

Form **990-PF****Return of Private Foundation**

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

OMB No 1545-0052

2018

Department of the Treasury

Internal Revenue Service

▶ 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.

Open to Public Inspection

For calendar year 2018 or tax year beginning

, and ending

Name of foundation

A Employer identification number

Tulgey Wood Foundation**06-1062661**

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

Room/suite

19 Field Point Drive

B Telephone number

(203) 629-2484

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

Greenwich, CT 06830C If exemption application is pending, check here ☐ **6**

G Check all that apply:

☐ Initial return☐ Initial return of a former public charity☐ Final return☐ Amended return☐ Address change☐ Name changeD 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 **04**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)

J Accounting method:

☒ Cash☐ Accrual☐ Other (specify) _____F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐▶ \$ **2395057.** (Part I, column (d) must be on cash basis.)**Part I Analysis of Revenue and Expenses**

(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))

(a) Revenue and expenses per books

(b) Net investment income

(c) Adjusted net income

(d) Disbursements for charitable purposes (cash basis only)

1 Contributions, gifts, grants, etc., received

2 Check ☒ if the foundation is not required to attach Sch. B

3 Interest on savings and temporary cash investments

35.**35.****35.****Statement 1**

4 Dividends and interest from securities

74189.**74189.****74189.****Statement 2**

5a Gross rents

b Net rental income or (loss)

6a Net gain or (loss) from sale of assets not on line 10

238943.

b Gross sales price for all assets on line 6a

735181.

7 Capital gain net income (from Part IV, line 2)

238943.

8 Net short-term capital gain

N/A

9 Income modifications

10a Gross sales less returns and allowances

b Less Cost of goods sold

c Gross profit or (loss)

11 Other income

10097.**10097.****10097.****Statement 3**

12 Total Add lines 1 through 11

323264.**323264.****84321.**

13 Compensation of officers, directors, trustees, etc

0.**0.****0.****0.**

14 Other employee salaries and wages

15 Pension plans, employee benefits

16a Legal fees

Stmt 4**22165.****22165.****22165.****22165.**

b Accounting fees

c Other professional fees

Stmt 5**26395.****26395.****26395.****26395.**

17 Interest

149.**149.****149.****149.**

18 Taxes

Stmt 6**982.****982.****982.****982.**

19 Depreciation and depletion

20 Occupancy

21 Travel, conferences, and meetings

22 Printing and publications

52.**52.****52.****52.**

23 Other expenses

24 Total operating and administrative expenses Add lines 13 through 23

49743.**49743.****49743.****49743.**

25 Contributions, gifts, grants paid

153550.**153550.**

26 Total expenses and disbursements. Add lines 24 and 25

203293.**49743.****49743.****203293.**

27 Subtract line 26 from line 12:

a Excess of revenue over expenses and disbursements

119971.

b Net investment income (if negative, enter -0-)

273521.

c Adjusted net income (if negative, enter -0-)

34578.

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

		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing			
	2 Savings and temporary cash investments	66926.	39588.	39588.
	3 Accounts receivable ▶			
	Less: allowance for doubtful accounts ▶			
	4 Pledges receivable ▶			
	Less: allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons			
	7 Other notes and loans receivable ▶			
	Less: allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments - U.S. and state government obligations			
	b Investments - corporate stock Stmt 7	1295116.	946841.	1431708.
	c Investments - corporate bonds Stmt 8	407151.	501956.	490162.
	11 Investments - land, buildings, and equipment basis ▶			
Less: accumulated depreciation ▶				
12 Investments - mortgage loans				
13 Investments - other Stmt 9	89850.	45846.	45191.	
14 Land, buildings, and equipment: basis ▶				
Less: accumulated depreciation ▶				
15 Other assets (describe ▶ Statement 10)	0.	404329.	388408.	
16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item I)	1859043.	1938561.	2395057.	
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			
	22 Other liabilities (describe ▶)			
23 Total liabilities (add lines 17 through 22)	0.	0.		
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/>			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ <input checked="" type="checkbox"/>			
	27 Capital stock, trust principal, or current funds	1859043.	1938561.	
	28 Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
	29 Retained earnings, accumulated income, endowment, or other funds	0.	0.	
	30 Total net assets or fund balances	1859043.	1938561.	
31 Total liabilities and net assets/fund balances	1859043.	1938561.		

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	1859043.
2 Enter amount from Part I, line 27a	2	119971.
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	1979014.
5 Decreases not included in line 2 (itemize) ▶	5	40453.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	1938561.

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Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (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 see Schedule			
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			0.
b 735181.		496238.	238943.
c			
d			
e			

(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			0.
b			238943.
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	238943.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8	}	3	238943.

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))
2017	143915.	2553669.	.056356
2016	156130.	2439627.	.063997
2015	137250.	2618361.	.052418
2014	150530.	2712160.	.055502
2013	119606.	2669940.	.044797

2 Total of line 1, column (d)	2	.273070
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	.054614
4 Enter the net value of noncharitable-use assets for 2018 from Part X, line 5	4	2566424.
5 Multiply line 4 by line 3	5	140163.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	2735.
7 Add lines 5 and 6	7	142898.
8 Enter qualifying distributions from Part XII, line 4	8	203269.

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

c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations, enter 4% of Part I, line 12, col. (b).

1	2735.
2	0.
3	2735.
4	0.
5	2735.
6	
6a	0.
6b	0.
6c	0.
6d	0.
7	0.
8	113.
9	2848.
10	
11	

2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-)

3 Add lines 1 and 2

4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-)

5 **Tax based on investment income** Subtract line 4 from line 3. If zero or less, enter -0-

6 Credits/Payments:

a 2018 estimated tax payments and 2017 overpayment credited to 2018

b Exempt foreign organizations - tax withheld at source

c Tax paid with application for extension of time to file (Form 8868)

d Backup withholding erroneously withheld

7 Total credits and payments. Add lines 6a through 6d

8 Enter any **penalty** for underpayment of estimated tax. Check here ☐ if Form 2220 is attached

9 **Tax due** If the total of lines 5 and 8 is more than line 7, enter **amount owed**

10 **Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid**

11 Enter the amount of line 10 to be: **Credited to 2019 estimated tax** ☐ **Refunded** ☐

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition. If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.		X
1c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. <input type="checkbox"/> \$ 0. (2) On foundation managers. <input type="checkbox"/> \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. <input type="checkbox"/> \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by <i>General Instruction T</i> .		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?		X
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV	X	
8a Enter the states to which the foundation reports or with which it is registered. See instructions. <input type="checkbox"/> <u>None</u>		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by <i>General Instruction G</i> ? If "No," attach explanation	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2018 or the tax year beginning in 2018? See the instructions for Part XIV. If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

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Part VII-A Statements Regarding Activities (continued)

	Yes	No
11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule. See instructions		X
12 Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement. See instructions		X
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► N/A	X	
14 The books are in care of ► Emile W. Jacques Telephone no. ► (203) 629-2484 Located at ► 19 Field Point Drive, Greenwich, CT ZIP+4 ► 06830		
15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - check here and enter the amount of tax-exempt interest received or accrued during the year. 15 N/A		
16 At any time during calendar year 2018, 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 ►		X

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

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

	Yes	No
1a During the year, did the foundation (either directly or indirectly): (1) Engage in the sale or exchange, or leasing of property with a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions Organizations relying on a current notice regarding disaster assistance, check here N/A		
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 2018?		X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)): a At the end of tax year 2018, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2018? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years ► b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.) N/A c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ►		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No b If "Yes," did it have excess business holdings in 2018 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 2018.) N/A		
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2018?		X

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

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

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

N/A

Organizations relying on a current notice regarding disaster assistance, check here ☐

c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?

N/A

☐ Yes ☐ No

If "Yes," attach the statement required by Regulations section 53.4945-5(d).

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?

☐ Yes ☒ No

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

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

6b

X

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

☐ Yes ☒ No

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

N/A

7b

8 Is the foundation subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment(s) during the year?

☐ Yes ☒ No**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.

(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
Katherine R. Schubart 114 Magic Hill Road Hinesburg, VT 05461	President	0.00	0.	0.
Dr. Clinton B. Wright 6600 Tulip Hill Terrace Bethesda, MD 20816	Vice President, Ass't	0.00	0.	0.
Nicholas Deane 120 Fulton Street Boston, MA 02109	Vice President, Ass't	0.00	0.	0.
Emile W. Jacques 19 Field Point Greenwich, CT 06830	Secretary, Treasurer	0.00	0.	0.

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

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

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

0

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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	2596028.
b	Average of monthly cash balances	1b	9479.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	2605507.
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	2605507.
4	Cash-deemed-held-for-charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	39083.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	2566424.
6	Minimum investment return. Enter 5% of line 5	6	128321.

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	128321.
2a	Tax on investment income for 2018 from Part VI, line 5	2a	2735.
b	Income tax for 2018. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	2735.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	125586.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	125586.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	125586.

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	203293.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8; and Part XIII, line 4	4	203293.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	2735.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	200558.

Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years.

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Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2017	(c) 2017	(d) 2018
1 Distributable amount for 2018 from Part XI, line 7				125586.
2 Undistributed income, if any, as of the end of 2018				
a Enter amount for 2017 only			0.	
b Total for prior years: 2014, 2015, 2016		0.		
3 Excess distributions carryover, if any, to 2018:				
a From 2013	17112.			
b From 2014	15567.			
c From 2015	41071.			
d From 2016	36396.			
e From 2017	17702.			
f Total of lines 3a through e	127848.			
4 Qualifying distributions for 2018 from Part XII, line 4: \$ 203293.				
a Applied to 2017, but not more than line 2a			0.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2018 distributable amount				125586.
e Remaining amount distributed out of corpus	77707.			
5 Excess distributions carryover applied to 2018 (If an amount appears in column (d), the same amount must be shown in column (a))	0.			0.
6 Enter the net total of each column as indicated below:	205555.			
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5				
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 2017. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2018. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2019				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions)	0.			
8 Excess distributions carryover from 2013 not applied on line 5 or line 7	17112.			
9 Excess distributions carryover to 2019. Subtract lines 7 and 8 from line 6a	188443.			
10 Analysis of line 9:				
a Excess from 2014	15567.			
b Excess from 2015	41071.			
c Excess from 2016	36396.			
d Excess from 2017	17702.			
e Excess from 2018	77707.			

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

N/A

1 a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2018, enter the date of the ruling

b Check box to indicate whether the foundation is a private operating foundation described in section

☐ 4942(j)(3) or ☐ 4942(j)(5)

2 a 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).)

None

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.

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 Schedule of Donations XV				
				153550.
Total			3a	153550.
b Approved for future payment				
None				
Total			3b	0.

Form 990-PF (2018)

Form 990-PF Interest on Savings and Temporary Cash Investments Statement 1

Source	(a) Revenue Per Books	(b) Net Investment Income	(c) Adjusted Net Income
UBS Financial Services	35.	35.	35.
Total to Part I, line 3	35.	35.	35.

Form 990-PF Dividends and Interest from Securities Statement 2

Source	Gross Amount	Capital Gains Dividends	(a) Revenue Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income
UBS Financial	3501.	0.	3501.	3501.	3501.
UBS Financial	70688.	0.	70688.	70688.	70688.
To Part I, line 4	74189.	0.	74189.	74189.	74189.

Form 990-PF Other Income Statement 3

Description	(a) Revenue Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income
Capital gain distributions	5546.	5546.	5546.
Capital gain distributions	4551.	4551.	4551.
Total to Form 990-PF, Part I, line 11	10097.	10097.	10097.

Form 990-PF Legal Fees Statement 4

Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Emile W. Jacques, PC	22165.	22165.	22165.	22165.
To Fm 990-PF, Pg 1, ln 16a	22165.	22165.	22165.	22165.

Form 990-PF	Other Professional Fees			Statement	5
Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes	
UBS Financial Investment fees	26395.	26395.	26395.	26395.	
To Form 990-PF, Pg 1, ln 16c	26395.	26395.	26395.	26395.	

Form 990-PF	Taxes			Statement	6
Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes	
Foreign tax	982.	982.	982.	982.	
To Form 990-PF, Pg 1, ln 18	982.	982.	982.	982.	

Form 990-PF	Corporate Stock		Statement	7
Description	Book Value		Fair Market Value	
Corporate Stock	946841.		1431708.	
Total to Form 990-PF, Part II, line 10b	946841.		1431708.	

Form 990-PF	Corporate Bonds		Statement	8
Description	Book Value		Fair Market Value	
Corporate Bonds	501956.		490162.	
Total to Form 990-PF, Part II, line 10c	501956.		490162.	

Form 990-PF	Other Investments	Statement	9
Description	Valuation Method	Book Value	Fair Market Value
Other	COST	45846.	45191.
Total to Form 990-PF, Part II, line 13		45846.	45191.

Form 990-PF	Other Assets	Statement	10
Description	Beginning of Yr Book Value	End of Year Book Value	Fair Market Value
Investments- Non Traditional	0.	404329.	388408.
To Form 990-PF, Part II, line 15	0.	404329.	388408.

Tulgey Wood Foundation

Part XV, Line 3a

Grants and Contributions Paid During the Year

2018

<u>Recipient</u>	<u>Status</u>	<u>Purpose</u>	<u>Amount</u>
ACLU c/o the Gift Processing Dept. 125 Broad Street, 18 th Floor New York, NY 10004	Public Charity	Support of Organization	250
Addison County Parent Child Center P. O. Box 646 Middlebury, VT 05753	Public Charity	Support of Organization	2,000
Aloha Foundation 2968 Lake Morey Road Fairlee, VT 05045	Public Charity	Support of Organization	500
American Ballet Theater 890 Broadway, 3rd FL New York, NY 10211-0226	Public Charity	Support of Organization	150
American University WAMU 88.5 4000 Brandywine St. NW Washington, DC 20016-8082	Public Charity	Support of Organization	500
Associates of the Boston Public Library 700 Boylston Street Boston, MA 02116	Public Charity	Support of Organization	300
Barre Historical Society P. O. Box 496 Barre, VT 05641-0496	Public Charity	Support of Organization	1,500
Birds of Vermont Museum 900 Sherman Hollow Road Huntington, VT 05462	Public Charity	Support of Organization	750.00
Boston Athenaeum 10 1/2 Beacon Street Boston, MA 02108	Public Charity	Support of Organization	2,400.00

Tulgey Wood Foundation

Part XV, Line 3a

Grants and Contributions Paid During the Year

2018 ACLU Foundation

<u>Recipient</u>	<u>Status</u>	<u>Purpose</u>	<u>Amount</u>
ACLU c/o the Gift Processing Dept. 125 Broad Street, 18 th Floor New York, NY 10004	Public Charity	Support of Organization	250
Addison County Parent Child Center P. O. Box 646 Middlebury, VT 05753	Public Charity	Support of Organization	2,000
Aloha Foundation 2968 Lake Morey Road Fairlee, VT 05045	Public Charity	Support of Organization	500
American Ballet Theater 890 Broadway, 3rd FL New York, NY 10211-0226	Public Charity	Support of Organization	150
American University WAMU 88.5 4000 Brandywine St. NW Washington, DC 20016-8082	Public Charity	Support of Organization	500
Associates of the Boston Public Library 700 Boylston Street Boston, MA 02116	Public Charity	Support of Organization	300
Barre Historical Society P. O. Box 496 Barre, VT 05641-0496	Public Charity	Support of Organization	1,500
Birds of Vermont Museum 900 Sherman Hollow Road Huntington, VT 05462	Public Charity	Support of Organization	750.00
Boston Athenaeum 10 1/2 Beacon Street Boston, MA 02108	Public Charity	Support of Organization	2,400.00

Brennan Center for Justice 120 Broadway Suite 1750 New York, NY 10271	Public Charity	Support of Organization	400.00
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Brookview House Development Department 2 Brookview Street #1 Dorchester Center, MA 02124	Public Charity	Support of Organization	250.00
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Brown Annual Fund Box 1893 Providence, RI 12912	Public Charity	Support of Organization	2,000.00
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Champlain Housing Trust 88 King Street, Suite 100 Burlington, VT 05401-4706	Public Charity	Support of Organization	5,000.00
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Charles River Conservancy 4 Brattle Street Cambridge, MA 02138	Public Charity	Support of Organization	350
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City Harvest 6 East 32nd Street, 5th floor New York, NY 10016	Public Charity	Support of Organization	450
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Community Boating 21 David Mugar Way Boston, MA 02114	Public Charity	Support of Organization	500
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Community College of Vermont Office of Development 1 Abenaki Way Winooski, VT 05404	Public Charity	Support of Organization	2,500.00
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Community Sailing Center PO Box 64818 Burlington, VT 05406	Public Charity	Support of Organization	2,500.00
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Concord Academy Annual Fund 166 Main Street	Public Charity	Support of Organization	1,950.00
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Concord, MA 02114

Conservatory Lab Charter School 25 Arlington Street Boston, MA 02116	Public Charity	Support of Organization	500
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Doctors Without Borders 333 Seventh Avenue, 2nd FL New York, NY 10001	Public Charity	Support of Organization	2,500.00
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Flynn Theater for Performing Arts 153 Main Street Burlington, Vermont 05401	Public Charity	Support of Organization	5,000.00
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Fort Ticonderoga Fort Road Ticonderoga, NY 12883	Public Charity	Support of Organization	1,000.00
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Foundation for Portland Public Schools 353 Cumberland Avenue Portland, ME 04101	Public Charity	Support of Organization	500.00
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Harvard College Fund 124 Mount Auburn Street Cambridge, MA 02138	Public Charity	Support of Organization	3,250
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Historic New England 141 Cambridge Street Boston, MA 02114	Public Charity	Support of Organization	3,600.00
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HomeShare Vermont 412 Farrell Street, Suite 300 South Burlington, VT 05403-4466	Public Charity	Support of Organization	2,500.00
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Hopkins School 986 Forest Road New Haven, CT 06515	Public Charity	Support of Organization	250.00
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Horace Mann PTA PTA Treasurer Receivables 4430 Newark Street NW Washington, DC 20016	Public Charity	Support of Organization	2,500.00
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Institute Of Contemporary Art 100 Northern Ave. Boston, MA 02210	Public Charity	Support of Organization	100
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International Rescue Committee P. O. Box 6068 Albert Lea, MN-56007-9847	Public Charity	Support of Organization	100
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Isabella Stuart Gardner Museum 2 Palace Road Boston, MA 02115	Public Charity	Support of Organization	3,800.00
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Kieve Wavus PO Box 169 Nobleboro, ME 04555	Public Charity	Support of Organization	1,000.00
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Lake Champlain Land Trust 1 Main Street Burlington, VT 05401	Public Charity	Support of Organization	1,000.00
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Lamoille County Conservation District 109 Professional Drive, Suite 2 Morrisville, VT 05661	Public Charity	Support of Organization	300
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Lamoille Home Health and Hospice 54 Farr Avenue Morrisville, VT 05661	Public Charity	Support of Organization	1,000.00
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Laraway Youth & Family Services P. O. Box 621, 275 VT Rte. 15 West Johnson, VT 05656	Public Charity	Support of Organization	3,000.00
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Library Foundation of Los Angeles 630 W. 5th Street Los Angeles, CA 90071	Public Charity	Support of Organization	100
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Los Angeles Conservancy 523 West Sixth St., Suite 826 Los Angeles, CA 90014	Public Charity	Support of Organization	100
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Massachusetts Historical Society	Public Charity	Support of Organization	1,600.00
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1154 Boylston Street
Boston, MA 02215-3695

McClure-Miller VNA Respite House 1110 Prim Road Colchester, VT 05446-6405	Public Charity	Support of Organization	3,000.00
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Meals on Wheels of Lamoille County 24 Upper Main Street/P. O. Box 1427 Morrisville, VT 05661	Public Charity	Support of Organization	250
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Mercy Connections Challenge 255 S. Champlain Street, Suite #8 Burlington, VT 05401	Public Charity	Support of Organization	1,000.00
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Morristown Centennial Library 7 Richmond Street, Box 727 Morrisville, VT 05661	Public Charity	Support of Organization	150
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Morrisville Alliance for Culture P. O. Box 748 Morrisville, VT 05661	Public Charity	Support of Organization	500
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Museum of Fine Arts 465 Huntington Avenue Boston, MA 02115	Public Charity	Support of Organization	3,000.00
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National Gallery of Art 2000 B South Club Drive Landover, MD 20785	Public Charity	Support of Organization	10,000.00
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Natural Resources Defense Council 40 West 20th Street New York, NY 10011	Public Charity	Support of Organization	200
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New York City Rescue Mission 90 Lafayette Street New York, NY 10013	Public Charity	Support of Organization	450
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New York Public Library 445 Fifth Avenue New York, NY 10016	Public Charity	Support of Organization	100
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North Bennet Street School 39 North Bennet Street Boston, MA 02113	Public Charity	Support of Organization	2,150.00
Nurse Family Partnership 1900 Grant Street, Suite 400 Denver, CO 80203	Public Charity	Support of Organization	200
New York Public Radio PO Box 1550 New York, NY 10116-1550	Public Charity	Support of Organization	200
Open Door Clinic 100 Porter Drive Middlebury, VT 05753	Public Charity	Support of Organization	1,000.00
Pan Mass Challenge 77 Fourth Avenue Needham, MA 02494	Public Charity	Support of Organization	500
Partners in Health Boston PO Box 996 Frederick, MD 21705-9942	Public Charity	Support of Organization	2,600.00
Phillips Exeter Academy 20 Main Street Exeter, NH 03833	Public Charity	Support of Organization	3,000.00
Planned Parenthood League of Massachusetts 1055 Commonwealth Ave. Boston, MA 02215-1001	Public Charity	Support of Organization	1,000.00
Planned Parenthood Los Angeles PO Box 740528 Los Angeles, CA 90074-0528	Public Charity	Support of Organization	250
Planned Parenthood of Massachusetts 1055 Commonwealth Ave. Boston, MA 02215-1001	Public Charity	Support of Organization	1,000

P. & S Annual Fund 630 West 168th Street, BB2-250 New York, NY 10032	Public Charity	Support of Organization	2,000.00
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RAICES Texas 5121 Crestway Drive, Suite 105 San Antonio, TX 78239	Public Charity	Support of Organization	100
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Rock Point Diocese of Vermont 5 Rock Point Road Burlington, VT 05408	Public Charity	Support of Organization	2,500.00
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Rokeby Museum 4334 Route 7 Ferrisburg, VT 05456-9711	Public Charity	Support of Organization	2,500.00
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Sara Holbrook Community Center 66 North Avenue Burlington, VT 05401	Public Charity	Support of Organization	1,500.00
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Shady Hill School Annual Fund 178 Coolidge Hill Road Cambridge, MA 02138	Public Charity	Support of Organization	1,750.00
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Sibley Memorial Foundation 5255 Loughboro Road, NW Washington, DC 20016	Public Charity	Support of Organization Women's support gala	4,000.00
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Solidarity Bridge 1703 Darrow Avenue, Suite #1 Evanston, IL 60201	Public Charity	Support of Organization	1,000.00
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Southern Poverty Law Center 400 Washington Ave. Montgomery, AL 36104	Public Charity	Support of Organization	200
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St. Albans Annual Giving Mount St. Alban Washington, DC 20116-5095	Public Charity	Support of Organization	15,000.00
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St. Phillips Episcopal Church 602 Malaga Avenue	Public Charity	Support of Organization	1,000.00
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Coral Gables, FL 33134

Stern Center for Language and Learning 183 Talcott Road, Suite 101 Williston, VT 05495	Public Charity	Support of Organization	2,500.00
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Suffield Academy Annual Fund 185-North-Main-Street Suffield, CT 06078	Public Charity	Support of Organization	250
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The Ronald N. Terrill Memorial Fund 90 Woods Edge Rd. Morrisville, VT 05661	Public Charity	Support of Organization	1,500.00
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The Woods Academy 6801 Greentree Road Bethesda, MD 20817	Public Charity	Support of Organization	4,000.00
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University of California Berkeley College of Engineering 208 McLaughlin Hall #1722 Berkeley, CA 94720-1722	Public Charity	Support of Organization	500
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UVM Medical Center Foundation Courtyard at Given #M 111 Colchester Avenue Burlington, VT 05401	Public Charity	Support of Organization	100
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Vermont Community Foundation 3 Court Street Middlebury, VT 05753	Public Charity Con Hogan Fund	Support of Organization	1,000.00
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Vermont Journalism Trust/ VTDigger.org 26 State Street, Suite 8 Montpelier, VT 05602	Public Charity	Support of Organization	1,500.00
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Vermont Granite Museum P. O. Box 282 Barre, VT 05641	Public Charity	Support of Organization	1,000.00
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Vermont Humanities Council 11 Loomis St.	Public Charity	Support of Organization	2,500.00
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Montpelier, VT 05602

Vermont Int'l Film Foundation/VTIFF P. O. Box 483 Burlington, VT 05402	Public Charity	Support of Organization	2,250.00
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Vermont Land Trust 8-Bailey-Avenue- Montpelier, VT 05602-9942	Public Charity	Support of Organization	700
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Vermont Youth Conservation Corps. 1949 East Main Street Richmond, VT 05477	Public Charity	Support of Organization	350
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Vermont Works for Women 32A Mallets Bay Avenue Winooski, VT 05404	Public Charity	Support of Organization	2,500.00
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Wellesley College Fund 106 Central Street Wellesley, MA 02481	Public Charity	Support of Organization	3,000.00
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Westmoreland Congregational Church 1 Westmorland Circle Bethesda, MD 20815	Public Charity	Support of Organization	1,000.00
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World Food Program 1725 Eye Street NW, Suite 510 Washington, DC 20006	Public Charity	Support of Organization	100
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The Yellow Ribbon Fund 4905 Del Ray Avenue, Suite 500 Bethesda, MD 20814	Public Charity	Support of Organization	7,750.00
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Young Writers Project 47 Maple Street Burlington, VT 05401	Public Charity	Support of Organization	1,000.00
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TOTAL 2018 Donations:

153,550.00

TULGEY WOOD FOUNDATION
19 Field Point Drive
Greenwich, CT 06830
Tax ID # 06-1062661

SCHEDULE 1 FORM 990-PF YEAR 2018

Schedule of Capital Gains and Losses Part I, line 6a & Part IV, line 2 *

28949

	<u>Gain</u>	<u>Loss</u>
Altria Group, Inc.	4,621.41	
British American Tobacco		-3,715.14
Cigna Corporation	15,519.36	
CVS Health Corp.	8,451.79	
Calvert Short Duration Income Fund		-860.12
Cisco Sys Inc.	4,830.45	
Cognizant Tech. Solutions CRP	9,444.65	
Comcast Corp CL A	7,835.14	
Dell Technologies	1.05	
DWS Short Duration Funds		-3,244.42
Energy Transfer Partners		-6,018.75
Eversource Energy	11,561.21	
First Eagle Overseas Fund	1,362.35	
Fortive Corp.	1,250.61	
Garrett Motion Inc.	247.97	
Honeywell International Inc.	11,033.72	
Ishares US Real Estate	5,269.08	
JP Morgan Income Builder Fund CL A	2,417.75	
Keycorp New Common Stock	10,050.56	
Lauder Estee Cosmetics CL A	13,650.47	
Magellan Midstream Partners	9,720.40	
Matthews Asia Dividend	8,681.06	
Matthews Asian Growth & Income		-553.5
Microsoft Corp.	20,798.96	
Naspers Ltd.	25,680.89	

News Corp. New CL A	1,234.15	
Novartis AG	4,354.40	
Praxair Inc.	3,304.44	
Price T Rowe	6,257.58	
Redwood Trust Inc.		-946.51
Resideo Technologies	780.83	
Rio Tinto		-1,734.13
Targa Resources	7,660.23	
Texas Instruments	2,573.37	
Thermo Fisher Scientific	26,303.99	
Tractor Supply Company	12,671.86	
Twenty First Century Fox	10,266.64	
Unity Group Inc.		-745.88
Virtus Newfleet Multi Sector Bond Fund		-1,707.18
Voya Global Equity Fund CL I	3,433.82	
Xilinx Inc.	8,468.14	
Adient PLC Foreign stock		-649.91
Invesco LTD Foreign stock		-3,113.21
Linde PLC Foreign stock		<u>-31.47</u>
Nvent Elec PLC Foreign stock	1,024.93	
Pentair PLC Foreign stock	<u>1,499.77</u>	
total capital gains	262,263.03	
total losses	<u>-23,320.22</u>	-23,320.22
	238,942.81	

Net Realized Gain per Books (Total Part I, line 6a,col.(a))

238,942.81

Total Part IV, line 2