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 instructions is at *www.irs.gov/form990pf*.

OMB No 1545-0052

2016

Open to Public Inspection

For calendar year 2016, or tax year beginning 01-01-2016 , and ending 12-31-2016

Name of foundation
BEDFORD FAMILY CHARITABLE TRUST
C/O STEVEN BEDFORD TRUSTEE

A Employer identification number
86-6255502

Number and street (or P O box number if mail is not delivered to street address) 11 SHAFER ROAD
Room/suite

B Telephone number (see instructions)
(860) 489-9908

City or town, state or province, country, and ZIP or foreign postal code
NEW HARTFORD, CT 06057

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)*▶$ 1,598,542

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) (see instructions))*

			(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 (attach schedule)				
	2	Check ▶ ☑ if the foundation is **not** required to attach Sch B				
	3	Interest on savings and temporary cash investments	3,657	3,657		
	4	Dividends and interest from securities	32,566	32,566		
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10	-19,967			
	b	Gross sales price for all assets on line 6a 256,591				
	7	Capital gain net income (from Part IV, line 2)		0		
	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) (attach schedule)				
	11	Other income (attach schedule)	10,540	10,540		
	12	**Total.** Add lines 1 through 11	26,796	46,763		
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 (attach schedule)				
	b	Accounting fees (attach schedule)	4,000	4,000		0
	c	Other professional fees (attach schedule)				
	17	Interest				
	18	Taxes (attach schedule) (see instructions)	2,394	894		0
	19	Depreciation (attach schedule) and depletion				
	20	Occupancy				
	21	Travel, conferences, and meetings				
	22	Printing and publications				
	23	Other expenses (attach schedule)	24,584	24,524		0
	24	**Total operating and administrative expenses.** Add lines 13 through 23	30,978	29,418		0
	25	Contributions, gifts, grants paid	55,000			55,000
	26	**Total expenses and disbursements.** Add lines 24 and 25	85,978	29,418		55,000
	27	Subtract line 26 from line 12				
	a	**Excess of revenue over expenses and disbursements**	-59,182			
	b	**Net investment income** (if negative, enter -0-)		17,345		
	c	**Adjusted net income**(if negative, enter -0-)				

Part II Balance Sheets — Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)		Beginning of year (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	50,650	68,967	68,967
3	Accounts receivable ▶			
	Less allowance for doubtful accounts ▶			
4	Pledges receivable ▶			
	Less allowance for doubtful accounts ▶			
5	Grants receivable			
6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
7	Other notes and loans receivable (attach schedule) ▶			
	Less allowance for doubtful accounts ▶			
8	Inventories for sale or use			
9	Prepaid expenses and deferred charges			
10a	Investments—U S and state government obligations (attach schedule)			
b	Investments—corporate stock (attach schedule)	1,174,211	1,130,213	1,475,963
c	Investments—corporate bonds (attach schedule)	23,125		
11	Investments—land, buildings, and equipment basis ▶			
	Less accumulated depreciation (attach schedule) ▶			
12	Investments—mortgage loans			
13	Investments—other (attach schedule)	79,245	68,869	53,612
14	Land, buildings, and equipment basis ▶			
	Less accumulated depreciation (attach schedule) ▶			
15	Other assets (describe ▶)			
16	**Total assets** (to be completed by all filers—see the instructions Also, see page 1, item I)	1,327,231	1,268,049	1,598,542
Liabilities 17	Accounts payable and accrued expenses	854	854	
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 ▶)			
23	**Total liabilities**(add lines 17 through 22)	854	854	
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	1,326,377	1,267,195	
25	Temporarily restricted			
26	Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ ☐ **and complete lines 27 through 31.**			
27	Capital stock, trust principal, or current funds			
28	Paid-in or capital surplus, or land, bldg , and equipment fund			
29	Retained earnings, accumulated income, endowment, or other funds			
30	**Total net assets or fund balances** (see instructions)	1,326,377	1,267,195	
31	**Total liabilities and net assets/fund balances** (see instructions)	1,327,231	1,268,049	

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	1,326,377
2	Enter amount from Part I, line 27a	2	-59,182
3	Other increases not included in line 2 (itemize) ▶	3	0
4	Add lines 1, 2, and 3	4	1,267,195
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	1,267,195

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 Additional Data Table			
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 See Additional Data Table			
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 See Additional Data Table			
b			
c			
d			
e			

2 Capital gain net income or (net capital loss)	If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7	2	-19,967
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	19,999	1,557,192	0 012843
2014	0	1,566,279	0 000000
2013	101,000	1,442,944	0 069996
2012	80,000	1,357,028	0 058952
2011	102,254	1,357,544	0 075323

2 **Total** of line 1, column (d)	2	0 217114
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 043423
4 Enter the net value of noncharitable-use assets for 2016 from Part X, line 5	4	1,495,492
5 Multiply line 4 by line 3	5	64,939
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	173
7 Add lines 5 and 6	7	65,112
8 Enter qualifying distributions from Part XII, line 4	8	55,000

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 ▶ ☐ and enter 1% of Part I, line 27b			1	347
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	347
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	347
6	Credits/Payments				
a	2016 estimated tax payments and 2015 overpayment credited to 2016	6a	2,369		
b	Exempt foreign organizations—tax withheld at source	6b			
c	Tax paid with application for extension of time to file (Form 8868)	6c	1,000		
d	Backup withholding erroneously withheld	6d			
7	Total credits and payments Add lines 6a through 6d.			7	3,369
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	3,022
11	Enter the amount of line 10 to be **Credited to 2017 estimated tax** ▶ 3,022 **Refunded** ▶			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?	1a		No
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes (see Instructions for definition)?	1b		No
	*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*			
c	Did the foundation file **Form 1120-POL** for this year?	1c		No
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year **(1)** On the foundation ▶ $ 0 **(2)** On foundation managers ▶ $ 0			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ▶ $ 0			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? *If "Yes," attach a detailed description of the activities*	2		No
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? *If "Yes," attach a conformed copy of the changes*	3		No
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		No
b	If "Yes," has it filed a tax return on **Form 990-T** for this year?	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? *If "Yes," attach the statement required by General Instruction T*	5		No
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	Yes	
7	Did the foundation have at least $5,000 in assets at any time during the year? *If "Yes," complete Part II, col (c), and Part XV*	7	Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) ▶AZ			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? *If "No," attach explanation*	8b	Yes	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2016 or the taxable year beginning in 2016 (see instructions for Part XIV)? *If "Yes," complete Part XIV*	9		No
10	Did any persons become substantial contributors during the tax year? *If "Yes," attach a schedule listing their names and addresses*	10		No

Part VII-A Statements Regarding Activities (continued)

			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		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?	13	Yes	

Website address ▶N/A

14 The books are in care of ▶ALAN L GOLDBERG CPA Telephone no ▶(212) 891-6020

Located at ▶750 THIRD AVENUE - 13TH FL NEW YORK NY ZIP+4 ▶10017

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

			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		No
	See instructions for exceptions and filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR) If "Yes", enter the name of the foreign country ▶			

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

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

				Yes	No
1a	During the year did the foundation (either directly or indirectly)				
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	☐ Yes ☑ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	☐ Yes ☑ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	☐ Yes ☑ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	☐ Yes ☑ No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	☐ Yes ☑ No			
	(6) Agree to pay money or property to a government official? (**Exception.** Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days)	☐ Yes ☑ No			
b	If any answer is "Yes" to 1a(1)–(6), did **any** of the acts fail to qualify under the exceptions described in Regulations section 53 4941(d)-3 or in a current notice regarding disaster assistance (see instructions)?		1b		
	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		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? If "Yes," list the years ▶ 20___, 20___, 20___, 20___	☐ Yes ☑ No			
b	Are there any years listed in 2a for which the foundation is **not** applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to **all** years listed, answer "No" and attach statement—see instructions)		2b		
c	If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here ▶ 20___, 20___, 20___, 20___				
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	☐ Yes ☑ No			
b	If "Yes," did it have excess business holdings in 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).*		3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		4a		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 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))?	☐ 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)?		**5b**		
	Organizations relying on a current notice regarding disaster assistance check here ▶ ☐				
c	If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?	☐ Yes ☐ No			
	If "Yes," attach the statement required by Regulations section 53 4945–5(d)				
6a	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	☐ Yes ☑ No			
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?		**6b**		No
	If "Yes" to 6b, file Form 8870				
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	☐ Yes ☑ No			
b	If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?		**7b**		

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

1 List all officers, directors, trustees, foundation managers and their compensation (see instructions).

(a) Name and address	Title, and average hours per week **(b)** devoted to position	**(c)** Compensation **(If not paid, enter -0-)**	**(d)** Contributions to employee benefit plans and deferred compensation	**(e)** Expense account, other allowances
CLAY PATRICK BEDFORD JR AYERS LAKE FARM 557 ROUTE 202 BARRINGTON, NH 03825	TRUSTEE AND PRESIDENT 1 00	0	0	0
PETER BENJAMIN BEDFORD AYERS LAKE FARM 557 ROUTE 202 BARRINGTON, NH 03825	TRUSTEE 1 00	0	0	0
STEVEN BEDFORD 11 SHAFER ROAD NEW HARTFORD, CT 06057	TRUSTEE AND PRESIDENT 1 00	0	0	0
HILARY B PARKHURST 93 OLD CHURCH ROAD GREENWICH, CT 06830	TRUSTEE 1 00	0	0	0

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	**(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 (see instructions). If none, enter "NONE".

(a) Name and address of each person paid more than $50,000	**(b)** Type of service	**(c)** Compensation
NONE		
Total number of others receiving over $50,000 for professional services. . . . . ▶		0

Part IX-A **Summary of Direct Charitable Activities**

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

Part IX-B **Summary of Program-Related Investments** (see instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1	
2	
All other program-related investments See instructions	
3	
Total. Add lines 1 through 3 . . . . ▶	0

Part X Minimum Investment Return (All domestic foundations must complete this part Foreign foundations,see instructions)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes				
a	Average monthly fair market value of securities.			1a	1,450,238
b	Average of monthly cash balances.			1b	68,028
c	Fair market value of all other assets (see instructions).			1c	0
d	**Total** (add lines 1a, b, and c).			1d	1,518,266
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	1,518,266
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).			4	22,774
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3 Enter here and on Part V, line 4			5	1,495,492
6	**Minimum investment return.** Enter 5% of line 5.			6	74,775

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	74,775
2a	Tax on investment income for 2016 from Part VI, line 5.	2a	347		
b	Income tax for 2016 (This does not include the tax from Part VI).	2b			
c	Add lines 2a and 2b.			2c	347
3	Distributable amount before adjustments Subtract line 2c from line 1.			3	74,428
4	Recoveries of amounts treated as qualifying distributions.			4	0
5	Add lines 3 and 4.			5	74,428
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	74,428

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	55,000
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	55,000
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	0
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4.	6	55,000

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					74,428
2 Undistributed income, if any, as of the end of 2016					
a Enter amount for 2015 only.				0	
b Total for prior years 20___, 20___, 20___			0		
3 Excess distributions carryover, if any, to 2016					
a From 2011.					
b From 2012.	32,356				
c From 2013.	33,173				
d From 2014.					
e From 2015.					
f **Total** of lines 3a through e.		65,529			
4 Qualifying distributions for 2016 from Part XII, line 4 ▶ $ 55,000					
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.					55,000
e Remaining amount distributed out of corpus		0			
5 Excess distributions carryover applied to 2016 *(If an amount appears in column (d), the same amount must be shown in column (a))*		19,428			19,428
6 **Enter the net total of each column as indicated below:**					
a Corpus Add lines 3f, 4c, and 4e Subtract line 5		46,101			
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 instructions				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 (see instructions)		0			
9 **Excess distributions carryover to 2017.** Subtract lines 7 and 8 from line 6a		46,101			
10 Analysis of line 9					
a Excess from 2012.	12,928				
b Excess from 2013.	33,173				
c Excess from 2014.					
d Excess from 2015.					
e Excess from 2016.					

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 ☐ 4942(j)(3) or ☐ 4942(j)(5)

	Tax year	Prior 3 years			(e) Total
	(a) 2016	**(b)** 2015	**(c)** 2014	**(d)** 2013	
2a 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 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 ▶ ☐ 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

STEVEN BEDFORD CO-TRUSTEE
11 SHAFER ROAD
NEW HARTFORD, CT 06057
(860) 489-9908

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

THE PURPOSE OF THE CONTRIBUTION OR GRANT AND AMOUNT

c Any submission deadlines

NONE

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

PURPOSE IS FOR SECONDARY AND HIGHER EDUCATION OR MEDICAL CARE AND RESEARCH

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*				
ST PAUL'S ENGINEERING HONORS PROGRAM 325 PLEASANT STREET CONCORD, NH 03301		501(C)(3) PUBLIC CHA	GENERAL CONTRIBUTION	20,000
COLUMBIA UNIVERSITY DEPARTMENT OF ART HISTORY 1190 AMSTERDAM AVENUE NEW YORK, NY 10027		501(C)(3) PUBLIC CHA	GENERAL CONTRIBUTION	10,000
SAINT MARY'S COLLEGE OF CALIFORNIA 1928 SAINT MARYS ROAD MORAGA, CA 94575		501(C)(3) PUBLIC CHA	GENERAL CONTRIBUTION	25,000
Total . . . . ▶ **3a**				55,000
b *Approved for future payment*				
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) 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			14	3,657	
4 Dividends and interest from securities. . . .			14	32,566	
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.			01	10,540	
8 Gain or (loss) from sales of assets other than inventory			18	-19,967	
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		26,796	0

13 Total. Add line 12, columns (b), (d), and (e). 13 26,796

(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) (See instructions)

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)**		**No**
(2) Other assets.	**1a(2)**		**No**
b Other transactions			
(1) Sales of assets to a noncharitable exempt organization.	**1b(1)**		**No**
(2) Purchases of assets from a noncharitable exempt organization.	**1b(2)**		**No**
(3) Rental of facilities, equipment, or other assets.	**1b(3)**		**No**
(4) Reimbursement arrangements.	**1b(4)**		**No**
(5) Loans or loan guarantees.	**1b(5)**		**No**
(6) Performance of services or membership or fundraising solicitations.	**1b(6)**		**No**
c Sharing of facilities, equipment, mailing lists, other assets, or paid employees.	**1c**		**No**

d If the answer to any of the above is "Yes," complete the following schedule Column **(b)** should always show the fair market value of the goods, other assets, or services given by the reporting foundation If the foundation received less than fair market value in any transaction or sharing arrangement, show in column **(d)** the value of the goods, other assets, or services received

(a) Line No	**(b)** Amount involved	**(c)** Name of noncharitable exempt organization	**(d)** Description of transfers, transactions, and sharing arrangements

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

b If "Yes," complete the following schedule

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

Sign Here

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

******	2017-11-13	******	May the IRS discuss this return with the preparer shown below (see instr)? ☑ **Yes** ☐ **No**
Signature of officer or trustee	Date	Title	

Paid Preparer Use Only

Print/Type preparer's name	Preparer's Signature	Date	Check if self-employed ▶ ☐	PTIN
ALAN L GOLDBERG				P00970164
Firm's name ▶ EISNERAMPER LLP				Firm's EIN ▶13-1639826
Firm's address ▶ 750 THIRD AVENUE NEW YORK, NY 100172703				Phone no (212) 949-8700

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(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)
60 SHS ATMOS ENERGY CORP	P	2015-07-15	2016-06-07
30 SHS DOMINION RES INC VA NEW	P	2015-07-15	2016-02-08
1 352 SHS ENBRIDGE ENERGY MGMT	P	2016-08-12	2016-11-14
270 SHS INFRAREIT INC	P	2015-03-16	2016-03-22
20 SHS NEW JERSEY RES CORP	P	2015-07-15	2016-02-08
10 SHS SEMPRA ENERGY	P	2015-03-30	2016-02-08
50 SHS WILLIAMS COMPANIES INC	P	2016-05-31	2016-10-06
20 SHS ENBRIDGE ENERGY PTNRS LP	P	2016-02-08	2016-05-31
1 015 SHS ENBRIDGE ENERGY MGMT LLC	P	2016-02-12	2016-05-13
128 SHS SUBURBAN PROPANE PTNRS LP	P	2016-03-30	2016-11-07

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
4,428		3,220	1,208
2,082		2,083	-1
32			32
4,271		7,624	-3,353
692		570	122
935		1,099	-164
1,529		1,121	408
436		325	111
21			21
4,108		3,855	253

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

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	
			1,208
			-1
			32
			-3,353
			122
			-164
			408
			111
			21
			253

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(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)
26 SHS TALLGRASS ENERGY PTNR LP	P	2015-07-15	2016-06-15
90 SHS TARGA RESRCES PTNRS CHG LP	P	2015-01-26	2016-01-19
6 SHS TRANSMONTAIGNE PTNRS LP	P	2015-10-13	2016-10-11
10 SHS WESTLAKE CHEMICAL PTNRS LP	P	2015-03-30	2016-02-08
40 SHS ATMOS ENERGY CORP	P	2014-06-18	2016-05-31
55 SHS DOMINION RES INC VA NEW	P	2013-06-26	2016-02-08
30 SHS ENBRIDGE INC	P	2014-01-17	2016-10-06
440 SHS ENBRIDGE ENERGY MGMT LLC	P	2013-05-28	2016-11-17
30 SHS EVERSOURCE ENERGY	P	2013-05-28	2016-02-08
440 SHS KINDER MORGAN INC DEL	P	2013-06-04	2016-10-06

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
1,195		1,174	21
880		3,425	-2,545
245		191	54
184		270	-86
2,815		2,034	781
3,816		3,458	358
1,291		1,334	-43
10,545		10,374	171
1,618		1,280	338
9,211		14,124	-4,913

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

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	
			21
			-2,545
			54
			-86
			781
			358
			-43
			171
			338
			-4,913

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(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)
70 SHS NATIONAL GRID PLC SPON ADR NEW	P	2013-06-26	2016-10-06
20 SHS NEXTERA ENERGY INC	P	2013-05-28	2016-02-08
82 SHS ONE GAS INC	P	2014-06-20	2016-05-31
90 SHS PIEDMONT NATURAL GAS CHG	P	2015-01-12	2016-02-11
40 SHS SEMPRA ENERGY	P	2014-03-12	2016-01-19
70 SHS TRANSCANADA CORP	P	2013-05-28	2016-10-06
30 SHS UGI CORP NEW	P	2013-06-11	2016-05-31
20 SHS ALLIANCE RESOURCES PTNRS LP	P	2013-05-28	2016-10-06
50 SHS AMERIGAS PTNRS LP	P	2013-05-28	2016-06-07
190 SHS COLUMBIA PIPELINE PTNRS LP	P	2015-03-30	2016-11-09

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
4,769		4,193	576
2,274		1,559	715
4,757		3,113	1,644
5,321		3,559	1,762
3,697		3,998	-301
3,268		3,338	-70
1,216		774	442
449		762	-313
2,209		2,368	-159
3,241		5,045	-1,804

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

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	
			576
			715
			1,644
			1,762
			-301
			-70
			442
			-313
			-159
			-1,804

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(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)
150 SHS ENERGY TRANSFER PTNRS LP	P	2005-04-20	2016-01-19
90 SHS ENTERPRISE PRODUCTS PTNRS	P	2008-10-24	2016-10-06
130 SHS PLAINS ALL AMERICAN PIPELINE LP	P	2004-07-14	2016-10-06
10 SHS TC PIPELINES	P	2011-08-12	2016-05-31
134 SHS TALLGRASS ENERGY PTNR LP	P	2014-10-20	2016-06-15
155 SHS TARGA RESRCES PTNRS CHG LP	P	2015-01-12	2016-01-19
214 SHS TRANSMONTAIGNE PTNRS LP	P	2013-05-28	2016-10-21
176 SHS WILLIAMS PTNRS LP NEW UNIT LTD PTNRSHIP INT	P	2014-08-14	2016-02-08
0 71 SHS UNDER ARMOUR INC CLASS C	P	2016-06-29	2016-06-29
700 SHS BIOMED REALTY TRUST CHG INC	P	2013-05-29	2016-01-28

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
3,524		6,685	-3,161
2,470		907	1,563
4,081		6,773	-2,692
550		435	115
6,185		6,403	-218
1,515		6,667	-5,152
7,405		9,205	-1,800
2,590		10,155	-7,565
26			26
16,677		14,572	2,105

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

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	
			-3,161
			1,563
			-2,692
			115
			-218
			-5,152
			-1,800
			-7,565
			26
			2,105

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(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)
282 SHS FIRST POTOMAC 7 75% PFD	P	2012-04-04	2016-04-27
45 SHS FIRST POTOMAC 7 75% PFD	P	2012-04-04	2016-07-06
173 SHS FIRST POTOMAC 7 75% PFD	P	2012-04-04	2016-01-19
2 SHS GENERAL MOTORS CO WTS	P	2014-11-13	2016-06-09
2 SHS GENERAL MOTORS CO WTS	P	2014-11-13	2016-06-09
200 SHS ISHARES MSCI SWEDEN ETF CAPPED	P	2012-03-16	2016-11-15
400 SHS KKR FINL HLDGS 8 375% PFD	P	2011-11-08	2016-11-15
100 SHS NVIDIA CORP	P	2013-12-17	2016-12-29
391 85 SHS PRUDENTIAL SECTOR FDS	P	2012-02-03	2016-05-04
700 SHS STAGINDUSTRIAL INC 9% PFD	P	2012-08-30	2016-11-02

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
7,050		6,938	112
1,125		997	128
4,325		4,256	69
39			39
24			24
5,432		5,865	-433
10,000		10,000	0
10,471		1,417	9,054
15,000		11,679	3,321
17,500		19,210	-1,710

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

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	
			112
			128
			69
			39
			24
			-433
			0
			9,054
			3,321
			-1,710

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(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)
1,000 SHS BARCLAY BANK PLC 7 75%	P	2008-03-31	2016-06-15
25,000 SHS CHESAPEAKE ENERGY CORP	P	2012-05-18	2016-01-20
500 SHS DIGITAL REALTY 7% E PFD	P	2011-09-08	2016-09-15
73 SHS GENERAL MOTORS CO WTS	P	2011-04-21	2016-06-09
73 SHS GENERAL MOTORS CO WTS	P	2011-04-21	2016-06-09
251 SHS QWEST CORP 7 5% PERPTL	P	2011-09-15	2016-09-15
CAPITAL GAINS DIVIDENDS	P		

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
25,000		24,990	10
11,378		24,359	-12,981
12,500		12,500	0
1,434			1,434
867			867
6,275		6,275	0
1,613			1,613

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

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	
			10
			-12,981
			0
			1,434
			867
			0
			1,613

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TY 2016 Accounting Fees Schedule

Name: BEDFORD FAMILY CHARITABLE TRUST
C/O STEVEN BEDFORD TRUSTEE

EIN: 86-6255502

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING FEES	4,000	4,000		0

TY 2016 General Explanation Attachment

Name: BEDFORD FAMILY CHARITABLE TRUST
C/O STEVEN BEDFORD TRUSTEE

EIN: 86-6255502

General Explanation Attachment

Identifier	Return Reference	Explanation	
1		FORM 990-PF	ON AUGUST 26, 2016, CLAY PATRICK BEDFORD, JR , THE FOUNDATION'S PRESIDENT, PASSED AWAY HE WAS SUCCEEDED AS PRESIDENT BY STEVEN BEDFORD

TY 2016 Investments Corporate Stock Schedule

Name: BEDFORD FAMILY CHARITABLE TRUST
C/O STEVEN BEDFORD TRUSTEE

EIN: 86-6255502

Name of Stock	End of Year Book Value	End of Year Fair Market Value
AT & T INC - 700 SHARES	19,291	29,771
BRISTOL MYERS SQUIBB CO - 100 SHS	2,183	5,844
CATERPILLAR INC - 200 SHS	8,005	18,548
CELGENE CORP - 200 SHS	7,401	23,150
DU PNT EI DE NEMOURS & CO - 300 SHS	13,315	22,020
EMERSON ELECTRIC CO EMR - 200	9,960	11,150
HARRIS CORP DEL - 200 SHARES	8,593	20,494
HEALTH CARE REIT INC - 300 SHARES	14,065	20,079
ISHARES DOW JONES SELECT DIV INDEX F-600 SHS	33,165	53,142
ISHARES TR RUSSELL 2000 VALUE - 200	10,880	23,788
MERCK & CO INC - 150 SHARES	5,682	8,831
NATIONAL HEALTH INVS INC - 200 SHS	5,670	14,834
NEXTRA ENERGY INC - 70 SHARES	6,998	8,362
NUCOR CORP - 200 SHARES	8,323	11,904
PLAINS ALL AMERICAN PIPELINE - 780	20,796	25,186
PROCTER & GAMBLE CO - 200 SHARES	12,684	16,816
REYNOLDS AMERICAN INC - 600 SHARES	7,422	33,624
SENIOR HOUSING PROPERTY TR - 600 SHS	9,502	11,358
STARWOOD PROPERTY TR INC - 500 SHARES	10,693	10,975
TAIWAN SEMICONDUCTOR MFG CO - 500 SH	4,759	14,375
WALMART STORE - 300 SHARES	15,807	20,736
DB CONT CAP TR 6.55% NON-CUM - 500 SHS	10,706	11,985
GREAT ATL & PACIFIC 9.375% - 100 SHS	1,700	0
HSBC HOLDINGS PLC 6.2% - 400	9,430	10,080
APPLE INC - 525 SHS	32,675	60,806
INTERDIGITAL INC - 200 SHS	10,238	18,270
QWEST CORP 7.5% PFD - 500	6,225	6,237
ENTERPRISE PRODUCTS PARTNERS - 1526 SHS	20,562	41,263
MAGELLAN MIDSTREAM PRTNS - 280 SHS	11,375	21,176
SPECTRA ENERGY PARTNERS LP - 680 SHS	20,176	31,171

Name of Stock	End of Year Book Value	End of Year Fair Market Value
TC PIPELINES TCP - 360 SHS	11,061	21,182
ARBOR REALTY TRUST INC - 500	2,548	3,730
BHP BILLITON LTD - 100	7,175	3,578
CISCO SYSTEMS INC - 200	4,888	6,044
ALPHABET (GOOGLE) INC - 50	17,010	39,107
INTEL CORP - 600	15,057	21,762
KKR & CO L P DEL - 500	10,163	7,695
JOHNSON & JOHNSON - 200	12,500	23,042
MOSAIC COMPANY - 100 SHS	5,895	2,933
DRIVE SHACK INC - 66 SHS	2,472	248
NEWMONT MINING CORP NEW - 200	9,880	6,814
NOVARTIS AG - 200	13,522	14,568
POTASH CORP OF SASKATCHEWAN INC - 100	4,666	1,809
WASTE MGMT INC DEL - 300	11,718	21,273
BGC PARTNERS 8.125% - 300 SHS	7,500	7,710
CHARLES SCHWAB 6% - 500 SHS	12,500	12,635
ALLIANCE HOLDINGS GP LP - 242 SHS	9,447	6,800
ALLIANCE RESOURCES PARTNERS LP - 500	13,630	11,225
ALLSTATE CORP - 200 SHARES	10,600	14,824
AMERICAN EAGLE OUTFITTERS - 300 SHARES	4,262	4,551
AMERIGAS PARTNERS LP - 180 SHS	4,327	8,626
ANWORTH MORTGAGE ASSET - 500 SHARES	2,320	2,585
BARRICK GOLD CORP - 500 SHARES	9,593	7,990
CDN IMPERIAL BK COMMERCE - 200 SHARES	16,612	16,320
DEERE & CO - 300 SHARES	25,655	30,912
DUNKIN BRANDS GROUP INC - 300 SHARES	14,401	15,732
ENBRIDGE ENERGY MANAGEMENT LLC-677 SHS	16,291	17,534
ENBRIDGE INC - 70 SHARES	2,667	2,948
ENBRIDGE INCOME FUND HOLDINGS-295 SHS	9,918	10,335
EQUITY MIDSTREAM PARTNER LP-298 SHS	18,598	22,851

Name of Stock	End of Year Book Value	End of Year Fair Market Value
II-ISE CLOUD COMPUTING INDEX FUND - 200 SHARES	4,880	6,896
HOLLY ENERGY PARTNERS LP - 655 SHARES	14,627	20,999
HSBC HOLDINGS PLC - 200 SHARES	11,053	8,036
INTER PIPELINE LTD - 240 SHARES	5,700	5,296
INTERNATIONAL BUSINESS MACHINE CORP - 100 SHARES	19,923	16,599
KEYCORP NEW - 200 SHARES	2,644	3,654
KINDER MORGAN INC DEL - 647 SHARES	17,055	13,399
NATIONAL GRID PLC SPON ADRE NEW - 30 SHARES	2,053	1,750
NIKE INC CLASS B - 100 SHARES	6,700	10,166
NORFOLK SOUTHERN CORP - 200 SHARES	16,526	21,614
EVERSOURCE/NORTHEAST UTIL - 170 SHARES	8,013	9,389
NVIDIA CORP - 100 SHARES	1,503	10,674
TRANSCANADA CORP - 390 SHARES	13,948	17,609
UGI CORP NEW - 90 SHARES	2,335	4,147
VODAFONE GROUP PLC - 218 SHARES	10,314	5,326
WALGREEN COMPANY - 200 SHARES	9,881	16,552
3D SYS CORP - 200 SHS	7,523	2,658
ALIBABA GRP HOLDINGS - 100 SHS	9,892	8,781
DISNEY WALT CO - 200 SHS	18,271	20,844
FORD MOTOR CO - 500 SHS	7,450	6,065
NEW RESIDENTIAL INVESTMENT - 200 SHS	2,756	3,144
NEW SENIOR INVESTMENT - 66 SHS	1,189	646
PANERA BREAD CO - 50 SHS	9,273	10,255
STRATASYS LTD - 100 SHS	10,352	1,654
TARGET CORP - 100 SHS	5,981	7,223
TUTOR PERINI CORP - 200 SHS	5,874	5,600
VERIZON - 105 SHS	5,052	5,605
YAHOO - 300 SHS	11,700	11,601
NEXTERA ENERGY PARTNERS - 532 SHS	17,292	13,587
SEMPRA ENERGY - 50 SHS	5,098	5,032

Name of Stock	End of Year Book Value	End of Year Fair Market Value
TALLGRASS ENERGY PARTNER - 124 SHS	3,904	5,884
ALLERGAN PLC - 50 SHS	13,999	10,501
CHEMOURS CO - 60 SHS	713	1,325
JPMORGAN CHASE - 200 SHS	12,000	17,258
NETFLIX - 100 SHS	10,388	12,380
RMR GRP - 6 SHS	71	237
SOUTH 32 LTD - 40 SHS	360	396
UNDER ARMOUR INC - 200 SHS	8,335	5,422
COLUMBIA PIPELINE PARTNERS - 585	8,129	10,033
WESTLAKE CHEMICAL PARTNERS - 130	2,604	2,815
NEW JERSEY RES CORP - 170 SHS	5,103	6,035
AMERICAN ELECTRIC POWER INC - 70 SHS	4,364	4,407
BUCKEYE PTNRS LP - 120 SHS	7,847	7,939
DOMINION MIDSTREAM PTNRS LP - 160 SHS	3,794	4,728
DUKE ENERGY CORP - 30 SHS	2,320	2,329
ENBRIDGE ENERGY PTNRS LP - 320 SHS	5,566	8,154
ONEOK PTNRS LP - 320 SHS	5,886	13,763
PHILLIPS 66 PTNRS LP - 130 SHS	5,839	6,323
PUBLIC SVC ENTERPRISE GROUP INC - 100 SHS	4,075	4,388
WILLIAMS COMPANIES INC - 132 SHS	2,969	4,110
AMAZON COM INC - 25 SHS	14,131	18,747
BB&T CORP - 300 SHS	10,188	14,106
COLONY STARWOOD HOMES - 100 SHS	2,884	2,881
LOCKHEED MARTIN CORP - 100 SHS	24,836	24,994
UNITED TECHNOLOGIES CORP - 50 SHS	4,807	5,481
WHOLE FOODS MARKET INC - 300 SHS	10,086	9,228
WESTERN ALLIANCE BK PFD 6.25% - 1000 SHS	25,000	23,960

TY 2016 Investments - Other Schedule

Name: BEDFORD FAMILY CHARITABLE TRUST
C/O STEVEN BEDFORD TRUSTEE

EIN: 86-6255502

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
PRUDENTIAL SECTORS FDS - 1175 UNITS	AT COST	43,600	31,739
FIRST TRUST CYBERSECURITY PORTFOLIO	AT COST	25,269	21,873

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TY 2016 Other Expenses Schedule

Name: BEDFORD FAMILY CHARITABLE TRUST
C/O STEVEN BEDFORD TRUSTEE

EIN: 86-6255502

Other Expenses Schedule

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ADVISORY FEES	24,518	24,518		0
NON-DEDUCTIBLE EXPENSES	60	0		0
ADR FEES	6	6		0

TY 2016 Other Income Schedule

Name: BEDFORD FAMILY CHARITABLE TRUST
C/O STEVEN BEDFORD TRUSTEE

EIN: 86-6255502

Other Income Schedule

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
ROYALTIES	49	49	49
OTHER PARTNERSHIP GAINS	250	250	250
SEC 1231 LOSS FROM PARTNERSHIP	-44	-44	-44
OTHER INVESTMENT INCOME	10,285	10,285	10,285

TY 2016 Taxes Schedule

Name: BEDFORD FAMILY CHARITABLE TRUST
C/O STEVEN BEDFORD TRUSTEE

EIN: 86-6255502

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOREIGN TAXES	894	894		0
FEDERAL EXCISE TAXES	1,500	0		0