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Form **990-PF**

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

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

▶ Do not enter social security numbers on this form as it may be made public.

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

OMB No 1545-0047

2019

Open to Public Inspection

For calendar year 2019 or tax year beginning 21,540 **, 2019, and ending** **, 20**

Name of foundation: Kennebunk Savings Bank Foundation

A Employer identification number: 01-0547392

Number and street (or P O box number if mail is not delivered to street address): 104 Main Street, PO Box 28 | Room/suite:

B Telephone number (see instructions): (207) 985-4903

City or town, state or province, country, and ZIP or foreign postal code: Kennebunk, ME 04043

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

04

E If private foundation status was terminated under section 507(b)(1)(A), check here ▶ ☐

I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ▶ $ 5,082,635

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

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

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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).)

03/04

			(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)	405,977			
	2	Check ▶ ☐ if the foundation is not required to attach Sch. B				
	3	Interest on savings and temporary cash investments	955	955		
	4	Dividends and interest from securities	99,711	99,711		
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10	57,498			
	b	Gross sales price for all assets on line 6a				
	7	Capital gain net income (from Part IV, line 2)		57,498		
	8	Net short-term capital gain			571	
	9	Income modifications				
	10a	Gross sales less returns and allowances				
	b	Less: Cost of goods sold				
	c	Gross profit or (loss) (attach schedule)				
	11	Other income (attach schedule)				
	12	**Total.** Add lines 1 through 11	564,141	158,164	571	
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc				
	14	Other employee salaries and wages				
	15	Pension plans, employee benefits				
	16a	Legal fees (attach schedule) STMT 1	3,420	0		3,420
	b	Accounting fees (attach schedule) STMT 1				
	c	Other professional fees (attach schedule)	20,140	20,140		0
	17	Interest				
	18	Taxes (attach schedule) (see instructions) STMT 1	3,761	1,221		0
	19	Depreciation (attach schedule) and depletion				
	20	Occupancy				
	21	Travel, conferences, and meetings				
	22	Printing and publications				
	23	Other expenses (attach schedule) STMT 1	179	179		0
	24	**Total operating and administrative expenses.** Add lines 13 through 23	27,500	21,540	0	3,420
	25	Contributions, gifts, grants paid	555,470			555,470
	26	**Total expenses and disbursements.** Add lines 24 and 25	582,970	21,540	0	558,890
	27	Subtract line 26 from line 12:				
	a	**Excess of revenue over expenses and disbursements**	(18,829)			
	b	**Net investment income** (if negative, enter -0-)		136,624		
	c	**Adjusted net income** (if negative, enter -0-)			571	

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Part II Balance Sheets

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

			Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing	44,357	97,228	97,228
	2	Savings and temporary cash investments	1,057,427	928,513	945,613
	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)	0	0	0
	b	Investments—corporate stock (attach schedule) STMT 2	1,634,410	1,550,567	3,060,361
	c	Investments—corporate bonds (attach schedule) STMT 2	822,524	963,888	979,433
	11	Investments—land, buildings, and equipment: basis ▶			
		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)	3,558,718	3,540,196	5,082,635
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)	None	None	
Net Assets or Fund Balances		**Foundations that follow FASB ASC 958, check here ▶ ☐ and complete lines 24, 25, 29, and 30.**			
	24	Net assets without donor restrictions			
	25	Net assets with donor restrictions			
		Foundations that do not follow FASB ASC 958, check here ▶ ☑ and complete lines 26 through 30.			
	26	Capital stock, trust principal, or current funds			
	27	Paid-in or capital surplus, or land, bldg., and equipment fund			
	28	Retained earnings, accumulated income, endowment, or other funds	3,558,718	3,540,196	
	29	**Total net assets or fund balances** (see instructions)	3,558,718	3,540,196	
	30	**Total liabilities and net assets/fund balances** (see instructions)	3,558,718	3,540,196	

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 29 (must agree with end-of-year figure reported on prior year's return)	1	3,558,718
2	Enter amount from Part I, line 27a	2	(18,829)
3	Other increases not included in line 2 (itemize) ▶ cost basis adjustments	3	307
4	Add lines 1, 2, and 3	4	3,540,196
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 29	6	3,540,196

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	Publicly Traded Securities			
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	321,018		263,520	57,498
b				
c				
d				
e				

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

	(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
a				57,498
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	57,498
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	571

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))
2018	501,159	4,657,783	.10759603871
2017	373,848	4,548,192	.08219705764
2016	456,437	4,268,394	10693413026
2015	293,551	4,348,222	.06751058248
2014	322,261	4,274,811	07538602291

2	**Total** of line 1, column (d)	2	43962383200
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	08792476640
4	Enter the net value of noncharitable-use assets for 2019 from Part X, line 5	4	4,745,011
5	Multiply line 4 by line 3	5	417,204
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	1,366
7	Add lines 5 and 6	7	418,570
8	Enter qualifying distributions from Part XII, line 4	8	558,890

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	1,366
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	1,366
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	1,366
6	Credits/Payments				
a	2019 estimated tax payments and 2018 overpayment credited to 2019	6a	2,010		
b	Exempt foreign organizations—tax withheld at source	6b	0		
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	2,010
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	0
10	**Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶			10	644
11	Enter the amount of line 10 to be. **Credited to 2020 estimated tax ▶** 644 **Refunded ▶**			11	0

Part VII-A Statements Regarding Activities

			Yes	No
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a		✓
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition	1b		✓
	If the answer is "Yes" to **1a** or **1b**, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.			
c	Did the foundation file **Form 1120-POL** for this year?	1c		✓
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: **(1)** On the foundation ▶ $ 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		✓
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes	3		✓
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		✓
b	If "Yes," has it filed a tax return on **Form 990-T** for this year?	4b	N/A	
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by *General Instruction T*	5		✓
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	✓	
7	Did the foundation have at least $5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV	7	✓	
8a	Enter the states to which the foundation reports or with which it is registered. See instructions. ▶ Maine			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by *General Instruction G*? If "No," attach explanation	8b	✓	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2019 or the tax year beginning in 2019? See the instructions for Part XIV. If "Yes," complete Part XIV	9		✓
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10		✓

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

			Yes	No
11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule. See instructions	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 ▶ www.kennebunksavings com/community

14 The books are in care of ▶ Thomas Zuke Telephone no. ▶ (207) 985-4903

Located at ▶ 7 Alewive Park Road, Kennebunk, ME ZIP+4 ▶ 04043

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 |

			Yes	No
16	At any time during calendar year 2019, 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?	☐ 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		✓
	Organizations relying on a current notice regarding disaster assistance, check here ▶ ☐				
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2019?		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 2019, did the foundation have any undistributed income (Part XIII, lines 6d and 6e) for tax year(s) beginning before 2019? If "Yes," list the years ▶ 20___ , 20___ , 20___ , 20___	☐ Yes ☑ No			
b	Are there any years listed in 2a for which the foundation is **not** applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to **all** years listed, answer "No" and attach statement—see instructions)		2b	N/A	
c	If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here ▶ 20___ , 20___ , 20___ , 20___				
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	☐ Yes ☑ No			
b	If "Yes," did it have excess business holdings in 2019 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 Form 4720, Schedule C, to determine if the foundation had excess business holdings in 2019)		3b	N/A	
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		4a		✓
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2019?		4b		✓

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

		Yes	No
5a During the year, did the foundation pay or incur any amount to:			
(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☑ No			
(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☑ No			
(3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☑ No			
(4) Provide a grant to an organization other than a charitable, etc , organization described in section 4945(d)(4)(A)? See instructions ☐ Yes ☑ No			
(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☑ No			
b If any answer is "Yes" to 5a(1)–(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53 4945 or in a current notice regarding disaster assistance? See instructions	5b	N/A	
Organizations relying on a current notice regarding disaster assistance, check here ▶ ☐			
c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? ☐ Yes ☐ No			
If "Yes," attach the statement required by Regulations section 53.4945-5(d)			
6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? ☐ Yes ☑ No			
b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?	6b		✓
If "Yes" to 6b, file Form 8870.			
7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☑ No			
b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?	7b	N/A	
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. 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 Statement 3				

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 ▶ None

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 ▶		None

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 None	
2	
3	
4	

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

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1 None	
2	
All other program-related investments See instructions 3	
Total. Add lines 1 through 3 ▶	None

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	4,242,149
b	Average of monthly cash balances	1b	575,121
c	Fair market value of all other assets (see instructions)	1c	0
d	**Total** (add lines 1a, b, and c)	1d	4,817,270
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	4,817,270
4	Cash deemed held for charitable activities. Enter 1½% of line 3 (for greater amount, see instructions)	4	72,259
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3. Enter here and on Part V, line 4	5	4,745,011
6	**Minimum investment return.** Enter 5% of line 5	6	237,251

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	237,251
2a	Tax on investment income for 2019 from Part VI, line 5	2a	1,366		
b	Income tax for 2019. (This does not include the tax from Part VI.)	2b	0		
c	Add lines 2a and 2b			2c	1,366
3	Distributable amount before adjustments. Subtract line 2c from line 1			3	235,885
4	Recoveries of amounts treated as qualifying distributions			4	0
5	Add lines 3 and 4			5	235,885
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	235,885

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	558,890
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	558,890
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	1,366
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	557,524

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 2018	(c) 2018	(d) 2019
1	Distributable amount for 2019 from Part XI, line 7				235,885
2	Undistributed income, if any, as of the end of 2019				
a	Enter amount for 2018 only			0	
b	Total for prior years 20___, 20___, 20___		0		
3	Excess distributions carryover, if any, to 2019:				
a	From 2014 . . . 100,206				
b	From 2015 . . . 78,594				
c	From 2016 . . . 246,077				
d	From 2017 . . . 149,052				
e	From 2018 . . . 271,950				
f	**Total** of lines 3a through e	845,879			
4	Qualifying distributions for 2019 from Part XII, line 4 ▶ $ 558,890				
a	Applied to 2018, 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 2019 distributable amount				235,885
e	Remaining amount distributed out of corpus	323,005			
5	Excess distributions carryover applied to 2019 (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	1,168,884			
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 2018 Subtract line 4a from line 2a. Taxable amount—see instructions			0	
f	Undistributed income for 2019 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2020				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 2014 not applied on line 5 or line 7 (see instructions)	100,206			
9	**Excess distributions carryover to 2020.** Subtract lines 7 and 8 from line 6a	1,068,678			
10	Analysis of line 9.				
a	Excess from 2015 . . . 78,594				
b	Excess from 2016 . . . 246,077				
c	Excess from 2017 . . . 149,052				
d	Excess from 2018 . . . 271,950				
e	Excess from 2019 . . . 323,005				

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 2019, enter the date of the ruling ▶ N/A

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

	Tax year	Prior 3 years			
	(a) 2019	(b) 2018	(c) 2017	(d) 2016	(e) Total
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4, for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon					
a "Assets" alternative test—enter: (1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test—enter 2/3 of minimum investment return shown in Part X, line 6, for each year listed					
c "Support" alternative test—enter: (1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

Part XV Supplementary Information (Complete this part only if the foundation had $5,000 or more in assets at any time during the year—see instructions.)

1 **Information Regarding Foundation Managers:**

a List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than $5,000) (See section 507(d)(2).)

None

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

None

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

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

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

See Statement 4

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

See Statement 4

c Any submission deadlines

See Statement 4

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

See Statement 4

Part XV Supplementary Information *(continued)*

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
See Statement 5				
Total ▶ 3a				555,470
b *Approved for future payment*				
See Statement 6				
Total ▶ 3b				200,000

Part XVI-A Analysis of Income-Producing Activities

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			14	955	
4 Dividends and interest from securities			14	99,711	
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			14	57,498	
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)				158,164	

13 **Total.** Add line 12, columns (b), (d), and (e) . . . 13 158,164

(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)
	N/A

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

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

d If the answer to any of the above is "Yes," complete the following schedule. Column **(b)** should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column **(d)** the value of the goods, other assets, or services received

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

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

Thomas [signature] 11/10/20 Treasurer

Signature of officer or trustee | Date | Title

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

Paid Preparer Use Only

Print/Type preparer's name	Preparer's signature	Date	Check ☐ if self-employed	PTIN
Barbara I. Belik	Barbara I. Belik	11/9/2020		P01459740
Firm's name ▶ Bergen & Parkinson, LLC			Firm's EIN ▶	01-0513838
Firm's address ▶ 62 Portland Road, Suite 25, Kennebunk, Maine 04043			Phone no	(207) 985-7000

Schedule B (Form 990, 990-EZ, or 990-PF) Department of the Treasury Internal Revenue Service	**Schedule of Contributors** ▶ Attach to Form 990, Form 990-EZ, or Form 990-PF. ▶ Go to *www.irs.gov/Form990* for the latest information.	OMB No 1545-0047 **2019**

Name of the organization	Employer identification number
Kennebunk Savings Bank Foundation	01-0547392

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 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 33⅓% 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 990-PF, 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: Kennebunk Savings Bank Foundation

Employer identification number: 01-0547392

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	Kennebunk Savings Bank 104 Main Street, PO Box 28 Kennebunk, Maine 04043	$ 405,977	Person ☑ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)

Kennebunk Savings Bank Foundation **EIN # 01-0547392**
Form 990-PF
Tax Year Ended 12/31/19

Part I, Analysis of Revenue and Expenses

Line 16a, Legal Fees

Tax Compliance and Consulting Fees	$3,420

Line 16c, Other Professional Fees

Investment Management Fees	$20,140

Line 18, Taxes

§4940 Tax on Net Investment Income	$ 2,540
Foreign Taxes Paid on Dividends	1,221
	$ 3,761

Line 23, Other Expenses

ADR Pass-thru Fees	$ 179

Kennebunk Savings Bank Foundation
Form 990-PF
Tax Year Ended 12/31/19

EIN # 01-0547392

Part II, Balance Sheets
Line 10b, Investments – Corporate Stock

Quantity	Security	Adj Unit Cost	Total Adjusted Cost	Price	Market Value
COMMON STOCK					
Consumer Staples					
825	Nestle S A Reg B ADR	59 32	48,939 95	108 26	89,314 50
750	PepsiCo	59 09	44,319 33	136 67	102,502 50
825	Procter & Gamble	55 82	46,053 20	124 90	103,042 50
1,450	Unilever NV	31 75	46,033 84	57 46	83,317 00
750	Wal-Mart	69 74	52,307 48	118 84	89,130 00
			237,653 80		467,306 50
Health Care					
650	Danaher Corp	23 04	14,974 94	153 48	99,762 00
1,000	Dentsply Sirona Inc	29 58	29,580 23	56 59	56,590 00
1,000	Medtronic PLC	76 95	76,950 00	113 45	113,450 00
1,300	Novo-Nordisk	10 56	13,729 33	57 88	75,244 00
1,350	Roche Hldg Ltd ADR	36 73	49,580 95	40 66	54,891 00
400	Waters	45 57	18,227 88	233 65	93,460 00
			203,043 34		493,397 00
Industrials					
425	3M Company	87 07	37,002 75	176 42	74,978 50
1,100	Emerson Electric	46 78	51,455 43	76 26	83,886 00
325	Fortive Corp	14 34	4,659 05	76 39	24,826 75
725	United Parcel Service	83 70	60,680 90	117 06	84,868 50
300	United Technologies	128 11	38,431 58	149 76	44,928 00
			192,229 71		313,487 75
Materials					
325	Ecolab Inc	114 09	37,080 40	192 99	62,721 75
500	Linde PLC	163 45	81,725 00	212 90	106,450 00
			118,805 40		169,171 75
Information Technology					
600	Accenture Plc	57 52	34,512 58	210 57	126,342 00
1,800	Cisco Systems	20 43	36,773 92	47 96	86,328 00
1,000	Fiserv	13 72	13,718 08	115 63	115,630 00
400	Intuit	62 81	25,123 97	261 93	104,772 00
900	Microsoft Corp	29 75	26,771 00	157 70	141,930 00
1,000	Oracle	32 54	32,541 13	52 98	52,980 00
700	Qualcomm	51 00	35,703 42	88 23	61,761 00
800	Texas Instruments	35 05	28,036 98	128 29	102,632 00
			233,181 07		792,375 00
Energy					
1,800	Kinder Morgan Inc	16 60	29,885 94	21 17	38,106 00
750	Occidental Pete	80 27	60,202 22	41 21	30,907 50
700	Schlumberger Ltd	54 54	38,180 17	40 20	28,140 00
			128,268 33		97,153 50
Financials					
750	American Express	53 97	40,477 00	124 49	93,367 50
650	JPMorgan Chase	92 32	60,009 02	139 40	90,610 00
			100,486 02		183,977 50
	COMMON STOCK Total		1,213,667 67		2,516,869 00

Kennebunk Savings Bank Foundation
Form 990-PF
Tax Year Ended 12/31/19

EIN # 01-0547392

Part II, Balance Sheets
Line 10b, Investments – Corporate Stock

Quantity	Security	Adj Unit Cost	Total Adjusted Cost	Price	Market Value
EQUITY EXCHANGE TRADED FUNDS					
Exchange Traded Funds					
3,000	Vanguard FTSE Emerging Market	41 64	124,928 15	44 47	133,410 00
1,800	iShares MSCI EAFE Index	73 95	133,116 72	69 44	124,992 00
3,400	iShares S&P Small Cap 600 Idx	23 19	78,854 80	83 85	285,090 00
			336,899 67		543,492 00
	EQUITY EXCHANGE TRADED Total		336,899 67		543,492.00

CORPORATE STOCK, TOTAL 1,550,567 3,060,361

Kennebunk Savings Bank Foundation **EIN # 01-0547392**
Form 990-PF
Tax Year Ended 12/31/19

Part II, Balance Sheets
Line 10c, Investments – Corporate Bonds

Quantity	Security	Adj Unit Cost	Total Adjusted Cost	Price	Market Value
CORPORATE BONDS					
50,000	Amgen Inc 3 450% Due 10-01-20	100 55	50,276 38	101 06	50,530 25
50,000	Berkshire Hathaway 2 900% Due 10-15-20	100 34	50,167 96	100 73	50,366 65
50,000	PepsiCo 3 125% Due 11-01-20	100 62	50,308 94	101.06	50,532 00
50,000	Wells Fargo & Co 3 000% Due 01-22-21	100 26	50,127.85	101 13	50,565 85
50,000	National Rural Utility Corp 3 000% Due 03-15-21	100 01	50,004 40	100 55	50,274 05
50,000	Glaxosmithkline Capital Corp 2 850% Due 05-08-22	100 90	50,448 79	102 16	51,079.20
50,000	Starbucks Corp 2 700% Due 06-15-22	101 98	50,990 06	101.88	50,939 70
50,000	J P Morgan Chase 3.250% Due 09-23-22	100.29	50,142 72	103 35	51,675 00
50,000	Home Depot Inc 2 700% Due 04-01-23	102 44	51,220 72	102 40	51,199 40
50,000	Oracle Corp 2 400% Due 09-15-23	100 52	50,261.07	101 60	50,802 30
50,000	Honeywell Intl 3 350% Due 12-01-23	103 18	51,590 47	105 08	52,540 40
100,000	IBM Corp 3 625% Due 02-12-24	103 49	103,491 73	105 82	105,820 70
	Accrued Interest				4,919 17
			659,031 09		671,244 67
FIXED INCOME EXCHANGE TRADED FUNDS					
Exchange Traded Funds					
1,600	Vanguard Intermediate Term Corp Bd	90 44	144,701 28	91 33	146,128 00
2,000	Vanguard Short-Term Corp Bd Index	80 08	160,155 35	81 03	162,060 00
			304,856 63		308,188 00
	FIXED INCOME EXCHANGE Total		304,856 63		308,188 00
	CORPORATE BONDS, TOTAL		963,888		979,433

Part VIII., Information About Officers, Directors, etc.

Line 1, List of All Officers, Directors, Etc.

(a)	(b)	(c) (d) (e)
Bradford C. Paige P.O. Box 28 7 Alewive Park Road Kennebunk, ME 04043	President and Director Less than 1 hr./wk.	None
Dennis Byrd P.O. Box 28 7 Alewive Park Road Kennebunk, ME 04043	Exec. Vice President Less than 1 hr./wk.	None
Thomas Zuke P.O. Box 28 7 Alewive Park Road Kennebunk, ME 04043	Treasurer Less than 1 hr./wk.	None
Maureen Flaherty P.O. Box 28 7 Alewive Park Road Kennebunk, ME 04043	Senior Vice President 20 hrs/annually	None
Alan Brown P.O. Box 28 7 Alewive Park Road Kennebunk, ME 04043	Vice President 120 hrs/annually	None
Patricia Wheeler P.O. Box 28 7 Alewive Park Road Kennebunk, ME 04043	Clerk Less than 1 hr./wk.	None
James J. Keating, III P.O. Box 28 7 Alewive Park Road Kennebunk, ME 04043	Director Less than 1 hr./wk.	None
Geoffrey Titherington P.O. Box 28 7 Alewive Park Road Kennebunk, ME 04043	Director Less than 1 hr./wk.	None

Stephen A. Morris P.O. Box 28 7 Alewive Park Road Kennebunk, ME 04043	Director Less than 1 hr./wk.	None
Milda Castner P.O. Box 28 7 Alewive Park Road Kennebunk, ME 04043	Director Less than 1 hr/wk	None
Matthew Chase P.O. Box 28 7 Alewive Park Road Kennebunk, ME 04043	Director Less than 1 hr/wk	None
Lori A. Howell P.O. Box 28 7 Alewive Park Road Kennebunk, ME 04043	Director Less than 1 hr/wk	None
Douglas Stockbridge P O. Box 28 7 Alewive Park Road Kennebunk, ME 04043	Director Less than 1 hr/wk	None
Stephen H. Roberts P.O. Box 28 7 Alewive Park Road Kennebunk, ME 04043	Director Less than 1 hr/wk	None
Paul H. Gurney, Jr. P O. Box 28 7 Alewive Park Road Kennebunk, ME 04043	Director Less than 1 hr/wk	None

Part XV, Supplementary Information
Line 2, Information Regarding Grant Programs

Kennebunk Savings

Eligibility Quiz

Is your organization or the program you are seeking funding for based in one of the New England area states?

-Select One-

Next

Kennebunk Savings

Eligibility Quiz

Is the organization or program for which you are requesting funding

- A non-profit or charitable organization?
- Are you tax exempt as described in Internal Revenue Code -- either section 501(c)(3) or 509(a) (1) , (2), or (3)?
- Do you have active and responsible leadership -- paid and/or volunteer?
- Are you able to provide adequate financial information including income and expenses?

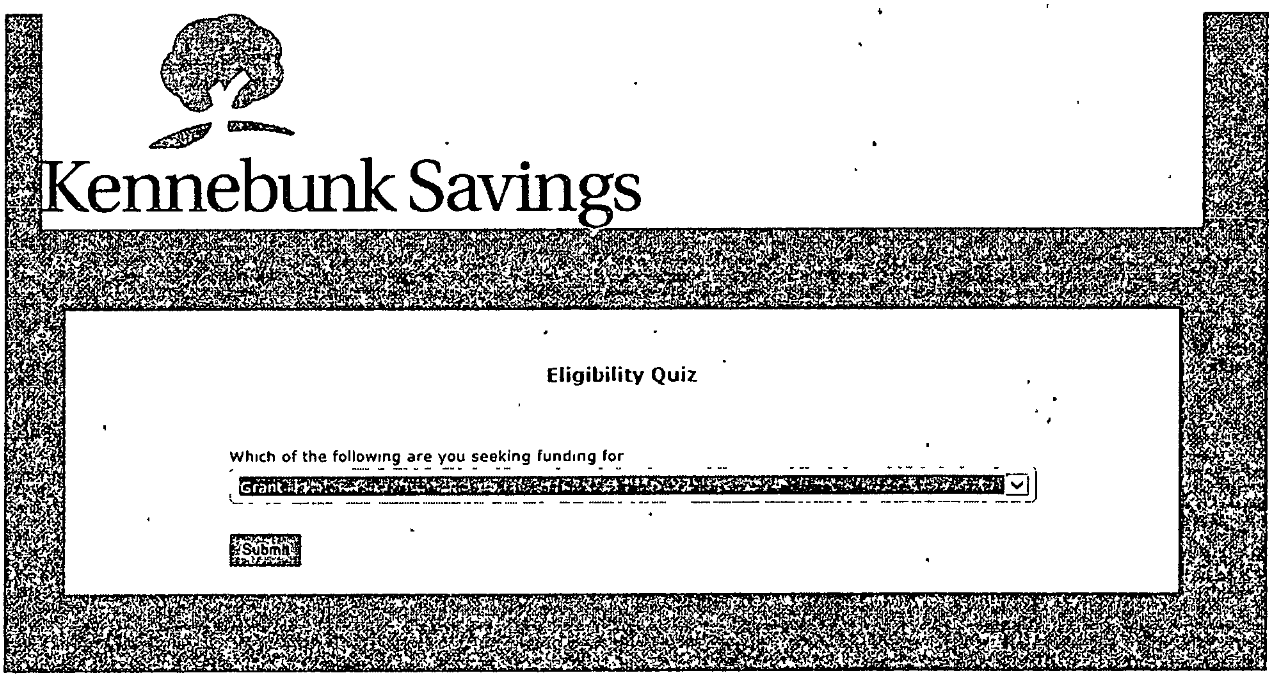
-Select One-

Next

Kennebunk Savings Bank Foundation
Form 990-PF
Tax Year Ended 12/31/19

EIN: 01-0547392

Part XV, Supplementary Information
Line 2, Information Regarding Grant Programs



Part XV, Supplementary Information
Line 2, Information Regarding Grant Programs

Grant Application Form

Before You Begin

Some quick tips for using this online application form:

- Before filling out the application, you may find it helpful to click the "Printer Friendly Version" button above. This will offer you a preview of all of the questions on the application.
- You have the ability to save and come back to your application at a later time by clicking the "Save & Return to My Account" button at the bottom of each screen.
- To move to the next page, please click the "Next Page" button at the bottom of the page or click the page number at the top of the page to jump to that page.
- Do *not* use the "Back" or "Forward" buttons on your browser to navigate through this application.
- You might want to consider utilizing a word-processing tool (i.e. Microsoft Word), and then cutting and pasting your answers into the application.
- **When clicking the "Review Before Submitting" button:** You will be required to review the entire application one final time before clicking the "Submit Application" button at the bottom of the screen.

Contact Information

Organization Primary Contact

Prefix
- Select One -

First Name

Last Name

Title

Office Address

Part XV, Supplementary Information
Line 2, Information Regarding Grant Programs

City

State
-
Select
One -

Zip Code

Office Phone

Fax

E-mail

Request Primary Contact

Same as Organization Primary Contact
No

Prefix
<None>

First
Name

Last Name

Title

Office Address

Part XV, Supplementary Information
Line 2, Information Regarding Grant Programs

City

State

Zip Code

Office Phone

Fax

E-mail

Organization Information

Organization Legal Name

Tax ID
If known

Also Known As

Address

City

State

Part XV, Supplementary Information
Line 2, Information Regarding Grant Programs

- Select One -

Zip Code

County

Phone

Fax

E-mail Address

Website

Full-Time Staff

Part-Time Staff

Volunteers

Select the geographic area(s) that your organization serves.

Mission Statement

History/Background
Enter the Organization's brief history and background

Part XV, Supplementary Information
Line 2, Information Regarding Grant Programs

Request Information

Project Title

Request Amount

Project Start Date

Project End Date

Project Description
Brief description of the program for which you are requesting a donation, including program goals and objectives.

Please provide a detailed project budget for your request. If you do not have a budget you may use this budget template. Once completed, attach the budget using the upload button below. Budget Template

Attachment

Comments/Notes
If you have additional comments or anything else you'd like to add, please do so here.

Financial Information

If you are applying for a grant of $5000 or over, please complete the fields below. If you are applying for a grant under $5000 and you do not have the financial information available, please advance to next section of the application.

Has the organization received a grant from Kennebunk Savings in the past?

If 'Yes', in what year was the most recent funding received?

Please list the names and most current amounts of your primary funders/grantors (private/public or both) that have supported your organization during the most recent completed fiscal year.

Most Recent Audited Financial Statement

Current Organization Operating Budget with Revenue and Expenses

Confirmation

Confirmation of Charitable Intent

Check "I confirm" to certify the following:

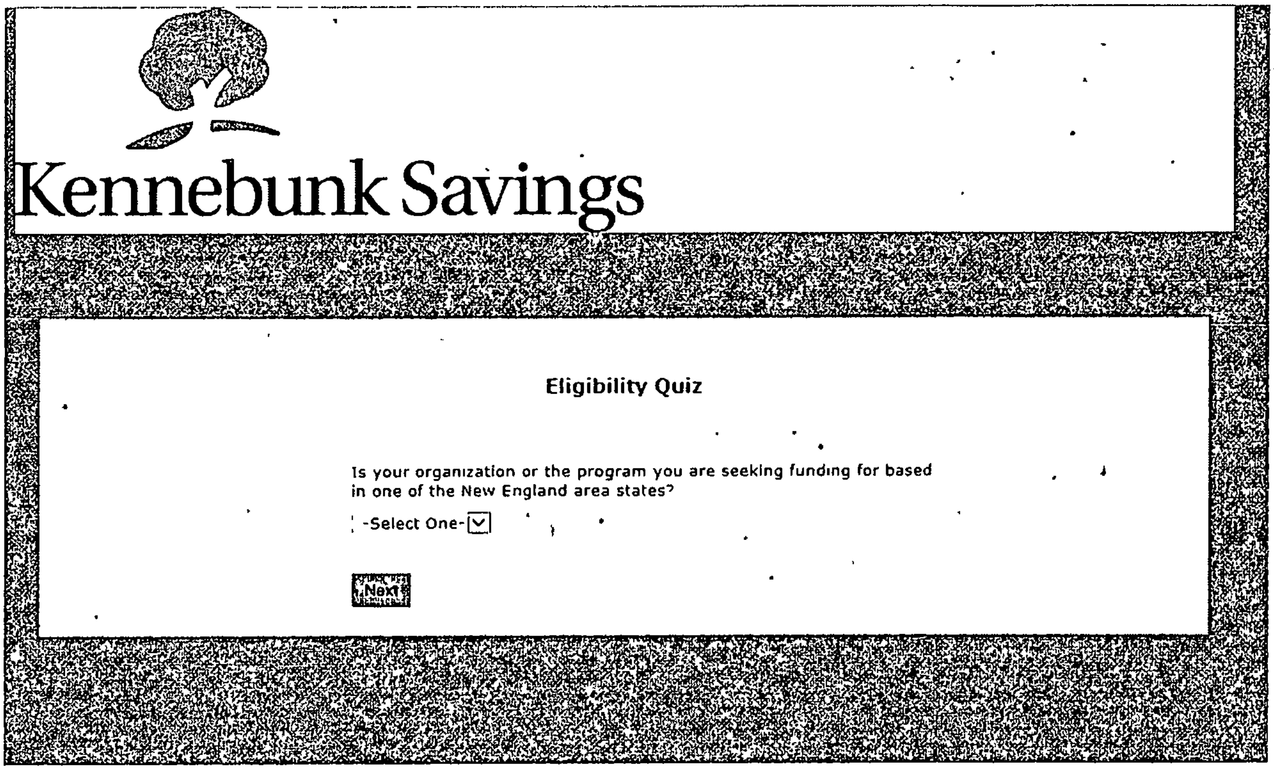
We further certify that none of the proposed grant funds will be used to provide any direct benefit to Kennebunk Savings Bank or Kennebunk Savings Bank Foundation employee or any employee's family member (except in the provision of charitable services or education available to the public at large), or to any staff member, board member, or donor to the Organization. No goods or services have been offered or promised in consideration for this charitable contribution. I further certify that to the best of my knowledge, information, and belief, the purpose of this grant is charitable and for the good of the community, and is not intended to fulfill business purposes or obligations of any kind including but not limited to offset, sales, or procurement commitments.

I Confirm
No

Kennebunk Savings Bank Foundation
Form 990-PF
Tax Year Ended 12/31/19

EIN: 01-0547392

Part XV, Supplementary Information
Line 2, Information Regarding Grant Programs


Kennebunk Savings

Eligibility Quiz

Is your organization or the program you are seeking funding for based in one of the New England area states?

-Select One-

Next

Statement 4

Part XV, Supplementary Information
Line 2, Information Regarding Grant Programs

Kennebunk Savings

Eligibility Quiz

Is the organization or program for which you are requesting funding:

- A non-profit or charitable organization?
- Are you tax exempt as described in Internal Revenue Code -- either section 501(c)(3) or 509(a) (1) , (2), or (3)?
- Do you have active and responsible leadership -- paid and/or volunteer?
- Are you able to provide adequate financial information including income and expenses?

-Select One-

Next

Kennebunk Savings

Eligibility Quiz

Which of the following are you seeking funding for·

The Huntington Common Charitable Fund for Seniors of the Kennebunk Savings Bank Foundation

Submit

Kennebunk Savings Bank Foundation
Form 990-PF
Tax Year Ended 12/31/19

EIN: 01-0547392

Part XV, Supplementary Information
Line 2, Information Regarding Grant Programs

Kennebunk Savings

The Huntington Common Charitable Fund for Seniors of the Kennebunk Savings Bank Foundation was established in 2006. Every year the Kennebunk Savings Bank Foundation distributes proceeds from the Fund with the specific goal of helping seniors (ages 65 and older) throughout York County. The Foundation's Trustees will be guided by recommendations made by the Huntington Common Charitable Fund for Seniors Board of Advisors.

Does your grant proposal aim to help seniors in York County?

Yes

Submit

Part XV, Supplementary Information
Line 2, Information Regarding Grant Programs

Huntington Common Charitable Fund

Before You Begin

Some quick tips for using this online application form:

- Before filling out the application, you may find it helpful to click the "Printer Friendly Version" button above. This will offer you a preview of all of the questions on the application.
- You have the ability to save and come back to your application at a later time by clicking the "Save & Return to My Account" button at the bottom of each screen.
- To move to the next page, please click the "Next Page" button at the bottom of the page or click the page number at the top of the page to jump to that page.
- Do *not* use the "Back" or "Forward" buttons on your browser to navigate through this application.
- You might want to consider utilizing a word-processing tool (i.e. Microsoft Word), and then cutting and pasting your answers into the application.
- **When clicking the "Review Before Submitting" button:** You will be required to review the entire application one final time before clicking the "Submit Application" button at the bottom of the screen.

Contact Information

Organization Primary Contact
Prefix - Select One - First Name Last Name Title Office Address

Part XV, Supplementary Information
Line 2, Information Regarding Grant Programs

City

State
-
Select
One -

Zip Code

Office Phone

Fax

E-mail

Request Primary Contact

Same as Organization Primary Contact
No

Prefix
<None>

First
Name

Last Name

Title

Office Address

Part XV, Supplementary Information
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City

State

Zip Code

Office Phone

Fax

E-mail

Organization Information

Organization Legal Name

Tax ID
If known

Also Known As

Address

City

State

Part XV, Supplementary Information
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\- Select One -

Zip Code

County

Phone

Fax

E-mail Address

Website

Full-Time Staff

Part-Time Staff

Volunteers

Select the geographic area(s) that your organization serves.

Mission Statement

History/Background
Enter the Organization's brief history and background

Part XV, Supplementary Information
Line 2, Information Regarding Grant Programs

Request Information

Project Title

Request Amount

Project Start Date

Project End Date

Project Description
Brief description of the program for which you are requesting a donation, including program goals and objectives.

Please provide a detailed project budget for your request. If you do not have a budget you may use this budget template. Once completed, attach the budget using the upload button below. Budget Template

Attachment

Comments/Notes
If you have additional comments or anything else you'd like to add, please do so here.

Financial Information

If you are applying for a grant please complete the fields below.

Has the organization received a grant from Kennebunk Savings in the past?

If 'Yes', in what year was the most recent funding received?

Part XV, Supplementary Information
Line 2, Information Regarding Grant Programs

Please list the names and most current amounts of your primary funders/grantors (private/public or both) that have supported your organization during the most recent completed fiscal year.

Most Recent Audited Financial Statement

Current Organization Operating Budget with Revenue and Expenses

Confirmation

Confirmation of Charitable Intent

Check "I confirm" to certify the following:

We further certify that none of the proposed grant funds will be used to provide any direct benefit to Kennebunk Savings Bank or Kennebunk Savings Bank Foundation employee or any employee's family member (except in the provision of charitable services or education available to the public at large), or to any staff member, board member, or donor to the Organization. No goods or services have been offered or promised in consideration for this charitable contribution. I further certify that to the best of my knowledge, information, and belief, the purpose of this grant is charitable and for the good of the community, and is not intended to fulfill business purposes or obligations of any kind including but not limited to offset, sales, or procurement commitments.

I Confirm
No

Part XV, Supplementary Information
Line 3a, Grants and Contributions Paid During the Year

DATE	RECIPIENT					PURPOSE	AMOUNT
2/16/2019	Sanford-Springvale Mousam Way Land Trust	917 Main St Ste B	Sanford	ME	04073-3568	Community Gardens and Ecology Center	10,000
2/16/2019	Southern Maine Veterans Memorial Cemetery Associ	83 Stanley Rd	Springvale	ME	04083	POW/MIA Monument - Two tablets ($4,500 each)	9,000
2/25/2019	Friends Of Hope Cemetery & Woods	PO Box 1550	Kennebunk	ME	04043-4150	Hope Woods Conservation Initiative Year 2 of 2	50,000
3/8/2019	Arundel Conservation Trust	PO Box 2704	Kennebunkport	ME	04046-2704	Limerick Road Project - Capital Campaign	25,000
4/17/2019	Biddeford High School	20 Maplewood Avenue	Biddeford	ME	04005	Scholarship Award for Graduating Senior	1,000
4/17/2019	Dover High School	61 Locust Street, Suite 409	Dover	NH	03820	Scholarship Award for Graduating Senior	1,000
4/17/2019	Marshwood High School	260 Route 236	South Berwick	ME	3908	Scholarship Award for Graduating Senior	1,000
4/17/2019	Noble High School	388 Somersworth Road	North Berwick	ME	03906	Scholarship Award for Graduating Senior	1,000
4/17/2019	Portsmouth High School	50 Andrew Jarvis Drive	Portsmouth	NH	03801	Scholarship Award for Graduating Senior	1,000
4/17/2019	Sanford High School	917 Main Street Suite 200	Sanford	ME	04073	Scholarship Award for Graduating Senior	1,000
4/17/2019	Robert W Traip Academy	12 Williams Avenue	Kittery	ME	03904	Scholarship Award for Graduating Senior	1,000
4/17/2019	United Way of the Greater Seacoast	112 Corporate Dr , Unit 3	Portsmouth	NH	03801-6890	Employee Match	3,360
4/17/2019	United Way	PO Box 727	Kennebunk	ME	04043	Employee Match	52,610
4/17/2019	Wells High School	200 Sanford Road	Wells	ME	04090	Scholarship Award for Graduating Senior	1,000
4/17/2019	Winnacunnet High School	1 Alumni Drive	Hampton	NH	3842	Scholarship Award for Graduating Senior	1,000
4/17/2019	York High School	1 Robert Stevens Dr	York	ME	03909	Scholarship Award for Graduating Senior	1,000
4/25/2019	Center For Wildlife Inc	P O Box 620	Cape Neddick	ME	03902-0620	Capital Campaign commitment year 1 of 2	25,000
6/5/2019	University of New Hampshire Foundation Incorporat	Elliott Alumni Center9 Edgewood Rd	Durham	NH	03824-0000	Veterans of York County Community-Based Recreational Therapy	26,000
6/6/2019	Kennebunk High School	89 Fletcher Street	Kennebunk	ME	04043	Scholarship Award for Graduating Senior	1,000
6/6/2019	Southern Maine Veterans Memorial Cemetery Associ	83 Stanley Rd	Springvale	ME	04083	POW/MIA Tablet - Challenge Grant	4,500
6/6/2019	University of New Hampshire Foundation Incorporat	Elliott Alumni Center9 Edgewood Rd	Durham	NH	03824-0000	2019 Spotlight Fund - Northeast Passage's Recovery in Action Program	40,000
6/7/2019	Partners Healthcare System Inc	399 Revolution Dr Ste 645	Somerville	MA	03820-2526	Oral Health Community Outreach Program	5,000
6/7/2019	Carlisle Charitable Foundation	PO Box 935	Kennebunk	ME	04043-0935	Tuition Subsidy for Participation in Integrated Horsemanship Program for Seniors	6,000
6/18/2019	Hope On Haven Hill	158 US Route 108	Somersworth	NH	03878	2019 Spotlight Fund - New Database and Marketing Materials	5,000
7/10/2019	Dover Police Charities Inc	46 Chestnut St	Dover	NH	03820-3396	Spotlight Fund Dover Youth to Youth	2,500
7/10/2019	Greater Seacoast Community Health	100 Campus Drive, Suite 12	Portsmouth	NH	03801	SOS Recovery Community Organization - Spotlight Fund Recovery Coach Academy	20,000
7/10/2019	Portland Recovery Community Center	468 Forest Ave	Portland	ME	04101	Spotlight Fund York County Recovery Coaching Network	10,000
7/10/2019	Triangle Club Inc	120 Broadway	Dover	NH	03820-3230	Spotlight Fund Marketing Support	5,000
7/10/2019	United Way of the Greater Seacoast	112 Corporate Dr , Unit 3	Portsmouth	NH	03801-6890	Spotlight Fund Granite Youth Alliance	7,500
7/10/2019	University Of New England	11 Hills Beach Rd	Biddeford	ME	04005-9526	Spotlight Fund Project Alliance Kennebunk High School PSA	5,000
7/10/2019	York County Shelter Programs Inc	24 George Rd	Alfred	ME	04002	Spotlight Fund Recovery Coaching at Layman Way	10,000
7/10/2019	York Hospital	15 Hospital Drive 2C	York	ME	03909-1011	Spotlight Fund Youth Prevention Programming in York County	10,000
7/17/2019	Volunteers Of America	14 Maine St Ste 205	Brunswick	ME	04011-2051	Food Security for Seniors - Grocery Distribution	5,000
7/17/2019	Young Mens Christian Association Of Southern Maine	70 Forest Ave	Portland	ME	04101	Active Older Adults Program at the YMCA's Northern York County Branch	1,500
7/17/2019	York Hospital	15 Hospital Drive 2C	York	ME	03909-1011	Lunchtime Learning Champions in Care for Older Adults	8,000
8/24/2019	Sanford Schools Legacy Foundation	917 Main St Ste 200	Sanford	ME	04073-3568	Sanford High School and Regional Technical Center Career Center	10,000
8/30/2019	Animal Welfare Society Inc	Post Office Box 43	West Kennebunk	ME	04094	Renovation Capital Campaign Year 3 of 4	25,000
8/30/2019	Community Action Partnership Of Strafford County	577 Central Avenue, Suite 10	Dover	NH	03820	Open Doors Capital Campaign Year 3 of 4	25,000
8/30/2019	Hospice Of Southern Maine	180 US Route 1	Scarborough	ME	4074	Home Hospice Care Campaign - A Community Campaign to Build a Home Hospice Center	25,000
8/30/2019	William Fogg Public Library	PO Box 359	Eliot	ME	03903	William Fogg Public Library Expansion Project - Year 1 of 3	25,000
8/30/2019	Center For Wildlife Inc	P O Box 620	Cape Neddick	ME	03902-0620	Caring Community for Seniors	5,000
8/30/2019	Good Shepherd Food Bank	PO Box 1807	Auburn	ME	04211-1807	York County Seniors Produce Pilot	2,000
8/30/2019	Ogunquit Playhouse Foundation	PO Box 1510	Ogunquit	ME	03907-1510	Senior Engagement Project	5,000
8/30/2019	The Opportunity Alliance	50 Lydia Lane	South Portland	ME	04106	Senior Volunteer Programs	9,000
12/19/2019	Maine Parent Teacher Association Inc	24 Felt Rd	Bryant Pond	ME	04219	Kennebunk Inclusive Playground Project	$ 25,000
12/19/2019	Portland Recovery Community Center	468 Forest Ave	Portland	ME	04101	Spotlight Fund York County Recovery Coaching Network - Phase 2	10,000
12/20/2019	Animal Welfare Society Inc	Post Office Box 43	West Kennebunk	ME	04094	Companions for Life Keeping Vulnerable Pets with Senior Owners	7,500
12/20/2019	Senior Center At Lower Village Inc	175 Port Rd	Kennebunk	ME	04043-7735	The Center Safety and Beautification Project	10,000
12/20/2019	Good Shepherd Food Bank	PO Box 1807	Auburn	ME	04211-1807	Senior Food Mobiles Program Support in York County	15,000
							$ 555,470

Part XV, Supplementary Information
Line 3b, Grants & Contributions Approved for Future Payment

Recipient	Category/ Purpose	Year to be Paid	Amount
Animal Welfare Society PO Box 43 West Kennebunk, ME 04094	Capital Campaign	2020	$25,000
Strafford County CAP 642 Central Avenue Dover, NH 03820	Capital Campaign	2020	$25,000
Center for Wildlife PO Box 620 Cape Neddick, ME 03902	Capital Campaign	2020	$25,000
Avesta Housing 307 Cumberland Avenue Portland, ME 04101	Capital Campaign	2020 2021 2022	$25,000 $25,000 $25,000
William Fogg Library PO Box 359 Eliot, ME 03903	Expansion Project	2020 2021	$25,000 $25,000
TOTAL APPROVED FOR FUTURE PAYMENT			**$200,000**