

EXTENDED TO NOVEMBER 15, 2019

## Return of Private Foundation

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

Form 990-PF

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](http://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

and ending

Name of foundation <b>THE WELLER FOUNDATION, INC.</b>		A Employer identification number <b>06-6068987</b>
Number and street (or P.O. box number if mail is not delivered to street address) <b>P.O. BOX 894</b>	Room/suite	B Telephone number <b>203-304-9233</b>
City or town, state or province, country, and ZIP or foreign postal code <b>NEWTOWN, CT 06470</b>		C If exemption application is pending, check here <input type="checkbox"/>
G Check all that apply: <input type="checkbox"/> Initial return <input type="checkbox"/> Final return <input checked="" type="checkbox"/> Address change <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Amended return <input type="checkbox"/> Name change		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
H Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col (c), line 16) <b>\$ 2,936,399.</b>	J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify)	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>

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				N/A	
2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B					
3 Interest on savings and temporary cash investments		8.	8.		STATEMENT 1
4 Dividends and interest from securities		94,134.	94,134.		STATEMENT 2
5a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10		16,138.			
b Gross sales price for all assets on line 6a		652,244.			
7 Capital gain net income (from Part IV, line 2)			16,138.		
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)					
11 Other income		20.	20.		STATEMENT 3
12 Total Add lines 1 through 11		110,300.	110,300.		
13 Compensation of officers, directors, trustees, etc		40,810.	750.		40,060.
14 Other employee salaries and wages					
15 Pension plans, employee benefits					
16a Legal fees					
b Accounting fees		10,115.	0.		10,115.
c Other professional fees					
17 Interest					
18 Taxes		7,079.	0.		0.
19 Depreciation and depletion					
20 Occupancy		991.	0.		991.
21 Travel, conferences, and meetings		1,126.	0.		1,126.
22 Printing and publications					
23 Other expenses		8,405.	0.		8,405.
24 Total operating and administrative expenses Add lines 13 through 23		68,526.	750.		60,697.
25 Contributions, gifts, grants paid		86,122.			86,122.
26 Total expenses and disbursements Add lines 24 and 25		154,648.	750.		146,819.
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements		-44,348.			
b Net investment income (if negative, enter -0-)			109,550.		
c Adjusted net income (if negative, enter -0-)				N/A	

Part II Balance Sheets		Beginning of year	End of year	
			(a) Book Value	(b) Book Value
Assets	1 Cash - non-interest-bearing			
	2 Savings and temporary cash investments	153,940.	120,278.	120,278.
	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 STMT 7	23,031.	22,926.	25,827.
	b Investments - corporate stock STMT 8	1,651,555.	1,653,780.	2,359,456.
	c Investments - corporate bonds STMT 9	460,099.	448,543.	430,838.
	11 Investments - land, buildings, and equipment basis ▶ Less accumulated depreciation ▶			
	12 Investments - mortgage loans			
	13 Investments - other			
	14 Land, buildings, and equipment: basis ▶ Less accumulated depreciation ▶			
	15 Other assets (describe ▶)			
	16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item I)	2,288,625.	2,245,527.	2,936,399.
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"/> 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 ▶ <input checked="" type="checkbox"/> and complete lines 27 through 31			
	27 Capital stock, trust principal, or current funds	2,288,625.	2,245,527.	
	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	2,288,625.	2,245,527.	
	31 Total liabilities and net assets/fund balances	2,288,625.	2,245,527.	

## Part III Analysis of Changes in Net Assets or Fund Balances

1 Total net assets or fund balances at beginning of year - Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	2,288,625.
2 Enter amount from Part I, line 27a	2	-44,348.
3 Other increases not included in line 2 (itemize) ▶ RECOVERY OF ASSETS	3	1,250.
4 Add lines 1, 2, and 3	4	2,245,527.
5 Decreases not included in line 2 (itemize) ▶	5	0.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	2,245,527.

**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.)
<b>1a PUBLICLY TRADED SECURITIES</b>	<b>P</b>		
<b>b CAPITAL GAIN DISTRIBUTIONS</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 652,244.		656,514.	-4,270.
b			20,408.
c			
d			
e			

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

(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a			-4,270.
b			20,408.
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	16,138.
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	N/A

**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	142,461.	3,078,635.	.046274
2016	140,051.	2,866,532.	.048857
2015	140,712.	2,850,371.	.049366
2014	123,037.	2,913,209.	.042234
2013	133,082.	2,732,676.	.048700

2 Total of line 1, column (d)	2	.235431
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	.047086
4 Enter the net value of noncharitable-use assets for 2018 from Part X, line 5	4	3,104,120.
5 Multiply line 4 by line 3	5	146,161.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	1,096.
7 Add lines 5 and 6	7	147,257.
8 Enter qualifying distributions from Part XII, line 4	8	146,819.

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).**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

1,930. Refunded

**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?**b** 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.**c** Did the foundation file Form 1120-POL for this year?**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.

**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**4a** Did the foundation have unrelated business gross income of \$1,000 or more during the year?**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 General Instruction T

**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?

**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**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**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**10** Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses

Yes No

1a X

1b X

1c X

2 X

3 X

4a X

4b

5 X

6 X

7 X

8b X

9 X

10 X

N/A

**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 <b>► N/A</b>	X	
14 The books are in care of <b>► THE FOUNDATION</b> Telephone no. <b>► 203-304-9233</b> Located at <b>► P.O. BOX 894, NEWTOWN, CT</b> ZIP+4 <b>► 06470</b>		
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 <b>► 15</b> <b>N/A</b>		
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 <b>►</b>		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 checked="" type="checkbox"/> Yes <input 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 <b>►</b> <input type="checkbox"/>	1b	X
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	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 checked="" type="checkbox"/> Yes <input type="checkbox"/> No If "Yes," list the years <b>► 2017</b>		
b Are there any years listed in 2a for which the foundation is <b>not</b> 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	X
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. <b>►</b>		
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.) <b>N/A</b>	3b	
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	X
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	X

**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

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

☐

5b

☒

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

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

☒

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
SEE STATEMENT 10		40,810.	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

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

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

[illegible]

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

<b>Part IX-A</b>	<b>Summary of Direct Charitable Activities</b>
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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	N/A	
2		
3		
4		

<b>Part IX-B</b>	<b>Summary of Program-Related Investments</b>
------------------	---

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.

Amount

<b>1</b>	<b>NOT APPLICABLE</b>	
		0.
<b>2</b>		
	All other program-related investments. See instructions.	
<b>3</b>		
	<b>Total.</b> Add lines 1 through 3	0.

Form **990-PF** (2018)

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

<b>1</b>	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
<b>a</b>	Average monthly fair market value of securities	<b>1a</b>	3,019,882.
<b>b</b>	Average of monthly cash balances	<b>1b</b>	131,509.
<b>c</b>	Fair market value of all other assets	<b>1c</b>	
<b>d</b>	Total (add lines 1a, b, and c)	<b>1d</b>	3,151,391.
<b>e</b>	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	<b>1e</b>	0.
<b>2</b>	Acquisition indebtedness applicable to line 1 assets	<b>2</b>	0.
<b>3</b>	Subtract line 2 from line 1d	<b>3</b>	3,151,391.
<b>4</b>	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	<b>4</b>	47,271.
<b>5</b>	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	<b>5</b>	3,104,120.
<b>6</b>	Minimum investment return. Enter 5% of line 5	<b>6</b>	155,206.

**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.)

<b>1</b>	Minimum investment return from Part X, line 6	<b>1</b>	155,206.
<b>2a</b>	Tax on investment income for 2018 from Part VI, line 5	<b>2a</b>	2,191.
<b>b</b>	Income tax for 2018. (This does not include the tax from Part VI.)	<b>2b</b>	
<b>c</b>	Add lines 2a and 2b	<b>2c</b>	2,191.
<b>3</b>	Distributable amount before adjustments. Subtract line 2c from line 1	<b>3</b>	153,015.
<b>4</b>	Recoveries of amounts treated as qualifying distributions	<b>4</b>	1,250.
<b>5</b>	Add lines 3 and 4	<b>5</b>	154,265.
<b>6</b>	Deduction from distributable amount (see instructions)	<b>6</b>	0.
<b>7</b>	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	<b>7</b>	154,265.

**Part XII** Qualifying Distributions (see instructions)

<b>1</b>	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
<b>a</b>	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	<b>1a</b>	146,819.
<b>b</b>	Program-related investments - total from Part IX-B	<b>1b</b>	0.
<b>2</b>	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	<b>2</b>	
<b>3</b>	Amounts set aside for specific charitable projects that satisfy the:		
<b>a</b>	Suitability test (prior IRS approval required)	<b>3a</b>	
<b>b</b>	Cash distribution test (attach the required schedule)	<b>3b</b>	
<b>4</b>	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8; and Part XIII, line 4	<b>4</b>	146,819.
<b>5</b>	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	<b>5</b>	0.
<b>6</b>	Adjusted qualifying distributions. Subtract line 5 from line 4	<b>6</b>	146,819.

**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				154,265.
2 Undistributed income, if any, as of the end of 2018				
a Enter amount for 2017 only			149,377.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2018:				
a From 2013				
b From 2014				
c From 2015				
d From 2016				
e From 2017				
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2018 from Part XII, line 4: ► \$ 146,819.				
a Applied to 2017, but not more than line 2a			146,819.	
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				0.
e Remaining amount distributed out of corpus	0.			
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	0.			
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.			2,558.	
f Undistributed income for 2018. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2019				154,265.
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	0.			
9 Excess distributions carryover to 2019 Subtract lines 7 and 8 from line 6a	0.			
10 Analysis of line 9:				
a Excess from 2014				
b Excess from 2015				
c Excess from 2016				
d Excess from 2017				
e Excess from 2018				

N/A

- ☐ 4942(i)(3) or ☐ 4942(i)(5)

- (4) Gross investment income

[illegible]

823601 12-11-18

**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
<b>a Paid during the year</b>				
SCHEDULE ATTACHED				86,122.
<b>Total</b>			<b>3a</b>	86,122.
<b>b Approved for future payment</b>				
NONE				
<b>Total</b>			<b>3b</b>	0.



## Information Regarding Transfers to and Transactions and Relationships With Noncharitable Exempt Organizations

		Yes	No
1	Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c)(3) (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?		
a	Transfers from the reporting foundation to a noncharitable exempt organization of:		
	(1) Cash		X
	(2) Other assets		X
b	Other transactions:		
	(1) Sales of assets to a noncharitable exempt organization		X
	(2) Purchases of assets from a noncharitable exempt organization		X
	(3) Rental of facilities, equipment, or other assets		X
	(4) Reimbursement arrangements		X
	(5) Loans or loan guarantees		X
	(6) Performance of services or membership or fundraising solicitations		X
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees		X
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.		

[illegible]

- 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
N/A		

**Sign  
Here**

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

May the IRS discuss this return with the preparer shown below? See instr

☒ Yes ☐ No

Signature of officer or trustee

Date \_\_\_\_\_

Title

**TREASURER**

Print/Type preparer's name
----------------------------

Preparer's signature

Date

Check ☐ self-employed

PTIN

BRIAN E. SKINNER

Firm's name ▶ WILLIAM H. PARR & COMPANY, LLP

Firm's address ► 381 POST ROAD  
DARIEN, CT 06820

Phone no. 203-655-8261

Form **990-PF** (2018)

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FORM 990-PF INTEREST ON SAVINGS AND TEMPORARY CASH INVESTMENTS STATEMENT 1

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SOURCE	(A) REVENUE PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME
PEOPLE'S BANK	8.	8.	
TOTAL TO PART I, LINE 3	8.	8.	

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FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

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SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
MORGAN STANLEY	94,134.	0.	94,134.	94,134.	
TO PART I, LINE 4	94,134.	0.	94,134.	94,134.	

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FORM 990-PF OTHER INCOME STATEMENT 3

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DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
FIRST EAGLE SETTLEMENT FUND	20.	20.	
TOTAL TO FORM 990-PF, PART I, LINE 11	20.	20.	

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FORM 990-PF ACCOUNTING FEES STATEMENT 4

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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
TAX RETURN	10,115.	0.		10,115.
TO FORM 990-PF, PG 1, LN 16B	10,115.	0.		10,115.

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FORM 990-PF	TAXES			STATEMENT	5
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
2017 FEDERAL EXTENSION PAYMENT	6,500.	0.			0.
2018 FEDERAL ESTIMATED TAX PAYMENT	618.	0.			0.
LESS: REFUNDED 2016 OVERPAYMENT	-40.	0.			0.
FEDERAL TAX WITHHELD	1.	0.			0.
TO FORM 990-PF, PG 1, LN 18	7,079.	0.			0.

FORM 990-PF	OTHER EXPENSES			STATEMENT	6
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
INSURANCE	2,164.	0.			2,164.
JUDGING FEES	1,200.	0.			1,200.
SCHOLARSHIP AWARD PROMOTION, BROCHURES	1,534.	0.			1,534.
MISCELLANEOUS	993.	0.			993.
SUPPLIES	2,514.	0.			2,514.
TO FORM 990-PF, PG 1, LN 23	8,405.	0.			8,405.

FORM 990-PF	U.S. AND STATE/CITY GOVERNMENT OBLIGATIONS			STATEMENT	7
DESCRIPTION	U.S. GOV'T	OTHER GOV'T	BOOK VALUE	FAIR MARKET VALUE	
GINNIE MAE POOLS	X		336.		340.
ILLINOIS ST GENERAL OBLIGATIONS 4.950%		X	22,590.		25,487.
TOTAL U.S. GOVERNMENT OBLIGATIONS			336.		340.
TOTAL STATE AND MUNICIPAL GOVERNMENT OBLIGATIONS			22,590.		25,487.
TOTAL TO FORM 990-PF, PART II, LINE 10A			22,926.		25,827.

FORM 990-PF

CORPORATE STOCK

STATEMENT

8

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
AMEREN CORP	31,663.	65,230.
BANK OF AMERICA	27,219.	29,568.
BERKSHIRE HATHAWAY B	30,063.	102,090.
CHEVRON TEXACO CORP	24,154.	67,015.
CITIGROUP INC.	48,379.	26,030.
COMCAST CORP (NEW)	11,077.	32,960.
DOWDUPONT INC	23,403.	26,740.
I.B.M.	17,151.	17,050.
JOHNSON & JOHNSON	5,476.	64,525.
JPMORGAN CHASE & CO	38,617.	97,620.
PEPSICO, INC	13,705.	88,384.
PFIZER INC	29,283.	43,650.
PROCTOR & GAMBLE	24,372.	73,536.
PROGRESS ENERGY	245.	198.
UNITEDHEALTH GP INC	8,494.	94,666.
WAL MART STORES	12,513.	93,150.
JP MORGAN MID-CAP VALUE C	84,501.	115,771.
AMERICAN WA MUTUAL	61,968.	83,196.
FIRST EAGLE GLOBAL C	84,721.	102,947.
BARCLAYS PLC	9,522.	1,508.
HEALTH CARE SEL SECT	13,419.	34,604.
MICROSOFT CORP	16,985.	71,099.
AMERICAN ELECTRIC POWER CO	20,869.	44,844.
VERIZON COMMUNICATIONS	47,812.	73,086.
AT&T INC	51,118.	48,518.
HARTFORD EQUITY INC C	20,000.	23,685.
JP MORGAN INCOME BUILDER C	50,000.	51,493.
GOLDMAN SACHS INC PFD	18,477.	19,360.
JP MORGAN EQUITY INCOME C	30,576.	38,222.
CISCO SYS INC	9,961.	17,332.
WALGREENS BOOTS ALLIANCE INC	24,558.	27,332.
PJT PARTNERS INC	38.	388.
THE FINANCIAL SEL SECT SPDR	12,715.	11,910.
ABBVIE INC	11,247.	18,438.
GOLDMAN SACHS GRP INC	16,827.	16,705.
ROYAL DUTCH SHELL PLC	15,803.	17,982.
FIRST TRUST BALANCED INCOME EQUITY	24,951.	23,002.
FIRST TRUST STRAT INC ADVAN 69	23,900.	19,288.
FIRST TRUST INTEREST RATE HEDGE 114	19,969.	16,767.
FIRST TRUST INTEREST RATE HEDGE 115	34,986.	27,179.
BLACKROCK CREDIT ALL INC TR IV	10,650.	8,944.
FT-PREFERRED SECUR & INC ETF	24,222.	21,540.
HOME DEPOT INC	37,600.	42,955.
JOHN HANCOCK FINANCIAL OPFS FD	22,666.	16,758.
EATON VANCE SENIOR INCOME TRUST	24,712.	21,600.
ISHARES MSCI EMERGING MKTS	12,472.	11,718.
ISHARES SILVER SHARES	10,391.	10,890.



PHILIP MORRIS INTERNATIONAL	16,967.	13,352.
SPDR S&P REGIONAL BANKING	19,516.	14,037.
FIRST TRUST SENIOR LOAN CLOSED 24	17,560.	16,980.
FIRST TRUST DOW TARGET 1/10/18	33,830.	31,309.
FIRST TRUST SELECT DSIP 1 QTR 2018	54,226.	51,629.
FIRST TRUST BANKING OPPORTUNITY 29	66,650.	47,354.
INVESCO GLOBAL TECH LEADERS 2018-2	47,909.	41,509.
FIRST TRUST BANKING OPPORTUNITY 30	27,352.	19,555.
INVESCO GLOBAL TECH LEADERS 2018-4	25,136.	23,431.
FIRST TRUST S&P DIVIDEND ARISTOCRATS	19,768.	17,705.
FIRST TRUST BALANCED INCOME EQUITY 31	20,000.	17,458.
FIRST TRUST SENIOR LOAN CLOSED 22	19,167.	16,669.
INVESCO DIVERSIFIED HEALTH 2018-2	36,274.	35,410.
FIRST TRUST GLOBAL DIVIDEND 56	18,231.	15,784.
INVESCO DIVERSIFIED HEALTH 2018-4	37,744.	35,801.
TOTAL TO FORM 990-PF, PART II, LINE 10B	1,653,780.	2,359,456.

FORM 990-PF	CORPORATE BONDS	STATEMENT	9
DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE	
PNC FIN SVCS 6.750%	14,924.	15,666.	
CITIGROUP INC 5.90%	20,509.	19,086.	
MORGAN STANLEY 5.50%	24,459.	26,784.	
NATIONWIDE FINL SVCS 6.75%	19,388.	20,372.	
PRUDENTIAL FINANCIAL 5.875%	31,065.	30,819.	
PRUDENTIAL FINANCIAL 5.625%	25,698.	24,546.	
BARCLAYS BK PLC 6.86%	19,539.	20,605.	
JPMORGAN CHASE 5.15%	24,486.	24,030.	
JPMORGAN CHASE 6.00%	29,382.	30,075.	
GENERAL ELECTRIC CAP CORP 5.25%	19,336.	16,112.	
CITIGROUP INC 5.95% FIXED	10,002.	9,126.	
CITIGROUP INC 5.90% FIXED	20,006.	18,611.	
JP MORGAN CHASE 5.15% FIXED	24,869.	24,029.	
JP MORGAN CHASE 5.15% FIXED	24,933.	24,029.	
BANK OF AMERICA 6.25% FIXED	19,947.	20,163.	
CITIGROUP INC 5.90% FIXED	19,999.	18,611.	
GOLDMAN SACHS GRP 3.125%	30,007.	24,437.	
DOMINION RESOURCES INC 5.75%	19,744.	20,258.	
BANK OF AMERICA 5.875% FIXED	25,256.	23,182.	
GENERAL MOTORS 5.75% FIXED	24,994.	20,297.	
TOTAL TO FORM 990-PF, PART II, LINE 10C	448,543.	430,838.	

FORM 990-PF

PART VIII - LIST OF OFFICERS, DIRECTORS  
TRUSTEES AND FOUNDATION MANAGERS

STATEMENT 10

NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN CONTRIB	EXPENSE ACCOUNT
BRIAN E. SKINNER 176 MICHIGAN ROAD NEW CANAAN, CT 06840	VICE CHAIRMAN, TREASURER & VARIOUS	4,000.	0.	0.
MICHAEL J. SMITH 151 WILTON ROAD EAST RIDGEFIELD, CT 06877	CHAIRMAN & TRUSTEE VARIOUS	4,000.	0.	0.
LOUIS J. LACROCE 14 DIAMOND DRIVE NEWTOWN, CT 06470	TRUSTEE VARIOUS	4,000.	0.	0.
ALEXANDER FRASER 3 SEALAND DRIVE NEWTOWN, CT 06470	SECRETARY & TRUSTEE VARIOUS	4,000.	0.	0.
MICHAEL P. ZABINSKI 102 SHOREFRONT STREET MILFORD, CT 06460	TRUSTEE VARIOUS	4,000.	0.	0.
JOANN E. DAVIES 57 HESSEKY MEADOW ROAD WOODBURY, CT 06798	FOUNDATION MANAGER & TRUSTEE VARIOUS	20,810.	0.	0.
TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII		40,810.	0.	0.

2018

SCHEDULE ATTACHED TO FORM 990-PF

Part XV, Line 2 - Information Regarding Scholarship Programs

The Foundation administers award and scholarship programs designed to provide benefits to high school students in five communities in Connecticut: Newtown, Monroe, Trumbull, Shelton, Easton and Redding.

Three of the programs, the Senior Science Award, the Eleanor F. Moore Business Award and Paul W. Broggi Communications Award, are presented annually in each of the five high schools, honoring students who have excelled in science, business studies and communications, and the recipients are chosen by the faculties of the individual high schools. No application is required.

A fourth program, the Vincent Voccia Vocational Award, is currently presented annually to high school students who have selected a vocational-technical career. The recipient is chosen according to the rules and regulations as described in the attached summary of the program.

The fifth program, the annual choice of a Barton L. Weller scholar, who must be a student in one of the five high schools, is chosen according to the rules and regulations established by the Foundation, which are described in the attached brochure regarding the program.

2018

SCHEDULE ATTACHED TO FORM 990-PF

Part XV, Line 2 - Information Regarding Scholarship Programs (continued)

A sixth program, The Weller Collegiate Scholarship, is presented annually to incoming freshman students at local colleges who are from one of the five communities. The recipients are chosen by the local colleges based on financial need. No application form is required.

The seventh program, The Weller Instrumental Music Scholarship, is presented annually to high school students who have enrolled in a conservatory or college as a music major with a concentration in instrumental music. There was no program in 2018.

The eighth program, the Weller Medical/Health Sciences Scholarship, is presented annually based on the rules and regulations as described in the attached summary of the program.

The ninth program, the Weller Education Scholarship, is presented annually to a high school senior planning to pursue a teaching career in public or private elementary or secondary schools. The recipient is chosen according to the rules described in the attached summary.

The tenth program, the Weller Computer Science/Technology Scholarship, is presented annually to a high school senior planning to pursue a career in computer science or computer engineering. The recipient is chosen according to the rules described in the attached summary.

2018

SCHEDULE ATTACHED TO FORM 990-PF

Part XV, Line 2 - Information Regarding Scholarship Programs

The eleventh program, the Weller Engineering Scholarship, is presented annually to a high school senior planning to pursue a career in engineering. The recipient is chosen according rules in the attached summary.

In addition to the award or scholarship programs for high school students described above, the Foundation also grants an annual award to teachers in the public school systems of Monroe, Trumbull and Newtown, Connecticut. The Weller Excellence in Teaching Award is an award for kindergarten through fifth grade teachers in recognition of teaching quality and innovation. The recipients are selected according to the rules described in the attached summary.

The above award programs have been approved by the Internal Revenue Service under Section 4945 of the Internal Revenue Code.

THE WELLER FOUNDATION, INCORPORATED2018SCHEDULE ATTACHED TO 990-PF, PART XV, LINE 3(a)Grants and Contributions Paid During the Year

<u>Contributions</u>	<u>Name</u>	<u>Relationship</u>	<u>Purpose</u>	<u>Amount</u>
Junior Achievement		None	Support of organization	\$ 2,000
Edith Wheeler Memorial Library		None	Support of organization	3,000
Cyrenius H. Booth Library		None	Support of organization	1,155
Cardinal Shehan Center		None	Support of organization	1,000
Joel Barlow High School		None	Support of organization	3,000
Masuk High School		None	Support of organization	4,957
Newtown High School		None	Support of organization	3,680
Shelton High School		None	Support of organization	2,482
Trumbull High School		None	Support of organization	950
Total Cash Contributions				<u>\$22,224</u>

Cash Awards

Barton L. Weller Scholarship Award  
of \$3,500 to each of the following:

a) Nadia Koltchine (third payment)	None	Encourage both academic	
b) Michael Lynders (fourth payment)	None	excellence and a college	
c) Talia Hankin (first payment)	None	education	14,000
d) Marissa Peck (second payment)	None		

Weller Excellence in Teaching Award  
of \$1,000 to each of the following:

a) Wendy Cushing	None	Encourage teaching	
b) Desiree Conway	None	excellence in grades	
c) Jennifer Angelovic	None	kindergarten through fifth	3,000

Weller Engineering Scholarship of  
\$1,000 (\$1,250 beginning 2017) to each of the following:

a) Branden Fernandes (second payment)	None	Encourage local students	
b) Joshua Panos (third payment)	None	in field of engineering	
c) Eliana Gerb (fourth payment)	None		3,250

(Continued)

THE WELLER FOUNDATION, INCORPORATED2018SCHEDULE ATTACHED TO 990-PF, PART XV, LINE 3(a)Grants and Contributions Paid During the Year (continued)

<u>Name</u>	<u>Relationship</u>	<u>Purpose</u>	<u>Amount</u>
<u>Cash Awards (continued)</u>			
Weller Medical/ Health Sciences Scholarship of \$1,250 to each of the following:			
a) Megan Smith (third payment)	None	Encourage local students in field of medical/ health sciences	5,000
b) Megan Folchick (fourth payment)	None		
c) Isabella Kaiser (first payment)	None		
d) Joseph Conrod (second payment)	None		
Weller Education Scholarship of \$1,250 to each of the following:			
a) Lindsey McMorris (fourth payment)	None	Encourage and financially assist a local high school senior to pursue a teaching career.	5,000
b) Katelyn Zimmerman (third payment)	None		
c) Danielle Gaiser (first payment)	None		
d) Christina Andreo (second payment)	None		
Weller Computer Science/Technology Scholarship of \$1,250 to the following:			
a) Saloni Shah	None	Encourage local students in field of computer sciences.	1,250
Weller Collegiate Scholarship of \$1,000 to the following			
a) Greta Capecci	None	Assist local students in obtaining a quality college education	1,000
Barton L. Weller Scholarship Finalist Award of \$500 to each of the following:			
a) Jinkuk Hong	None	Encourage both academic excellence and a college education	1,500
b) Kathryn Jelliffe	None		
c) Lauren Pawlowski	None		

(Continued)

THE WELLER FOUNDATION, INCORPORATED2018SCHEDULE ATTACHED TO 990-PF, PART XV, LINE 3(a)Grants and Contributions Paid During the Year (continued)

<u>Name</u>	<u>Relationship</u>	<u>Purpose</u>	<u>Amount</u>
<u>Cash Awards (continued)</u>			
Barton L. Weller Scholarship Finalist Selected of \$200 to each of the following:			
a) Sarah Gloria	None	Encourage both academic excellence and a college education	1,000
b) Carter Goodrich	None		
c) Manan Manchanda	None		
d) Annika Morgan	None		
e) Kaitlyn Siedman	None		
Vincent Voccia Vocational Award of \$1,500 to each of the following:			
a) Kaitlyn Craig (first payment)	None	Encourage vocational skills	12,000
b) Grace Richards-Hannigan (first payment)	None		
c) Joshua Bent (first payment)	None		
d) Taylor McCarthy (first payment)	None		
e) Jake Marlin (first payment)	None		
f) Luke Paltauf (second payment)	None		
g) Samantha Berkowitz (second payment)	None		
h) Matthew Juliano (second payment)	None		
Eleanor F. Moore Awards of \$500 to each of the following:			
a) Michael Waugh	None	Foster interest in business careers	2,500
b) Kevin Papscoe	None		
c) Owen Sullivan	None		
d) Reid Chavez	None		
e) Courtney Lynch	None		
Senior Science Awards of \$500 to each of the following:			
a) Alexander Palvinski	None	Foster interest in business careers	2,500
b) Katherine Lee	None		
c) Ioannis Kousidis	None		
d) Samantha Tiberi	None		
e) Vishal Ramesh	None		

(Continued)



THE WELLER FOUNDATION, INCORPORATED2018SCHEDULE ATTACHED TO 990-PF, PART XV, LINE 3(a)Grants and Contributions Paid During the Year (continued)

<u>Name</u>	<u>Relationship</u>	<u>Purpose</u>	<u>Amount</u>
<u>Cash Awards (continued)</u>			
Paul W. Broggi Awards of \$500 to each of the following:			
a) Annabelle Miller	None	Foster interest	
b) Kaitlin Kerr	None	in communications	
c) Savannah Mather	None	careers	2,500
d) Kristina Abissi	None		
e) Kayleigh Fleming	None		
<u>Total Cash Awards and Contributions</u>			<u>\$76,724</u>
<u>Non-Cash Awards &amp; Contributions</u>			
Scholarship Awards Luncheon and dinner for award recipients previously listed	None	Encourage both academic excellence and a college education	8,773
Five new school Award Plaques for the Eleanor F. Moore, Paul W. Broggi and Senior Science Award winners given to area high schools	None	Encourage both academic excellence and a college education	625
<u>Total Non-Cash Awards and Contributions</u>			<u>9,398</u>
<u>Total Contributions and Awards</u>			<u>\$86,122</u>