000000000000
Security Provided by Borrower	NONE
Purpose of Loan	TO FUND CHARITABLE EXPENDITURES
Description of Lender Consideration	CASH
Consideration FMV	

TY 2015 Other Expenses Schedule

Name: CHERYL CHASE & STUART BEAR FAMILY
FOUNDATION INC

EIN: 06-1562154

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

TY 2015 Taxes Schedule

Name: CHERYL CHASE & STUART BEAR FAMILY
FOUNDATION INC

EIN: 06-1562154

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FEDERAL EXCISE TAX	2,000	0		0

Schedule B (Form 990, 990-EZ, or 990-PF) Department of the Treasury Internal Revenue Service	Schedule of Contributors ▶ Attach to Form 990, 990-EZ, or 990-PF ▶ Information about Schedule B (Form 990, 990-EZ, or 990-PF) and its instructions is at www.irs.gov/form990	OMB No 1545-0047 2015
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Name of the organization CHERYL CHASE & STUART BEAR FAMILY FOUNDATION INC	Employer identification number 06-1562154
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Organization type (check one)

Filers of:	Section:
Form 990 or 990-EZ	☐ 501(c)() (enter number) organization ☐ 4947(a)(1) nonexempt charitable trust not treated as a private foundation ☐ 527 political organization
Form 990-PF	☒ 501(c)(3) exempt private foundation ☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation ☐ 501(c)(3) taxable private foundation

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

General Rule

- ☒ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or other property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions.

Special Rules

- ☐ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33¹/₃% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of **(1)** \$5,000 or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I, II, and III.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Do not complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling \$5,000 or more during the year. ▶ \$ _____

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

Name of organization CHERYL CHASE & STUART BEAR FAMILY FOUNDATION INC	Employer identification number 06-1562154
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Part I Contributors (see instructions) Use duplicate copies of Part I if additional space is needed			
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	CHERYL ANNE CHASE	\$ 1,012,904	Person ☒
	C/O CHASE ENTERPRISES GOODWIN SQ 22		Payroll ☐
	HARTFORD, CT 06103		Noncash ☐ (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person ☐
			Payroll ☐
			Noncash ☐ (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person ☐
			Payroll ☐
			Noncash ☐ (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person ☐
			Payroll ☐
			Noncash ☐ (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person ☐
			Payroll ☐
			Noncash ☐ (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person ☐
			Payroll ☐
			Noncash ☐ (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person ☐
			Payroll ☐
			Noncash ☐ (Complete Part II for noncash contributions)

Name of organization CHERYL CHASE & STUART BEAR FAMILY FOUNDATION INC	Employer identification number 06-1562154
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Part III Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of *exclusively* religious, charitable, etc., contributions of \$1,000 or less for the year. (Enter this information once. See instructions.) ► \$ _____

Use duplicate copies of Part III if additional space is needed

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