

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	36,305	33,912	33,914
	2	Savings and temporary cash investments			
	3	Accounts receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	4	Pledges receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7	Other notes and loans receivable (attach schedule) ▶ _____ Less allowance for doubtful accounts ▶ _____			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10a	Investments—U S and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)	689,408	709,337	798,701
	c	Investments—corporate bonds (attach schedule)			
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)			
	14	Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
15	Other assets (describe ▶ _____)	1,241			
16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	726,954	743,249	832,615	
Liabilities	17	Accounts payable and accrued expenses			
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶ _____)	9,570	16,874	
	23	Total liabilities (add lines 17 through 22)	9,570	16,874	
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	717,384	726,375	
	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)	717,384	726,375	
	31	Total liabilities and net assets/fund balances (see instructions) .	726,954	743,249	

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	717,384
2	Enter amount from Part I, line 27a	2	8,991
3	Other increases not included in line 2 (itemize) ▶ _____	3	
4	Add lines 1, 2, and 3	4	726,375
5	Decreases not included in line 2 (itemize) ▶ _____	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30 .	6	726,375

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			

(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			
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			
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	
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))
2016	45,084	718,569	0 062741
2015	45,080	778,517	0 057905
2014	51,797	762,303	0 067948
2013	56,653	873,503	0 064857
2012	45,411	839,334	0 054104
2 Total of line 1, column (d)			2 0 307555
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 061511
4 Enter the net value of noncharitable-use assets for 2017 from Part X, line 5			4 714,861
5 Multiply line 4 by line 3			5 43,972
6 Enter 1% of net investment income (1% of Part I, line 27b)			6 188
7 Add lines 5 and 6			7 44,160
8 Enter qualifying distributions from Part XII, line 4			8 50,296

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	188
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col (b)		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	2	
3	Add lines 1 and 2.	3	188
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5	188
6	Credits/Payments		
a	2017 estimated tax payments and 2016 overpayment credited to 2017	6a	
b	Exempt foreign organizations—tax withheld at source	6b	
c	Tax paid with application for extension of time to file (Form 8868)	6c	
d	Backup withholding erroneously withheld	6d	
7	Total credits and payments. Add lines 6a through 6d.	7	
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	188
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid ▶	10	
11	Enter the amount of line 10 to be Credited to 2018 estimated tax ▶ Refunded ▶	11	

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a	No
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for definition)? <i>If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities</i>	1b	No
c Did the foundation file Form 1120-POL for this year?	1c	No
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation ▶ \$ _____ (2) On foundation managers ▶ \$ _____		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ▶ \$ _____		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If "Yes," attach a detailed description of the activities</i>	2	No
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? <i>If "Yes," attach a conformed copy of the changes</i>	3	No
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a	No
b If "Yes," has it filed a tax return on Form 990-T for this year?	4b	
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If "Yes," attach the statement required by General Instruction T</i>	5	No
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	Yes
7 Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col (c), and Part XV</i>	7	Yes
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ MA _____		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? <i>If "No," attach explanation</i> .	8b	Yes
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2017 or the taxable year beginning in 2017 (see instructions for Part XIV)? <i>If "Yes," complete Part XIV</i>	9	No
10 Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses</i>	10	No

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions).	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address N/A	13	Yes	
14	The books are in care of BENJAMIN WALLACE Telephone no (860) 214-0270			

Located at **PO BOX 584 SOUTH WINDSOR CT** ZIP+4 **06074**

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	Yes	No

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

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

1a	During the year did the foundation (either directly or indirectly)		Yes	No
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ 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			
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			
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)? ☐ Yes ☒ No Organizations relying on a current notice regarding disaster assistance check here. ☐ 	5b		
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 <i>If "Yes," attach the statement required by Regulations section 53.4945–5(d)</i>			
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? ☐ Yes ☒ No <i>If "Yes" to 6b, file Form 8870</i>	6b		No
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? ☐ Yes ☒ No	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
BENJAMIN WALLACE PO BOX 584 SOUTH WINDSOR, CT 06074	TRUSTEE 000 00	12,000	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	Expense account, (e) other allowances
NONE				

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

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

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

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

Part IX-A Summary of Direct Charitable Activities

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

	Expenses
1	
2	
3	
4	

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

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

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
a	Average monthly fair market value of securities.	1a	690,676
b	Average of monthly cash balances.	1b	35,071
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	725,747
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	
2	Acquisition indebtedness applicable to line 1 assets.	2	
3	Subtract line 2 from line 1d.	3	725,747
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	10,886
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4.	5	714,861
6	Minimum investment return. Enter 5% of line 5.	6	35,743

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	35,743
2a	Tax on investment income for 2017 from Part VI, line 5.	2a	188
b	Income tax for 2017 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	188
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	35,555
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	35,555
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	35,555

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	50,296
b	Program-related investments—total from Part IX-B.	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes.	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required).	3a	
b	Cash distribution test (attach the required schedule).	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4.	4	50,296
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	188
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	50,108

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				35,555
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.	3,780			
b From 2013.	13,405			
c From 2014.	14,104			
d From 2015.	6,522			
e From 2016.	9,558			
f Total of lines 3a through e.	47,369			
4 Qualifying distributions for 2017 from Part XII, line 4 ▶ \$ 50,296				
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.				35,555
e Remaining amount distributed out of corpus	14,741			
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	62,110			
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				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions).				
8 Excess distributions carryover from 2012 not applied on line 5 or line 7 (see instructions).	3,780			
9 Excess distributions carryover to 2018. Subtract lines 7 and 8 from line 6a	58,330			
10 Analysis of line 9				
a Excess from 2013.	13,405			
b Excess from 2014.	14,104			
c Excess from 2015.	6,522			
d Excess from 2016.	9,558			
e Excess from 2017.	14,741			

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.

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					
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

BENJAMIN WALLACE
PO BOX 584
SOUTH WINDSOR, CT 06074
(860) 214-0270

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

THERE IS NO SPECIFIC FORM ON WHICH APPLICATIONS SHOULD BE MADE, HOWEVER, ALL APPLICATIONS SHOULD PROVIDE SUBSTANTIATION THAT THE ORGANIZATION IS A CHARITABLE ORGANIZATION AS DEFINED IN IRC CODE SECTION 170(C), 2055(A) AND 2522(A)

c Any submission deadlines

THERE ARE NO SUBMISSION DEADLINES

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

THE CHATHAM-BEECH FOUNDATION MAKES CONTRIBUTIONS TO CHARITABLE ORGANIZATIONS DULY AUTHORIZED TO CARRY ON ACTIVITIES FOR SUCH PURPOSES WHICH ARE DESCRIBED IN IRS CODE SECTION 170(C), 2055(A) AND 2522(A) AND THEREFORE, HAVE NO RESTRICTIONS ON THEIR CONTRIBUTIONS. THE FOUNDATION DOES GIVE PREFERENCE TO ORGANIZATIONS HAVING AN OFFICE WITHIN THE COMMONWEALTH OF MASSACHUSETTS

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 <i>Paid during the year</i> See Additional Data Table				
Total			▶ 3a	37,838
b <i>Approved for future payment</i>				
Total			▶ 3b	

Enter gross amounts unless otherwise indicated

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

Form **990-PF** (2017)

Part XVII Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

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?		Yes	No
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.	***** 2018-12-17 *****	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
	N ANDREW ROBB		2019-02-07		P00251883
	Firm's name ► BURGESS SCHULTZ & ROBB PC				Firm's EIN ► 04-3578147
	Firm's address ► PO BOX 467 EAST LONGMEADOW, MA 010280467				Phone no (413) 525-0025

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
ALZHEIMER'S ASSOCIATION 225 N MICHIGAN AVE FL 1 CHICAGO, IL 60601			DONATION	500
AMERICAN CAMP ASSOCIATION 5000 STATE ROAD NORTH MARTINSVILLE, IN 46151			DONATION	1,250
AMERICAN RED CROSS PIONEER VALLEY CHAPTER 506 COTTAGE STREET SPRINGFIELD, MA 01104			DONATION	1,000
Total ▶ 3a				37,838

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
BAYSTATE HEALTH FOUNDATION 280 CHESTNUT STREET SPRINGFIELD, MA 01199			DONATION	5,250
BONEFISH AND TARPON TRUST 135 SAN LORENZO AVE STE 860 CORAL GABLES, FL 33146			DONATION	250
BOSTON AREA GLEANERS 240 BEAVER STREET WALTHAM, MA 02452			DONATION	100
Total 3a				37,838

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
CAPE COD HEALTH FOUNDATION PO BOX 370 HYANNIS, MA 02601			DONATION	500
CENTER FOR THE ARTS EVERGREEN 31880 ROCKY VILLAGE DR EVERGREEN, CO 80439			DONATION	1,000
COMMUNITY FOUNDATION OF WESTERN MA 1500 MAIN STREET PO BOX 15769 SPRINGFIELD, MA 01115			DONATION	1,000
Total ► 3a				37,838

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
EMERSON HEALTH CARE FOUNDATION 133 OLD ROAD TO NINE ACRE CONCORD, MA 01742			DONATION	250
FELINE FRIENDS INCPO BOX 174 FEEDING HILLS, MA 01030			DONATION	250
FOREST PARK ZOOLOGY SOCIETY 302 SUMNER AVE SPRINGFIELD, MA 01108			DONATION	1,000
Total ▶ 3a				37,838

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
FOUNDATION FOR METROWEST 3 ELLIOT STREET NATICK, MA 01760			DONATION	250
FRIENDS OF THE GOODNOW LIBRARY 21 CONCORD ROAD SUDBURY, MA 01776			DONATION	500
FRIENDS OF THE HOMELESS 755 WORTHINGTON STREET SPRINGFIELD, MA 01105			DONATION	1,000
Total ▶ 3a				37,838

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
GIFTS OF MUSIC FUND HARTFORD FOUNDATION FOR PUBLIC GIVING 10 COLUMBUS BLVD HARTFORD, CT 06106			DONATION	250
GLOBAL GRASSROOTS 1950 LAFAYETTE RD PORTSMOUTH, NH 03801			DOANTION	1,000
HARTFORD HOSPITAL80 SEYMOUR ST HARTFORD, CT 06102			DONATION	1,500
Total ▶ 3a				37,838

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
JEWISH GERIATRIC SERVICES 770 CONVERSE STREET LONGMEADOW, MA 01106			DONATION	250
LONGFELLOW WAYSIDE INN 72 WAYSIDE INN RD SUDBURY, MA 01776			DONATION	250
MASS AUDUBON SOCIETY 208 SOUTH GREAT ROAD LINCOLN, MA 01773			DONATION	250
Total ▶ 3a				37,838

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
MASS GENERAL HOSPITAL55 FRUIT ST BOSTON, MA 02114			DONATION	150
MULTIPLE MYELOMA RESEARCH FOUNDATIO 383 MAIN AVE NORWALK, CT 06851			DONATION	250
NEW ENGLAND PUBLIC RADIO FOUNDATION 1525 MAIN ST SPRINGFIELD, MA 01103			DONATION	1,000
Total ▶ 3a				37,838

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
NORTHEASTERN UNIVERSITY 360 HUNTINGTON AVE BOSTON, MA 02115			DONATION	2,000
OARS23 BRADFORD STREET CONCORD, MA 01742			DONATION	250
OPEN PANTRY COMMUNITY SERVICES PO BOX 5127 SPRINGFIELD, MA 01101			DONATION	1,000
Total ▶ 3a				37,838

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
PLANNED PARENTHOOD LEAGUE OF MASSACHUSETTS 1055 COMMONWEALTH AVE BOSTON, MA 02215			DONATION	3,000
SINAI TEMPLE1100 DICKINSON STREET SPRINGFIELD, MA 01108			DONATION	1,088
SKIDMORE COLLEGE 815 NORTH BROADWAY SARATOGA SPRINGS, NY 12866			DONATION	250
Total ▶ 3a				37,838

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
SOUTH WINDSOR DOLLARS FOR SCHOLARS PO BOX 197 SOUTH WINDSOR, CT 06074			DONATION	1,500
SOUTH WINDSOR HISTORICAL SOCIETY 771 ELLINGTON RD SOUTH WINDSOR, CT 06074			DONATION	250
SUDBURY VALLEY TRUSTEES 18 WOLBACH ROAD SUDBURY, MA 01776			DONATION	1,000
Total 3a				37,838

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
TEMPLE BETH HILLEL20 BAKER LANE SOUTH WINDSOR, CT 06074			DONATION	4,000
THE BRIDGE FAMILY CENTER 1022 FARMINGTON AVE WEST HARTFORD, CT 06107			DOANTION	1,500
THE FOOD BANK OF WESTERN MA 9 N HATFIELD ROAD HATFIELD, MA 01038			DONATION	500
Total ▶ 3a				37,838

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
WGBY44 HAMPDEN STREET SPRINGFIELD, MA 01103			DONATION	500
WILA45 MPALE AVE WINDSOR, CT 06095			DONATION	1,500
YOUTH TENNIS FOUNDATION OF NEW ENGLAND110 TURNPIKE ROAD WESTBOROUGH, MA 01581			DONATION	500
Total ▶ 3a				37,838

TY 2017 Accounting Fees Schedule**Name:** CHATHAM-BEECH CHARITABLE FOUNDATION**EIN:** 22-6374659**Accounting Fees Schedule**

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
TAX PREPARATION FEES	2,975	2,083		892

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

TY 2017 Gain/Loss from Sale of Other Assets Schedule

Name: CHATHAM-BEECH CHARITABLE FOUNDATION

EIN: 22-6374659

Name	Date Acquired	How Acquired	Date Sold	Purchaser Name	Gross Sales Price	Basis	Basis Method	Sales Expenses	Total (net)	Accumulated Depreciation
ABBVIE	2014-03	PURCHASE	2017-10		70,391	31,408			38,983	
BOARDWALK PIPELINE	2008-03	PURCHASE	2017-11		13,960	24,845			-10,885	
BGC PARTNERS		PURCHASE	2017-11		8,095	2,891			5,204	
QUALITY CARE	2017-06	PURCHASE	2017-12		2,899	6,170			-3,271	
RMR GROUP		PURCHASE	2017-12		647	131			516	
CALL CANADIAN IMPERIAL BANK	2017-07	PURCHASE	2017-12			107			-107	
CALL PEPSICO		PURCHASE	2018-01			642			-642	
ABBOTT LABS	2014-03	PURCHASE	2018-01		50,452	28,963			21,489	
CALL ALLIANCE RESOURCES		PURCHASE	2018-03		1,194				1,194	
CALL PEPSICO		PURCHASE	2018-03		1,946				1,946	
ENTERPRISE PRODUCTION PARTNERS		PURCHASE	2018-04		36,459	37,257			-798	
CALL CANADIAN IMPERIAL BANK		PURCHASE	2018-04		1,201				1,201	
CALL PEPSICO		PURCHASE	2018-05		1,548				1,548	
CALL SCANA CORP		PURCHASE	2018-05		1,333				1,333	
CALL SCANA CORP		PURCHASE	2018-05			1,554			-1,554	
PPL CORP		PURCHASE	2018-05		38,767	39,078			-311	
PPL CORP		PURCHASE	2018-05		2,769	2,791			-22	
CALL BANK OF AMERICA		PURCHASE	2017-05		246				246	
BANK OF AMERICA	2016-07	PURCHASE	2018-05		30,779	26,287			4,492	
SOUTHERN CO	2018-05	PURCHASE	2018-05		13,073	13,252			-179	
CALL MACY'S		PURCHASE	2018-05			3,414			-3,414	
CALL INTEL CORP		PURCHASE	2018-07		3,162				3,162	
CALL SOUTHERN CO		PURCHASE	2018-08			1,686			-1,686	
ANNALY CAPITAL MGMT		PURCHASE	2018-08		23,759	43,169			-19,410	
CALL SOUTHERN CO		PURCHASE	2018-08		1,359				1,359	

TY 2017 Investments Corporate Stock Schedule

Name: CHATHAM-BEECH CHARITABLE FOUNDATION
EIN: 22-6374659

Name of Stock	End of Year Book Value	End of Year Fair Market Value
ABBOTT LABS		
ABBVIE INC		
ALLIANCE RESOURCE PARTNERS LP	28,012	30,600
ANNALY CAPITAL MANAGEMENT	25,440	24,552
AT & T	51,156	50,370
BANK OF AMERICA		
BGC PARTNERS INC		
BOARDWALK PIPELINE PTNRS		
BP PLC SPON ADR	44,183	46,100
CANADIAN IMPERIAL BANK	25,644	28,131
CANON INC	20,140	22,155
CHEVRON CORP	51,100	61,140
EXXON MOBIL	62,293	85,020
GENERAL ELECTRIC	40,090	11,290
HCP INC	29,750	26,320
INTEL CORP	38,575	94,580
INTERNATIONAL BUSS. MACHINES	31,315	30,242
NOBLE CORP	26,359	7,030
JOHNSON & JOHNSON	37,206	41,451
PEPSICO	36,249	55,900
PFIZER INC.	26,248	44,070
MACY'S INC	27,575	34,730
QUALITY CARE PPTYS		
RMR GROUP		
SENIOR HOUSING PROPERTIES TR	18,358	17,560
OWENS & MINOR INC	25,025	24,780
TEVA PHARMACEUTICALS IND LTD		
WELLTOWER INC	33,695	32,160
ROUNDING ADJSUTMENT	2	
SOUTHERN CO	30,922	30,520

TY 2017 Other Assets Schedule

Name: CHATHAM-BEECH CHARITABLE FOUNDATION

EIN: 22-6374659

Other Assets Schedule

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
RETURN ON CAPITAL	1,241		

TY 2017 Other Expenses Schedule**Name:** CHATHAM-BEECH CHARITABLE FOUNDATION**EIN:** 22-6374659**Other Expenses Schedule**

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
EXPENSES				
DUES & SUBSCRIPTIONS	1,944	1,361		583
POSTAGE	144	101		43
INSURANCE	238	167		71
INVESTMENT EXPENSES	39	27		12
SUPPLIES	129	90		39

TY 2017 Other Income Schedule

Name: CHATHAM-BEECH CHARITABLE FOUNDATION

EIN: 22-6374659

Other Income Schedule

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
OTHER REVENUE	55		55

TY 2017 Other Liabilities Schedule**Name:** CHATHAM-BEECH CHARITABLE FOUNDATION**EIN:** 22-6374659

Description	Beginning of Year - Book Value	End of Year - Book Value
PAYROLL LIABILITIES	3,830	3,982
RETURN ON CAPITAL		1,219
INVESTMENT OPTIONS	5,740	11,673

TY 2017 Taxes Schedule**Name:** CHATHAM-BEECH CHARITABLE FOUNDATION**EIN:** 22-6374659

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOREIGN TAXES PAID	394	276		118
OTHER TAXES	286	200		86