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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

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

OMB No 1545-0052

2018

Open to Public Inspection

For calendar year 2018, or tax year beginning 01-01-2018, and ending 12-31-2018

Name of foundation DAVID AND EUNICE BIGELOW FOUNDATION		A Employer identification number 06-1535327	
Number and street (or P O box number if mail is not delivered to street address) 134 East Ave	Room/suite	B Telephone number (see instructions) (203) 227-7470	
City or town, state or province, country, and ZIP or foreign postal code Norwalk, CT 06851		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) \$ 7,429,298	J Accounting method ☒ Cash ☐ Accrual ☐ Other (specify) <u>(Part I, column (d) must be on cash basis)</u>	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) 494,703				
	2 Check ☐ if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments 5,079	5,079			
	4 Dividends and interest from securities 217,057	217,057			
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10 686,230				
	b Gross sales price for all assets on line 6a 2,994,414				
	7 Capital gain net income (from Part IV, line 2)		686,230		
	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)	16,416	0			
12 Total. Add lines 1 through 11	1,419,485	908,366			
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc 0	0		0	
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)				
	c Other professional fees (attach schedule)	29,488	29,488		0
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	13,463	132		0
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	23,014	0		23,014
	24 Total operating and administrative expenses. Add lines 13 through 23	65,965	29,620		23,014
	25 Contributions, gifts, grants paid	643,916			643,916
26 Total expenses and disbursements. Add lines 24 and 25	709,881	29,620		666,930	
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements 709,604				
	b Net investment income (if negative, enter -0-)		878,746		
c Adjusted net income (if negative, enter -0-)					

For Paperwork Reduction Act Notice, see instructions.

Cat No 11289X

Form 990-PF (2018)

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	-217,733	-47,968	-47,968
	2 Savings and temporary cash investments	695,907	608,475	608,475
	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)	211,248	595,525	588,996
	b Investments—corporate stock (attach schedule)	1,683,860	2,206,922	3,274,044
	c Investments—corporate bonds (attach schedule)	3,184,427	3,064,100	2,958,294
	11 Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12 Investments—mortgage loans			
	13 Investments—other (attach schedule)	181,055	21,314	47,457
	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)	5,738,764	6,448,368	7,429,298	
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)	0	0	
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	0	0	
	28 Paid-in or capital surplus, or land, bldg, and equipment fund	0	0	
	29 Retained earnings, accumulated income, endowment, or other funds	5,738,764	6,448,368	
	30 Total net assets or fund balances (see instructions)	5,738,764	6,448,368	
31 Total liabilities and net assets/fund balances (see instructions) .	5,738,764	6,448,368		

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	5,738,764
2 Enter amount from Part I, line 27a	2	709,604
3 Other increases not included in line 2 (itemize) ▶ _____	3	0
4 Add lines 1, 2, and 3	4	6,448,368
5 Decreases not included in line 2 (itemize) ▶ _____	5	0
6 Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30 .	6	6,448,368

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
1 a Schwab - ST Realized GL			
b Schwab - LT Realized GL			
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 728,155		726,614	1,541
b 2,266,259		1,581,570	684,689
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
a			1,541
b			684,689
c			
d			
e			

2 Capital gain net income or (net capital loss)	2	686,230
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8	3	

Part V Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income)

If section 4940(d)(2) applies, leave this part blank

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?

☐ Yes ☒ No

If "Yes," the foundation does not qualify under section 4940(e) Do not complete this part

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2017	394,686	6,684,097	0 059049
2016	375,790	5,652,132	0 066486
2015	312,175	5,281,287	0 059110
2014	298,385	4,885,754	0 061072
2013	282,258	4,223,692	0 066827

2 Total of line 1, column (d)	2	0 312544
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	0 062509
4 Enter the net value of noncharitable-use assets for 2018 from Part X, line 5	4	7,325,875
5 Multiply line 4 by line 3	5	457,933
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	8,787
7 Add lines 5 and 6	7	466,720
8 Enter qualifying distributions from Part XII, line 4	8	666,930

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	8,787
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col (b)		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	2	0
3	Add lines 1 and 2.	3	8,787
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	0
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5	8,787
6	Credits/Payments		
a	2018 estimated tax payments and 2017 overpayment credited to 2018	6a	13,360
b	Exempt foreign organizations—tax withheld at source	6b	
c	Tax paid with application for extension of time to file (Form 8868)	6c	0
d	Backup withholding erroneously withheld	6d	0
7	Total credits and payments. Add lines 6a through 6d.	7	13,360
8	Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached	8	0
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	4,573
11	Enter the amount of line 10 to be Credited to 2019 estimated tax ☐ 4,573 Refunded ☐	11	0

Part VII-A Statements Regarding Activities

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	Yes	No
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? (see Instructions for 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	1b		No
c	Did the foundation file Form 1120-POL for this year?	1c		No
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation ☐ \$ 0 (2) On foundation managers ☐ \$ 0			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ☐ \$ 0			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities	2		No
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes	3		No
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a		No
b	If "Yes," has it filed a tax return on Form 990-T for this year?	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T	5		No
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	Yes	
7	Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), and Part XV	7	Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) ☐ CT			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation .	8b	Yes	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2018 or the taxable year beginning in 2018? See the instructions for Part XIV. If "Yes," complete Part XIV	9		No
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10		No

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule. See instructions.	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement. See instructions.	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ▶ N/A	13	Yes	
14	The books are in care of ▶ Gunn Godfrey and Allison Telephone no ▶ (203) 227-7470			

Located at **▶** 134 East Ave Norwalk CT ZIP+4 **▶** 06851

15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —check here ▶ ☐			
	and enter the amount of tax-exempt interest received or accrued during the year ▶ 15			
16	At any time during calendar year 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?	16	Yes	No
	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.

1a	During the year did the foundation (either directly or indirectly)		Yes	No
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☒ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☒ No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☒ No			
	(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days). ☐ Yes ☒ No			
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions. ☐	1b		
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2018? ☐	1c		No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2018, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2018? ☐ Yes ☒ No			
	If "Yes," list the years ▶ 20____, 20____, 20____, 20____			
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions).	2b		
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ▶ 20____, 20____, 20____, 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☒ No			
b	If "Yes," did it have excess business holdings in 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).	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2018?	4b		No

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	
	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? If "Yes," attach the statement required by Regulations section 53.4945–5(d)	☐ Yes	☐ No
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	
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	
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 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, 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
See Additional Data Table				
2 Compensation of five highest-paid employees (other than those included on line 1—see instructions). If none, enter "NONE."				
(a) Name and address of each employee paid more than \$50,000	(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

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)
3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE".

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

Part IX-A Summary of Direct Charitable Activities

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

	Expenses
1	
2	
3	
4	

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

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

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
a	Average monthly fair market value of securities.	1a	6,978,841
b	Average of monthly cash balances.	1b	458,596
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	7,437,437
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	7,437,437
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	111,562
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4.	5	7,325,875
6	Minimum investment return. Enter 5% of line 5.	6	366,294

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	366,294
2a	Tax on investment income for 2018 from Part VI, line 5.	2a	8,787
b	Income tax for 2018 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	8,787
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	357,507
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	357,507
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	357,507

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	666,930
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	666,930
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	8,787
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	658,143

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 2017	(c) 2017	(d) 2018
1 Distributable amount for 2018 from Part XI, line 7				357,507
2 Undistributed income, if any, as of the end of 2018				
a Enter amount for 2017 only.			0	
b Total for prior years 20____, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2018				
a From 2013. 83,597				
b From 2014. 65,610				
c From 2015. 57,880				
d From 2016. 108,480				
e From 2017. 73,812				
f Total of lines 3a through e.	389,379			
4 Qualifying distributions for 2018 from Part XII, line 4 ▶ \$ 666,930				
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.				357,507
e Remaining amount distributed out of corpus	309,423			
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:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	698,802			
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 instructions			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 (see instructions).	83,597			
9 Excess distributions carryover to 2019. Subtract lines 7 and 8 from line 6a	615,205			
10 Analysis of line 9				
a Excess from 2014. 65,610				
b Excess from 2015. 57,880				
c Excess from 2016. 108,480				
d Excess from 2017. 73,812				
e Excess from 2018. 309,423				

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 2018, enter the date of the ruling. ▶					
b Check box to indicate whether the organization is a private operating foundation described in section ☐ 4942(j)(3) or ☐ 4942(j)(5)					
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed	Tax year	Prior 3 years			(e) Total
	(a) 2018	(b) 2017	(c) 2016	(d) 2015	
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)) See Additional Data Table	
b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest	
2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:	
Check here ☒ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. 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	
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	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i> See Additional Data Table				
Total			▶ 3a	
b <i>Approved for future payment</i>				
Total			▶ 3b	

Enter gross amounts unless otherwise indicated

[illegible]

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

1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?		Yes	No
a Transfers from the reporting foundation to a noncharitable exempt organization of			
(1) Cash.	1a(1)		No
(2) Other assets.	1a(2)		No
b Other transactions			
(1) Sales of assets to a noncharitable exempt organization.	1b(1)		No
(2) Purchases of assets from a noncharitable exempt organization.	1b(2)		No
(3) Rental of facilities, equipment, or other assets.	1b(3)		No
(4) Reimbursement arrangements.	1b(4)		No
(5) Loans or loan guarantees.	1b(5)		No
(6) Performance of services or membership or fundraising solicitations.	1b(6)		No
c Sharing of facilities, equipment, mailing lists, other assets, or paid employees.	1c		No
d If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received.			

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

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

b If "Yes," complete the following schedule

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

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.

Sign Here	*****	2019-05-13	*****	May the IRS discuss this return with the preparer shown below? (see instr)? ☒ Yes ☐ No
	Signature of officer or trustee	Date	Title	

Paid Preparer Use Only	Print/Type preparer's name	Preparer's Signature	Date	Check if self-employed ☒	PTIN
	David L Godfrey				P00232920
	Firm's name ▶ Allison & Godfrey	Firm's EIN ▶ 06-1175330			
Firm's address ▶ 134 East Avenue Norwalk, CT 06851					Phone no (203) 227-7470

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

(a) Name and address	Title, and average hours per week (b) devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances
David C Bigelow	President 0 00	0	0	0
5 Broadview Road Westport, CT 06880				
Eunice J Bigelow	VP/Treasurer 0 00	0	0	0
5 Broadview Road Westport, CT 06880				
David L Godfrey	Secretary 0 00	0	0	0
134 East Ave Norwalk, CT 06851				
Cynthia R Bigelow	Director 0 00	0	0	0
284 Hemlock Road Fairfield, CT 06824				
Lori Bigelow	Director 0 00	0	0	0
4 River Ridge Lane Wilton, CT 06897				

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

David C Bigelow
Eunice J Bigelow
Cynthia R Bigelow
Lori Bigelow

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Access Educational Services Inc PO Box 397 Bridgeport, CT 06601	None	PC	General Support	25,000
Bigelow Center for Senior Activities 100 Mona Terrace Fairfield, CT 06824	None	PC	General	9,000
Bridge House880 Fairfield Ave Bridgeport, CT 06605	None	PC	General	10,000
Total ▶ 3a				643,916

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Bridgeport Hospital Foundation Inc PO Box 5000 Bridgeport, CT 06610	None	PC	Norma Pfriem Breast Cancer Center	15,000
Bridgeport Rescue Mission 1088 Fairfield Ave Bridgeport, CT 06605	None	PC	General	8,000
Bullard Haven Technical College 500 Palisade Avenue Bridgeport, CT 06610	None	PC	Scholarship Fund	10,000
Total ▶ 3a				643,916

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Burroughs Community Center 2470 Fairfield Avenue Bridgeport, CT 06605	None	PC	General	6,000
Cardinal Shehan Center1494 Main St Bridgeport, CT 06604	None	PC	General	9,000
Caroline House574 Stillman St Bridgeport, CT 06608	None	PC	General	6,000
Total ▶ 3a				643,916

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Catholic Charities of Fairfield County 238 Jewett Avenue Bridgeport, CT 06606	None	PC	General	3,000
Center for Family Justice 753 Fairfield Ave Bridgeport, CT 06604	None	PC	General	15,000
Central Park Conservancy 14 E 60th Street New York, NY 10022	None	PC	General	1,000
Total ▶ 3a				643,916

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Connecticut Audobon Society 314 Unquowa Rd Fairfield, CT 06824	None	PC	General	2,000
Connecticut Challenge 250 Pequot Avenue Southport, CT 06890	None	PC	Mission Training Center	4,000
Connecticut Food BankPO Box 8686 New Haven, CT 06531	None	PC	General	18,000
Total ▶ 3a				643,916

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Connecticut Yankee Council 60 Wellington Rd Milford, CT 064600032	None	PC	2018 Coastal Fairfield County Scout Breakfast	5,000
Creative Youth Productions Inc 23 Cedarhurst Trail Sandy Hook, CT 06482	None	PC	General	25,000
Domestic Violence Crisis Center 777 Summer Street Stamford, CT 06901	None	PC	General Support	5,000
Total ► 3a				643,916

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Fairfield Museum and History Center 370 Beach Road Fairfield, CT 06824	None	PC	General	1,000
Fairfield Theater Company70 Sanford St Fairfield, CT 06824	None	PC	General	2,500
Fairfield University 1073 North Benson Rd Fairfield, CT 068245195	None	PC	General Fund	15,000
Total ▶ 3a				643,916

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Fairfield YMCA841 Old Post Road Fairfield, CT 06824	None	PC	2018 Annual Campaign	14,000
Foundation for Excellence in Bridgeport Public Schools 45 Lyon Terrace Room 328 Bridgeport, CT 06604	None	PC	General Support	208,916
Girl Scouts of AmericaPO Box 5046 New York, NY 10087	None	PC	General Support	9,000
Total ▶ 3a				643,916

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Grasmere By the Sea1 Post Road Fairfield, CT 06824	None	PC	General	7,000
Greater Bridgeport Symphony 446 University Ave Bridgeport, CT 06604	None	PC	Rich - 05/08/19 04 09PM Worksheet Grants and Contributions Paid	1,000
Hole in the Wall Gang 555 Long Wharf Drive New Haven, CT 06511	None	PC	General Support	2,500
Total ▶ 3a				643,916

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Homes For the Brave655 Park Avenue Bridgeport, CT 06605	None	PC	General Support	2,500
Homes With Hope 49 Richmondville Ave Suite 112 Westport, CT 06880	None	PC	Rich - 05/08/19 04 09PM Worksheet Grants and Contributions Paid	5,000
Horizons at GFA 35 Beachside Ave PO Box 998 Greens Farms, CT 06838	None	Public	General	7,000
Total ▶ 3a				643,916

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Human Services Council of Mid Fairfield County One Park St Norwalk, CT 06851	None	PC	General	6,500
Innocence Project 100 Fifth Avenue 3rd Floor New York, NY 10011	None	PC	General	10,000
Janus Center for Youth In Crisis 180 Fairfield Ave Bridgeport, CT 06604	None	PC	General	5,000
Total ▶ 3a				643,916

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Joe Torre Safe at Home Foundation PO Box 3133 Grand Central Station New York, NY 10163	None	PC	General	5,000
Kids Empowered By Your Support Inc co K E Y S 239 Chestnut Hill Rd Stamford, CT 06903	None	PC	General Support	25,000
LifeBridge Community Services 475 Clinton Ave Bridgeport, CT 06605	None	PC	General	8,000
Total ▶ 3a				643,916

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
McGivney Community Center 338 Stillman St Bridgeport, CT 06608	None	PC	General	1,000
Mercy Learning Center637 Park Ave Bridgeport, CT 06604	None	PC	General	10,000
Neighborhood Studio of Fairfield County 391 East Washington Ave Bridgeport, CT 06608	None	PC	General	5,000
Total ▶ 3a				643,916

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Norwalk Community College Foundation Inc 188 Richards Avenue Norwalk, CT 06854	None	PC	General	10,000
Norwalk Hospital Foundation 34 Maple Street Norwalk, CT 06856	None	PC	Norwalk Hospital Community Care Team	10,000
Operation Hope636 Old Post Road Fairfield, CT 06824	None	PC	General Support	9,000
Total ▶ 3a				643,916

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Pilot HousePO Box 1553 Fairfield, CT 06825	None	PC	General	5,000
Pivot Ministries Inc485 Jane Street Bridgeport, CT 06608	None	PC	General Support	2,500
Ralphola Taylor Community Center YMCA 790 Central Ave Bridgeport, CT 06607	None	PC	General	5,000
Total ▶ 3a				643,916

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Sacred Heart University 5151 Park Avenue Fairfield, CT 06825	None	PC	David & Eunice Bigelow Scholarship	15,000
St Catherine Academy 760 Tahmore Drive Fairfield, CT 06825	None	PC	Scholarship Assistance	3,000
St Vincent's Medical Center Foundation 2800 Main St Bridgeport, CT 06606	None	PC	Cancer Care	5,000
Total ▶ 3a				643,916

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
St Vincent's Medical Center Foundation 2800 Main St Bridgeport, CT 06606	None	PC	SWIM Across the Sound for Prostate Cancer	5,000
STAR182 Wolfpit Avenue Norwalk, CT 06851	None	PC	2018/2019 Annual Appeal	5,000
The Workplace350 Fairfield Ave 302 Bridgeport, CT 06604	None	PC	General Support	1,000
Total ▶ 3a				643,916

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
University of Bridgeport 126 Park Avenue Bridgeport, CT 06604	None	PC	Bigelow Family Foundation Scholarship Fund	15,000
University of New Haven 300 Boston Post Rd West Haven, CT 06516	None	PC	College of Business Dean's Excellence Fund	5,000
Urban Impact of Black RockPO Box 3716 Bridgeport, CT 06605	None	PC	General	2,500
Total ▶ 3a				643,916

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Wakeman's Boys and Girls Clubs 2414 Fairfield Ave Bridgeport, CT 06605	None	PC	General	9,000
YMCA Camp Hi-Rock162 East St Mt Washington, MA 10258	None	PC	General	10,000
Total ▶ 3a				643,916

TY 2018 Investments Corporate Bonds Schedule

Name: DAVID AND EUNICE BIGELOW FOUNDATION

EIN: 06-1535327

Investments Corporate Bonds Schedule

Name of Bond	End of Year Book Value	End of Year Fair Market Value
100M ADT Corp 3.5% 7/15/22	87,625	92,500
100M AMC Networks Inc 4.75% 12/15/21	101,284	96,875
100M Ashland Inc 4.75% 8/15/22	99,687	98,500
25M Ashland Inc 6.5% 6/30/29	25,462	24,875
15M Ball Corp 4% 11/15/23	13,641	14,531
100M Ball Corp 5.0% 3/15/2022	101,445	101,375
50M Carpenter Technology 5.20% 7/15/2021	50,951	50,937
25M Cinemark USA Inc 4.875% due 6/01/2023	24,627	23,938
75M Cinemark USA Inc 5.125% due 12/15/2022	76,788	73,594
100M Clean Harbor 5.125% 06/01/2021	100,446	99,250
75M Dell Inc 4.625% 4/01/2021	77,877	73,313
100M Dell Inc 5.875% 6/15/2019	103,737	100,000
100M Dow Chemical Co 4.25% due 9/15/23	101,199	99,986
80M Dow Chemical Co 4.30% due 9/15/23	80,807	79,997
93M Energy Transfer EQ 5.875% 1/15/2024	93,731	94,860
50M Energy Transfer EQ 7.500% 10/15/2020	52,765	52,250
50M Ford Motor Credit 3.65% 2/20/23	50,275	47,323
25M Ford Motor Credit 4.25% 9/20/2022	25,456	24,016
100M JP Morgan Chase 2.75% 6/23/2000	99,289	99,348
100M Lear Corp 5.25% due 01/15/2025	104,471	102,500

Investments Corporate Bonds Schedule

Name of Bond	End of Year Book Value	End of Year Fair Market Value
25M Lear Corp 5.375% 03/15/2024	25,815	25,500
110M Levi Strauss 5% due 5/1/2025	114,703	107,250
120M Mastec Inc 4.875% 3/15/2023	117,820	116,400
85M Motorola Solutions 3.75% 5/15/2022	84,069	83,892
121M Oshkosh Corp 5.375% 3/01/2025	125,332	121,454
75M Royal Caribbean Cruises 5.250% 11/15/2022	74,149	77,719
20M Service Corp Intl 4.5% 11/15/2020	19,795	19,850
105M Service Corp Intl 8% 11/15/2021	120,394	111,300
70M Servicemaster Co 7.45% 8/15/2027	74,010	71,925
50M Spectrum Brands 6.625% 11/15/2022	52,232	50,938
50M Sprint Aerosyss 3.95% 6/15/2023	50,137	49,866
20M Tenneco Inc 5.000% 7/15/2016	19,657	15,350
120M Tenneco Inc 6.875% 12/15/2020	125,332	103,950
70M Time Warner Cable 8.75% 02/14/2019	83,133	70,439
125M Treehouse Foods 4.875% 3/15/2022	127,204	123,281
50M Tupperware 4.75% 6/1/2021	51,754	50,812
125M United Rentals 5.75% 11/15/2024	130,186	120,312
35M Weyerhaeuser Co 7.125% 07/15/2023	41,090	38,838
150M William Carter 5.25% 8/15/21	155,725	149,250

TY 2018 Investments Corporate Stock Schedule

Name: DAVID AND EUNICE BIGELOW FOUNDATION
EIN: 06-1535327

Investments Corporation Stock Schedule

Name of Stock	End of Year Book Value	End of Year Fair Market Value
600 Airproducts & Chemicals	96,987	96,030
75 Alphabet Inc Cl A	22,456	78,372
75 Alphabet Inc Cl C	18,646	77,671
70 Amazon Inc	20,288	105,138
650 Apple Inc	21,810	102,531
1200 Aptiv PLC	102,581	73,884
500 Berkshire Hathaway Cl B	19,669	102,090
235 Boeing Co	78,824	75,788
72 Booking Holdings Inc	99,262	124,014
1100 Celgene Corp	39,664	70,499
1200 Cognizant Tech Solutions	15,770	76,176
400 Core Laboratories	35,120	23,864
550 Deere & Co	46,115	82,044
255 Edwards Life Sciences	35,049	39,058
350 EPAM Systems	41,244	40,604
400 Facebook Inc Cl A	29,930	52,436
1000 Iquvia Holdings Inc	50,867	116,170
800 Jacobs Engineering Group	4,412	46,768
1200 Kansas City Southern	88,887	114,540
1080 Nike Inc Cl B	56,185	80,071
2400 Norwegian Cruise Line	115,295	101,736
500 Palo Alto Networks	75,482	94,175
1300 Paypal Holdings Inc	14,134	109,317
700 Pepsico Inc	37,215	77,336
3500 Quanta Services Inc	75,729	105,350
100 Regeneron Pharmacueticals	46,751	37,350
800 Resmed Inc	7,792	91,096
2300 Starbucks Corp	125,251	148,120
700 United Parcel Service	43,166	68,271
850 Veeva Systems Inc	71,127	75,922

Investments Corporation Stock Schedule

Name of Stock	End of Year Book Value	End of Year Fair Market Value
1080 Visa Inc Cl A	15,105	142,495
1200 Walt Disney Co	127,728	131,580
4890 Allstate Corp 6.25% Pfd	126,191	123,717
4500 Charles Schwab C 6.0% Pfd	115,893	114,255
5000 Digital Real 5.875% Pfd	128,825	126,050
5943 State Street Corp 6% Pfd	157,472	149,526

TY 2018 Investments Government Obligations Schedule**Name:** DAVID AND EUNICE BIGELOW FOUNDATION**EIN:** 06-1535327**US Government Securities - End
of Year Book Value:**

99,810

**US Government Securities - End
of Year Fair Market Value:**

99,906

**State & Local Government
Securities - End of Year Book
Value:**

495,715

**State & Local Government
Securities - End of Year Fair
Market Value:**

489,090

TY 2018 Investments - Other Schedule

Name: DAVID AND EUNICE BIGELOW FOUNDATION

EIN: 06-1535327

Investments Other Schedule 2

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
300 American Tower Corp REIT	AT COST	21,314	47,457

TY 2018 Other Expenses Schedule**Name:** DAVID AND EUNICE BIGELOW FOUNDATION**EIN:** 06-1535327**Other Expenses Schedule**

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Road Race Related Expenses	22,984	0		22,984
Bank Service Charges	30	0		30

TY 2018 Other Income Schedule

Name: DAVID AND EUNICE BIGELOW FOUNDATION

EIN: 06-1535327

Other Income Schedule

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
Gross Income from Special Fundraising Events	16,416		16,416

TY 2018 Other Professional Fees Schedule**Name:** DAVID AND EUNICE BIGELOW FOUNDATION**EIN:** 06-1535327

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Investment Fees	29,488	29,488		0

TY 2018 Taxes Schedule**Name:** DAVID AND EUNICE BIGELOW FOUNDATION**EIN:** 06-1535327

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Federal Excise Tax	13,331	0		0
Foreign Taxes	132	132		0

Schedule B (Form 990, 990-EZ, or 990-PF) Department of the Treasury Internal Revenue Service	Schedule of Contributors ▶ Attach to Form 990, 990-EZ, or 990-PF ▶ Go to <u>www.irs.gov/Form990</u> for the latest information	OMB No 1545-0047 2018
	Name of the organization DAVID AND EUNICE BIGELOW FOUNDATION	Employer identification number 06-1535327

Organization type (check one)

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

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

General Rule

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

Special Rules

- ☐ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33¹/₃% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I, II, and III.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Don't complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling \$5,000 or more during the year. . . . ▶ \$ _____

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

Name of organization DAVID AND EUNICE BIGELOW FOUNDATION	Employer identification number 06-1535327
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Part I **Contributors** (See instructions) Use duplicate copies of Part I if additional space is needed

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	David and Eunice Bigelow 5 Broadview Rd Westport, CT 06880	 \$ 339,597	Person ☒ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions)
2	AmGraph 90 Versailles Road Versailles, CT 06383	 \$ 15,000	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
3	International Marketing Systems Two Corporate Dr Ste 136 Shelton, CT 06484	 \$ 25,000	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
4	16W Marketing LLC 75 Union Ave 2nd Floor Rutherford, NJ 07070	 \$ 5,000	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
5	Wausau Container Corporation 8000 Highland Dr PO Box 1285 Wausau, WI 544021285	 \$ 10,000	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
6	New York Yankees One East 161st Street Bronx, NY 10451	 \$ 5,000	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)

Name of organization DAVID AND EUNICE BIGELOW FOUNDATION	Employer identification number 06-1535327
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Part II		Noncash Property	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
1	75 shares Alphabet Inc Class A (GOOGL)	\$ 83 727	2018-12-03
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
1	50 Shares Amazon com Inc (AMZN)	\$ 88 618	2018-12-03
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
1	1000 sh American Tower Corp (AMT)	\$ 163 080	2018-12-03
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
1	600 shares Visa Inc Cl A	\$ 87 000	2018-12-03
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
		\$	

Name of organization DAVID AND EUNICE BIGELOW FOUNDATION	Employer identification number 06-1535327
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Part III	Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of exclusively religious, charitable, etc., contributions of \$1,000 or less for the year. (Enter this information once. See instructions.) ▶ \$ _____ Use duplicate copies of Part III if additional space is needed
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(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4		Relationship of transferor to transferee
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4		Relationship of transferor to transferee
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4		Relationship of transferor to transferee
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4		Relationship of transferor to transferee