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Form **990-PF**

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

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

▶ Do not enter social security numbers on this form as it may be made public.

▶ Information about Form 990-PF and its separate instructions is at *www.irs.gov/form990pf.*

OMB No 1545-0052

2016

Open to Public Inspection

For calendar year 2016 or tax year beginning , and ending

Name of foundation
ALEXANDER M. & CATHERINE M. WRIGHT CHARITABLE FOUNDATION

A Employer identification number: 04-6974050

Number and street (or P O box number if mail is not delivered to street address) / Room/suite
SHIPMAN & GOODWIN 1 CONSTITUTION PL

B Telephone number: 860-251-5000

City or town, state or province, country, and ZIP or foreign postal code
HARTFORD, CT 06103-1919

C If exemption application is pending, check here ▶ ☐

G Check all that apply: ☐ Initial return ☐ Initial return of a former public charity ☐ Final return ☐ Amended return ☐ Address change ☐ Name change

D 1 Foreign organizations, check here ▶ ☐

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

H Check type of organization: ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation

E If private foundation status was terminated under section 507(b)(1)(A), check here ▶ ☐

I Fair market value of all assets at end of year (from Part II, col (c), line 16) ▶$ 733,549.

J Accounting method: ☒ Cash ☐ Accrual ☐ Other (specify) (Part I, column (d) must be on cash basis.)

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

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))	(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 ▶ ☒ if the foundation is not required to attach Sch B				
3 Interest on savings and temporary cash investments				
4 Dividends and interest from securities	15,751.	15,751.		STATEMENT 1
5a Gross rents				
b Net rental income or (loss)				
6a Net gain or (loss) from sale of assets not on line 10	916.			
b Gross sales price for all assets on line 6a 128,847.				
7 Capital gain net income (from Part IV, line 2)		916.		
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				
12 **Total** Add lines 1 through 11	16,667.	16,667.		
Operating and Administrative Expenses				
13 Compensation of officers, directors, trustees, etc	0.	0.		0.
14 Other employee salaries and wages				
15 Pension plans, employee benefits				
16a Legal fees STMT 2	10,240.	3,072.		7,168.
b Accounting fees				
c Other professional fees				
17 Interest				
18 Taxes STMT 3	4,077.	0.		0.
19 Depreciation and depletion				
20 Occupancy				
21 Travel, conferences, and meetings				
22 Printing and publications				
23 Other expenses STMT 4	100.	100.		0.
24 **Total operating and administrative expenses** Add lines 13 through 23	14,417.	3,172.		7,168.
25 Contributions, gifts, grants paid	34,000.			34,000.
26 **Total expenses and disbursements** Add lines 24 and 25	48,417.	3,172.		41,168.
27 Subtract line 26 from line 12.				
a Excess of revenue over expenses and disbursements	-31,750.			
b **Net investment income** (if negative, enter -0-)		13,495.		
c **Adjusted net income** (if negative, enter -0-)			N/A	

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Form **990-PF** (2016)

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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	200.	200.	200.
	2 Savings and temporary cash investments	70,986.	43,579.	43,579.
	3 Accounts receivable ▶			
	Less: allowance for doubtful accounts ▶			
	4 Pledges receivable ▶			
	Less: allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons			
	7 Other notes and loans receivable ▶			
	Less: allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments - U.S and state government obligations			
	b Investments - corporate stock STMT 6	503,270.	487,713.	563,360.
	c Investments - corporate bonds			
	11 Investments - land, buildings and equipment basis ▶			
	Less accumulated depreciation ▶			
	12 Investments - mortgage loans			
	13 Investments - other STMT 7	117,227.	128,438.	126,410.
	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)	691,683.	659,930.	733,549.
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 ▶ ☐ 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 ▶ [X] and complete lines 27 through 31			
	27 Capital stock, trust principal, or current funds	0.	0.	
	28 Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
	29 Retained earnings, accumulated income, endowment, or other funds	691,683.	659,930.	
	30 **Total net assets or fund balances**	691,683.	659,930.	
	31 **Total liabilities and net assets/fund balances**	691,683.	659,930.	

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	691,683.
2	Enter amount from Part I, line 27a	2	-31,750.
3	Other increases not included in line 2 (itemize) ▶	3	0.
4	Add lines 1, 2, and 3	4	659,933.
5	Decreases not included in line 2 (itemize) ▶ SEE STATEMENT 5	5	3.
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	659,930.

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	SEE STATEMENT ATTACHED	P		
b	CAPITAL GAINS DIVIDENDS			
c				
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	127,281.		127,931.	-650.
b	1,566.			1,566.
c				
d				
e				

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

	(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a				-650.
b				1,566.
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 — 916.

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))
2015	40,980.	798,338.	.051332
2014	42,560.	805,374.	.052845
2013	36,440.	731,863.	.049791
2012	40,780.	686,055.	.059441
2011	36,468.	677,855.	.053799

2	**Total** of line 1, column (d)	2	.267208
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	.053442
4	Enter the net value of noncharitable-use assets for 2016 from Part X, line 5	4	727,860.
5	Multiply line 4 by line 3	5	38,898.
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	135.
7	Add lines 5 and 6	7	39,033.
8	Enter qualifying distributions from Part XII, line 4	8	41,168.

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 ▶ [ ] 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 ▶ [X] and enter 1% of Part I, line 27b	1	135.
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	135.
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	135.
6	Credits/Payments:		
a	2016 estimated tax payments and 2015 overpayment credited to 2016 — 6a: 2,800.		
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	2,800.
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	2,665.
11	Enter the amount of line 10 to be: **Credited to 2017 estimated tax** ▶ 160. **Refunded** ▶	11	2,505.

Part VII-A Statements Regarding Activities

		Line	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?	1a		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*	1b		X
c	Did the foundation file **Form 1120-POL** for this year?	1c		X
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. ▶ $ 0. (2) On foundation managers. ▶ $ 0.			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ $ 0.			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? *If "Yes," attach a detailed description of the activities.*	2		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*	3		X
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		X
b	If "Yes," has it filed a tax return on **Form 990-T** for this year? N/A	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		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?	6	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*	7	X	
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	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 2016 or the taxable year beginning in 2016 (see instructions for Part XIV)? *If "Yes," complete Part XIV*	9		X
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10		X

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)	11		X
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	

Website address ▶ N/A

14 The books are in care of ▶ SHIPMAN & GOODWIN LLP Telephone no. ▶ 860-251-5000
Located at ▶ ONE CONSTITUTION PLAZA, HARTFORD, CT ZIP+4 ▶ 06103-1919

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

			Yes	No
16	At any time during calendar year 2016, 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		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?	☐ 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)?	N/A	1b		
	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 2016?		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 2016, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2016?	☐ Yes ☒ 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?	☐ Yes ☒ No			
b	If "Yes," did it have excess business holdings in 2016 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 2016.)*	N/A	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		4a		X
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2016?		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)? N/A | 5b |

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

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

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

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

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? | 6b | | X

If "Yes" to 6b, file Form 8870

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

b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction? N/A | 7b |

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

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

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
JAMES T BETTS C/O SHIPMAN & GOODWIN LLP, 1 CONSTITU HARTFORD, CT 06103-1919	TRUSTEE 0.40	0.	0.	0.

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

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

Total number of other employees paid over $50,000 ▶ 0

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

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

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

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

Part IX-A Summary of Direct Charitable Activities

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

Part IX-B Summary of Program-Related Investments

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.	Amount
1 N/A	
2	
All other program-related investments. See instructions.	
3	
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	698,302.
b	Average of monthly cash balances	1b	40,642.
c	Fair market value of all other assets	1c	
d	**Total** (add lines 1a, b, and c)	1d	738,944.
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	738,944.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	11,084.
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3. Enter here and on Part V, line 4	5	727,860.
6	**Minimum investment return.** Enter 5% of line 5	6	36,393.

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	36,393.
2a	Tax on investment income for 2016 from Part VI, line 5	2a	135.		
b	Income tax for 2016. (This does not include the tax from Part VI.)	2b			
c	Add lines 2a and 2b			2c	135.
3	Distributable amount before adjustments. Subtract line 2c from line 1			3	36,258.
4	Recoveries of amounts treated as qualifying distributions			4	0.
5	Add lines 3 and 4			5	36,258.
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	36,258.

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	41,168.
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	41,168.
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	135.
6	**Adjusted qualifying distributions** Subtract line 5 from line 4	6	41,033.

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 2015	(c) 2015	(d) 2016
1 Distributable amount for 2016 from Part XI, line 7				36,258.
2 Undistributed income, if any, as of the end of 2016				
a Enter amount for 2015 only			335.	
b Total for prior years: ____ , ____ , ____		0.		
3 Excess distributions carryover, if any, to 2016:				
a From 2011				
b From 2012				
c From 2013				
d From 2014				
e From 2015				
f **Total** of lines 3a through e	0.			
4 Qualifying distributions for 2016 from Part XII, line 4: ▶ $ 41,168.				
a Applied to 2015, but not more than line 2a			335.	
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 2016 distributable amount				36,258.
e Remaining amount distributed out of corpus	4,575.			
5 Excess distributions carryover applied to 2016 (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	4,575.			
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 2015. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2016. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2017				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 2011 not applied on line 5 or line 7	0.			
9 **Excess distributions carryover to 2017** Subtract lines 7 and 8 from line 6a	4,575.			
10 Analysis of line 9:				
a Excess from 2012				
b Excess from 2013				
c Excess from 2014				
d Excess from 2015				
e Excess from 2016 4,575.				

Part XIV Private Operating Foundations (see instructions and Part VII-A, question 9) N/A

1 a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2016, enter the date of the ruling ▶

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

	Tax year	Prior 3 years			
	(a) 2016	(b) 2015	(c) 2014	(d) 2013	(e) Total
2 a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon:					
a "Assets" alternative test - enter: (1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test - enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed					
c "Support" alternative test - enter: (1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

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

1 **Information Regarding Foundation Managers:**

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

NONE

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

NONE

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

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

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

JAMES T BETTS, TRUSTEE, 860-251-5000
C/O SHIPMAN & GOODWIN LLP, ONE CONSTITUTION PLAZA, HARTFORD, CT 06103-1919

b The form in which applications should be submitted and information and materials they should include:

BY WRITTEN REQUEST

c Any submission deadlines:

APPLICATIONS CONSIDERED ON A ROLLING BASIS IN THE ORDER RECEIVED

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

ONLY ORGANIZATIONS DESCRIBED IN SEC. 501(C)(3) OF THE IRS CODE AND QUALIFYING AS PUBLIC CHARITIES UNDER SEC. 509(A) ARE ELIGIBLE FOR GRANTS.

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				
CHARTER OAK CHAPTER, OF THE AMERICAN RED CROSS 209 FARMINGTON AVE FARMINGTON, CT 06105	NONE	PUBLIC CHARITY	UNRESTRICTED GIFT	1,000.
CONNECTICUT NATIONAL GUARD FOUNDATION, INC 360 BROAD ST HARTFORD, CT 06105-3795	NONE	PUBLIC CHARITY	UNRESTRICTED GIFT	1,000.
FINE ARTS RADIO, INC PO BOX 920 MONROE, CT 06468	NONE	PUBLIC CHARITY	UNRESTRICTED GIFT	1,000.
GREATER HARTFORD ARTS COUNCIL 45 PRATT ST HARTFORD, CT 06103	NONE	PUBLIC CHARITY	UNRESTRICTED GIFT	2,000.
HARTFORD FOUNDATION FOR PUBLIC GIVING 10 COLUMBUS BLVD, 8TH FL HARTFORD, CT 06106	NONE	PUBLIC CHARITY	UNRESTRICTED GIFT	1,000.
Total SEE CONTINUATION SHEET(S)			▶ 3a	34,000.
b Approved for future payment				
NONE				
Total			▶ 3b	0.

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.	Unrelated business income		Excluded by section 512, 513, or 514		(e)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	Related or exempt function income
1 Program service revenue:					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities			14	15,751.	
5 Net rental income or (loss) from real estate:					
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal property					
7 Other investment income					
8 Gain or (loss) from sales of assets other than inventory			18	916.	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue:					
a					
b					
c					
d					
e					
12 Subtotal Add columns (b), (d), and (e)		0.		16,667.	0.

13 **Total.** Add line 12, columns (b), (d), and (e) 13 16,667.

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

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

Line No ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes).
4	INTEREST, DIVIDEND AND OTHER INCOME FROM CASH AND SECURITIES
	PROVIDED FUNDS OUT OF WHICH CHARITABLE CONTRIBUTIONS WERE MADE.

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.

(a) Line no	(b) Amount involved	(c) Name of noncharitable exempt organization	(d) Description of transfers, transactions, and sharing arrangements
		N/A	

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

b If "Yes," complete the following schedule.

(a) Name of organization	(b) Type of organization	(c) Description of relationship
N/A		

Sign Here

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

Signature of officer or trustee: [signature] Date: 5.4.17 Title: TRUSTEE

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
BRYON W. HARMON	[signature]	5/2/17		P00237150
Firm's name ▶ SHIPMAN & GOODWIN LLP			Firm's EIN ▶ 06-0640174	
Firm's address ▶ ONE CONSTITUTION PLAZA HARTFORD, CA 06103-1919			Phone no. 860-251-5000	

Form **990-PF** (2016)

623622 11-23-16

Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

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
HARTFORD HOSPITAL 80 SEYMOUR ST HARTFORD, CT 06102	NONE	PUBLIC CHARITY	UNRESTRICTED GIFT	2,000.
MOUNT HOLYOKE COLLEGE 50 COLLEGE ST SOUTH HADLEY, MA 01075	NONE	PUBLIC CHARITY	UNRESTRICTED GIFT	8,000.
SALVATION ARMY 333 HOMESTEAD AVE HARTFORD, CT 06105	NONE	PUBLIC CHARITY	UNRESTRICTED GIFT	2,000.
THE HARTFORD SYMPHONY ORCHESTRA 99 PRATT ST HARTFORD, CT 06103	NONE	PUBLIC CHARITY	UNRESTRICTED GIFT	8,000.
UNITED WAY OF THE GREATER HARTFORD 30 LAUREL ST HARTFORD, CT 06106	NONE	PUBLIC CHARITY	UNRESTRICTED GIFT	2,000.
WADSWORTH ATHENEUM 600 MAIN ST HARTFORD, CT 06103	NONE	PUBLIC CHARITY	UNRESTRICTED GIFT	2,000.
WEST HARTFORD PUBLIC SCHOOLS 50 SOUTH MAIN ST WEST HARTFORD, CT 06107	NONE	PUBLIC CHARITY	UNRESTRICTED GIFT	1,000.
YMCA OF GREATER HARTFORD 241 TRUMBULL ST HARTFORD, CT 06103	NONE	PUBLIC CHARITY	UNRESTRICTED GIFT	2,000.
HARTFORD STAGE 50 CHURCH ST HARTFORD, CT 06103	NONE	PUBLIC CHARITY	UNRESTRICTED GIFT	1,000.
Total from continuation sheets				28,000.

623631
04-01-16

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 1

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
DIVIDENDS	16,998.	1,566.	15,432.	15,432.	
INTEREST	319.	0.	319.	319.	
TO PART I, LINE 4	17,317.	1,566.	15,751.	15,751.	

FORM 990-PF LEGAL FEES STATEMENT 2

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
SHIPMAN & GOODWIN LLP	10,240.	3,072.		7,168.
TO FM 990-PF, PG 1, LN 16A	10,240.	3,072.		7,168.

FORM 990-PF TAXES STATEMENT 3

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
IRS - EXCISE TAX	4,077.	0.		0.
TO FORM 990-PF, PG 1, LN 18	4,077.	0.		0.

FORM 990-PF OTHER EXPENSES STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNT MAINTENANCE FEE	100.	100.		0.
TO FORM 990-PF, PG 1, LN 23	100.	100.		0.

FORM 990-PF OTHER DECREASES IN NET ASSETS OR FUND BALANCES STATEMENT 5

DESCRIPTION	AMOUNT
ADJ TO DECREASE COST BASIS DUE TO 2015 ROP	3.
TOTAL TO FORM 990-PF, PART III, LINE 5	3.

FORM 990-PF CORPORATE STOCK STATEMENT 6

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
SEE SCHEDULE ATTACHED	487,713.	563,360.
TOTAL TO FORM 990-PF, PART II, LINE 10B	487,713.	563,360.

FORM 990-PF OTHER INVESTMENTS STATEMENT 7

DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
SEE SCHEDULE ATTACHED	COST	128,438.	126,410.
TOTAL TO FORM 990-PF, PART II, LINE 13		128,438.	126,410.

SHIPMAN & GOODWIN® LLP
COUNSELORS AT LAW

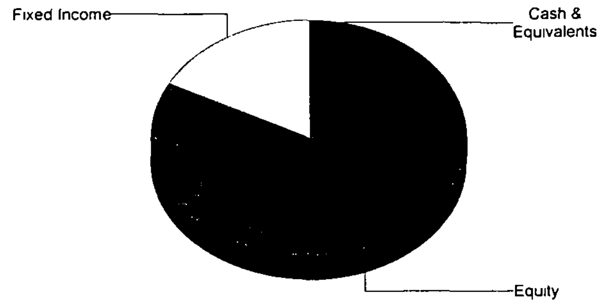
ALEXANDER M & CATHERINE MAUS WRIGHT TRUST
U/A JAMES T BETTS, TRUSTEE

JAMES T BETTS
C/O SHIPMAN & GOODWIN LLP
ONE CONSTITUTION PLAZA
HARTFORD, CT 06103-1919

Account	75024960
Report Period	From 12/31/2016 To 12/31/2016
Your Contact	JAMES T BETTS (860) 251-5150
Administrator	KATHLEEN A JONKMAN (860) 251-5131

Portfolio Summary

	Market Value as of 12/31/16	% of Total	Estimated Income
Cash Equivalents	43,778 63	5 97	28 87
Fixed Income	126,409 62	17 23	3,532 10
Equity	563,360 15	76 80	10,471 30
Total Assets	733,548.40	100 00	14,032 27



Asset Detail Summary

	Cost Basis	% Cost	Market Value	% Mkt	Unrealized Gain/Loss	Estimated Annual Income	Yield At Mkt
CASH & EQUIVALENTS							
MONEY MARKET FUNDS	43,578 63	6 61	43,578 63	5 94	0 00	28 87	0 1
TOTAL CASH & EQUIVALENTS	43,578 63	6 61	43,578 63	5 94	0 00	28 87	0 1
FIXED INCOME							
CORPORATE BOND FUNDS - ETF	63,502 26	9 63	61,130 00	8 33	(2,372 26)	2,588 07	4 2
CORPORATE BONDS	27,180 50	4 12	27,689 62	3 77	509 12	525 00	1 9
DIVERSIFIED BOND FUNDS - ETF	37,755 00	5 72	37,590 00	5 12	(165 00)	419 03	1 1
TOTAL FIXED INCOME	128,437 76	19 47	126,409 62	17 23	(2,028 14)	3,532 10	2 8
EQUITY							
COMMON STOCK	244,907 32	37 12	320,809 80	43 73	75,902 48	5,044 60	1 6
EQUITY MUTUAL FUNDS	125,000 00	18 95	129,781 79	17 69	4,781 79	2,234 51	1 7
INTERNATIONAL EQUITY - ETF	25,656 00	3 89	22,960 00	3 13	(2,696 00)	628 14	2 7
INTERNATIONAL EQUITY MUTUAL FUNDS	50,000 00	7 58	46,978 24	6 40	(3,021 76)	1,298 03	2 8
REAL ESTATE INVESTMENT TRUSTS	17,149 80	2 60	16,290 00	2 22	(859 80)	1,057 50	6 5
SMALL CAP MUTUAL FUNDS	25,000 00	3 79	26,540 32	3 62	1,540 32	208 52	0 8
TOTAL EQUITY	487,713 12	73 93	563,360 15	76 80	75,647 03	10,471 30	1 9

Cash

	Market Value	% Mkt
Principal Cash	100 00	
Income Cash	100 00	
Total Cash	200 00	0 03

ALEXANDER M & CATHERINE MAUS WRIGHT TRUST
U/A JAMES T BETTS, TRUSTEE

SHIPMAN & GOODWIN LLP
COUNSELORS AT LAW

Account. 75024960
Report Period From 12/31/2016 To 12/31/2016

Gains and Losses Summary

	Year To Date
Long Term	1,476 95
Short Term	(561 48)
Total Realized Gain/Loss on Cost	**915.47**

ALEXANDER M & CATHERINE MAUS WRIGHT TRUST
U/A JAMES T BETTS, TRUSTEE

SHIPMAN & GOODWIN® LLP
COUNSELORS AT LAW

Account: 75024960
Report Period. From 12/31/2016 To 12/31/2016

Asset Statement

Units	Description	Cost Basis	Unit Price	Market Value	% Acct	Unrealized Gain/Loss	Estimated Annual Income	Yield At Mkt
CASH & EQUIVALENTS								
Money Markets								
41,145 60	FEDERATED US TREAS CASH - PRINCIPAL	41,145 60	1 00	41,145 60	5 61	0 00	27 26	0 07
2,433 03	FEDERATED US TREAS CASH - INCOME	2,433 03	1 00	2,433 03	0 33	0 00	1 61	0 07
TOTAL Money Markets		**43,578.63**		**43,578.63**	**5.94**	**0.00**	**28.87**	**0.07**
Cash								
	Principal Cash	100 00		100 00				
	Income Cash	100 00		100 00				
	Total Cash	200 00		200 00	0 03			
TOTAL CASH & EQUIVALENTS		**43,778.63**		**43,778.63**	**5.97**	**0.00**	**28.87**	**0.07**
FIXED INCOME								
Corporate Obligations								
28,000	EMC CORP DTD 06/06/13 1 875% 06/01/18	27,180 50	98 89	27,689 62	3 77	509 12	525 00	1 90
TOTAL Corporate Obligations		**27,180.50**		**27,689.62**	**3.77**	**509.12**	**525.00**	**1.90**
Exchange Traded Funds								
1,500	GUGGENHEIM HI YIELD ETF 2018	38,670 00	25 18	37,770 00	5 15	(900 00)	1,528 50	4 05
750	GUGGENHEIM ENHANCED SHORT DURATION ETF	37,755 00	50 12	37,590 00	5 12	(165 00)	419 03	1 11
1,000	POWERSHARES SENIOR LOAN PORT ETF	24,832 26	23 36	23,360 00	3 18	(1,472 26)	1,059 57	4 54
TOTAL Exchange Traded Funds		**101,257.26**		**98,720.00**	**13.46**	**(2,537.26)**	**3,007.10**	**3.05**
TOTAL FIXED INCOME		**128,437.76**		**126,409.62**	**17.23**	**(2,028.14)**	**3,532.10**	**2.79**
EQUITY								
Common Stock								
Consumer Discretionary								
20	AMAZON COM INC	15,369 64	749 87	14,997 40	2 04	(372 24)	0 00	0 00
300	DISNEY (THE WALT) CO COM	22,291 98	104 22	31,266 00	4 26	8,974 02	468 00	1 50
TOTAL Consumer Discretionary		**37,661.62**		**46,263.40**	**6.31**	**8,601.78**	**468.00**	**1.01**
Consumer Staples								
250	CVS HEALTH CORP	26,630 00	78 91	19,727 50	2 69	(6,902 50)	425 00	2 15
TOTAL Consumer Staples		**26,630.00**		**19,727.50**	**2.69**	**(6,902.50)**	**425.00**	**2.15**
Energy								
150	CHEVRON CORP	5,408 25	117 70	17,655 00	2 41	12,246 75	648 00	3 67
300	SCHLUMBERGER LTD	28,257 00	83 95	25,185 00	3 43	(3,072 00)	600 00	2 38
TOTAL Energy		**33,665.25**		**42,840.00**	**5.84**	**9,174.75**	**1,248.00**	**2.91**
Financial								

ALEXANDER M & CATHERINE MAUS WRIGHT TRUST
U/A JAMES T BETTS, TRUSTEE

SHIPMAN & GOODWIN® LLP
COUNSELORS AT LAW

Account: 75024960
Report Period From 12/31/2016 To 12/31/2016

Asset Statement(Cont'd)

Units	Description	Cost Basis	Unit Price	Market Value	% Acct	Unrealized Gain/Loss	Estimated Annual Income	Yield At Mkt
300	VISA INC CL A	21,678 00	78 02	23,406 00	3 19	1,728 00	198 00	0 85
TOTAL Financial		**21,678.00**		**23,406.00**	**3.19**	**1,728.00**	**198.00**	**0.85**
	Health Care							
3,500	MERRIMACK PHARMACEUTICALS	15,637 09	4 08	14,280 00	1 95	(1,357 09)	0 00	0 00
TOTAL Health Care		**15,637.09**		**14,280.00**	**1.95**	**(1,357.09)**	**0.00**	**0.00**
	Industrials							
100	LOCKHEED MARTIN CORP	9,399 00	249 94	24,994 00	3 41	15,595 00	728 00	2 91
200	UNITED TECHNOLOGIES CORP	9,500 00	109 62	21,924 00	2 99	12,424 00	528 00	2 41
TOTAL Industrials		**18,899.00**		**46,918.00**	**6.40**	**28,019.00**	**1,256.00**	**2.68**
	Information Technology							
50	ALPHABET INC A	29,077 50	792 45	39,622 50	5 40	10,545 00	0 00	0 00
280	APPLE INC	23,695 70	115 82	32,429 60	4 42	8,733 90	638 40	1 97
200	FACEBOOK INC CL A	22,541 26	115 05	23,010 00	3 14	468 74	0 00	0 00
520	MICROSOFT CORP	15,421 90	62 14	32,312 80	4 40	16,890 90	811 20	2 51
TOTAL Information Technology		**90,736.36**		**127,374.90**	**17.36**	**36,638.54**	**1,449.60**	**1.14**
	Real Estate Investment Trusts							
1,500	SPIRIT REALTY CAPITAL INC	17,149 80	10 86	16,290 00	2 22	(859 80)	1,057 50	6 49
TOTAL Real Estate Investment Trusts		**17,149.80**		**16,290.00**	**2.22**	**(859.80)**	**1,057.50**	**6.49**
TOTAL Common Stock		**262,057.12**		**337,099.80**	**45.95**	**75,042.68**	**6,102.10**	**1.81**
	Exchange Traded Funds							
	International Equity - ETF							
400	WISDOMTREE EUROPE HEDGED EQUITY ETF	25,656 00	57 40	22,960 00	3 13	(2,696 00)	628 14	2 74
TOTAL International Equity - ETF		**25,656.00**		**22,960.00**	**3.13**	**(2,696.00)**	**628.14**	**2.74**
TOTAL Exchange Traded Funds		**25,656.00**		**22,960.00**	**3.13**	**(2,696.00)**	**628.14**	**2.74**
	Mutual Funds							
	Equity Mutual Funds							
6,734 914	DFA US CORE EQUITY 1 PORTFOLIO	125,000 00	19 27	129,781 79	17 69	4,781 79	2,234 51	1 72
TOTAL Equity Mutual Funds		**125,000.00**		**129,781.79**	**17.69**	**4,781.79**	**2,234.51**	**1.72**
	International Equity Mutual Funds							
4,029 009	DFA INTL CORE EQUITY PORTFOLIO	50,000 00	11 66	46,978 24	6 40	(3,021 76)	1,298 03	2 76
TOTAL International Equity Mutual Funds		**50,000.00**		**46,978.24**	**6.40**	**(3,021.76)**	**1,298.03**	**2.76**
	Small Cap Mutual Funds							
709 824	DFA US SMALL CAP VALUE PORTFOLIO	25,000 00	37 39	26,540 32	3 62	1,540 32	208 52	0 79
TOTAL Small Cap Mutual Funds		**25,000.00**		**26,540.32**	**3.62**	**1,540.32**	**208.52**	**0.79**
TOTAL Mutual Funds		**200,000.00**		**203,300.35**	**27.71**	**3,300.35**	**3,741.06**	**1.84**

ALEXANDER M & CATHERINE MAUS WRIGHT TRUST
U/A JAMES T BETTS, TRUSTEE

SHIPMAN & GOODWIN® LLP
COUNSELORS AT LAW

Account 75024960
Report Period From 12/31/2016 To 12/31/2016

Asset Statement(Cont'd)

Units	Description	Cost Basis	Unit Price	Market Value	% Acct	Unrealized Gain/Loss	Estimated Annual Income	Yield At Mkt
TOTAL EQUITY		**487,713.12**		**563,360.15**	**76.80**	**75,647.03**	**10,471.30**	**1.86**
GRAND TOTAL ASSETS		**659,929.51**		**733,548.40**	**100.00**	**73,618.89**	**14,032.27**	**1.91**

Gains and Losses Worksheet

Account: 75024960

ALEXANDER M & CATHERINE MAUS WRIGHT TRUST U/A JAMES T BETTS, TRUSTEE

From 1/1/2016 To 12/31/2016

Tax ID: XX-XXX4050

SHIPMAN & GOODWIN® LLP
COUNSELORS AT LAW

SCHEDULE OF CAPITAL GAINS AND LOSSES

TRANSACTION DESCRIPTION UNITS	DATE ACQ.	DATE SOLD	PROCEEDS	COST	SHORT TERM GAIN/LOSS	LONG TERM GAIN/LOSS
CAPITAL GAINS/LOSSES						
SCHLUMBERGER LTD						
50 0000	07/10/14	01/06/16	3,437 94	(5,803 00)		(2,365 06)
UNION PACIFIC CORP						
100 0000	07/10/14	01/06/16	7,530 86	(9,978 50)		(2,447 64)
AMERICAN EXPRESS CO						
300 0000	02/12/15	02/25/16	16,339 11	(24,306 66)		(7,967 55)
CHEVRON CORP						
50 0000	08/25/03	02/25/16	4,194 92	(1,802 75)		2,392 17
SCHLUMBERGER LTD						
50 0000	07/10/14	02/25/16	3,564 93	(5,803 00)		(2,238 07)
UNION PACIFIC CORP						
200 0000	07/10/14	04/07/16	15,691 12	(19,957 00)		(4,265 88)
KAYNE ANDERSON ENERGY						
1,000 0000	01/05/16	04/14/16	8,259 82	(8,821 30)	(561 48)	
WELLS FARGO & CO						
500 0000	10/25/13	09/29/16	22,244 51	(21,420 00)		824 51
PIMCO 0-5 YR HI YIELD CORP BD INDEX ETF						
150 0000	10/25/13	11/08/16	14,741 70	(15,966 22)		(1,224 52)
ABBOTT LABORATORIES						
400 0000	08/07/02	12/22/16	15,177 23	(6,950 17)		8,227 06
MICROSOFT CORP						
80 0000	01/26/12	12/22/16	5,096 70	(2,372 60)		2,724 10
UNITED TECHNOLOGIES CORP						
100 0000	01/15/04	12/22/16	11,001 77	(4,750 00)		6,251 77
TOTAL CAPITAL GAINS/LOSSES			**127,280.61**	**(127,931.20)**	**(561.48)**	**(89.11)**
CAPITAL GAIN DISTRIBUTIONS						

Gains and Losses Worksheet

Account: 75024960

ALEXANDER M & CATHERINE MAUS WRIGHT TRUST U/A JAMES T BET

From 1/1/2016 To 12/31/2016

Tax ID: XX-XXX4050

SHIPMAN & GOODWIN LLP
COUNSELORS AT LAW

TRANSACTION DESCRIPTION UNITS	DATE ACQ.	DATE SOLD	PROCEEDS	COST	SHORT TERM GAIN/LOSS	LONG TERM GAIN/LOSS
CAPITAL GAIN DISTRIBUTIONS CONTINUED						
CAPITAL GAIN - LONG TERM DFA US CORE EQUITY 1 PORTFOLIO $0 0851 PER SHARE ON 6,734 914 SHARES		12/19/16	573 34			573 34
CAPITAL GAIN - LONG TERM DFA US SMALL CAP VALUE PORTFOLIO $1 3985 PER SHARE ON 709 824 SHARES		12/19/16	992 72			992 72
TOTAL CAPITAL GAIN DISTRIBUTIONS			**1,566.06**			**1,566.06**
GRAND TOTAL			**128,846.67**	**(127,931.20)**	**(561.48)**	**1,476.95**