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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.

▶ Go to www.irs.gov/Form990PF for instructions and the latest information.

OMB No 1545-0052

2017

Open to Public Inspection

1810

For calendar year 2017 or tax year beginning November 1, 2017, and ending October 31, 2018

Name of foundation: The Crew Family Foundation Inc.

A Employer identification number: 06-1191170

Number and street (or P O box number if mail is not delivered to street address): 100 East Main Street | Room/suite:

B Telephone number (see instructions):

City or town, state or province, country, and ZIP or foreign postal code: Plainville CT 06062

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) ▶ $ 2,053,136

J Accounting method: ☒ Cash ☐ Accrual ☐ Other (specify) (Part I, column (d) must be on cash basis.)

F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ▶ ☐

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions).)

			(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1	Contributions, gifts, grants, etc., received (attach schedule)				
	2	Check ▶ ☐ if the foundation is not required to attach Sch B				
	3	Interest on savings and temporary cash investments	7,916	7,916		
	4	Dividends and interest from securities	48,034	48,034		
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10	289,977			
	b	Gross sales price for all assets on line 6a 808,909				
	7	Capital gain net income (from Part IV, line 2)		289,977		
	8	Net short-term capital gain				
	9	Income modifications				
	10a	Gross sales less returns and allowances				
	b	Less. Cost of goods sold				
	c	Gross profit or (loss) (attach schedule)				
	11	Other income (attach schedule)				
	12	**Total.** Add lines 1 through 11	345,927	345,927		
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc				
	14	Other employee salaries and wages				
	15	Pension plans, employee benefits				
	16a	Legal fees (attach schedule)				
	b	Accounting fees (attach schedule)				
	c	Other professional fees (attach schedule)	11,338	11,338		
	17	Interest				
	18	Taxes (attach schedule) (see instructions)	1,627	1,627		
	19	Depreciation (attach schedule) and depletion				
	20	Occupancy				
	21	Travel, conferences, and meetings				
	22	Printing and publications				
	23	Other expenses (attach schedule)				
	24	**Total operating and administrative expenses.** Add lines 13 through 23	12,965	12,965		
	25	Contributions, gifts, grants paid	918,500			918,500
	26	**Total expenses and disbursements.** Add lines 24 and 25	931,465	12,965		918,500
	27	Subtract line 26 from line 12				
	a	**Excess of revenue over expenses and disbursements**	(585,538)			
	b	**Net investment income** (if negative, enter -0-)		332,962		
	c	**Adjusted net income** (if negative, enter -0-)				

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

			Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing	314,407	74,934	74,934
	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)			
	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)	1,819,717	1,473,652	1,978,202
	14	Land, buildings, and equipment basis ▶			
		Less accumulated depreciation (attach schedule) ▶			
	15	Other assets (describe ▶)			
	16	**Total assets** (to be completed by all filers—see the instructions. Also, see page 1, item I)	2,134,124	1,548,586	2,053,136
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 ▶)			
	23	**Total liabilities** (add lines 17 through 22)			
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			
	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	231,587	231,587	
	29	Retained earnings, accumulated income, endowment, or other funds	1,902,537	1,316,999	
	30	**Total net assets or fund balances** (see instructions)	2,134,124	1,548,586	
	31	**Total liabilities and net assets/fund balances** (see instructions)	2,134,124	1,548,586	

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	2,134,124
2	Enter amount from Part I, line 27a	2	<585,538>
3	Other increases not included in line 2 (itemize) ▶	3	
4	Add lines 1, 2, and 3	4	1,548,586
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	1,548,586

Part IV Capital Gains and Losses for Tax on Investment Income

	(a) List and describe the kind(s) of property sold (for example, 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				
b	SEE ATTACHED STATEMENT			
c				
d	"Publicly TRADED SECURITIES"			
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				
b				
c				
d				
e				

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

	(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
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	289,977
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 doesn't qualify under section 4940(e). Do not complete this part

1 Enter the appropriate amount in each column for each year, see the instructions before making any entries

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2016	549,282	2,404,533	.2284
2015	661,561	1,988,027	.3328
2014	208,702	2,102,165	.0993
2013	560,866	2,197,987	.2552
2012	374,980	2,180,543	.1720

2	**Total** of line 1, column (d)	2	1.0877
3	Average distribution ratio for the 5-year base period—divide the total on line 2 by 5.0, or by the number of years the foundation has been in existence if less than 5 years	3	.2175
4	Enter the net value of noncharitable-use assets for 2017 from Part X, line 5	4	2,342,588
5	Multiply line 4 by line 3	5	509513
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	3330
7	Add lines 5 and 6	7	509843
8	Enter qualifying distributions from Part XII, line 4	8	918,500

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	3330	–
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	3330	–
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	3330	–
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	3330	-
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		✓
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition	1b		✓
	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		✓
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? If "Yes," attach a detailed description of the activities	2		✓
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		✓
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		✓
b	If "Yes," has it filed a tax return on **Form 990-T** for this year?	4b	N/A	
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by *General Instruction T*	5		✓
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	✓	
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	✓	
8a	Enter the states to which the foundation reports or with which it is registered. See instructions ▶ CONNECTICUT			
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	✓	
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 tax year beginning in 2017? See the instructions for Part XIV If "Yes," complete Part XIV	9		✓
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10		✓

Part VII-A Statements Regarding Activities *(continued)*

		Yes	No
11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule See instructions		✓
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*		✓
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	✓	

Website address ▶ N/A

14 The books are in care of ▶ THE CREW FAMILY FOUNDATION INC Telephone no. ▶ (860) 793-6955
Located at ▶ 100 EAST MAIN STREET PLAINVILLE CT ZIP+4 ▶ 06062

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

		Yes	No
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 the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country ▶		

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

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

		Yes	No
1a	During the year, did the foundation (either directly or indirectly)		
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☑ No		
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☑ No		
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☑ No		
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☑ No		
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☑ No		
	(6) Agree to pay money or property to a government official? (**Exception.** Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) ☐ Yes ☑ No		
b	If any answer is "Yes" to 1a(1)–(6), did **any** of the acts fail to qualify under the exceptions described in Regulations section 53 4941(d)-3 or in a current notice regarding disaster assistance? See instructions	1b N/A	
	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	✓
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 N/A	
c	If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here. ▶ 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 N/A	
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	✓
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	✓

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

			Yes	No
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	N/A
	Organizations relying on a current notice regarding disaster assistance, check here ▶ ☐			
c	If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? N/A	☐ Yes ☐ No		
	If "Yes," attach the statement required by Regulations section 53 4945-5(d)			
6a	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	☐ Yes ☑ No		
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?		6b	N/A
	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	N/A

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

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

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
TED J. CREW 80 Knollwood LA Avon CT 06001	President Director	-0-	-0-	-0-
PEGGY L. CREW 80 Knollwood LA Avon CT 06001	SECRETARY Director	-0-	-0-	-0-
KIM CREW 93 MONTEVIDEO Rd Avon CT 06001	Director	-0-	-0-	-0-
PAM BAKER 106 Kendal Rd Lexington MA 02173	Director	-0-	-0-	-0-

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

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

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

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors *(continued)*

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

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

Part IX-A Summary of Direct Charitable Activities N/A

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 NONE	N/A
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 NONE	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	2,216,709
b	Average of monthly cash balances	1b	161,553
c	Fair market value of all other assets (see instructions)	1c	
d	**Total** (add lines 1a, b, and c)	1d	2,378,262
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	2,378,262
4	Cash deemed held for charitable activities Enter 1½% of line 3 (for greater amount, see instructions)	4	35,674
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3 Enter here and on Part V, line 4	5	2,342,588
6	**Minimum investment return.** Enter 5% of line 5	6	117,129

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	117,129
2a	Tax on investment income for 2017 from Part VI, line 5	2a	3330		
b	Income tax for 2017 (This does not include the tax from Part VI)	2b			
c	Add lines 2a and 2b			2c	3,330
3	Distributable amount before adjustments Subtract line 2c from line 1			3	113,799
4	Recoveries of amounts treated as qualifying distributions			4	
5	Add lines 3 and 4			5	113,799
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	113,799

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	918,500
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	918,500
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	3,330
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	915,170

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					113,799
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	267,310				
b	From 2013	453,579				
c	From 2014	106,288				
d	From 2015	565,078				
e	From 2016	432,309				
f	**Total** of lines 3a through e		1,824,564			
4	Qualifying distributions for 2017 from Part XII, line 4 ▶ $ 918,500					
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					113,799
e	Remaining amount distributed out of corpus		804,701			
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		2,629,265			
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)		267,310			
9	**Excess distributions carryover to 2018.** Subtract lines 7 and 8 from line 6a		2,361,955			
10	Analysis of line 9					
a	Excess from 2013	453,579				
b	Excess from 2014	106,288				
c	Excess from 2015	565,078				
d	Excess from 2016	432,309				
e	Excess from 2017	804,701				

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 ▶ N/A

b Check box to indicate whether the foundation is a private operating foundation described in section ☐ 4942(j)(3) or ☐ 4942(j)(5)

	Tax year	Prior 3 years			
	(a) 2017	(b) 2016	(c) 2015	(d) 2014	(e) Total
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 foundation 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))

TED J + PEGGY L. CREW

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

NONE

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 , to individuals or organizations under other conditions, complete items 2a, b, c, and d. See instructions

a The name, address, and telephone number or email address of the person to whom applications should be addressed

(860) 793-6955

The CREW Family Foundation Inc. 100 EAST MAIN ST PlAINVILLE CT 06062

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

NONE

c Any submission deadlines

NONE

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

NONE

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 ATTACHED STATEMENT	N/A	Public	SEE ATTACHED	$918,500
Total . . . . . . ▶ 3a				918,500
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 (a) Business code	Unrelated business income (b) Amount	Excluded by section 512, 513, or 514 (c) Exclusion code	Excluded by section 512, 513, or 514 (d) Amount	(e) Related or exempt function income (See instructions)
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	7,916	
4 Dividends and interest from securities			14	48,034	
5 Net rental income or (loss) from real estate					
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal property					
7 Other investment income					
8 Gain or (loss) from sales of assets other than inventory			18	289,977	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue a					
b					
c					
d					
e					
12 Subtotal. Add columns (b), (d), and (e)				345,927	

13 **Total.** Add line 12, columns (b), (d), and (e) 13 345,927

(See worksheet in line 13 instructions to verify calculations)

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

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) (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)		✓
	(2) Other assets	1a(2)		✓
b	Other transactions:			
	(1) Sales of assets to a noncharitable exempt organization	1b(1)		✓
	(2) Purchases of assets from a noncharitable exempt organization	1b(2)		✓
	(3) Rental of facilities, equipment, or other assets	1b(3)		✓
	(4) Reimbursement arrangements	1b(4)		✓
	(5) Loans or loan guarantees	1b(5)		✓
	(6) Performance of services or membership or fundraising solicitations	1b(6)		✓
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c		✓

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
		NONE	

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

b If "Yes," complete the following schedule.

(a) Name of organization	(b) Type of organization	(c) Description of relationship
NONE		

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.

[signature] 12/12/18 PRESIDENT

Signature of officer or trustee | Date | Title

May the IRS discuss this return with the preparer shown below? See instructions ☐ Yes ☐ No

Paid Preparer Use Only

Print/Type preparer's name	Preparer's signature	Date	Check ☐ if self-employed	PTIN
Firm's name ▶			Firm's EIN ▶	
Firm's address ▶			Phone no	

#06-1191170

The Crew Family Foundation
2017 Form 990-PF

Part I	Line 1 - Contributions Ted & Peggy Crew 80 Knollwood Lane Avon, CT 06001	$0
Part I	Line 16 (c) - Other Professional Fees Investment Advisor Fees	$11,338
Part I	Line 18 - Taxes Internal Revenue Service	$1,627
Part I	Line 23 - Other Expenses CT Secretary of State	$0

Part II, Line 13 - Investments		Beginning Book Value	Ending Book Value	Ending Fair Market Value
2,017	FIDELITY ADV SMALL CAP CL A	47,009	53,406	53,590
1,281	AMERICAN MUTUAL FUND INC CL A	47,097	37,811	52,442
920	AMERICAN EUROPACIFIC GRWTH FD CL A	38,246	41,142	44,241
662	FRANKLIN DYNATECH FD ADV CL A	21,166	21,918	48,762
1,133	FRANKLIN REAL ESTATE ADV CL	17,390	19,592	23,276
1,369	FRANKLIN SMALL MID CAP GRWTH CL A	47,408	51,334	54,020
2,267	FRANKLIN MUTUAL GLOBAL DISCOVERY Z	65,203	67,966	70,808
997	OPPENHEIMER DEV MKTS CL Y	50,663	37,762	37,040
1,418	PGIM GLOBAL REAL ESTATE CL Z	24,910	23,475	32,720
4,339	OPPENHEIMER STEELPATH MLP ALPHA	41,689	44,404	31,328
0	TEMPLETON EMER MKT SMLL CAP CL A	17,872	(0)	0
1,711	TETON WESTWOOD MIGHTY MITES	40,189	43,098	46,353
0	LOOMIS SAYLES BOND INSTL CLASS 1	40,036	(0)	0
3,370	DOUBLELINE TOTAL RETURN BOND FD		35,220	34,648
5,246	NEUBERGER BERMAN HIGH INC BOND FD	47,512	49,886	43,857
4,557	PRINCIPAL PREFERRED SECURITIES INSTL		45,604	44,518
640	INVESCO ETF TR S&P 500 EQUAL WEIGHTEI	38,654	38,654	63,405
1,645	INVESCO EXCH TRADED FD TR II	90,812	60,018	78,944
463	I SHARES RUSSELL MIDCAP GROWTH	53,888	29,017	56,555
426	I SHARES RUSSELL 1000 GROWTH ETF	57,883	28,020	60,526
260	I SHARES RUSSELL 2000 VALUE ETF	37,294	19,393	31,499
194	I SHARES RUSSELL 2000 GROWTH ETF	42,428	18,291	36,451
632	I SHARES TR RUSSELL 3000 INDEX	114,844	77,050	100,861
2,006	WISDOMTREE TR EMERGING MKTS HIGH	132,253	65,001	80,922
1,200	WISDOMTREE MIDCAP DIV FD	25,001	25,001	41,148
1,500	WISDOMTREE SMALLCAP DIV FD	27,596	27,596	41,025
269	WISDOMTREE INT'L LARGE CAP DIV		12,962	121,166
0	I SHARES CORE U S AGGREGATE BOND ETF	24,114	0	0
653	I SHARES COHEN & STEERS ETF REALTY M/	73,459	57,373	64,392
0	I SHARES S&P U S PREFERRED STOCK	46,536	0	0
300	SPDR GOLD TRUST ETF	48,732	48,732	34,545
593	CATEPILLAR INC	69,294	42,545	71,943
673	CHEVRON CORPORATION	125,566	65,342	75,140
1,436	DUNKIN' BRANDS INC	85,315	61,318	104,196
5,000	FORD MOTOR CORP DEL COM		53,826	47,750
652	MCDONALDS CORP	59,768	51,005	115,339
276	PEPSICO IN	24,912	24,912	31,017
45,000	JP MORGAN CHASE 6 3% 4/23/19	45,113	45,113	45,792
54,000	GOODYEAR RO FA 8 75 8/15/20	49,865	49,865	57,983
	TOTALS	1,819,717	1,473,652	1,978,202

The Crew Family Foundation
2017 Form 990 - PF
Return of Private Foundation
06-1191170
Capital Gains / Loss

Part IV

Shares	Description	Date Acquired	Date Sold	Gross Sales Price	Cost or Basis	Gain or (Loss)
Capital Gain Distribution - Mutual Funds						88
Long Term						
742	American Mutual Fund CL	Var	3/20/2018	30,000	13,943	16,057
329	Caterpillar Inc Ave Price Trade	Var	3/21/2018	49,887	20,138	29,749
439	Chevron Corp New Com	Var	3/21/2018	49,944	47,296	2,648
397	Ishares Russell Midcap Growth	Var	3/21/2018	49,977	24,871	25,106
355	Ishares Russell 1000 Growth ETF	Var	3/21/2018	49,894	23,351	26,543
240	Ishares Russell 2000 Value ETF	Var	3/21/2018	29,975	17,901	12,074
256	Ishares Russell 2000 Growth ETF	Var	3/21/2018	49,924	24,137	25,787
310	Ishares Russell 3000 ETF	Var	3/21/2018	49,827	37,794	12,033
844	Powershares Exch Traded Fd TST 11 S&P	Var	3/21/2018	39,958	30,794	9,164
2112	Wisdomtree TR Emerge Mks High	Var	3/21/2018	99,901	60,860	39,041
348	Oppenheimer Dev Markets CL Y	Var	7/26/2018	15,000	13,228	1,772
416	PGIM Global Real Estate CL 2	Var	7/26/2018	10,000	3,664	6,336
108	Caterpillar Inc	Var	7/27/2018	14,910	6,611	8,299
120	Chevron Corp New Com	Var	7/27/2018	14,961	12,928	2,033
562	Dunkin Brands Group Inc	Var	7/27/2018	39,948	23,997	15,951
217	Ishares Core US Aggregate BD ETF	Var	7/27/2018	23,022	24,114	(1,092)
99	Ishares Russell 1000 Growth ETF	Var	7/27/2018	14,940	6,512	8,428
201	Ishares TR Cohen Steer REIT	Var	7/27/2018	19,973	16,086	3,887
126	McDonalds Corp	Var	7/27/2018	19,904	8,763	11,141
673	Wisdomtree TR Emerge Mks High	Var	7/27/2018	29,999	19,379	10,620
2835	Loomis Sayles Bond INSTL	Var	8/23/2018	38,496	42,054	(3,558)
1808	Templeton Emerging Mrkts Small Cap	Var	8/23/2018	25,273	17,906	7,367
1146	Ishares TR S&P U S PFDSTK	Var	8/24/2018	43,196	46,536	(3,340)
Subtotal				808,909	542,863	266,046
Capital Gain Distribution - Mutual Funds						23,843
Total Capital Gain						$ 289,977

The Crew Family Foundation
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Part XV

Date	Payee	Payee Address	Description	$ Amount
11/03/2017	My Brother's Workshop	PO Box 503205 St Thomas, VI 00805	Donation	$10,000
11/17/2017	MAP International	4700 Glynco Parkway Brunswick, GA 31525	Donation	$100,000
11/17/2017	Faith's Lodge	Ms. Kelly McDyre 4080 West Broadway Suite 212 Minneapolis, MN 55422	Donation	$5,000
11/17/2017	Grace Academy	277 Main Street Hartford, CT 06106	Donation	$5,000
11/17/2017	True Grace Ministries	138 Colony Road Gardner, MA 01440	Donation	$1,000
11/17/2017	Salvation Army of Waterbury, CT	74 Central Avenue Waterbury, CT 06702	Donation	$5,000
12/14/2017	American Leprosy Missions	1 ALM Way Greenville, SC 29601	Donation	$10,000
1/10/2018	Valley Community Baptist Church	590 West Avon Road Avon, CT 06001	Donation	$500
2/23/2018	Christ The King - Newton	258 Concord St. Newton, MA 02462	Donation	$25,000
2/23/2018	Kids Alive	Kids Alive International 2507 Cumberland Drive Valparaiso, IN 46383	Donation	$75,000
3/1/2018	Mary's Place	Lisa Pelusa Mary's Place 6 Poquonock Avenue Windsor, CT 06095-2507	Donation	$5,000
5/28/2018	University of Hartford	200 Bloomfield Avenue West Hartford, CT 06117	Donation	$5,000
3/28/2018	MAP International	4700 Glynco Parkway Brunswick, GA 31525	Donation	$100,000
3/28/2018	Kids Alive	Kids Alive International 2507 Cumberland Drive Valparaiso, IN 46383	Donation	$315,000

The Crew Family Foundation
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Part XV

3/30/2018	Pioneers	10123 Wiliam Carey Drive Orlando, FL 32832	Donation	$6,000
4/10/2018	Connecticut Children's Medical Center Foundation, Inc.	282 Washington Street Hartford, CT 06106-3322	Donation	$35,000
4/13/2018	St. Jude's Children's Research Hospital	262 Danny Thomas Place Memphis, TN 38105	Donation	$1,000
4/13/2018	Boston Ability Center - One Night Out	49 Walnut Park Wellesley Hills, MA 02481	Donation	$5,000
7/5/2018	Mary's Place	Mary's Place 6 Poquonock Avenue Windsor, CT 06095-2507	Donation	$5,000
7/30/2018	Kids Alive	Kids Alive International 2507 Cumberland Drive Valparaiso, IN 46383	Donation	$100,000
7/30/2018	MAP International	4700 Glynco Parkway Brunswick, GA 31525	Donation	$100,000
9/7/2018	Faith's Lodge	Ms. Kelly McDyre 505 Hwy 169 N, Suite 245 Plymouth MN 55441	Donation	$5,000
				$918,500

The Crew Family Foundation
2017 Form 990-PF
Part VIII

Section 1

(a)	(b)	(c)	(d)	(e)
Janet Wade 142 Church Street Newton, MA 02458	Director	0	0	0