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Form **990-PF**
Department of the Treasury
Internal Revenue Service

Return of Private Foundation

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

▶ **Do not enter social security numbers on this form as it may be made public.**
▶ **Information about Form 990-PF and its instructions is at *www.irs.gov/form990pf*.**

OMB No 1545-0052

2017

Open to Public Inspection

For calendar year 2017, or tax year beginning 01-01-2017 , and ending 12-31-2017

Name of foundation
NORFOLK FOUNDATION INC

A Employer identification number
47-5535228

Number and street (or P O box number if mail is not delivered to street address)
PO BOX 333

Room/suite

B Telephone number (see instructions)
(860) 541-0463

City or town, state or province, country, and ZIP or foreign postal code
NORFOLK, CT 060580333

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)* ▶$ 2,238,407

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)	366,300			
	2	Check ▶ ☐ if the foundation is **not** required to attach Sch B				
	3	Interest on savings and temporary cash investments	221	221	221	
	4	Dividends and interest from securities	23,506	23,506	23,506	
	5a	Gross rents	6,600	6,600	6,600	
	b	Net rental income or (loss) 4,901				
	6a	Net gain or (loss) from sale of assets not on line 10	67,647			
	b	Gross sales price for all assets on line 6a 1,243,481				
	7	Capital gain net income (from Part IV, line 2)		106,339		
	8	Net short-term capital gain			21,560	
	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)	434	0	434	
	12	**Total.** Add lines 1 through 11	464,708	136,666	52,321	
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc	77,430	0	0	77,430
	14	Other employee salaries and wages				
	15	Pension plans, employee benefits	8,499	0	0	8,499
	16a	Legal fees (attach schedule)	6,748	0	0	0
	b	Accounting fees (attach schedule)	8,242	4,130	4,130	0
	c	Other professional fees (attach schedule)	1,554	0	0	1,554
	17	Interest				
	18	Taxes (attach schedule) (see instructions)	26,115	286	286	4,873
	19	Depreciation (attach schedule) and depletion	21,952	351	351	
	20	Occupancy	9,441	0	0	9,441
	21	Travel, conferences, and meetings				
	22	Printing and publications	727	0	0	727
	23	Other expenses (attach schedule)	44,501	15,332	15,332	24,212
	24	**Total operating and administrative expenses.** Add lines 13 through 23	205,209	20,099	20,099	126,736
	25	Contributions, gifts, grants paid	121,809			121,809
	26	**Total expenses and disbursements.** Add lines 24 and 25	327,018	20,099	20,099	248,545
	27	Subtract line 26 from line 12				
	a	**Excess of revenue over expenses and disbursements**	137,690			
	b	**Net investment income** (if negative, enter -0-)		116,567		
	c	**Adjusted net income**(if negative, enter -0-)			32,222	

Part II Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)

		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash—non-interest-bearing	30,087	479,806	479,806
	2 Savings and temporary cash investments			
	3 Accounts receivable ▶			
	Less allowance for doubtful accounts ▶			
	4 Pledges receivable ▶			
	Less allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7 Other notes and loans receivable (attach schedule) ▶ 75,000			
	Less allowance for doubtful accounts ▶ 0	0	75,000	75,000
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges		19,834	19,834
	10a Investments—U S and state government obligations (attach schedule)	99,881	0	0
	b Investments—corporate stock (attach schedule)			
	c Investments—corporate bonds (attach schedule)			
	11 Investments—land, buildings, and equipment basis ▶ 14,045			
	Less accumulated depreciation (attach schedule) ▶ 351	14,045	13,694	13,694
	12 Investments—mortgage loans			
	13 Investments—other (attach schedule)	1,713,550	851,348	851,348
	14 Land, buildings, and equipment basis ▶ 623,444			
	Less accumulated depreciation (attach schedule) ▶ 32,584	516,922	590,860	590,860
	15 Other assets (describe ▶)	984	207,865	207,865
	16 **Total assets** (to be completed by all filers—see the instructions Also, see page 1, item I)	2,375,469	2,238,407	2,238,407
Liabilities	17 Accounts payable and accrued expenses	5,412	5,250	
	18 Grants payable			
	19 Deferred revenue	1,650		
	20 Loans from officers, directors, trustees, and other disqualified persons	317,535		
	21 Mortgages and other notes payable (attach schedule)			
	22 Other liabilities (describe ▶)			
	23 **Total liabilities**(add lines 17 through 22)	324,597	5,250	
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	2,050,872	2,183,157	
	25 Temporarily restricted		50,000	
	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)	2,050,872	2,233,157	
	31 **Total liabilities and net assets/fund balances** (see instructions)	2,375,469	2,238,407	

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	2,050,872
2	Enter amount from Part I, line 27a	2	137,690
3	Other increases not included in line 2 (itemize) ▶	3	44,595
4	Add lines 1, 2, and 3	4	2,233,157
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	2,233,157

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	106,339
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	21,560

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))
2016	166,237	1,871,598	0 088821
2015			
2014			
2013			
2012			

2	**Total** of line 1, column (d)	2	0 088821
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 088821
4	Enter the net value of noncharitable-use assets for 2017 from Part X, line 5	4	1,431,487
5	Multiply line 4 by line 3	5	127,146
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	1,166
7	Add lines 5 and 6	7	128,312
8	Enter qualifying distributions from Part XII, line 4	8	514,802

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	1,166
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	1,166
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	1,166
6	Credits/Payments		
a	2017 estimated tax payments and 2016 overpayment credited to 2017 — 6a: 21,000		
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: 0		
7	Total credits and payments Add lines 6a through 6d	7	21,000
8	Enter any **penalty** for underpayment of estimated tax Check here ☐ if Form 2220 is attached	8	0
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	19,834
11	Enter the amount of line 10 to be **Credited to 2018 estimated tax** ▶ 1,200 **Refunded** ▶	11	18,634

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		No
7	Did the foundation have at least $5,000 in assets at any time during the year? *If "Yes," complete Part II, col (c), and Part XV*	7	Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ CT			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? *If "No," attach explanation* .	8b	Yes	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2017 or the taxable year beginning in 2017 (see instructions for Part XIV)? *If "Yes," complete Part XIV*	9	Yes	
10	Did any persons become substantial contributors during the tax year? *If "Yes," attach a schedule listing their names and addresses*	10	Yes	

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions).	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Yes	

Website address ▶ NORFOLKFOUNDATION NET

14 The books are in care of ▶ NORFOLK FOUNDATION INC Telephone no ▶ (860) 541-0463

Located at ▶ 2 STATION PLACE NORFOLK CT ZIP+4 ▶ 06058

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of **Form 1041** —Check here ▶ ☐ and enter the amount of tax-exempt interest received or accrued during the year ▶ 15

16	At any time during calendar year 2017, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See instructions for exceptions and filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR) If "Yes", enter the name of the foreign country ▶	16		No

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

			Yes	No
	File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			
1a	During the year did the foundation (either directly or indirectly)			
	(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 2017?	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 2017, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2017? ☐ Yes ☑ No If "Yes," list the years ▶ 20____ , 20____ , 20____ , 20____			
b	Are there any years listed in 2a for which the foundation is **not** applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to **all** years listed, answer "No" and attach statement—see instructions)	2b		
c	If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here ▶ 20____ , 20____ , 20____ , 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☑ No			
b	If "Yes," did it have excess business holdings in 2017 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 2017).*	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 2017?	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	Expense account, (e) other allowances
See Additional Data Table				

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

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

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

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 RENOVATION AND ESTABLISHMENT OF THE NORFOLK HUB - THE HUB CREATION BRINGS A GREATER SHARED AWARENESS OF THE TOWN OF NORFOLK'S MANY VOLUNTEER ORGANIZATIONS AND WILL BE USED FOR COMMUNITY SUPPORT AND EVENTS THE NORFOLK HUB WILL OFFER WORK AND MEETING SPACES AND PROFESSIONAL SUPPORT TO ITS MEMBER ORGANIZATIONS	191,216
2 SUPPORT OF THE COMMUNITY OF NORFOLK - PARTICIPATION AND INVOLVEMENT IN THE COMMUNITY AND COMMUNITY EVENTS	101,614
3 ACTIVITIES TO DEVELOP A SUSTAINABLE DOWNTOWN - RENOVATION AND MAINTENANCE OF 6 STATION PLACE	100,163
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	1,311,155
b	Average of monthly cash balances	1b	128,381
c	Fair market value of all other assets (see instructions)	1c	13,750
d	**Total** (add lines 1a, b, and c)	1d	1,453,286
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	1,453,286
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	21,799
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3 Enter here and on Part V, line 4	5	1,431,487
6	**Minimum investment return.** Enter 5% of line 5	6	71,574

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	
2a	Tax on investment income for 2017 from Part VI, line 5	2a		
b	Income tax for 2017 (This does not include the tax from Part VI)	2b		
c	Add lines 2a and 2b		2c	
3	Distributable amount before adjustments Subtract line 2c from line 1		3	
4	Recoveries of amounts treated as qualifying distributions		4	
5	Add lines 3 and 4		5	
6	Deduction from distributable amount (see instructions)		6	
7	**Distributable amount** as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1		7	

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	248,545
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	266,257
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	514,802
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	1,166
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	513,636

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 2016	(c) 2016	(d) 2017
1 Distributable amount for 2017 from Part XI, line 7				
2 Undistributed income, if any, as of the end of 2017				
a Enter amount for 2016 only.				
b Total for prior years 20___ , 20___ , 20___				
3 Excess distributions carryover, if any, to 2017				
a From 2012.				
b From 2013.				
c From 2014.				
d From 2015.				
e From 2016.				
f **Total** of lines 3a through e.				
4 Qualifying distributions for 2017 from Part XII, line 4 ▶ $ _____				
a Applied to 2016, but not more than line 2a				
b Applied to undistributed income of prior years (Election required—see instructions).				
c Treated as distributions out of corpus (Election required—see instructions).				
d Applied to 2017 distributable amount.				
e Remaining amount distributed out of corpus				
5 Excess distributions carryover applied to 2017 *(If an amount appears in column (d), the same amount must be shown in column (a))*				
6 **Enter the net total of each column as indicated below:**				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5				
b Prior years' undistributed income Subtract line 4b from line 2b				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.				
d Subtract line 6c from line 6b Taxable amount —see instructions				
e Undistributed income for 2016 Subtract line 4a from line 2a Taxable amount—see instructions				
f Undistributed income for 2017 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2018				
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions)				
8 Excess distributions carryover from 2012 not applied on line 5 or line 7 (see instructions) . . .				
9 **Excess distributions carryover to 2018.** Subtract lines 7 and 8 from line 6a				
10 Analysis of line 9				
a Excess from 2013. . . .				
b Excess from 2014. . . .				
c Excess from 2015. . . .				
d Excess from 2016. . . .				
e Excess from 2017. . . .				

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 2017, enter the date of the ruling. . . . . ▶ 2018-03-26

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) 2017	(b) 2016	(c) 2015	(d) 2014	
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed	32,222	93,580	0	0	125,802
b 85% of line 2a	27,389	79,543	0	0	106,932
c Qualifying distributions from Part XII, line 4 for each year listed	514,802	185,026	0	0	699,828
d Amounts included in line 2c not used directly for active conduct of exempt activities	137,744	13,471	0	0	151,215
e Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c	377,058	171,555	0	0	548,613
3 Complete 3a, b, or c for the alternative test relied upon					
a "Assets" alternative test—enter (1) Value of all assets					0
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					0
b "Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed	47,716	62,387	0	0	110,103
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)					0
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					0
(3) Largest amount of support from an exempt organization					0
(4) Gross investment income					0

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))

See Additional Data Table

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 email address of the person to whom applications should be addressed

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

c Any submission deadlines

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

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* See Additional Data Table				
Total . . . . . ▶ **3a**				121,809
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	221	
4 Dividends and interest from securities. . . .			14	23,506	
5 Net rental income or (loss) from real estate					
a Debt-financed property.					
b Not debt-financed property.			16	4,901	
6 Net rental income or (loss) from personal property					
7 Other investment income.					
8 Gain or (loss) from sales of assets other than inventory			18	67,647	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue					
a MICELLANEOUS INCOME			01	434	
b					
c					
d					
e					
12 Subtotal Add columns (b), (d), and (e). .		0		96,709	0
13 **Total.** Add line 12, columns (b), (d), and (e).				13	96,709

(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

******	2018-06-30	******
Signature of officer or trustee	Date	Title

May the IRS discuss this return with the preparer shown below (see instr)? ☑ Yes ☐ No

Paid Preparer Use Only

Print/Type preparer's name	Preparer's Signature	Date	Check if self-employed ▶ ☑	PTIN
TRACY E FILLOW CPA		2018-06-21		P00634557

Firm's name ▶ TRACY E FILLOW CPA	Firm's EIN ▶06-1271935
Firm's address ▶ 23 SOUTH MAIN ST PO BOX 799 KENT, CT 06757	Phone no (860) 927-4848

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

List and describe the kind(s) of property sold (e g , real estate, **(a)** 2-story brick warehouse, or common stock, 200 shs MLC Co)	**(b)** How acquired P—Purchase D—Donation	**(c)** Date acquired (mo , day, yr)	**(d)** Date sold (mo , day, yr)
40 SH APPLE, INC	D	2017-03-16	2017-03-20
100 SH EXXON MOBIL CORP	D	2017-05-23	2017-06-06
300 SH TIME WARNER	D	2017-08-29	2017-08-30
30 SH AMGEN	D	2017-12-15	2017-12-18
PUBLICLY TRADED SECURITIES	P		
PUBLICLY TRADED SECURITIES	P		
CAPITAL GAINS DIVIDENDS	P		

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

(e) Gross sales price	Depreciation allowed **(f)** (or allowable)	Cost or other basis **(g)** plus expense of sale	Gain or (loss) **(h)** (e) plus (f) minus (g)
5,643		515	5,128
8,019		68	7,951
30,411		7,566	22,845
5,304		2,789	2,515
900,232		878,672	21,560
289,084		247,532	41,552
4,788			4,788

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			Gains (Col (h) gain minus col (k), but not less than -0-) **or** **(l)** Losses (from col (h))
(i) F M V as of 12/31/69	Adjusted basis **(j)** as of 12/31/69	Excess of col (i) **(k)** over col (j), if any	
			5,128
			7,951
			22,845
			2,515
			21,560
			41,552
			4,788

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

(a) Name and address	Title, and average hours per week (b) devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances
DAWN M WHALEN PO BOX 333 NORFOLK, CT 060580333	DIRECTOR 45 00	77,430	1,500	0
SAMUEL A ANDERSON PO BOX 333 NORFOLK, CT 060580333	PRESIDENT 10 00	0	0	0
ELIZABETH B BORDEN PO BOX 333 NORFOLK, CT 060580333	TREASURER 2 00	0	0	0
JOSEPH HURST PO BOX 333 NORFOLK, CT 060580333	VICE PRESIDENT 9 00	0	0	0
STEPHEN W MELVILLE PO BOX 333 NORFOLK, CT 060580333	SECRETARY 10 00	0	0	0
MARY M ACKERLY PO BOX 333 NORFOLK, CT 060580333	BOARD MEMBER 1 00	0	0	0
LISA ATKIN PO BOX 333 NORFOLK, CT 060580333	BOARD MEMBER 1 00	0	0	0
MARK BURKE PO BOX 333 NORFOLK, CT 060580333	BOARD MEMBER 2 00	0	0	0
CATIE DOUGAN PO BOX 333 NORFOLK, CT 060580333	BOARD MEMBER 0 00	0	0	0

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

MARY M ACKERLY
STEPHEN W MELVILLE

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
TOWN OF NORFOLKPO BOX 82 NORFOLK, CT 06058		GOV	SUPPORT OF CITY MEADOW PROGRAM, WEEKEND IN NORFOLK AND RAILS TO TRAILS	100,661
CHURCH OF CHRIST NORFOLK PO BOX 582 NORFOLK, CT 06058		PC	CHURCH BUILDING STAINED GLASS	5,000
BATTELL ARTS FOUNDATION INC PO BOX 661 NORFOLK, CT 06058		PC	GENERAL GRANT	1,000
NORFOLK LAND TRUSTPO BOX 363 NORFOLK, CT 06058		PC	GENERAL GRANT	1,500
NORFOLK HISTORICAL SOCIETY PO BOX 288 NORFOLK, CT 06058		PC	GENERAL GRANT	4,000
Total . . . . . ▶ 3a				121,809

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
NORFOLK COMMUNITY ASSOCIATION PO BOX 358 NORFOLK, CT 06058		PC	GENERAL GRANT	9,648
Total 3a . . . . . ▶				121,809

TY 2017 Accounting Fees Schedule

Name: NORFOLK FOUNDATION INC

EIN: 47-5535228

Accounting Fees Schedule

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING EXPENSE	8,242	4,130	4,130	0

Note: To capture the full content of this document, please select landscape mode (11" x 8.5") when printing.

TY 2017 Amortization Schedule

Name: NORFOLK FOUNDATION INC

EIN: 47-5535228

Description of Amortized Expenses	Date Acquired, Completed, or Expended	Amount Amortized	Deduction for Prior Years	Amortization Method	Current Year Amortization	Net Investment Income	Adjusted Net Income	Total Amount of Amortization
CLOSING COSTS	2016-05-20	1,181	197	36 000000000000	394	0	0	591

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Note: To capture the full content of this document, please select landscape mode (11" x 8.5") when printing.

TY 2017 Depreciation Schedule

Name: NORFOLK FOUNDATION INC

EIN: 47-5535228

Description of Property	Date Acquired	Cost or Other Basis	Prior Years' Depreciation	Computation Method	Rate / Life (# of years)	Current Year's Depreciation Expense	Net Investment Income	Adjusted Net Income	Cost of Goods Sold Not Included
BUILDING - 6 STATION PLACE	2016-05-20	215,106	3,477	SL	40 000000000000	5,378	0	0	
LAND - 6 STATION PLACE	2016-05-20	70,000		L		0	0	0	
BUILDING IMPROVEMENTS - 6 STATION PLACE	2016-12-31	35,044	35	SL	40 000000000000	876	0	0	
BUILDING IMPROVEMENTS - 6 STATION PLACE	2017-01-04	66,185		SL	40 000000000000	1,655	0	0	
SHED - 6 STATION PLACE	2017-05-24	3,454		SL	10 000000000000	201	0	0	
REFRIGERATOR	2016-08-24	23,145	4,629	SL	5 000000000000	4,629	0	0	
REFRIGERATOR-INSTALLATION	2017-01-31	6,490		SL	5 000000000000	1,190	0	0	
HOOD	2016-11-15	14,211	2,842	SL	5 000000000000	2,842	0	0	
HOOD-INSTALLATION	2017-01-05	5,034		SL	5 000000000000	1,007	0	0	
FREEZER LIGHTS	2017-04-24	1,637		SL	5 000000000000	218	0	0	
FREEZER DOOR	2017-10-11	3,191		SL	5 000000000000	160	0	0	
WALL UNITS-AIR CONDITIONERS	2017-07-10	9,548		SL	5 000000000000	955	0	0	
BUILDING - 2 STATION PLACE-HUB	2016-07-13	99,599		SL	40 000000000000	2,490	0	0	
LAND - 2 STATION PLACE	2016-07-13	70,800		L		0	0	0	
BUILDING - 2 STATION PLACE-HAIR SALON	2016-07-13	14,045		SL	40 000000000000	351	351	351	

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TY 2017 Investments - Land Schedule

Name: NORFOLK FOUNDATION INC

EIN: 47-5535228

Category/ Item	Cost/Other Basis	Accumulated Depreciation	Book Value	End of Year Fair Market Value
BUILDING - 2 STATION PLACE-HAIR SALON	14,045	351	13,694	13,694

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TY 2017 Investments - Other Schedule

Name: NORFOLK FOUNDATION INC

EIN: 47-5535228

Investments Other Schedule 2

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
DEUTSCHE BANK	FMV	851,348	851,348

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TY 2017 Land, Etc. Schedule

Name: NORFOLK FOUNDATION INC

EIN: 47-5535228

Category / Item	Cost / Other Basis	Accumulated Depreciation	Book Value	End of Year Fair Market Value
BUILDING - 6 STATION PLACE	215,106	8,855	206,251	206,251
LAND - 6 STATION PLACE	70,000	0	70,000	70,000
BUILDING IMPROVEMENTS - 6 STATION PLACE	35,044	911	34,133	34,133
BUILDING IMPROVEMENTS - 6 STATION PLACE	66,185	1,655	64,530	64,530
SHED - 6 STATION PLACE	3,454	201	3,253	3,253
REFRIGERATOR	23,145	9,258	13,887	13,887
REFRIGERATOR-INSTALLATION	6,490	1,190	5,300	5,300
HOOD	14,211	5,684	8,527	8,527
HOOD-INSTALLATION	5,034	1,007	4,027	4,027
FREEZER LIGHTS	1,637	218	1,419	1,419
FREEZER DOOR	3,191	160	3,031	3,031
WALL UNITS-AIR CONDITIONERS	9,548	955	8,593	8,593
BUILDING - 2 STATION PLACE-HUB	99,599	2,490	97,109	97,109
LAND - 2 STATION PLACE	70,800	0	70,800	70,800

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TY 2017 Legal Fees Schedule

Name: NORFOLK FOUNDATION INC

EIN: 47-5535228

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LEGAL EXPENSE	6,748	0	0	0

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TY 2017 Other Assets Schedule

Name: NORFOLK FOUNDATION INC

EIN: 47-5535228

Other Assets Schedule

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
CONSTRUCTION IN PROGRESS		207,275	207,275
CLOSING COSTS	984	590	590

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TY 2017 Other Expenses Schedule

Name: NORFOLK FOUNDATION INC

EIN: 47-5535228

Other Expenses Schedule

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ADVERTISING EXPENSE	1,257	0	0	1,257
FEES AND PERMITS	3,804	0	0	0
OFFICE SUPPLIES	2,660	0	0	2,660
TELEPHONE	1,059	0	0	1,059
INTERNET SERVICES AND WEBSITE	1,233	0	0	1,233
PAYROLL SERVICE FEES	181	0	0	181
INVESTMENT MANAGEMENT FEE	14,270	14,270	14,270	0
INSURANCE	4,091	0	0	3,394
COMPUTER SERVICES AND SUPPLIES	1,004	0	0	1,004
RENTALS	800	0	0	800

Other Expenses Schedule

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
POSTAGE	381	0	0	381
MISCELLANEOUS	593	0	0	593
MEALS AND TRAVEL	459	0	0	459
PROFESSIONAL DEVELOPMENT	1,040	0	0	1,040
BANK CHARGES	62	0	0	0
OUTREACH	1,449	0	0	1,449
EVENTS	931	0	0	931
REPAIRS	6,135	0	0	6,135
UTILITIES	1,636	0	0	1,636
UTILITIES	623	623	623	0

Other Expenses Schedule

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INSURANCE	219	219	219	0
REPAIRS AND MAINTENANCE	204	204	204	0
SUPPLIES	16	16	16	0
AMORTIZATION	394	0	0	0

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TY 2017 Other Income Schedule

Name: NORFOLK FOUNDATION INC

EIN: 47-5535228

Other Income Schedule

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
MICELLANEOUS INCOME	434		434

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TY 2017 Other Increases Schedule

Name: NORFOLK FOUNDATION INC

EIN: 47-5535228

Description	Amount
UNREALIZED GAINS ON INVESTMENTS	44,595

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TY 2017 Other Professional Fees Schedule

Name: NORFOLK FOUNDATION INC

EIN: 47-5535228

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
OTHER PROFESSIONAL SERVICES	1,554	0	0	1,554

efile GRAPHIC print - DO NOT PROCESS	As Filed Data -	DLN: 93491190007578

TY 2017 Substantial Contributors Schedule

Name: NORFOLK FOUNDATION INC

EIN: 47-5535228

Name	Address
STEPHEN AND RUTH MELVILLE	PO BOX 449 NORFOLK, CT 06058
MARY ACKERLY	PO BOX 570 NORFOLK, CT 06058
JOHN AND MARLENE CHILDS	165 SAGO PALM ROAD VERO BEACH, FL 32963
AKC FUND INC	275 MADISON AVE 6TH FLOOR NEW YORK, NY 10016

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TY 2017 Taxes Schedule

Name: NORFOLK FOUNDATION INC

EIN: 47-5535228

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
EXCISE TAXES - 990PF	20,956	0	0	0
REAL ESTATE TAXES	4,873	0	0	4,873
REAL ESTATE TAXES	286	286	286	0

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Schedule B (Form 990, 990-EZ, or 990-PF)

Department of the Treasury
Internal Revenue Service

Schedule of Contributors

▶ Attach to Form 990, 990-EZ, or 990-PF
▶ Information about Schedule B (Form 990, 990-EZ, or 990-PF) and its instructions is at *www.irs.gov/form990*

OMB No 1545-0047

2017

Name of the organization
NORFOLK FOUNDATION INC

Employer identification number
47-5535228

Organization type (check one)

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

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

General Rule

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

Special Rules

☐ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of **(1)** $5,000 or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1 Complete Parts I and II

☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than $1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals Complete Parts I, II, and III

☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc , purposes, but no such contributions totaled more than $1,000 If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc , purpose Don't complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc , contributions totaling $5,000 or more during the year . . . . . ▶ $ _____

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

Name of organization	Employer identification number
NORFOLK FOUNDATION INC	47-5535228

Part I **Contributors** (See Instructions) Use duplicate copies of Part I if additional space is needed

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
____	See Additional Data Table	$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contribution)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
____		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contribution)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
____		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contribution)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
____		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contribution)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
____		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contribution)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
____		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contribution)

Name of organization	Employer identification number
NORFOLK FOUNDATION INC	47-5535228

Part II **Noncash Property** (See instructions) Use duplicate copies of Part II if additional space is needed

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
3	300 SHARES TIME WARNER STOCK	$ 30,474	2017-08-30
4	30 SHARES AMGEN STOCK	$ 5,273	2017-12-15
6	100 SHARES EXXON MOBIL STOCK	$ 8,257	2017-05-23
7	40 SHARES APPLE STOCK	$ 5,626	2017-03-16
		$	
		$	

Name of organization	Employer identification number
NORFOLK FOUNDATION INC	47-5535228

Part III ***Exclusively*** **religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than $1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of *exclusively* religious, charitable, etc., contributions of $1,000 or less for the year. (Enter this information once. See instructions.) ▶ $** _____

Use duplicate copies of Part III if additional space is needed

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

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

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

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

Additional Data

Software ID:
Software Version:
EIN: 47-5535228
Name: NORFOLK FOUNDATION INC

Form 990 Schedule B, Part I - Contributors (see Instructions) Use duplicate copies of Part I if additional space is needed.

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	STEPHEN AND RUTH MELVILLE PO BOX 449 NORFOLK, CT06058	$ 217,535	Person ☑ Payroll ☐ Noncash ☐ (Complete Part II for noncash contribution)
2	COALITION FOR SOUND GROWTH PO BOX 376 NORFOLK, CT06058	$ 36,337	Person ☑ Payroll ☐ Noncash ☐ (Complete Part II for noncash contribution)
3	MARY ACKERLY PO BOX 570 NORFOLK, CT06058	$ 30,474	Person ☑ Payroll ☐ Noncash ☑ (Complete Part II for noncash contribution)
4	MARY ACKERLY PO BOX 570 NORFOLK, CT06058	$ 5,273	Person ☑ Payroll ☐ Noncash ☑ (Complete Part II for noncash contribution)
5	AKC FUND 275 MADISON AVE 6TH FLOOR NEW YORK, NY10016	$ 10,000	Person ☑ Payroll ☐ Noncash ☐ (Complete Part II for noncash contribution)
6	LEILA JAVITCH 110 RIVERSIDE DRIVE NEW YORK, NY10024	$ 8,257	Person ☑ Payroll ☐ Noncash ☑ (Complete Part II for noncash contribution)

Form 990 Schedule B, Part I - Contributors (see Instructions) Use duplicate copies of Part I if additional space is needed.

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
7	MARY FANETTE PO BOX 484 NORFOLK, CT06058	$ 5,626	Person ☑ Payroll ☐ Noncash ☑ (Complete Part II for noncash contribution)
8	JOHN AND MARLENE CHILDS 165 SAGO PALM ROAD VERO BEACH, FL06058	$ 50,000	Person ☑ Payroll ☐ Noncash ☐ (Complete Part II for noncash contribution)