

Form **990-PF**Department of the Treasury
Internal Revenue Service**Return of Private Foundation**
or Section 4947(a)(1) Trust Treated as Private Foundation▶ Do not enter social security numbers on this form as it may be made public.
▶ Go to www.irs.gov/Form990PF for instructions and the latest information.

OMB No. 1545-0052

2018

Open to Public Inspection

For calendar year 2018 or tax year beginning November 1, 2018, and ending October 31, 2019

Name of foundation

The Cory and Bob Donnalley Charitable Foundation, Inc

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

40 Ettl Lane Unit 20

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

Greenwich CT 06831

G Check all that apply:

☐ Initial return ☐ Initial return of a former public charity

☐ Final return ☐ Amended return

☐ Address change ☐ Name change

H Check type of organization: ☒ Section 501(c)(3) exempt private foundation **04**

☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation

I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ▶ \$ **1,384,734**

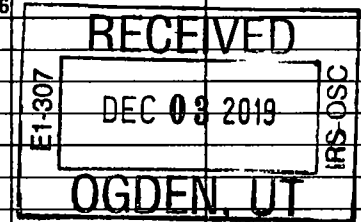
J Accounting method: ☒ Cash ☐ Accrual ☐ Other (specify) _____

(Part I, column (d) must be on cash basis.)

A Employer identification number**061074091****B** Telephone number (see instructions)**203-532-0415****C** If exemption application is pending, check here ▶ ☐**D** 1. Foreign organizations, check here ▶ ☐2. Foreign organizations meeting the 85% test, check here and attach computation ▶ ☐**E** If private foundation status was terminated under section 507(b)(1)(A), check here ▶ ☐**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)
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Revenue	1 Contributions, gifts, grants, etc., received (attach schedule)				
	2 Check <input type="checkbox"/> if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities	28,373	28,373		
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	840,493			
	b Gross sales price for all assets on line 6a				
	7 Capital gain net income (from Part IV, line 2)		840,493		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
Operating and Administrative Expenses	b Less: Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)				
	12 Total. Add lines 1 through 11	868,866	868,866		
	13 Compensation of officers, directors, trustees, etc.				
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)				
	c Other professional fees (attach schedule)				
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	8,035	8,035		
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	18			
	24 Total operating and administrative expenses. Add lines 13 through 23	8,053	8,035		
	25 Contributions, gifts, grants paid	136,751			136,751
	26 Total expenses and disbursements. Add lines 24 and 25	144,804	8,035		136,751
	27 Subtract line 26 from line 12:				
	a Excess of revenue over expenses and disbursements	724,062			
	b Net investment income (if negative, enter -0-)		860,831		
	c Adjusted net income (if negative, enter -0-)				



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	64,222	1,009,132	1,009,132
	2 Savings and temporary cash investments			
	3 Accounts receivable ▶			
	Less: allowance for doubtful accounts ▶			
	4 Pledges receivable ▶			
	Less: allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7 Other notes and loans receivable (attach schedule) ▶			
	Less: allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments—U.S. and state government obligations (attach schedule)			
	b Investments—corporate stock (attach schedule)	292,094	71,246	375,652
	c Investments—corporate bonds (attach schedule)			
	11 Investments—land, buildings, and equipment: basis ▶			
Liabilities	Less: accumulated depreciation (attach schedule) ▶			
	12 Investments—mortgage loans			
	13 Investments—other (attach schedule)			
	14 Land, buildings, and equipment: basis ▶			
	Less: accumulated depreciation (attach schedule) ▶			
	15 Other assets (describe ▶)			
	16 Total assets (to be completed by all filers—see the instructions. Also, see page 1, item I)	356,316	1,080,378	1,384,784
	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
Net Assets or Fund Balances	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	
	Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/> and complete lines 24 through 26, and lines 30 and 31.			
	24 Unrestricted	356,316	1,080,376	
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ <input type="checkbox"/> and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds			
	28 Paid-in or capital surplus, or land, bldg., and equipment fund			
	29 Retained earnings, accumulated income, endowment, or other funds			
	30 Total net assets or fund balances (see instructions)			
	31 Total liabilities and net assets/fund balances (see instructions)	356,316	1,080,376	

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	356,316
2 Enter amount from Part I, line 27a	2	724,062
3 Other increases not included in line 2 (itemize) ▶	3	0
4 Add lines 1, 2, and 3	4	1,080,376
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	1,080,376

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (for example, real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a 9,837 shs Fidelity 500 Index	d	various	Various
b 1,052 shs British American Tobacco	d	6/21/17	various
c Capital Gains Distributions 500 Index Fund		Various	Various
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 1,019,128		147,996	871,132
b 37,511		72,851	(35,340)
c			4,701
d			
e			

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

(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a			
b			
c			
d			
e			

2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	840,493
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). See instructions. If (loss), enter -0- in Part I, line 8	3	

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

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

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

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

☐ Yes ☐ No

If "Yes," the foundation doesn't qualify under section 4940(e). Do not complete this part.

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2017	114,964	1,405,479	.0818
2016	88,245	1,246,396	.0706
2015	92,465	1,187,586	.0818
2014	113,105	1,184,236	.0952
2013	106,779	1,184,236	.0902

2 Total of line 1, column (d)	2	.4196
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	.0839
4 Enter the net value of noncharitable-use assets for 2018 from Part X, line 5	4	1,342,209
5 Multiply line 4 by line 3	5	112,611
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	8,608
7 Add lines 5 and 6	7	121,219
8 Enter qualifying distributions from Part XII, line 4 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.	8	128,143

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4940—see instructions)

1a	Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> 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 <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b	1		8,608
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations, enter 4% of Part I, line 12, col. (b).			
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-)	2		
3	Add lines 1 and 2	3		
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-)	4		
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5		8,608
6	Credits/Payments:			
a	2018 estimated tax payments and 2017 overpayment credited to 2018	6a		8,192
b	Exempt foreign organizations—tax withheld at source	6b		
c	Tax paid with application for extension of time to file (Form 8868)	6c		
d	Backup withholding erroneously withheld	6d		
7	Total credits and payments. Add lines 6a through 6d	7		8,192
8	Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8		
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9		416
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10		
11	Enter the amount of line 10 to be: Credited to 2019 estimated tax Refunded	11		

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		✓
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. ▶ \$ _____ (2) On foundation managers. ▶ \$ _____		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ \$ _____		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.		✓
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 <i>General Instruction T</i> .		✓
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. ▶ Connecticut		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by <i>General Instruction G</i> ? 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		✓ 2
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		✓

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	11	✓
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	✓
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	✓
Website address ▶ <u>None - available at Guidestar.org</u>		
14 The books are in care of ▶ <u>Robert G Donnalley Jr</u> Telephone no. ▶ <u>203-532-0415</u>		
Located at ▶ <u>40 Ettl Lane Unit 20 Greenwich CT</u> ZIP+4 ▶ <u>06831</u>		
15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —check here ▶ <input type="checkbox"/>		
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	✓
See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country ▶		

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required**File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.**

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

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

		Yes	No
5a	During the year, did the foundation pay or incur any amount to:		
(1)	Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
(2)	Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
(3)	Provide a grant to an individual for travel, study, or other similar purposes?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
(4)	Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> 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?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> 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		<input type="checkbox"/>
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?	<input type="checkbox"/> Yes	<input type="checkbox"/> 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?		
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?	6b	<input checked="" type="checkbox"/>
	If "Yes" to 6b, file Form 8870.		
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> 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(s) during the year?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> 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. 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
Robert G Donnalley Jr 40 Ettl Lane Unit 2- Greenwich CT 06831	Pres & Dir 1 hr	0	0	0
Jennifer E Donnalley 40 Ettl Lane Unit 2- Greenwich CT 06831	Dir 1/4 hr	0	0	0
Andrew B Donnalley 40 Ettl Lane Unit 2- Greenwich CT 06831	Dir 1/4	0	0	0
Steven B Lapin 23 Barnes Rd Stamford Ct 06902	Secty & Dir 1/2 hr	0	0	0

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

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

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

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

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

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.

Part IX-B Summary of Program-Related Investments (see instructions)**Total.** Add lines 1 through 3

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	1,382,649
b	Average of monthly cash balances	1b	0
c	Fair market value of all other assets (see instructions)	1c	0
d	Total (add lines 1a, b, and c)	1d	1,382,649
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	1,382,649
4	Cash deemed held for charitable activities. Enter 1½% of line 3 (for greater amount, see instructions)	4	20,740
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	1,361,909
6	Minimum investment return. Enter 5% of line 5	6	68,095

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	68,095
2a	Tax on investment income for 2018 from Part VI, line 5	2a	8,608
b	Income tax for 2018. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	8,608
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	59,487
4	Recoveries of amounts treated as qualifying distributions	4	0
5	Add lines 3 and 4	5	59,487
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	59,487

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	136,751
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	0
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	0
b	Cash distribution test (attach the required schedule)	3b	0
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8; and Part XIII, line 4	4	136,751
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	8,608
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	128,143

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				59,487
2 Undistributed income, if any, as of the end of 2018:				
a Enter amount for 2017 only				
b Total for prior years: 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2018:				
a From 2013 50,049				
b From 2014 55,676				
c From 2015 36,415				
d From 2016 28,006				
e From 2017 45,220				
f Total of lines 3a through e	215,366			
4 Qualifying distributions for 2018 from Part XII, line 4: ► \$ 136,751				
a Applied to 2017, but not more than line 2a				
b Applied to undistributed income of prior years (Election required—see instructions)				
c Treated as distributions out of corpus (Election required—see instructions)				
d Applied to 2018 distributable amount				59,487
e Remaining amount distributed out of corpus	77,264			
5 Excess distributions carryover applied to 2018 (If an amount appears in column (d), the same amount must be shown in column (a).)				
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	292,630			
b Prior years' undistributed income. Subtract line 4b from line 2b				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed				
d Subtract line 6c from line 6b. Taxable amount—see instructions				
e Undistributed income for 2017. Subtract line 4a from line 2a. Taxable amount—see instructions				
f Undistributed income for 2018. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2019				
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required—see instructions)				
8 Excess distributions carryover from 2013 not applied on line 5 or line 7 (see instructions)	50,049			
9 Excess distributions carryover to 2019. Subtract lines 7 and 8 from line 6a	242,581			
10 Analysis of line 9:				
a Excess from 2014 55,676				
b Excess from 2015 36,415				
c Excess from 2016 28,006				
d Excess from 2017 45,220				
e Excess from 2018 77,264				

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 foundation is a private operating foundation described in section ☐ 4942(j)(3) or ☐ 4942(j)(5)

	Tax year	Prior 3 years			(e) Total
	(a) 2018	(b) 2017	(c) 2016	(d) 2015	
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon:					
a "Assets" alternative test—enter:					
(1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test—enter $\frac{2}{3}$ 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).)

NA

- b** List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest.

NONE

2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:

Check here ☒ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc., to individuals or organizations under other conditions, complete items 2a, b, c, and d. See instructions.

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

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

- c** Any submission deadlines:

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

Part XV **Supplementary Information** (continued)**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a <i>Paid during the year</i>				
See Attached Schedule - All operating grants			67 recipients	136,751
Total			▶ 3a	136,751
b <i>Approved for future payment</i>				
None				
Total			▶ 3b	0

Enter gross amounts unless otherwise indicated.

Enter gross amounts unless otherwise indicated.		Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions)
		(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1	Program service revenue:					
a						
b						
c						
d						
e						
f						
g	Fees and contracts from government agencies					
2	Membership dues and assessments					
3	Interest on savings and temporary cash investments					
4	Dividends and interest from securities			14	28,373	
5	Net rental income or (loss) from real estate:					
a	Debt-financed property					
b	Not debt-financed property					
6	Net rental income or (loss) from personal property					
7	Other investment income					
8	Gain or (loss) from sales of assets other than inventory			18	840,493	
9	Net income or (loss) from special events					
10	Gross profit or (loss) from sales of inventory					
11	Other revenue: a					
b						
c						
d						
e						
12	Subtotal. Add columns (b), (d), and (e)				868,866	
13	Total. Add line 12, columns (b), (d), and (e)				868,866	868,866

(See worksheet in line 13 instructions to verify calculations.)

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

Line No.

Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes). (See instructions.)

[illegible]

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

[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

**Sign
Here**

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

Signature of officer or trustee

11/23/19
Date

President
Title

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

**Paid
Preparer
Use Only**

Print/Type preparer's name

Preparer's signature

Date _____

Check ☐ if self-employed

PTIN

Firm's name ▶

Firm's EIN ►

Firm's address ►

Phone no.

RECIPIENT-PUBLIC CHARITIES

PURPOSE: GENERAL OPERATING ACTIVITIES

RECEIPT	ADDRESS	AMOUNT
GREENWICH ARTS COUNCIL	299 Greenwich Ave	GREENWICH CT 06830 \$125
GREENWICH CAMPSHIP FUND	Town Hall 101 Field Point Rd	GREENWICH, CT 06830 400
GREENWICH CHAPLAINCY SERVICES	70 PARSONAGE ROAD	GREENWICH, CT 06830 150
GREENWICH LIBRARY	101 West Putnam Ave	GREENWICH CT 06830 250
GREENWICH Neighbors to Neighbors	248 EAST PUTNAM AVE	GREENWICH CT 06830 250
CALL A RIDE	37 LAFAYETTE PLACE	GREENWICH, CT 06830 100
COMMUNITY CENTERS INC	61 EAST PUTNAM AVE	GREENWICH, CT 06830 500
FAMILY CENTERS	P O BOX 7550	GREENWICH, CT 06836 2,500
FAMILY RE ENTRY	9 MOTT AVE	NORWALK, CT 06850 250
GLENVILLE VOLUNTEER FIRE DEPARTMENT	266 GLENVILLE RD	GLENVILLE, CT 06831 100
KIDS-IN-CRISIS	105 PROSPECT STREET	GREENWICH, CT 06830 1,000
LIBERATION PROGRAMS	P O BOX 8030	STAMFORD, CT 06905 150
MEALS-ON-WHEELS	89 MAPLE AVENUE	Greenwich Ct -06830 100
PATHWAYS	175 Milbank Avenue	GREENWICH CT 06830 500
RIVERHOUSE Adult Care	70 PARSONAGE ROAD	GREENWICH, CT 06830 500
STAMFORD HOSPITAL FOUNDATION	707 SUMMER STREET	STAMFORD CT 06901 2,500
TRANSPORTATION ASSOCIATION OF GREENWICH	231 EAST PUTNAM AVENUE	GREENWICH, CT 06830 100
THE JOYCE THEATER	175 8TH AVENUE	NEW YORK, NY 10011 1,000
IVY BALDWIN DANCE		BROOKLYN NY 250
ACLU OF CONNECTICUT FOUNDATION	32 GRAND STREET	HARTFORD, CT 06106 15,000
CCFA	386 PARK AVE SOUTH	NEW YORK, NY 10016-8804 500
CHARITY WATCH	3450 n Lake Shore Drnve, Suite 2802	CHICAGO, ILL 50
FAIRNESS WEST VIRGINIA	405 Capital Street, Suite 405	CHARLESTON, W VA 25301 1,000
GIBBON CONSERVATION CENTER	PO Box 800249	SANTA CLARITA- CA 91380 100
INSTITUTE ON TAXATION AND ECONOMIC POLICY	1616P ST N W, SUITE 200	WASHINGTON, DC 20036 500
MEDICAL STUDENTS FOR CHOICE	2041 BANCROFT SUITE 201	BERKLEY, CA 94704 1,000
NATIONAL COALITION TO ABOLISH THE DEATH PENALTY	1705 dEsALES st, nw 5TH Floor	Washington DC 20036 100
NATIONAL NETWORK OF ABORTION FUNDS	42 SEAVERNS AVENUE	BOSTON, MA 02130 1,000
PLANNED PARENTHOOD OF CT	129 WHITNEY AVENUE	NEW HAVEN CT 06510 9,000
ROOM TO READ	P O BOX 29127	SAN FRANCISCO, CA 1,250
VANGUARD CHARITABLE	P O Box 9509	Warwick, RI 02889-9509 25,000
VOLUNTEER REFERRAL CENTER	161 Madison Ave	New York, NY 10016 200
AVON THEATRE	8 SOUND SHORE DRIVE, SUITE #140	GREENWICH CT 06830 500
EMELIN THEATRE	153 LIBRARY LANE	MAMARONECK, NY 10543 100
LONG WHARF THEATRE	222 SARGENT DRIVE	NEW HAVEN, CT 06511 750
PENGUIN PLAYERS LTD	P O BOX 91	STONE POINT, N Y. 10980-00 5,000
ARS NOVA	511 West 54th Street	New York NY 10019 500
ART NEW YORK	575 EIGHTH AVE SUITE 17 SOUTH	NEW YORK, NY 10018 10,000
ATLANTIC THEATRE	336 WEST 20TH STREET	NEW YORK, NY 10011 1,200
BEDLAM E	603W 115TH STREET	NEW YORK, NY 10025 100
CLUBBED THUMB THEATRE	440 LAFAYETTE STREET	NEW YORK, NY 1003 500
ENSEMBLE STUDIO THEATRE	549 WEST 52ND STREET	NEW YORK, NY 10019 1,000
IRISH REP	163 WEST 17TH STREET	NEW YORK, NY 10011 250
KEEN COMPANY	520 8TH AVE, SUITE 328	MNEW YORK, NY 10018 1,000
MANHATTAN CLASS COMPANY	231 West 29th St Suite 233	NEW YORK, NY 10001 1,500
MANHATTAN THEATRE CLUB	453 WEST 16TH STREET	NEW YORK, N Y 10011 4,928
THE MINT THEATRE	311 West 43rd Street, 5th Floor	NEW YORK, N Y. 10036 758
THE NEW GROUP INC	410 West 42nd St	NEW YORK, NY 10036 1,000
NEW YORK THEATRE WORKSHOP	79E 4th Street	New York, NY 10003 1,000
THE PLAY COMPANY	321 W44th St Suite 802	new york Ny 10036 2,500
PLAYING ON AIR	210 West 101st ST PH-9	New York, NY 10025 100
PLAYWRIGHTS HORIZONS	416 WEST 42ND STREET	NEW YORK NY 10036 1,200
THE PLAYWRIGHTS REALM	520 8TH AVENUE SUITE 320	NEW YORK, NY 10013 250
PRIMARY STAGES	584 9TH AVENUE	NEW YORK, NY 10036 2,500
RATTLESTICK PLAYWRIGHTS THEATRE	224 Waverly Place	New York, NY 10014 500
RED BULL THEATRE	191 7th Ave Suite #23	New York, NY 10011 250
ROUNABOUT THEATRE CO	231 W 39TH STREET SUITE 1200	NEW YORK, NY 10018 20,000
SECOND STAGE	PO BOX 1807 ANSONIA STATION	NEW YORK, NY 10023 1,850
SHAW FESTIVAL	PO BOX 628	LEWISTON, NEW YORK 14092 150
SIGNATURE THEATRE CO	424 WEST 42ND Street, 2nd Floor	NEW YORK, NY 10036 5,000
TCG	355 LEXINGTON AVE	NEW YORK NY 10017 150
THEATRE DEVELOPMENT FUND	1501 BROADWAY, 21ST FLOOR	NEW YORK, NY 10036 1,000
VINEYARD THEATRE	309 EAST 26TH STREET	NEW YORK, N.Y 10010 1,140
Working Theatre	520 8th Aven Suite 303	New York, Ny ## 250
WP THEATRE	55 WEST END AVENUE	NEW YORK, NY 10023 250
BARRINGTON STAGE CO	PO BOX 946	BARRINGTON MA 01230 2,000
THE CHESTER THEATRE COMPANY	PO Box 722	Chester, MA 01011-0722 150
AMERICAN FRIENDS OF THE NATIONAL POTRAIT GALLERY	C/O DONNALLEY 40 ETTL LN UNIT 20	GREENWICH, CT 06831 1,000
AMERICAN ASSOCIATES OF THE ROYAL NATIONAL THEATRE	425 MARKET STREET	SAN FRANSICO, CA 94925 1,000

\$136,751

Total Contributions (67)

FORM 990 -PF

TAX ID 06-10749091
YEAR ENDED: OCT 31, 2019

THE CORY & BOB DONNALLEY
CHARITABLE FOUNDATION INC

PART II LINE 10 SECURITIES:

	10/31/18 BOOK VALUE	10/31/19 BOOK VALUE	10/31/19 MKT VAL
12,146.69 SHARES SPARTAN INDEX	202,544		
2,309.00 SHARES SPARTAN INDEX		54,116	243,987
1012 BERKLEY INSURANCE GROUP	7052	7052	106,108
1052 BRITISH TOBACCO CO	72,420		
0 BRITISH TOBACCO CO			
200 SHARES EXXON	8353	8353	13,514
308 SHARES INDEP HOLD CO*	1725	1725	12,043
	292,094	71,246	375,652