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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 (a) Book Value	End of year (b) Book Value (c) Fair Market Value		
Assets	1	Cash—non-interest-bearing	19,987	8,349	8,349
	2	Savings and temporary cash investments			
	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	11,045	9,168	9,168
	10a	Investments—U S and state government obligations (attach schedule)	844,593		
	b	Investments—corporate stock (attach schedule)	11,464,209	11,149,196	11,149,196
	c	Investments—corporate bonds (attach schedule)	4,087,233	3,261,443	3,261,443
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)		1,641,053	1,641,053
	14	Land, buildings, and equipment basis ▶ _____ 2,999 Less accumulated depreciation (attach schedule) ▶ 250		2,749	2,749
15	Other assets (describe ▶ _____)				
16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	16,427,067	16,071,958	16,071,958	
Liabilities	17	Accounts payable and accrued expenses	6,409	14,843	
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶ _____)	20,000	10,000	
	23	Total liabilities (add lines 17 through 22)	26,409	24,843	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here <input checked="" type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.				
	24	Unrestricted	16,308,447	15,956,870	
	25	Temporarily restricted	91,211	89,245	
	26	Permanently restricted	1,000	1,000	
	Foundations that do not follow SFAS 117, check here <input type="checkbox"/> 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)	16,400,658	16,047,115	
31	Total liabilities and net assets/fund balances (see instructions) .	16,427,067	16,071,958		

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	16,400,658
2	Enter amount from Part I, line 27a	2	1,147,703
3	Other increases not included in line 2 (itemize) ▶ _____	3	
4	Add lines 1, 2, and 3	4	17,548,361
5	Decreases not included in line 2 (itemize) ▶ _____	5	1,501,246
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30 .	6	16,047,115

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)
1 a Publicly Traded Securities	P	2015-09-13	2015-09-13
b			
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 18,343,243		16,661,010	1,682,233
b			
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
a			1,682,233
b			
c			
d			
e			

2 Capital gain net income or (net capital loss)	<div> <div>If gain, also enter in Part I, line 7</div> <div>If (loss), enter -0- in Part I, line 7</div> </div>	2	1,682,233
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))
2015	924,207	16,678,899	0 05541
2014	871,325	17,163,527	0 05077
2013	807,550	16,234,274	0 04974
2012	820,059	14,900,020	0 05504
2011	979,712	15,068,154	0 06502

2 Total of line 1, column (d)	2	0 275978
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 055196
4 Enter the net value of noncharitable-use assets for 2016 from Part X, line 5	4	16,004,742
5 Multiply line 4 by line 3	5	883,398
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	20,709
7 Add lines 5 and 6	7	904,107
8 Enter qualifying distributions from Part XII, line 4	8	893,113

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

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

1a	Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1 Date of ruling or determination letter _____ (attach copy of letter if necessary—see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b	1	41,418
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	
3	Add lines 1 and 2.	3	41,418
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5	41,418
6	Credits/Payments		
a	2016 estimated tax payments and 2015 overpayment credited to 2016	6a	42,816
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	42,816
8	Enter any penalty for underpayment of estimated tax. Check here <input checked="" type="checkbox"/> if Form 2220 is attached	8	
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed ▶	9	
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid . . . ▶	10	1,398
11	Enter the amount of line 10 to be Credited to 2017 estimated tax ▶ 1,398 Refunded ▶	11	

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a	No
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for definition)? <i>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</i>	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 ▶ \$ _____ (2) On foundation managers ▶ \$ _____		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ▶ \$ _____		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If "Yes," attach a detailed description of the activities</i>	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? <i>If "Yes," attach a conformed copy of the changes</i>	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	No
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If "Yes," attach the statement required by General Instruction T</i>	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	No
7 Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col (c), and Part XV</i>	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? <i>If "No," attach explanation</i> .	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 2016 or the taxable year beginning in 2016 (see instructions for Part XIV)? <i>If "Yes," complete Part XIV</i>	9	No
10 Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses</i>	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>www.fundforgreaterhartford.org</u>	13	Yes	
14	The books are in care of <u>The Fund For Greater Hartford</u> Telephone no <u>(860) 232-3113</u>			

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15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here <input type="checkbox"/> and enter the amount of tax-exempt interest received or accrued during the year <u>15</u>			
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? 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 <u></u>	16	Yes	No

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.

1a	During the year did the foundation (either directly or indirectly)		Yes	No
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days). <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? <input type="checkbox"/> Organizations relying on a current notice regarding disaster assistance check here. <input type="checkbox"/>	1b		No
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? <input type="checkbox"/>	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 2016, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2016? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years <u>20</u> , <u>20</u> , <u>20</u> , <u>20</u>			
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). <input type="checkbox"/>	2b		No
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here <u>20</u> , <u>20</u> , <u>20</u> , <u>20</u>			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
b	If "Yes," did it have excess business holdings in 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). <input type="checkbox"/>	3b		No
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 2016?	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))?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
(3) Provide a grant to an individual for travel, study, or other similar purposes?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? (see instructions).	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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)?		5b		No
Organizations relying on a current notice regarding disaster assistance check here.	<input type="checkbox"/>			
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?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?		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?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
b If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?		7b		No

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
See Additional Data Table				
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.				

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.		

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	

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	16,223,863
b	Average of monthly cash balances.	1b	14,168
c	Fair market value of all other assets (see instructions).	1c	10,438
d	Total (add lines 1a, b, and c).	1d	16,248,469
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	
3	Subtract line 2 from line 1d.	3	16,248,469
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	243,727
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4.	5	16,004,742
6	Minimum investment return. Enter 5% of line 5.	6	800,237

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	800,237
2a	Tax on investment income for 2016 from Part VI, line 5.	2a	41,418
b	Income tax for 2016 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	41,418
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	758,819
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	758,819
6	Deduction from distributable amount (see instructions).	6	
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1.	7	758,819

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	893,113
b	Program-related investments—total from Part IX-B.	1b	
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	893,113
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	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	893,113

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				758,819
2 Undistributed income, if any, as of the end of 2016				
a Enter amount for 2015 only.				
b Total for prior years 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2016				
a From 2011. 233,530				
b From 2012. 85,197				
c From 2013. 47,678				
d From 2014. 32,771				
e From 2015. 106,331				
f Total of lines 3a through e.	505,507			
4 Qualifying distributions for 2016 from Part XII, line 4 ▶ \$ 893,113				
a Applied to 2015, but not more than line 2a				
b Applied to undistributed income of prior years (Election required—see instructions).	0			
c Treated as distributions out of corpus (Election required—see instructions).				
d Applied to 2016 distributable amount.				758,819
e Remaining amount distributed out of corpus	134,294			
5 Excess distributions carryover applied to 2016 (If an amount appears in column (d), the same amount must be shown in column (a))				
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	639,801			
b Prior years' undistributed income Subtract line 4b from line 2b				
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.				
d Subtract line 6c from line 6b Taxable amount—see instructions				
e Undistributed income for 2015 Subtract line 4a from line 2a Taxable amount—see instructions				
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).				
8 Excess distributions carryover from 2011 not applied on line 5 or line 7 (see instructions).	233,530			
9 Excess distributions carryover to 2017. Subtract lines 7 and 8 from line 6a	406,271			
10 Analysis of line 9				
a Excess from 2012. 85,197				
b Excess from 2013. 47,678				
c Excess from 2014. 32,771				
d Excess from 2015. 106,331				
e Excess from 2016. 134,294				

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

1a 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 organization is a private operating foundation described in section <input type="checkbox"/> 4942(j)(3) or <input type="checkbox"/> 4942(j)(5)					
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed	Tax year	Prior 3 years			(e) Total
	(a) 2016	(b) 2015	(c) 2014	(d) 2013	
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 organization 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))	
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	
2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:	
Check here <input type="checkbox"/> 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 Kim Russo- Executive Director 75 Charter Oak Avenue Suite 2-200 Hartford, CT 06106 (860) 232-3113 www.fundforgreaterhartford.org	
b The form in which applications should be submitted and information and materials they should include Applications are provided by The Fund For Greater Hartford requiring a description of the organization and justification of need. Also required are the applicants name, address, and telephone number.	
c Any submission deadlines Applications rec'd 6 weeks before qtrly Exec Comm meetings	
d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors The applicant must be in Hartford, Middlesex, or Tolland County. No contributions are made to individuals or endowments.	

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 <i>Paid during the year</i> See Additional Data Table				
Total			3a	710,782
b <i>Approved for future payment</i>				
Total			3b	

Enter gross amounts unless otherwise indicated

Enter gross amounts unless otherwise indicated	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
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	457,164	
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					1,682,233
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).				457,164	1,682,233
13 Total. Add line 12, columns (b), (d), and (e).			13		2,139,397

(See worksheet in line 13 instructions to verify calculations)

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

[illegible]

Part XVII

- | | Yes | No |
|-------|-----|----|
| 1a(1) | | No |
| 1a(2) | | No |
| 1b(1) | | No |
| 1b(2) | | No |
| 1b(3) | | No |
| 1b(4) | | No |
| 1b(5) | | No |
| 1b(6) | | No |
| 1c | | No |

[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

Print/Type preparer's name Michael D Lynch	Preparer's Signature	Date	Check if self-employed <input type="checkbox"/>	PTIN P00971497
Firm's name ▶ KIRCALDIE RANDALL & MCNAB LLC				Firm's EIN ▶
Firm's address ▶ 81 Wolcott Hill Road Wethersfield, CT 06109				Phone no (860) 529-3366

Form 990PF Part VIII Line 1 - List all officers, directors, trustees, foundation managers and their compensation

(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
Maria Sanchez	Trustee 2 00	0		
75 Charter Oak Avenue Hartford, CT 06106				
Carey Redd	Trustee 2 00	0		
75 Charter Oak Ave Hartford, CT 06106				
Jan-Gee McCollam	Trustee 2 00	0		
75 Charter Oak Ave Hartford, CT 06106				
Raymond S Andrews Jr	Trustee 2 00	0		
75 Charter Oak Ave Hartford, CT 06106				
Christopher Aroh	Treasurer 2 00	0		
75 Charter Oak Ave Hartford, CT 06106				
Maria Pietrantuono	Trustee 2 00	0		
75 Charter Oak Ave Hartford, CT 06106				
Sanford Cloud Jr	Trustee 2 00	0		
75 Charter Oak Ave Hartford, CT 06106				
Judge Nina Elgo	Vice President 2 00	0		
75 Charter Oak Ave Hartford, CT 06106				
Judge Raheem Mullins	Trustee 2 00	0		
75 Charter Oak Ave Hartford, CT 06106				
Milagros Saldana Cruz	Trustee 2 00	0		
75 Charter Oak Ave Hartford, CT 06106				
Carmen Cid	President 2 00	0		
75 Charter Oak Ave Hartford, CT 06106				
Nelson Rodriguez	Trustee 2 00	0		
75 Charter Oak Ave Hartford, CT 06106				
Kim Russo	Executive Dir 40 00	88,327	5,280	
75 Charter Oak Ave Hartford, CT 06106				
Janel Simpson	Trustee 2 00	0		
75 Charter Oak Ave Hartford, CT 06106				
Lorenzo Marshall	Trustee 2 00	0		
75 Charter Oak Ave Hartford, CT 06106				

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>				
Achieve Hartford 221 Main St Hartford, CT 06106	None		Education	10,000
Ballet Theatre Company 20 Jefferson Ave West Hartford, CT 06017	None		Arts & Culture	5,000
ConnectiKids Inc 814 Asylum Ave Hartford, CT 06105	None		Education	15,000
Grace Academy 277 Main St Hartford, CT 06106	None		Education	5,000
Literacy Volunteers of Greater Hart 30 Arbor St Hartford, CT 06106	None		Education	5,000
Sankofa Kuumba Cultural Arts Consor PO Box 1255 Hartford, CT 06143	None		Arts & Culture	5,000
The Nat'l Conf for Community Justic 1095 Day Hill Rd Windsor, CT 06095	None		Health and Social Services	7,500
Lawyers for Children America Inc 151 Farmington Ave Hartford, CT 06156	None		Health and Social Services	10,000
Childrens Law Center of Connecticut 30 Arbor St South Hartford, CT 06106	None		Health and Social Services	10,000
Christian Activities Council 47 Vine St Hartford, CT 06112	None		Summer Program	3,000
Compass Youth Collaborative 55 Airport Rd Hartford, CT 06114	None		Education	12,000
Educational Resources for Children 50 Post Office Rd Enfield, CT 06082	None		Summer Program	3,000
Heartbeat Ensemble 233 Pearl St Hartford, CT 06103	None		Arts & Culture	5,000
Leadership Greater Hartford 30 Laurel St Hartford, CT 06106	None		Education	8,000
LISCHtfd Neighborhood Dev Supp Coll 75 Charter Oak Ave Hartford, CT 06106	None		Community Development	10,000
Total ► 3a				710,782

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				
Mark Twain House 351 Farmington Ave Hartford, CT 06105	None		Education	5,000
Nutmeg Big Brothers Big Sisters 30 Laurel St Hartford, CT 06106	None		Education	10,000
Organized Parents Make A Difference 350 Farmington Ave Hartford, CT 06105	None		Summer Program	3,000
Real Art Ways 50 Arbor St Hartford, CT 06106	None		Arts & Culture	5,000
St Vincent DePaul Place 617 Main St Middletown, CT 06457	None		Health and Social Services	5,000
Teach for America 142 Temple St New Haven, CT 06510	None		Education	10,000
The New Children's Museum 950 Trout Brook Dr West Hartford, CT 06119	None		Education	7,500
Village for Families and Children 1680 Albany Ave Hartford, CT 06105	None		Health & Social Service	5,000
Watkinson School 180 Bloomfield Hartford, CT 06105	None		Hispanic Program	15,000
Camp Courant 285 Broad St Hartford, CT 06115	None		Health and Social Service	10,000
Brain Injury Association of Connect 200 Day Hill Rd Windsor, CT 06095	None		Health and Social Services	7,000
Connecticut Assoc for Human Service 110 Bartholemew Ave Hartford, CT 06106	None		Education	10,000
Connecticut Council for Philanthrop 221 Main St Hartford, CT 06103	None		Education	7,000
Connecticut Science Center 250 Columbus Blvd Hartford, CT 06103	None		Education	7,500
Manchester Area Conference of Churc 460 Main St Manchester, CT 06045	None		Health and Social Services	10,000
Total ► 3a				710,782

Form 990FP 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				
Mercy Housing and Shelter 211 Wethersfield Ave Hartford, CT 06114	None		Health and Social Services	10,000
Organized Parents Make A Difference 350 Farmington Ave Hrtford, CT 06105	None		Education	5,000
East Catholic High School 115 New State Rd Manchester, CT 06040	None		Hispanic Program	5,000
Northwest Catholic High School 290 Wampanaog Dr West Hartford, CT 06117	None		Hispanic Program	25,000
Greater Hartford Arts Council 100 Pearl St Hartford, CT 06103	None		Arts & Culture	15,000
Connecticut Storytelling Center 270 Mohegan Ave New London, CT 06320	None		Arts & Culture	8,000
Knox Parks Foundation 75 Laurel St Hartford, CT 06106	None		Education	8,000
Read to Grow Inc 53 School Ground Rd Branford, CT 06405	None		Health & Social Service	7,000
YWCA Hartford Region 135 Broad St Hartford, CT 06105	None		Education	5,000
Connecticut Radio Information Syste 315 Windsor Ave Windsor, CT 06095	None		Education	5,000
Junior Achievement of Southwest NE 70 Farmington Ave Hartford, CT 06105	None		Education	7,500
Sea Research Foundation 55 Coogan Blvd Mystic, CT 06355	None		Education	7,500
Blue Hills Civic Association 120 Holcomb St Hartford, CT 06112	None		Education	7,000
Boy's and Girl's Club of Hartford 170 Sigourney St Hartford, CT 06105	None		Education	10,000
Catholic Charities 839-841 Asylum Ave Hartford, CT 06105	None		Health & Social Services	10,000
Total ►				710,782
3a				

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				
Hartford Food System 86 Park St Hartford, CT 06106	None		Health and Social Service	6,000
My Sisters' Place 237 Hamilton St Hartford, CT 06106	None		Health and Social Services	10,000
Prudence Crandall Center for Women PO Box 895 New Britain, CT 06050	None		Health and Social Service	10,000
Riverfront Recapture 50 Columbus Blvd 1st Floor Hartford, CT 06106	None		Education	9,200
South Park Inn 75 Main St Hartford, CT 06106	None		Health and Social Service	7,500
YWCA of New Britain 22 Glen St New Britain, CT 06051	None		Education	5,000
HARC 900 Asylum Ave Hartford, CT 06105	None		Summer Program	3,000
Spectrum in Motion 233 Pearl St 22 Hartford, CT 06103	None		Summer Program	3,000
Camp Courant 285 Broad St Hartford, CT 06115	None		Memorial Fund	4,749
Camp Courant 285 Broad St Hartford, CT 06115	None		Spellacy Fund	233
CONCORA 233 Pearl St Hartford, CT 06103	None		Arts & Culture	5,000
Hartford Public Library 500 Main St Hartford, CT 06103	None		Arts & Culture	10,000
House Of Bread 1453 Main St Hartford, CT 06120	None		Health and Social Services	5,000
CURET 1443 Albany Ave Hartford, CT 06112	None		Summer Program	3,000
Jumpstart for Young Children 308 Congress St Boston, MA 02210	None		Education	5,000
Total ►				710,782
3a				

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				
Hartford Performs 75 Charter Oak Ave Suite 1-208 Hartford, CT 06106	None		Arts & Culture	10,000
Hartford Parent University 23 Vine St Hartford, CT 06112	None		Education	7,500
Poverty Race Research Action Council 1200 18th St NW Washington, DC 20036	None		Education	10,000
Connecticut 4H Development Fund Inc 158 Auer Farm Rd Bloomfield, CT 06002	None		Education	8,600
KidSafe CT 19 Elm St Rockville, CT 06066	None		Health and Social Service	10,000
Salvation Army 855 Asylum Ave Hartford, CT 06105	None		Health and Social Service	6,000
True Colors Inc 30 Arbor St Hartford, CT 06106	None		Education	7,000
Bated Breath Theatre Company 233 Pearl St Hartford, CT 06103	None		Arts and Culture	5,000
Hartford City Ballet 85 Gillett St Hartford, CT 06105	None		Arts and Culture	5,000
Ascend Mentoring 34 Maple Avenue Windsor, CT 06095	None		Education	5,000
Educators 4 Excellence 153 East St New Haven, CT 06511	None		Education	10,000
Sunshine Kids Foundation 2 Hartford Square W Hartford, CT 06106	None		Health and Social Service	5,000
Farm to Family Inc 34 E Main St Avon, CT 06001	None		Health and Social Service	5,000
Hartford Youth Scholars Foundation 129 Allen Place Hartford, CT 06106	None		Education	5,000
Unified Theater PO Box 271760 West Hartford, CT 06127	None		Arts & Culture	5,000
Total ►				710,782
3a				

Form 990FP 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				
Community Fdn of Greater NB 74A Vine St New Britain, CT 06052	None		Education	10,000
Connecticut Landmarks 59 South Prospect St Hartford, CT 06106	None		Education	5,000
Connecticut Public Television 1049 Asylum St Hartford, CT 06106	None		Education	10,000
Hartford Promise 750 Main St Hartford, CT 06103	None		Education	12,000
Regional Youth Adult Social Action 2470 Fairfield Ave Bridgeport, CT 06605	None		Education	10,000
Urban Oaks Community Roots 225 Oak St New Britain, CT 06051	None		Education	15,000
YWCA of Metropolitan Hartford 135 Broad St Hartford, CT 06115	None		Education	5,000
Connecticut Coalition to end Homele 257 Lawrence St Hartford, CT 06106	None		Health & Social Service	5,000
Family Childrens Aid 75 West St Danbury, CT 06810	None		Health & Social Service	5,500
Healthy Eyes Alliance 129 Church St New Haven, CT 06510	None		Health & Social Service	10,000
Middlesex United Way 100 Riverview Center Middletown, CT 06457	None		Health & Social Service	7,500
Network Against Domestic Abuse 139 Hazard Ave Enfield, CT 06082	None		Health & Social Service	7,500
Oak Hill 120 Holcomb St Hartford, CT 06112	None		Health & Social Service	10,000
Planned Parenthood of Southern NE 345 Whitney Ave New Haven, CT 06511	None		Health & Social Service	10,000
Catholic Charities 839-841 Asylum Ave Hartford, CT 06105	None		Summer Program	3,000
Total ► 3a				710,782

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>				
Compass Youth Collaborative 55 Airport Rd Hartford, CT 06114	None		Summer Program	3,000
Hartford Youth Scholars Foundation 129 Allen Place Hartford, CT 06106	None		Summer Program	3,000
Village for Families and Children 1680 Albany Ave Hartford, CT 06105	None		Summer Program	3,000
North End Action Team 654 Main St Middletown, CT 06457	None		Community Development	10,000
Local Initiatives Support Corporati 75 Charter Oak Ave Hartford, CT 06106	None		Community Development	10,000
Total ▶ 3a				710,782

TY 2016 Accounting Fees Schedule**Name:** The Fund For Greater Hartford**EIN:** 06-0759107**Software ID:** 16000303**Software Version:** 2016v3.0

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Bookkeeping and payroll	11,964	0	0	11,964

TY 2016 Investments Corporate Bonds Schedule**Name:** The Fund For Greater Hartford**EIN:** 06-0759107**Software ID:** 16000303**Software Version:** 2016v3.0

Name of Bond	End of Year Book Value	End of Year Fair Market Value
Blackrock Strategic Income	1,219,826	1,219,826
Metropolitan West	1,635,099	1,635,099
Ashmore Emerging Markets	406,518	406,518

TY 2016 Investments Corporate Stock Schedule**Name:** The Fund For Greater Hartford**EIN:** 06-0759107**Software ID:** 16000303**Software Version:** 2016v3.0

Name of Stock	End of Year Book Value	End of Year Fair Market Value
Boston Partners Small	643,275	643,275
Dodge & Cox International	1,609,126	1,609,126
Eaton Vance Atlanta Cap	646,740	646,740
Harbor International	1,542,563	1,542,563
Morgan Stanley DGlobal	754,699	754,699
Oppenheimer Developing	886,672	886,672
Templeton Inst Foreign	788,922	788,922
Van Eck Global Hard	493,024	493,024
Vanguard Dividend Growth	19,500	19,500
Vanguard 500 Index	3,670,521	3,670,521
Government Money Fund	93,286	93,286
Scwab cash fund	868	868

TY 2016 Investments - Other Schedule**Name:** The Fund For Greater Hartford**EIN:** 06-0759107**Software ID:** 16000303**Software Version:** 2016v3.0

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
Aetos- Distressed Inv Strat (3200 shs)	FMV	338,541	338,541
Aetos- Multi-Strategy (4800 shs)	FMV	495,958	495,958
Aetos- Long/Short (8000 shs)	FMV	806,554	806,554

**TY 2016 Land, Etc.
Schedule****Name:** The Fund For Greater Hartford**EIN:** 06-0759107**Software ID:** 16000303**Software Version:** 2016v3.0

Category / Item	Cost / Other Basis	Accumulated Depreciation	Book Value	End of Year Fair Market Value
Miscellaneous	2,999	250	2,749	2,749

TY 2016 Legal Fees Schedule**Name:** The Fund For Greater Hartford**EIN:** 06-0759107**Software ID:** 16000303**Software Version:** 2016v3.0

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Legal	662	0	0	662

TY 2016 Other Expenses Schedule**Name:** The Fund For Greater Hartford**EIN:** 06-0759107**Software ID:** 16000303**Software Version:** 2016v3.0**Other Expenses Schedule**

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Dues and subscriptions	5,508			5,508
Insurance	3,199			3,214
Meetings	3,327			3,327
Miscellaneous	3			3
Office expense	9,697			9,692
Rental Expenses	6,747			6,747

TY 2016 Other Liabilities Schedule**Name:** The Fund For Greater Hartford**EIN:** 06-0759107**Software ID:** 16000303**Software Version:** 2016v3.0

Description	Beginning of Year - Book Value	End of Year - Book Value
Grants payable	20,000	10,000

TY 2016 Other Professional Fees Schedule**Name:** The Fund For Greater Hartford**EIN:** 06-0759107**Software ID:** 16000303**Software Version:** 2016v3.0

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Evaluation	10,000	0	0	10,000
Professional fees	5,875	0	0	5,875
Trustee investment fees	64,453	64,453	0	0
Website	4,500	0	0	4,500

TY 2016 Taxes Schedule**Name:** The Fund For Greater Hartford**EIN:** 06-0759107**Software ID:** 16000303**Software Version:** 2016v3.0

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Federal excise tax	41,418			
Foreign tax	4,059	4,059		
Payroll taxes	7,302			7,302