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Return of Private Foundation

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

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

2016

Open to Public Inspection

For calendar year 2016 or tax year beginning

, and ending

Name of foundation UD JC & AJ BOWLING FOUNDATION		A Employer identification number 31-1522458
Number and street (or P O box number if mail is not delivered to street address) C/O BLAIR & POTTS, P.O. BOX 1214	Room/suite	B Telephone number 203-327-2333
City or town, state or province, country, and ZIP or foreign postal code STAMFORD, CT 06904		C If exemption application is pending, check here <input type="checkbox"/>
G Check all that apply: <input type="checkbox"/> Initial return <input type="checkbox"/> Final return <input type="checkbox"/> Address change <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Amended return <input type="checkbox"/> Name change		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
H Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col (c), line 16) \$ 2,544,296.	J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>

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)
1 Contributions, gifts, grants, etc., received				
2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch. B				
3 Interest on savings and temporary cash investments				
4 Dividends and interest from securities	50,178.	50,178.		STATEMENT 1
5a Gross rents				
b Net rental income or (loss)				
6a Net gain or (loss) from sale of assets not on line 10	12,717.			
b Gross sales price for all assets on line 6a	58,527.			
7 Capital gain net income (from Part IV, line 2)		12,717.		
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	<334.>	0.	<334.>	STATEMENT 2
12 Total. Add lines 1 through 11	62,561.	62,895.	<334.>	
13 Compensation of officers, directors, trustees, etc	0.	0.	0.	0.
14 Other employee salaries and wages				
15 Pension plans, employee benefits				
16a Legal fees				
b Accounting fees				
c Other professional fees				
17 Interest				
18 Taxes	3,712.	0.	0.	0.
19 Depreciation and depletion				
20 Occupancy				
21 Travel, conferences, and meetings				
22 Printing and publications				
23 Other expenses	12,722.	12,722.	0.	0.
24 Total operating and administrative expenses. Add lines 13 through 23	16,434.	12,722.	0.	0.
25 Contributions, gifts, grants paid	140,100.			140,100.
26 Total expenses and disbursements. Add lines 24 and 25	156,534.	12,722.	0.	140,100.
27 Subtract line 26 from line 12:				
a Excess of revenue over expenses and disbursements	<93,973.>			
b Net investment income (if negative, enter -0-)		50,173.		
c Adjusted net income (if negative, enter -0-)			0.	

Part II Balance Sheets		Beginning of year (a) Book Value	End of year	
			(b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing			
	2 Savings and temporary cash investments	132,532.	80,911.	80,942.
	3 Accounts receivable ▶ Less: allowance for doubtful accounts ▶			
	4 Pledges receivable ▶ Less: allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons			
	7 Other notes and loans receivable ▶ Less: allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments - U.S. and state government obligations			
	b Investments - corporate stock STMT 5	1,201,284.	1,181,474.	2,447,203.
	c Investments - corporate bonds			
	11 Investments - land, buildings, and equipment basis ▶ Less: accumulated depreciation ▶			
	12 Investments - mortgage loans			
	13 Investments - other STMT 6	<79,715.>	<102,257.>	16,151.
	14 Land, buildings, and equipment basis ▶ Less: accumulated depreciation ▶			
Liabilities	15 Other assets (describe ▶)			
	16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item I)	1,254,101.	1,160,128.	2,544,296.
	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe ▶)			
	23 Total liabilities (add lines 17 through 22)	0.	0.	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ <input checked="" type="checkbox"/> and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds	1,639,475.	1,639,475.	
	28 Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
	29 Retained earnings, accumulated income, endowment, or other funds	<385,374.>	<479,347.>	
	30 Total net assets or fund balances	1,254,101.	1,160,128.	
	31 Total liabilities and net assets/fund balances	1,254,101.	1,160,128.	

Part III Analysis of Changes in Net Assets or Fund Balances

1 Total net assets or fund balances at beginning of year - Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	1,254,101.
2 Enter amount from Part I, line 27a	2	<93,973.>
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	1,160,128.
5 Decreases not included in line 2 (itemize) ▶	5	0.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	1,160,128.

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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 DEUTSCH BANK #1429 - SEE ATTACHED	P	03/25/13	12/07/16
b DEUTSCH BANK #1429 - SEE ATTACHED	P	VARIOUS	12/31/16
c CAPITAL GAINS DIVIDENDS			
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 3,771.		4,000.	<229.>
b 37,229.		41,810.	<4,581.>
c 17,527.			17,527.
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			<229.>
b			<4,581.>
c			17,527.
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	12,717.
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	140,000.	2,530,046.	.055335
2014	140,000.	2,527,993.	.055380
2013	143,000.	2,449,816.	.058372
2012	143,000.	2,324,071.	.061530
2011	144,200.	2,334,522.	.061769

2 Total of line 1, column (d)	2	.292386
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	.058477
4 Enter the net value of noncharitable-use assets for 2016 from Part X, line 5	4	2,583,178.
5 Multiply line 4 by line 3	5	151,056.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	502.
7 Add lines 5 and 6	7	151,558.
8 Enter qualifying distributions from Part XII, line 4	8	140,100.

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

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

1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)			
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b		1	1,003.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b).			
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		2	0.
3 Add lines 1 and 2		3	1,003.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		4	0.
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-		5	1,003.
6 Credits/Payments:			
a 2016 estimated tax payments and 2015 overpayment credited to 2016	6a	2,224.	
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	2,224.	
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	1,221.	
11 Enter the amount of line 10 to be: Credited to 2017 estimated tax <input type="checkbox"/> 1,221. Refunded <input type="checkbox"/>	11	0.	

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for the definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.		X
1c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. \$ 0. (2) On foundation managers. \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) <u>NONE</u>		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2016 or the taxable year beginning in 2016 (see instructions for Part XIV)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

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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? Website address ► N/A	13	X
14 The books are in care of ► BLAIR & POTTS Telephone no. ► (203) 327-2333 Located at ► P.O. BOX 1214, STAMFORD, CT ZIP+4 ► 06904		
15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year ► 15 N/A		
16 At any time during calendar year 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 the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country ►	16	X

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

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

	Yes	No
1a During the year did the foundation (either directly or indirectly): (1) Engage in the sale or exchange, or leasing of property with a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here ►	1b	X
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years ► b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.) N/A c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ►	2b	
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.) N/A	3b	
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 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?	4a	X
	4b	X

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

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

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?

☐ Yes ☒ No

(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?

☐ Yes ☒ No

(3) Provide a grant to an individual for travel, study, or other similar purposes?

☐ Yes ☒ No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? (see instructions)

☐ Yes ☒ No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?

☐ Yes ☒ No

b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?

N/A

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?

If "Yes" to 6b, file Form 8870.

6b

X

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?

☐ Yes ☒ No

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

N/A

7b

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

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

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

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

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

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

0

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

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

Amount

Total. Add lines 1 through 3	0.
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Part X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see instructions.)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	2,469,247.
b	Average of monthly cash balances	1b	153,269.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	2,622,516.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	2,622,516.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	39,338.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	2,583,178.
6	Minimum investment return. Enter 5% of line 5	6	129,159.

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	129,159.
2a	Tax on investment income for 2016 from Part VI, line 5	2a	1,003.
b	Income tax for 2016. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	1,003.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	128,156.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	128,156.
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	128,156.

Part XII Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
a	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	1a	140,100.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	140,100.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	0.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	140,100.

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.

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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				128,156.
2 Undistributed income, if any, as of the end of 2016				
a Enter amount for 2015 only			0.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2016:				
a From 2011	28,896.			
b From 2012	27,925.			
c From 2013	22,089.			
d From 2014	14,888.			
e From 2015	15,503.			
f Total of lines 3a through e	109,301.			
4 Qualifying distributions for 2016 from Part XII, line 4: ► \$ 140,100.				
a Applied to 2015, but not more than line 2a			0.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2016 distributable amount				128,156.
e Remaining amount distributed out of corpus	11,944.			
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	121,245.			
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	28,896.			
9 Excess distributions carryover to 2017. Subtract lines 7 and 8 from line 6a	92,349.			
10 Analysis of line 9:				
a Excess from 2012	27,925.			
b Excess from 2013	22,089.			
c Excess from 2014	14,888.			
d Excess from 2015	15,503.			
e Excess from 2016	11,944.			

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

Part XV Supplementary Information (continued)**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year				
NEW CANAAN COUNTRY SCHOOL P.O. BOX 997 NEW CANAAN, CT 06840	NONE	PUBLIC	GENERAL EXEMPT PURPOSE	20,000.
VARIOUS CHARITIES SEE ATTACHED C/O BLAIR & POTTS, PO BOX 1214 STAMFORD, CT 06904-1214	NONE	PUBLIC	GENERAL EXEMPT PURPOSE	20,000.
VARIOUS CHARITIES SEE ATTACHED C/O BLAIR & POTTS, PO BOX 1214 STAMFORD, CT 06904-1214	NONE	PUBLIC	GENERAL EXEMPT PURPOSE	20,000.
VARIOUS CHARITIES SEE ATTACHED C/O BLAIR & POTTS, PO BOX 1214 STAMFORD, CT 06904-1214	NONE	PUBLIC	GENERAL EXEMPT PURPOSE	80,100.
Total			3a	140,100.
b Approved for future payment				
NONE				
Total			3b	0.

Form 990-PF (2016)

The Bowling Family Foundation
2016 Gifts Designated by Belinda Bowling Bewkes Metzger, Trustee

Name & Address Amount

1. **Inspirica**
141 Franklin Street
Stamford, CT 06901-1014..... \$ 3,000

2. **St. Luke's Church**
1864 Post Road
Darien, CT 06820 \$ 3,000

3. **Eaglebrook School**
Pine Nook Road
Deerfield, MA 01342..... \$ 3,000

4. **Skidmore College**
Alumni Giving
815 North Broadway
Saratoga Springs, NY 12866..... \$ 1,000

5. **University of Kentucky**
UK Office of Development
Attn: Gift Receiving Office
William B. Sturgill Development Building
Lexington, KY 40506-0015
Memo: J. C. Bowling, Lecture Series..... \$ 1,000

6. **The Wee Burn Scholarship Fund**
The Wee Burn Country Club
P.O. Box 1046
Darien, CT 06820-1046 \$ 1,000

7. **The Lustgarten Foundation**
1111 Stewart Avenue
Bethpage, NY 11714
Memo: In Memory of
James Chandler Bowling..... \$ 1,000

8. **Post 53**
P.O. Box 2066
Darien, CT 06820 \$ 1,000

Name & Address Amount

9. **The Darien Police Association**
P.O. Box 53
Darien, CT 06820-9861..... \$ 1,000

10. **Noroton Heights Fire Department**
209 Noroton Avenue
Darien, CT 06820 \$ 1,000

11. **The Community Fund of Darien**
P.O. Box 926
Darien, CT 06820..... \$ 1,000

12. **Stamford Hospital Foundation**
1351 Washington Boulevard
Suite 202
Stamford, CT 06820
Memo: Bennett Cancer Center \$ 1,000

13. **Cure Alzheimer's Fund**
34 Washington Street
Suite 200
Wellesley Hills, MA 02481..... \$ 500

14. **Cancer Research Institute**
One Exchange Plaza
55 Broadway, Suite 1802
New York, NY 10006..... \$ 500

15. **Breast Cancer Research Foundation**
60 East 56th Street
8th Floor
New York, NY 10022..... \$ 500

16. **The Darien Historical Society**
45 Old Kings Hwy North
Darien, CT 06820 \$ 500

Total \$20,000

BOWLING FAMILY FOUNDATION
Designations of Nancy Gramps
2016

Inspirica Development Office 141 Franklin Street Stamford, CT 06901	\$ 5,000	Noroton Fire Department \$ 500 Mr. Christian Schneider – President Noroton Heights Fire Dept., Inc. P.O. Box 2124 Darien, CT 06820
St. Luke's Parish Financial Office St. Luke's Parish 1864 Post Road Darien, CT 06820	\$ 3,000	Joshua House Fund, Inc. \$ 500 P.O. Box 1792 Darien, CT 06820
Neighbor's Link Stamford 74 Selleck Ave Stamford, CT 06902	\$ 2,000	Lustgarten Foundation \$ 500 1111 Stewart Avenue Bethpage, NY 11714
Planned Parenthood Stamford Government Center 888 Washington Boulevard Stamford, CT 06901	\$ 2,000	University of the \$ 500 Cumberlands Office of the President University of the Cumberlands 816 Walnut Street Williamsburg, KY 40769-9983
American Civil Liberties Union \$1,000 125 Broad Street, 18th Floor, New York NY 10004		Rowayton Arts Center \$ 500 145 Rowayton Ave Rowayton, CT 06853
ProPublica 155 Avenue of the Americas 13th Floor New York, N.Y. 10013	\$ 1,000	Person-to-Person \$ 500 1864 Post Road Darien, CT 06820
Skidmore College \$ 1,000 Ms. Lori Eastman Skidmore College 815 North Broadway Saratoga Springs, NY 12866-1632		TOTAL: \$20,000
Water for People \$ 1,000 Coordinator, Donation Relations 100 E Tennessee Ave Denver, CO 80209		
Coalition for the Homeless \$ 1,000 Ms. Mary B. Sullivan Coalition for the Homeless 129 Fulton Street New York, New York 10038		

FOUNDATION 2016

UNIVERSITY OF LOUISVILLE Development Office Louisville, Kentucky 40292 (Designated for James Bowling Scholarships School of Business)	\$15,000
UNIVERSITY OF LOUISVILLE SCHOOL OF MEDICINE HSC Development & Alumni 132 East Gray Street Louisville, Kentucky 40202 (Designated for the Dr. Norman S. Fisher, Jr. Scholarship Fund)	2,500
BEREA COLLEGE Development Office Berea, Kentucky 40404	25,000
UNIVERSITY OF KENTUCKY Development Office 356 Peterson Service Building Lexington, Kentucky 40506 (Designated for the James Bowling Lecture Series)	15,000
INDIAN RIVER MEDICAL CENTER FOUNDATION (GOLDEN EAGLE) 1000 37 th Street Vero Beach, Florida 32960 (in my name only, Ann J. Bowling)	1,000
NATURE CONSERVANCY, KENTUCKY CHAPTER 114 Woodland Avenue Lexington, Kentucky 40502	500
SHAKERTOWN AT PLEASANT HILL, KENTUCKY, INC. 3501 Lexington Road Harrodsburg, Kentucky 40330	500

PADUCAH JUNIOR COLLEGE JAMES C. BOWLING ENDOWED SCHOLARSHIP 4810 Alben Barkley Drive P.O. Box 7380 Paducah, Kentucky 42002	2,000
COLGATE UNIVERSITY 13 Oak Drive Hamilton, New York 13346 (designated for the James C. Bowling Library Endowed Book Fund)	1,000
INDIAN RIVER HABITAT FOR HUMANITY 4568 U. S. Highway 1 Vero Beach, Florida 32967	700
THE HOTCHKISS SCHOOL Annual Fund Office 11 Interlaken Road Lakeville, Connecticut 06039	1,000
NEW CANAAN COUNTRY SCHOOL P.O. Box 997 New Canaan, Connecticut 06840 (from Ann Bowling, Rett, and Bo Zeigler's grandmother) (donated to the Grandparents' Fund)	4,000
DARIEN LIBRARY 1441 Post Road Darien, Connecticut 06820	500
POST 53 P.O. Box 2066 Darien, Connecticut 06820	500
NATIONAL BIBLE ASSOCIATION 488 Madison Avenue 24 th floor New York, New York 10022	500
SIGMA KAPPA FOUNDATION 695 Pro-Med Lane Suite 300 Carmel, Indiana 46032 (in name of Ann Jones Bowling, Alpha Theta '49)	400
DOCTORS WITHOUT BORDERS/ MEDCINS SANS FRONTIERES PO BOX 5022 Hagerstown, Maryland 21471	500

CONVENT OF SAINT BIRGITTA 4 Runkenhage Road Darien, Connecticut 06820	500
VNA & HOSPICE FOUNDATION, INC. 1110 35 th Lane Vero Beach, Florida 32960	500
GIDEONS INTERNATIONAL P.O. Box 440244 Nashville, Tennessee 37244	500
DISABLED AMERICAN VETERANS P.O. Box 14301 Cincinnati, Ohio 45250	500
RIVERSIDE THEATRE 3250 Riverside Park Drive Vero Beach, Florida 32963	500
SALVATION ARMY P.O. Box 509 Hartford, Connecticut 06141	500
MAKE-A-WISH Make-A-Wish Foundation 5272 River Road Suite 700	500
SMILE TRAIN P.O. BOX 96231 WASHINGTON, D.C. 20090 – 6231	500
P.O. BOX 96231 WASHINGTON D.C. 20090-6231	
CHILDREN'S AID SOCIETY Church Street Station PO Box 29517 New York, New York 10277	500
CHRISTIAN APPALACHIAN PROJECT P. O. Box 511 2610 Polumbo Drive Lancaster, Kentucky 40509	500

COVENANT HOUSE 500
P. O. Box 96708
2001 Mississippi Avenue SE
Washington, DC 20020

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

TOYS FOR TOTS FOUNDATION 500
Marine Corps Base
1851 Quantico Gateway Drive
P. O. Box 227
Triangle, Virginia 22172

BREWSTER ACADEMY 3,000
80 Academy Drive
Wolfeboro, New Hampshire 03894
(from Ann Bowling – grandmother of Grey Zeigler)

\$80,100

FORM 990-PF	DIVIDENDS AND INTEREST FROM SECURITIES	STATEMENT	1
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SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
DEUTSCHE BANK TR. CO. #651429	27,752.	17,527.	10,225.	10,225.	10,225.
DEUTSCHE BANK TR. CO. #651430	39,953.	0.	39,953.	39,953.	39,953.
TO PART I, LINE 4	67,705.	17,527.	50,178.	50,178.	50,178.

FORM 990-PF	OTHER INCOME	STATEMENT	2
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DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
K-1 EXCELSIOR VENTURE INVESTORS III	<334.>	0.	<334.>
TOTAL TO FORM 990-PF, PART I, LINE 11	<334.>	0.	<334.>

FORM 990-PF	TAXES	STATEMENT	3
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FOREIGN TAXES PAID	1,488.	0.	0.	0.
IRS TAX REFUNDS	2,224.	0.	0.	0.
TO FORM 990-PF, PG 1, LN 18	3,712.	0.	0.	0.

FORM 990-PF	OTHER EXPENSES			STATEMENT	4
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
ADVISORY FEES HIRTLE					
CALLAGHAN MGT (DEUT #1429)	4,291.	4,291.	0.	0.	
DEUTSCHE BANK TR. CO.- FEES	1,306.	1,306.	0.	0.	
BLAIR & POTTS FEES	7,125.	7,125.	0.	0.	
TO FORM 990-PF, PG 1, LN 23	12,722.	12,722.	0.	0.	

FORM 990-PF	CORPORATE STOCK		STATEMENT	5
DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE		
INVESTMENTS: DEUTSCHE BANK	1,181,474.	2,447,203.		
TOTAL TO FORM 990-PF, PART II, LINE 10B	1,181,474.	2,447,203.		

FORM 990-PF	OTHER INVESTMENTS		STATEMENT	6
DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE	
EXCELSIOR VENTURE INVESTORS III, LLC	FMV	<102,257.>	16,151.	
TOTAL TO FORM 990-PF, PART II, LINE 13		<102,257.>	16,151.	