

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 2019, and ending 20

Name of foundation	WILBUR A. AND HELEN L. PARK CHARITABLE TRUST			A Employer identification number <u>65-6418396</u>
06-0266	Number and street (or P.O. box number if mail is not delivered to street address)	Room/suite	B Telephone number (see instructions)	<u>207-619-8624</u>
5 MILK STREET, FIRST FLOOR City or town, state or province, country, and ZIP or foreign postal code PORTLAND, ME 04101				C If exemption application is pending, check here <input type="checkbox"/>
G Check all that apply: <input type="checkbox"/> Initial return <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Final return <input checked="" type="checkbox"/> Amended return <input type="checkbox"/> Address change <input type="checkbox"/> Name change				D 1. Foreign organizations, check here . . . <input type="checkbox"/> 2 Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
H Check type of organization: <input type="checkbox"/> Section 501(c)(3) exempt private foundation <input checked="" type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation				E If private foundation status was terminated under section 507(b)(1)(A), check here . . . <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ► \$ <u>423,406</u> . (J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> 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 . . . <input type="checkbox"/>
Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions).)		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income
		(d) Disbursements for charitable purposes (cash basis only)		
1 Contributions, gifts, grants, etc., received (attach schedule) .				
2 Check ► <input checked="" type="checkbox"/> if the foundation is not required to attach Sch. B.				
3 Interest on savings and temporary cash investments.	791.	791.		
4 Dividends and interest from securities	11,550.	11,550.		
5a Gross rents				
b Net rental income or (loss) _____				
6a Net gain or (loss) from sale of assets not on line 10	4,786.			
b Gross sales price for all assets on line 6a <u>108,401</u>				
7 Capital gain net income (from Part IV, line 2) .		4,786.		
8 Net short-term capital gain.				
9 Income modifications				
10a Gross sales less returns and allowances				
b Less. Cost of goods sold .				
c Gross profit or (loss) (attach schedule)				
11 Other income (attach schedule)				
12 Total. Add lines 1 through 11	17,127.	17,127.		
13 Compensation of officers, directors, trustees, etc. .	6,964.	6,964.		
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)	663.	347.		
19 Depreciation (attach schedule) and depletion .				
20 Occupancy				
21 Travel, conferences, and meetings				
22 Printing and publications				
23 Other expenses (attach schedule)				
24 Total operating and administrative expenses.				
Add lines 13 through 23.	7,627.	7,311.		
25 Contributions, gifts, grants paid	27,000.			26,997.
26 Total expenses and disbursements. Add lines 24 and 25	34,627.	7,311.		26,997.
27 Subtract line 26 from line 12:				
a Excess of revenue over expenses and disbursements	-17,500.			
b Net investment income (if negative, enter -0-)		9,816.		
c Adjusted net income (if negative, enter -0-)				

JSA For Paperwork Reduction Act Notice, see instructions.

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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				
	2 Savings and temporary cash investments		26,805.		
	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) . STMT 1 .	283,314.			
	c Investments - corporate bonds (attach schedule) . STMT 3 .	130,261.	423,406.	423,406.	
Liabilities	11 Investments - land, buildings, and equipment: basis ►				
	Less: accumulated depreciation ►				
	12 Investments - mortgage loans				
	13 Investments - other (attach schedule)				
	14 Land, buildings, and equipment: basis ►				
	Less: accumulated depreciation ►				
	15 Other assets (describe ►)				
	16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item I)	440,380.	423,406.	423,406.	
	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	
Net Assets or Fund Balances	Foundations that follow FASB ASC 958, check here ► <input type="checkbox"/>				
	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 ► <input checked="" type="checkbox"/>				
	and complete lines 26 through 30.				
	26 Capital stock, trust principal, or current funds	440,380.	423,406.		
	27 Paid-in or capital surplus, or land, bldg., and equipment fund				
	28 Retained earnings, accumulated income, endowment, or other funds				
	29 Total net assets or fund balances (see instructions)	440,380.	423,406.		
	30 Total liabilities and net assets/fund balances (see instructions)	440,380.	423,406.		

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	440,380.
2 Enter amount from Part I, line 27a	2	-17,500.
3 Other increases not included in line 2 (itemize) ► <u>VARIOUS ADJUSTMENTS</u>	3	526.
4 Add lines 1, 2, and 3	4	423,406.
5 Decreases not included in line 2 (itemize) ►	5	
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 29	6	423,406.

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Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (for example, real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
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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 108,401.		103,615.	4,786.
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			4,786.
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	4,786.
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	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))
2018	27,784.	518,802.	0.053554
2017	47,971.	528,088.	0.090839
2016	27,618.	569,296.	0.048513
2015	9,732.	555,229.	0.017528
2014			

2 Total of line 1, column (d)	2	0.210434
3 Average distribution ratio for the 5-year base period - divide the total on line 2 by 5.0, or by the number of years the foundation has been in existence if less than 5 years	3	0.052609
4 Enter the net value of noncharitable-use assets for 2019 from Part X, line 5	4	533,264.
5 Multiply line 4 by line 3	5	28,054.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	98.
7 Add lines 5 and 6	7	28,152.
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	26,997.

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 ► <input type="checkbox"/> and enter "N/A" on line 1 . . .	1	196.
'	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 type="checkbox"/> and enter 1% of Part I, line 27b		
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations, enter 4% of Part I, line 12, col. (b)		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-)	2	NONE
3	Add lines 1 and 2	3	196.
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-)	4	NONE
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5	196.
6	Credits/Payments:		
a	2019 estimated tax payments and 2018 overpayment credited to 2019	6a	216.
b	Exempt foreign organizations - tax withheld at source	6b	NONE
c	Tax paid with application for extension of time to file (Form 8868)	6c	NONE
d	Backup withholding erroneously withheld	6d	
7	Total credits and payments. Add lines 6a through 6d	7	216.
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	9	
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid ► 10	10	20.
11	Enter the amount of line 10 to be: Credited to 2020 estimated tax ► 20. Refunded ► 11	11	

Part VII-A Statements Regarding Activities

1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	Yes	No
1b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition	X	
1c	If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.	X	
2	Did the foundation file Form 1120-POL for this year?	X	
3	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year:		
4a	(1) On the foundation. ► \$ _____ (2) On foundation managers. ► \$ _____		
4b	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ► \$ _____		
5	Has the foundation engaged in any activities that have not previously been reported to the IRS?	X	
6	If "Yes," attach a detailed description of the activities.		
7	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes	X	
8a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	X	
8b	If "Yes," has it filed a tax return on Form 990-T for this year?	X	
9	Was there a liquidation, termination, dissolution, or substantial contraction during the year?	X	
10	If "Yes," attach the statement required by <i>General Instruction T</i> .		
11	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either:		
12	• By language in the governing instrument, or		
13	• 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?		
14	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		
15	Enter the states to which the foundation reports or with which it is registered. See instructions. ► ME		
16	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		
17	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		
18	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	X
12 Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement. See instructions	12	X
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► <u>N/A</u>	13	X
14 The books are in care of ► <u>Camden National Bank</u> Telephone no. ► <u>(207) 619-8624</u> Located at ► <u>5 MILK STREET, 5TH FLOOR, PORTLAND, ME</u> ZIP+4 ► <u>04101</u>		
15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - check here ► <u>15</u> and enter the amount of tax-exempt interest received or accrued during the year		
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? See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country ►	16	X

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

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

	Yes	No
1a During the year, did the foundation (either directly or indirectly):		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	<input type="checkbox"/>	Yes <input checked="" type="checkbox"/> No
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	<input type="checkbox"/>	Yes <input checked="" type="checkbox"/> No
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	<input type="checkbox"/>	Yes <input checked="" type="checkbox"/> No
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	<input checked="" type="checkbox"/>	Yes <input type="checkbox"/> No
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	<input type="checkbox"/>	Yes <input checked="" type="checkbox"/> No
(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)	<input type="checkbox"/>	Yes <input checked="" type="checkbox"/> No
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions	1b	X
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 2019?	1c	X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)).		
a At the end of tax year 2019, did the foundation have any undistributed income (Part XIII, lines 6d and 6e) for tax year(s) beginning before 2019?	<input type="checkbox"/>	Yes <input checked="" type="checkbox"/> No
If "Yes," list the years ► <u> </u>		
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. ► <u> </u>		
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 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	
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2019?	4b	X

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

5a	During the year, did the foundation pay or incur any amount to:	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	Yes	No
	(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	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	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?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	6b	X
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	7b	
	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?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No		
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
CAMDEN NATIONAL WEALTH MANAGEMENT 5 Milk St First Floor, Portland, ME 04101	Trustee 2	6,964.	-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		NONE	NONE	NONE

Total number of other employees paid over \$50,000 ► **NONE**

Part VIII³ 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		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.

Organizations and other beneficiaries served, conferences convened, research papers produced, etc.	
1	<u>NONE</u>
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.

1	NONE	

2	_____	

All other program-related investments. See instructions.		
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 541,385.
b Average of monthly cash balances	1b NONE
c Fair market value of all other assets (see instructions)	1c NONE
d Total (add lines 1a, b, and c)	1d 541,385.
e Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e
2 Acquisition indebtedness applicable to line 1 assets	2 NONE
3 Subtract line 2 from line 1d.	3 541,385.
4 Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4 8,121.
5 Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5 533,264.
6 Minimum investment return. Enter 5% of line 5	6 26,663.

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 26,663.
2a Tax on investment income for 2019 from Part VI, line 5	2a 196.
b Income tax for 2019. (This does not include the tax from Part VI.)	2b
c Add lines 2a and 2b.	2c 196.
3 Distributable amount before adjustments. Subtract line 2c from line 1.	3 26,467.
4 Recoveries of amounts treated as qualifying distributions.	4 NONE
5 Add lines 3 and 4	5 26,467.
6 Deduction from distributable amount (see instructions)	6 NONE
7 Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1.	7 26,467.

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 26,997.
b Program-related investments - total from Part IX-B.	1b
2 Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes.	2 NONE
3 Amounts set aside for specific charitable projects that satisfy the:	
a Suitability test (prior IRS approval required)	3a NONE
b Cash distribution test (attach the required schedule)	3b NONE
4 Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8; and Part XIII, line 4	4 26,997.
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 N/A
6 Adjusted qualifying distributions. Subtract line 5 from line 4	6 26,997.

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				26,467.
2 Undistributed income, if any, as of the end of 2019:				
a Enter amount for 2018 only.			NONE	
b Total for prior years: 20_____, 20_____, 20_____		NONE		
3 Excess distributions carryover, if any, to 2019:				
a From 2014	NONE			
b From 2015	NONE			
c From 2016	NONE			
d From 2017	3,359.			
e From 2018	2,276.			
f Total of lines 3a through e	5,635.			
4 Qualifying distributions for 2019 from Part XII, line 4: ► \$ 26,997.				
a Applied to 2018, but not more than line 2a			NONE	
b Applied to undistributed income of prior years (Election required - see instructions)		NONE		
c Treated as distributions out of corpus (Election required - see instructions)	NONE			
d Applied to 2019 distributable amount.				26,467.
e Remaining amount distributed out of corpus.	530.			
5 Excess distributions carryover applied to 2019 (If an amount appears in column (d), the same amount must be shown in column (a).)	NONE			NONE
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	6,165.			
b Prior years' undistributed income. Subtract line 4b from line 2b.		NONE		
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		NONE		
d Subtract line 6c from line 6b. Taxable amount - see instructions		NONE		
e Undistributed income for 2018. Subtract line 4a from line 2a. Taxable amount - see instructions			NONE	
f Undistributed income for 2019. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2020.				NONE
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)	NONE			
8 Excess distributions carryover from 2014 not applied on line 5 or line 7 (see instructions)	NONE			
9 Excess distributions carryover to 2020. Subtract lines 7 and 8 from line 6a	6,165.			
10 Analysis of line 9:				
a Excess from 2015	NONE			
b Excess from 2016	NONE			
c Excess from 2017	3,359.			
d Excess from 2018	2,276.			
e Excess from 2019	530.			

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

NOT APPLICABLE

a 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					
b Check box to indicate whether the foundation is a private operating foundation described in section	4942(j)(3) or		4942(j)(5)		
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed.	Tax year	Prior 3 years			(e) Total
	(a) 2019	(b) 2018	(c) 2017	(d) 2016	
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(e)(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).)

N/A

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.

N/A

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

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

- a The name, address, and telephone number or email address of the person to whom applications should be addressed:
- b The form in which applications should be submitted and information and materials they should include:
- c Any submission deadlines:
- d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors:

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<i>a Paid during the year</i>				
SEE STATEMENT 10				26,997.
Total			► 3a	26,997.
<i>b Approved for future payment</i>				
Total			► 3b	

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	791 .	
4 Dividends and interest from securities			14	11,550 .	
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	4,786 .	
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)				17,127 .	
13 Total. Add line 12, columns (b), (d), and (e) (See worksheet in line 13 instructions to verify calculations.)				13	17,127 .

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

NOT APPLICABLE

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:		
(1)	Cash	1a(1)	X
(2)	Other assets	1a(2)	X
b	Other transactions:		
(1)	Sales of assets to a noncharitable exempt organization	1b(1)	X
(2)	Purchases of assets from a noncharitable exempt organization	1b(2)	X
(3)	Rental of facilities, equipment, or other assets	1b(3)	X
(4)	Reimbursement arrangements	1b(4)	X
(5)	Loans or loan guarantees	1b(5)	X
(6)	Performance of services or membership or fundraising solicitations	1b(6)	X
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c	X
d	If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received.		

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

b If "Yes," complete the following schedule.

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

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

**Sign
Here**

► Jaime Estlein

05/27/2020

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 DEBRA M CLEARY	Preparer's signature <i>Debra M Cleary</i>	Date 05/27/2020	Check <input type="checkbox"/> if self-employed	PTIN P01497289
	Firm's name ► ERNST & YOUNG U.S. LLP	Firm's EIN ► 34-6565596			
	Firm's address ► 200 CLARENDON STREET BOSTON, MA	02116	Phone no. 617-587-9025		

FORM 990PF, PART II - CORPORATE STOCK

DESCRIPTION

ACCENTURE PLC 85 SHS
ADOBE SYSTEMS INC 25 SHS
AT&T INC 250 SHS
BARD CR INC 40 SHS
BCE INC 225 SHS
BECTION DICKINSON 50 SHS
CHECK POINT SOFTWARE TECH LTD
CHUBB LTD 87 SHS
CONAGRA BRANDS INC 210 SHS
DUKE ENERGY CORP 45 SHS
FLIR SYSTEMS INC 260 SHS
GENERAL ELECTRIC CORP 190 SHS
GENERAL MILLS INC 150 SHS
INTEL CORP 260 SHS
INTERNATIONAL FLAVORS & FRAGR
INTERNATIONAL BUSINESS MACHINE
JOHNSON & JOHNSON 90 SHS
KIMBERLY CLARK CORP 80 SHS
MCDONALDS CORP 50 SHS
MERCK & CO INC 130 SHS
MICROSOFT CORP 85 SHS
MONDELEZ INTL INC 85 SHS
NORTHWEST NAT GAS COMPANY 155
NOVARTIS AG SPONS ADR 120 SHS
OMNICOM GROUP 125 SHS
PEPSICO INC 90 SHS
PRAXAIR INC 70 SHS
PROCTER & GAMBLE CO 115 SHS
PUBLIC SERVICES INC 110 SHS

FORM 990PF, PART II - CORPORATE STOCK

DESCRIPTION

ROCKWELL COLLING 45 SHS
SYSSCO CORP 165 SHS
TARGET CORP 65 SHS
THE SOUTHERN COMPANY 75 SHS
TJS COS INC 100 SHS
TRANSCANADA CORP 170 SHS
UNITED PARCEL SVC CL B 60 SHS
UNITED TECHNOLOGIES CORP 71 SH
US BANCORP NEW 215 SHS
VENTAS INC REIT 145 SHS
WEYERHAEUSER CO REIT 244 SHS
XYLEM INC 130 SHS
FINANCIAL SEL SECTOR SPDR ETF
GENUINE PARTS CO 85 SHS
LINDE PLC 70 SHS
MEDTRONIC PLC 46 SHS
PAYCHEX INC 110 SHS
ZOETIS INC 80 SHS
3M 40 SHS
VISA INC CL A 55 SHS

TOTALS

FORM 990PF, PART II - CORPORATE BONDS

DESCRIPTION

ABBVIE 2.000% 11.6.2018 NONCAL
DR PEPPER/SNAPPLE GROUP 2.600%
FFCB 1.250% 10.22.2019 NONCALL
RYDER SYSTEM INC 2.875% 9.1.20
VANGUARD SHORT TERM BOND INDEX
VANGUARD TOTAL BOND INDEX VBTI
US TREASURY NOTES 12/31/2021 2

TOTALS

WILBUR A. AND HELEN L. PARK CHARITABLE TRUST
FORM 990PF, PART XV, LINE 3a - CONTRIBUTIONS, GIFTS, GRANTS PAID
=====

RECIPIENT NAME:

UNITED WAY OF EASTERN MAINE
ATTN: RACHEL GRIVOIS

ADDRESS:

700 MAIN STREET, SUITE 1
BANGOR, ME 04401

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

CHARITABLE PURPOSES OF THE ORGANIZATION

AMOUNT OF GRANT PAID 2,700.

RECIPIENT NAME:

AMERICAN LUNG ASSOCIATION OF MAINE

ADDRESS:

122 STATE STREET
AUGUSTA, ME 04330-5689

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

CHARITABLE PURPOSES OF THE ORGANIZATION

AMOUNT OF GRANT PAID 96.

RECIPIENT NAME:

PINE TREE SOCIETY

ADDRESS:

149 FRONT STREET
BATH, ME 04530

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

CHARITABLE PURPOSES OF THE ORGANIZATION

AMOUNT OF GRANT PAID 96.

STATEMENT 4

WILBUR A. AND HELEN L. PARK CHARITABLE TRUST
FORM 990PF, PART XV, LINE 3a - CONTRIBUTIONS, GIFTS, GRANTS PAID

65-6418396

=====

RECIPIENT NAME:

THE MAINE CHILDREN'S HOME
ATTN: STEVE MAYBERRY

ADDRESS:

93 SILVER STREET
WATERVILLE, ME 04901-5923

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

CHARITABLE PURPOSES OF THE ORGANIZATION

AMOUNT OF GRANT PAID 96.

RECIPIENT NAME:

ORONO NURSING ASSOCIATION
ANNIE BROWN, TREASURER

ADDRESS:

59 MAIN STREET
ORONO, ME 04473

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

CHARITABLE PURPOSES OF THE ORGANIZATION

AMOUNT OF GRANT PAID 675.

RECIPIENT NAME:

OLD TOWN/ORONO SENIOR CITIZENS
C/O AVA SPRUCE, PRESIDENT

ADDRESS:

11 CRAM STREET
BRADLEY, ME 04411

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

CHARITABLE PURPOSES OF THE ORGANIZATION

AMOUNT OF GRANT PAID 1,350.

STATEMENT 5

WILBUR A. AND HELEN L. PARK CHARITABLE TRUST
FORM 990PF, PART XV, LINE 3a - CONTRIBUTIONS, GIFTS, GRANTS PAID

65-6418396

RECIPIENT NAME:

OUR CHURCH FOR THE MUSIC COMMISSION
ATTN: TREASURER

ADDRESS:

36 OAK STREET
ORONO, ME 04473

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

CHARITABLE PURPOSES OF THE ORGANIZATION

AMOUNT OF GRANT PAID 675.

RECIPIENT NAME:

ORONO PUBLIC LIBRARY
ATTN: LAURIE CARPENTER

ADDRESS:

39 PINE STREET
ORONO, ME 04473

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

CHARITABLE PURPOSES OF THE ORGANIZATION

AMOUNT OF GRANT PAID 2,700.

RECIPIENT NAME:

ORONO-OLD TOWN KIWANIS CLUB
JOE PLUFF, TREASURER

ADDRESS:

PO BOX 515
ORONO, ME 04473-0515

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

CHARITABLE PURPOSES OF THE ORGANIZATION

AMOUNT OF GRANT PAID 1,350.

STATEMENT 6

WILBUR A. AND HELEN L. PARK CHARITABLE TRUST
FORM 990PF, PART XV, LINE 3a - CONTRIBUTIONS, GIFTS, GRANTS PAID

65-6418396

=====

RECIPIENT NAME:

GEN'L ALUMNI ASSOC. OF UNIV OF MAINE
BUCHANAN ALUMNI HOUSE

ADDRESS:

2 ALUMNI PLACE
ORONO, ME 04469

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

CHARITABLE PURPOSES OF THE ORGANIZATION

AMOUNT OF GRANT PAID 1,350.

RECIPIENT NAME:

BANGOR THEOLOGICAL SEMINARY
REVEREND DR. ROBERT GROVE-MARKWOOD

ADDRESS:

97 INDIA STREET
PORTLAND, ME 04101

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

CHARITABLE PURPOSES OF THE ORGANIZATION

AMOUNT OF GRANT PAID 675.

RECIPIENT NAME:

U OF M PATRON OF FINE ARTS FUND
BUCHANAN ALUMNI HOUSE-C/O S MELANSON

ADDRESS:

2 ALUMNI PLACE
ORONO, ME 04469

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

CHARITABLE PURPOSES OF THE ORGANIZATION

AMOUNT OF GRANT PAID 96.

STATEMENT 7

WILBUR A. AND HELEN L. PARK CHARITABLE TRUST
FORM 990PF, PART XV, LINE 3a - CONTRIBUTIONS, GIFTS, GRANTS PAID

65-6418396

RECIPIENT NAME:

SPRINGFIELD SHRINER'S HOSPITAL
ATT:TRUST/INVESTMENT ACCOUNTING TEAM

ADDRESS:

P.O. BOX 31356
TAMPA, FL 33631-3356

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

CHARITABLE PURPOSES OF THE ORGANIZATION

AMOUNT OF GRANT PAID 6,750.

RECIPIENT NAME:

AMERICAN CANCER SOCIETY
ATTN: MICHAEL SAENZ

ADDRESS:

P.O. BOX 720366
OKLAHOMA CITY, OK 73172

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

CHARITABLE PURPOSES OF THE ORGANIZATION

AMOUNT OF GRANT PAID 96.

RECIPIENT NAME:

SUNSHINE CLUB FOR CHILDREN
C/O ELIZABETH TRIMM, TREASURER

ADDRESS:

43 STARLIGHT DRIVE
EDDINGTON, ME 04428

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

CHARITABLE PURPOSES OF THE ORGANIZATION

AMOUNT OF GRANT PAID 96.

STATEMENT 8

WILBUR A. AND HELEN L. PARK CHARITABLE TRUST
FORM 990PF, PART XV, LINE 3a - CONTRIBUTIONS, GIFTS, GRANTS PAID

65-6418396

RECIPIENT NAME:

SALVATION ARMY FBO BANGOR CORPS

ADDRESS:

440 W. NYACK RD. ATTN: LEGAL DEPT.
WEST NYACK, NY 10994

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

CHARITABLE PURPOSES OF THE ORGANIZATION

AMOUNT OF GRANT PAID 96.

RECIPIENT NAME:

ORONO-OLD TOWN YMCA
ATTN: JANELLE LIBBY

ADDRESS:

472 STILLWATER AVENUE
OLD TOWN, ME 04468

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

CHARITABLE PURPOSES OF THE ORGANIZATION

AMOUNT OF GRANT PAID 1,350.

RECIPIENT NAME:

UNIVMA
UNIVERSITY OF MAINE ORONO

ADDRESS:

2 ALUMNI PLACE
ORONO, ME 04469

AMOUNT OF GRANT PAID 2,700.

RECIPIENT NAME:

RSU#26
Lynn Gray

ADDRESS:

10 GOODRIDGE DRIVE
ORONO, ME 04473

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

CHARITABLE PURPOSES OF THE ORGANIZATION

AMOUNT OF GRANT PAID 4,050.

STATEMENT 9

WILBUR A. AND HELEN L. PARK CHARITABLE TRUST
FORM 990PF, PART XV, LINE 3a - CONTRIBUTIONS, GIFTS, GRANTS PAID
=====

RECIPIENT NAME:
ORONO NURSING ASSOCIATION
ANNIE BROWN, TREASURER
ADDRESS:
59 MAIN STREET
ORONO, ME 04473

TOTAL GRANTS PAID: 26,997.
=====

STATEMENT 10

WILBUR A. AND HELEN L. PARK CHARITABLE TRUST

65-6418396

FEDERAL FOOTNOTES

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THIS 990-PF IS BEING AMENDED TO CORRECTLY REPORT QUALIFYING
DISTRIBUTIONS

STATEMENT 11

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