

Form **990-PF**
 Department of the Treasury
 Internal Revenue Service

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

▶ **Do not enter social security numbers on this form as it may be made public.**
 ▶ **Go to www.irs.gov/Form990PF for instructions and the latest information.**

OMB No. 1545-0052
2020
Open to Public Inspection

For calendar year 2020, or tax year beginning 07-01-2020, and ending 06-30-2021

Name of foundation WARDWELL HOME FOR THE AGING INC		A Employer identification number 01-0213987	
Number and street (or P.O. box number if mail is not delivered to street address) 43 MIDDLE STREET	Room/suite	B Telephone number (see instructions) (207) 284-7061	
City or town, state or province, country, and ZIP or foreign postal code SACO, ME 04072		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 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 checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>	
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ▶ \$ <u>12,324,900</u>		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>	
J Accounting method: <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ (Part I, column (d) must be on cash basis.)			

Part I Analysis of Revenue and Expenses <small>(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions).)</small>		(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) 50,073	50,073			
	2 Check <input type="checkbox"/> if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments 2,487	2,487	2,487	2,487	
	4 Dividends and interest from securities 201,832	201,832	201,832	201,832	
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10 228,054	228,054			
	b Gross sales price for all assets on line 6a 1,666,507	1,666,507			
	7 Capital gain net income (from Part IV, line 2)		228,054		
	8 Net short-term capital gain 228,054			228,054	
	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) 1,269,027	1,269,027	0	1,269,027		
12 Total. Add lines 1 through 11 1,751,473	1,751,473	432,373	1,701,400		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc. 79,966	79,966	0	79,966	0
	14 Other employee salaries and wages 577,530	577,530	20,000	557,530	18,714
	15 Pension plans, employee benefits 109,408	109,408	3,328	106,080	3,114
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule) 23,068	23,068	11,534	11,534	339
	c Other professional fees (attach schedule)				
	17 Interest 45,887	45,887	0	45,887	1,347
	18 Taxes (attach schedule) (see instructions) 29,076	29,076	0	29,076	854
	19 Depreciation (attach schedule) and depletion 160,378	160,378	0	160,378	
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule) 474,263	474,263	28,809	445,454	13,070
	24 Total operating and administrative expenses. Add lines 13 through 23 1,499,576	1,499,576	63,671	1,435,905	37,438
	25 Contributions, gifts, grants paid 600	600			600
26 Total expenses and disbursements. Add lines 24 and 25 1,500,176	1,500,176	63,671	1,435,905	38,038	
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements 251,297	251,297				
b Net investment income (if negative, enter -0-) 368,702		368,702			
c Adjusted net income (if negative, enter -0-) 265,495			265,495		

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	567,223	576,583	576,583
	2 Savings and temporary cash investments	767,123	720,592	720,592
	3 Accounts receivable ▶ <u>1,300</u>			
	Less: allowance for doubtful accounts ▶ _____		1,300	1,300
	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	12,959	14,693	14,693
	10a Investments—U.S. and state government obligations (attach schedule)			
	b Investments—corporate stock (attach schedule)	1,636,973	2,621,728	2,621,728
	c Investments—corporate bonds (attach schedule)	1,804,637	1,483,065	1,483,605
	11 Investments—land, buildings, and equipment: basis ▶ _____			
Less: accumulated depreciation (attach schedule) ▶ _____				
12 Investments—mortgage loans				
13 Investments—other (attach schedule)	654,200	654,200	654,200	
14 Land, buildings, and equipment: basis ▶ <u>8,089,904</u>				
Less: accumulated depreciation (attach schedule) ▶ <u>3,639,839</u>	4,570,014	4,450,065	4,450,065	
15 Other assets (describe ▶ _____)	1,548,371	1,802,134	1,802,134	
16 Total assets (to be completed by all filers—see the instructions. Also, see page 1, item I)	11,561,500	12,324,360	12,324,900	
Liabilities	17 Accounts payable and accrued expenses	1,920	912	
	18 Grants payable			
	19 Deferred revenue	33	1,350	
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable (attach schedule)	1,827,789	1,733,996	
	22 Other liabilities (describe ▶ _____)	64,094	62,170	
	23 Total liabilities (add lines 17 through 22)	1,893,836	1,798,428	
Net Assets or Fund Balances	Foundations that follow FASB ASC 958, check here ▶ <input checked="" type="checkbox"/> and complete lines 24, 25, 29 and 30.			
	24 Net assets without donor restrictions	8,085,958	8,983,396	
	25 Net assets with donor restrictions	1,581,706	1,542,536	
	Foundations that do not follow FASB ASC 958, check here ▶ <input type="checkbox"/> 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			
29 Total net assets or fund balances (see instructions)	9,667,664	10,525,932		
30 Total liabilities and net assets/fund balances (see instructions) .	11,561,500	12,324,360		

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	9,667,664
2 Enter amount from Part I, line 27a		2	251,297
3 Other increases not included in line 2 (itemize) ▶ _____		3	606,971
4 Add lines 1, 2, and 3		4	10,525,932
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	10,525,932

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1 a PUBLICLY TRADED SECURITIES	P		
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 1,666,507		1,438,453	228,054
b			
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col.(h))
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a			228,054
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	228,054
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	228,054

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

SECTION 4940(e) REPEALED ON DECEMBER 20, 2019 - DO NOT COMPLETE

1 Reserved			
(a) Reserved	(b) Reserved	(c) Reserved	(d) Reserved
2 Reserved			2
3 Reserved			3
4 Reserved			4
5 Reserved			5
6 Reserved			6
7 Reserved			7
8 Reserved			8

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 [X] and enter "N/A" on line 1. Date of ruling or determination letter: 1986-10-09 (attach copy of letter if necessary—see instructions)
b Reserved
c All other domestic foundations enter 1.39% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)
3 Add lines 1 and 2.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-
6 Credits/Payments:
a 2020 estimated tax payments and 2019 overpayment credited to 2020
b Exempt foreign organizations—tax withheld at source
c Tax paid with application for extension of time to file (Form 8868)
d Backup withholding erroneously withheld
7 Total credits and payments. Add lines 6a through 6d.
8 Enter any penalty for underpayment of estimated tax. Check here [] if Form 2220 is attached.
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid.
11 Enter the amount of line 10 to be: Credited to 2021 estimated tax Refunded

Part VII-A Statements Regarding Activities

1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? (see Instructions for definition).
c Did the foundation file Form 1120-POL for this year?
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. (2) On foundation managers.
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers.
2 Has the foundation engaged in any activities that have not previously been reported to the IRS?
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?
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?
4b If "Yes," has it filed a tax return on Form 990-T for this year?
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year?
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either:
7 Did the foundation have at least \$5,000 in assets at any time during the year?
8a Enter the states to which the foundation reports or with which it is registered
8b 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?
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 2020 or the taxable year beginning in 2020?
10 Did any persons become substantial contributors during the tax year?

Part VII-A Statements Regarding Activities (continued)

Table with 3 columns: Question, Yes, No. Rows 11-14 regarding controlled entities, distributions, public inspection requirements, and books in care.

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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.

Table with 3 columns: Question, Yes, No. Row 16 regarding interest in foreign countries.

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.

Main table with 3 columns: Question, Yes, No. Rows 1a-4b regarding Form 4720 exceptions and requirements.

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

5a During the year did the foundation pay or incur any amount to:

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? Yes No

(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive? Yes No

(3) Provide a grant to an individual for travel, study, or other similar purposes? Yes No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions. Yes No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? Yes No

b If any answer is "Yes" to 5a(1)–(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance? See instructions **5b**

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

c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? 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? Yes No **6b** **No**
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? Yes No **7b**

8 Is the foundation subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment during the year? Yes No

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors

1 List all officers, directors, trustees, foundation managers and their compensation. See instructions

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
See Additional Data Table				

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

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

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

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

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

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

Part IX-A Summary of Direct Charitable Activities

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

	Expenses
1 PROVIDING HOUSING AND RESIDENTIAL SERVICES FOR THE ELDERLY.	1,435,905
2	
3	
4	

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

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

	Amount
1	
2	
All other program-related investments. See instructions.	
3	
Total. Add lines 1 through 3 ▶	0

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities.	1a	3,773,202
b	Average of monthly cash balances.	1b	1,314,261
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	5,087,463
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	5,087,463
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	76,312
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	5,011,151
6	Minimum investment return. Enter 5% of line 5.	6	250,558

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	
2a	Tax on investment income for 2020 from Part VI, line 5.	2a	
b	Income tax for 2020. (This does not include the tax from Part VI.).	2b	
c	Add lines 2a and 2b.	2c	
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	
6	Deduction from distributable amount (see instructions).	6	
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1.	7	

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	38,038
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	43,326
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required).	3a	
b	Cash distribution test (attach the required schedule).	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	81,364
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	0
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	81,364

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 2019	(c) 2019	(d) 2020
1 Distributable amount for 2020 from Part XI, line 7				
2 Undistributed income, if any, as of the end of the end of 2020:				
a Enter amount for 2019 only.				
b Total for prior years: 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2020:				
a From 2015.				
b From 2016.				
c From 2017.				
d From 2018.				
e From 2019.				
f Total of lines 3a through e.				
4 Qualifying distributions for 2020 from Part XII, line 4: ▶ \$ _____				
a Applied to 2019, but not more than line 2a				
b Applied to undistributed income of prior years (Election required—see instructions).				
c Treated as distributions out of corpus (Election required—see instructions).				
d Applied to 2020 distributable amount.				
e Remaining amount distributed out of corpus				
5 Excess distributions carryover applied to 2020. (If an amount appears in column (d), the same amount must be shown in column (a).)				
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5				
b Prior years' undistributed income. Subtract line 4b from line 2b				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.				
d Subtract line 6c from line 6b. Taxable amount—see instructions				
e Undistributed income for 2019. Subtract line 4a from line 2a. Taxable amount—see instructions				
f Undistributed income for 2021. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2020				
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions).				
8 Excess distributions carryover from 2015 not applied on line 5 or line 7 (see instructions).				
9 Excess distributions carryover to 2021. Subtract lines 7 and 8 from line 6a				
10 Analysis of line 9:				
a Excess from 2016.				
b Excess from 2017.				
c Excess from 2018.				
d Excess from 2019.				
e Excess from 2020.				

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 2020, enter the date of the ruling. 1986-10-09

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

	Tax year				(e) Total
	(a) 2020	(b) 2019	(c) 2018	(d) 2017	
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed	250,558	159,802	278,583	2,684	691,627
b 85% of line 2a	212,974	135,832	236,796	2,281	587,883
c Qualifying distributions from Part XII, line 4 for each year listed	81,364	109,166	153,141	133,651	477,322
d Amounts included in line 2c not used directly for active conduct of exempt activities	0	0	0	0	0
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c	81,364	109,166	153,141	133,651	477,322
3 Complete 3a, b, or c for the alternative test relied upon:					
a "Assets" alternative test—enter:					
(1) Value of all assets					0
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					0
b "Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed.	167,039	155,007	196,805	195,332	714,183
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)					0
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii).					0
(3) Largest amount of support from an exempt organization					0
(4) Gross investment income					0

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).)

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

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

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

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

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

c Any submission deadlines:

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

Part XV **Supplementary Information** (continued)

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a <i>Paid during the year</i> VARIOUS LOCAL CHARITABLE ORGANIZATIONS VARIOUS SACO, ME 04072	NONE		CHARITABLE ACTIVITIES	600
Total ▶ 3a				600
b <i>Approved for future payment</i>				
Total ▶ 3b				0

Part XVI-A Analysis of Income-Producing Activities

Table with 5 main columns: (a) Business code, (b) Amount, (c) Exclusion code, (d) Amount, (e) Related or exempt function income. Rows include categories like Program service revenue, membership dues, interest on savings, dividends, rental income, and other revenue.

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

Table with 2 columns: Line No. and description. Line 1A: RENTAL INCOME: REAL ESTATE WAS ACQUIRED FOR THE PURPOSE OF PROVIDING HOUSING FOR THE ELDERLY. Line 11A: MISCELLANEOUS INCOME IS USED TO OFFSET ELDERLY HOUSING COSTS.

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

Part XVII

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?

Table with 3 columns: Question, Yes, No. Rows include 1a(1) Cash, 1a(2) Other assets, 1b(1) Sales of assets, 1b(2) Purchases of assets, 1b(3) Rental of facilities, 1b(4) Reimbursement arrangements, 1b(5) Loans or loan guarantees, 1b(6) Performance of services, and 1c Sharing of facilities.

a Transfers from the reporting foundation to a noncharitable exempt organization of:

- (1) Cash.
(2) Other assets.

b Other transactions:

- (1) Sales of assets to a noncharitable exempt organization.
(2) Purchases of assets from a noncharitable exempt organization.
(3) Rental of facilities, equipment, or other assets.
(4) Reimbursement arrangements.
(5) Loans or loan guarantees.
(6) Performance of services or membership or fundraising solicitations.

c Sharing of facilities, equipment, mailing lists, other assets, or paid employees.

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.

Table with 4 columns: (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 [x] No

b If "Yes," complete the following schedule.

Table with 3 columns: (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

Signature of officer or trustee: ***** Date: 2021-11-05 Title: *****

May the IRS discuss this return with the preparer shown below (see instr.) [] Yes [] No

Paid Preparer Use Only

Table for paid preparer information including: Print/Type preparer's name (GREGORY GEISSER), Preparer's Signature, Date, Check if self-employed, PTIN (P01216187), Firm's name (OTIS ATWELL), Firm's EIN (20-3690847), Firm's address (324 GANNETT DRIVE, SOUTH PORTLAND, ME 04106), and Phone no. (207) 780-1100.

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

(a) Name and address	Title, and average hours per week (b) devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances
KEVIN R ROBERT 43 MIDDLE STREET SACO, ME 04072	DIRECTOR 2.00	0	0	0
LORRAINE BOUCHARD 43 MIDDLE STREET SACO, ME 04072	DIRECTOR 2.00	0	0	0
DANA LANE 43 MIDDLE STREET SACO, ME 04072	TREASURER 2.00	0	0	0
MARK PETERSON 43 MIDDLE STREET SACO, ME 04072	DIRECTOR 2.00	0	0	0
SARAH MOORE 43 MIDDLE STREET SACO, ME 04072	DIRECTOR 2.00	0	0	0
ERIC COTE 43 MIDDLE STREET SACO, ME 04072	DIRECTOR 2.00	0	0	0
DANIEL BASTARCHE 43 MIDDLE STREET SACO, ME 04072	DIRECTOR 2.00	0	0	0
RENEE O'NEIL 43 MIDDLE STREET SACO, ME 04072	DIRECTOR 2.00	0	0	0
KIMBERLY D BOISVERT 43 MIDDLE STREET SACO, ME 04072	EXECUTIVE DIRECTOR 40.00	79,966	0	0
CATHRYN CLARK 43 MIDDLE STREET SACO, ME 04072	FINANCE DIRECTOR 15.00	38,884	0	0
THEO CIAMPA 43 MIDDLE STREET SACO, ME 04072	SECRETARY 2.00	0	0	0
JOHN BROCKINGTON 43 MIDDLE STREET SACO, ME 04072	PRESIDENT 2.00	0	0	0
CHRISTINE GUAY 43 MIDDLE STREET SACO, ME 04072	VICE PRESIDENT 2.00	0	0	0
MARY DANIS 43 MIDDLE STREET SACO, ME 04072	DIRECTOR 2.00	0	0	0
RON MICHAUD 43 MIDDLE STREET SACO, ME 04072	ASST TREASURER 2.00	0	0	0

TY 2020 Accounting Fees Schedule**Name:** WARDWELL HOME FOR THE AGING INC**EIN:** 01-0213987

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING	23,068	11,534	11,534	339

Note: To capture the full content of this document, please select landscape mode (11" x 8.5") when printing.

TY 2020 Amortization Schedule

Name: WARDWELL HOME FOR THE AGING INC

EIN: 01-0213987

Amortization Schedule

Description of Amortized Expenses	Date Acquired, Completed, or Expended	Amount Amortized	Deduction for Prior Years	Amortization Method	Current Year Amortization	Net Investment Income	Adjusted Net Income	Total Amount of Amortization
LOAN FINANCING FEES	2005-07-01	13,798	7,966	84.00000000000000	94	0	94	8,060

Note: To capture the full content of this document, please select landscape mode (11" x 8.5") when printing.

TY 2020 Depreciation Schedule

Name: WARDWELL HOME FOR THE AGING INC

EIN: 01-0213987

Depreciation Schedule

Description of Property	Date Acquired	Cost or Other Basis	Prior Years' Depreciation	Computation Method	Rate / Life (# of years)	Current Year's Depreciation Expense	Net Investment Income	Adjusted Net Income	Cost of Goods Sold Not Included
FIXED ASSETS	2010-06-30	4,088,500	2,853,139		20.0000000000000	61,307	0	61,307	
EQUIPMENT	2009-01-15	7,794	7,381		10.0000000000000	0	0	0	
BUILDING IMPROVEMENTS	2010-06-30	167,325	28,519		40.0000000000000	2,230	0	2,230	
BUILDING IMPROVEMENTS	2011-01-01	77,899	30,266		20.0000000000000	3,058	0	3,058	
FIXED ASSETS	2011-01-01	7,311	7,182		10.0000000000000	129	0	0	
BUILDING	2012-02-24	1,654,739	376,828		20.0000000000000	45,235	0	45,235	
BUILDING IMPROVEMENTS	2012-04-23	9,600	4,723		20.0000000000000	576	0	576	
LAND IMROVEMENTS	2012-02-28	7,240	3,832		26.0000000000000	389	0	389	
FURNISHINGS & EQUIPMENT	2012-03-07	2,018	1,652		20.0000000000000	201	0	201	
LAND	2012-02-24	132,150			0 %	0	0	0	
LAND	2010-06-30	906,842			0 %	0	0	0	
LAND	2010-06-30	20,740			0 %	0	0	0	
FURNISHINGS & EQUIPMENT	2011-07-25	26,516	23,613		10.0000000000000	2,772	0	2,772	
FURNISHINGS & EQUIPMENT	2013-01-01	21,689	14,514		10.0000000000000	1,986	0	1,986	
FENCE	2013-04-12	6,670	3,224		15.0000000000000	445	0	445	
BUILDING IMPROVEMENTS	2012-07-02	29,814	6,330		40.0000000000000	800	0	800	
FURNISHINGS & EQUIPMENT	2014-01-01	5,377	3,492		10.0000000000000	540	0	540	
LAND IMROVEMENTS	2014-01-01	3,820	1,997		15.0000000000000	387	0	387	
BUILDING IMPROVEMENTS	2014-01-01	54,835	17,955		20.0000000000000	2,741	0	2,741	
LAND - 54 FREE STREET	2010-07-16	45,900			0 %	0	0	0	

Depreciation Schedule

Description of Property	Date Acquired	Cost or Other Basis	Prior Years' Depreciation	Computation Method	Rate / Life (# of years)	Current Year's Depreciation Expense	Net Investment Income	Adjusted Net Income	Cost of Goods Sold Not Included
LAND - OAKS	2013-07-01	113,821			0 %	0	0	0	
FURNISHINGS & EQUIPMENT	2015-01-01	28,960	12,070		10.0000000000000	2,121	0	2,121	
LAND IMROVEMENTS	2015-01-01	17,198	4,729		15.0000000000000	861	0	861	
BUILDING IMPROVEMENTS	2015-01-01	36,577	10,283		20.0000000000000	1,827	0	1,827	
FURNISHINGS & EQUIPMENT	2016-01-01	7,828	3,074		10.0000000000000	603	0	603	
LAND IMROVEMENTS	2016-01-01	2,737	851		15.0000000000000	183	0	183	
BUILDING IMPROVEMENTS	2016-01-01	52,908	14,603		20.0000000000000	3,929	0	3,929	
FURNISHINGS & EQUIPMENT	2017-01-01	5,833	2,034		10.0000000000000	583	0	583	
LAND IMROVEMENTS	2017-01-01	5,981	1,419		15.0000000000000	399	0	399	
BUILDING IMPROVEMENTS	2017-01-01	65,313	9,889		20.0000000000000	2,160	0	2,160	
FURNISHINGS & EQUIPMENT	2018-01-01	57,537	12,112		10.0000000000000	5,373	0	5,373	
BUILDING IMPROVEMENTS	2018-01-01	71,884	8,491		20.0000000000000	3,596	0	3,596	
LAND	2017-01-01	133,744			0 %	0	0	0	
FURNISHINGS & EQUIPMENT	2019-01-01	32,495	5,856		10.0000000000000	4,239	0	4,239	
LAND IMROVEMENTS	2019-01-01	22,542	2,579		15.0000000000000	1,503	0	1,503	
BUILDING IMPROVEMENTS	2019-01-01	32,285	1,831		20.0000000000000	1,336	0	1,336	
FURNISHINGS & EQUIPMENT	2020-01-01	69,590	3,372		10.0000000000000	6,679	0	6,679	
BUILDING IMPROVEMENTS	2020-01-01	8,888	370		20.0000000000000	445	0	445	
BUILDING IMPROVEMENTS	2020-01-01	6,484	95		40.0000000000000	324	0	324	
BUILDING IMPROVEMENTS	2021-01-01	36,923		ADS	20.0000000000000	1,018	0	1,018	

Depreciation Schedule

Description of Property	Date Acquired	Cost or Other Basis	Prior Years' Depreciation	Computation Method	Rate / Life (# of years)	Current Year's Depreciation Expense	Net Investment Income	Adjusted Net Income	Cost of Goods Sold Not Included
FURNISHINGS & EQUIPMENT	2021-01-01	7,403		ADS	10.00000000000000	403	0	403	

TY 2020 Investments Corporate Bonds Schedule**Name:** WARDWELL HOME FOR THE AGING INC**EIN:** 01-0213987**Investments Corporate Bonds Schedule**

Name of Bond	End of Year Book Value	End of Year Fair Market Value
VARIOUS CORPORATE BONDS	1,483,065	1,483,605

TY 2020 Investments Corporate Stock Schedule**Name:** WARDWELL HOME FOR THE AGING INC**EIN:** 01-0213987

Investments Corporation Stock Schedule

Name of Stock	End of Year Book Value	End of Year Fair Market Value
VARIOUS CORPORATE STOCK	2,621,728	2,621,728

TY 2020 Investments - Other Schedule**Name:** WARDWELL HOME FOR THE AGING INC**EIN:** 01-0213987**Investments Other Schedule 2**

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
INVESTMENT IN OTHER ENTITIES	AT COST	654,200	654,200

**TY 2020 Land, Etc.
Schedule**

Name: WARDWELL HOME FOR THE AGING INC

EIN: 01-0213987

Category / Item	Cost / Other Basis	Accumulated Depreciation	Book Value	End of Year Fair Market Value
FIXED ASSETS	4,088,500	2,914,446	1,174,054	
EQUIPMENT	7,794	7,381	413	
BUILDING IMPROVEMENTS	167,325	30,749	136,576	
BUILDING IMPROVEMENTS	77,899	33,324	44,575	
FIXED ASSETS	7,311	7,311	0	
BUILDING	1,654,739	422,063	1,232,676	
BUILDING IMPROVEMENTS	9,600	5,299	4,301	
LAND IMPROVEMENTS	7,240	4,221	3,019	
FURNISHINGS & EQUIPMENT	2,018	1,853	165	
LAND	132,150	0	132,150	
LAND	906,842	0	906,842	
LAND	20,740	0	20,740	
LOAN FINANCING FEES	13,798	8,060	5,738	
FURNISHINGS & EQUIPMENT	26,516	26,385	131	
FURNISHINGS & EQUIPMENT	21,689	16,500	5,189	
FENCE	6,670	3,669	3,001	
BUILDING IMPROVEMENTS	29,814	7,130	22,684	
FURNISHINGS & EQUIPMENT	5,377	4,032	1,345	
LAND IMPROVEMENTS	3,820	2,384	1,436	
BUILDING IMPROVEMENTS	54,835	20,696	34,139	
LAND - 54 FREE STREET	45,900	0	45,900	
LAND - OAKS	113,821	0	113,821	
FURNISHINGS & EQUIPMENT	28,960	14,191	14,769	
LAND IMPROVEMENTS	17,198	5,590	11,608	
BUILDING IMPROVEMENTS	36,577	12,110	24,467	
FURNISHINGS & EQUIPMENT	7,828	3,677	4,151	
LAND IMPROVEMENTS	2,737	1,034	1,703	
BUILDING IMPROVEMENTS	52,908	18,532	34,376	
FURNISHINGS & EQUIPMENT	5,833	2,617	3,216	
LAND IMPROVEMENTS	5,981	1,818	4,163	

Category / Item	Cost / Other Basis	Accumulated Depreciation	Book Value	End of Year Fair Market Value
BUILDING IMPROVEMENTS	65,313	12,049	53,264	
FURNISHINGS & EQUIPMENT	57,537	17,485	40,052	
BUILDING IMPROVEMENTS	71,884	12,087	59,797	
LAND	133,744	0	133,744	
FURNISHINGS & EQUIPMENT	32,495	10,095	22,400	
LAND IMPROVEMENTS	22,542	4,082	18,460	
BUILDING IMPROVEMENTS	32,285	3,167	29,118	
FURNISHINGS & EQUIPMENT	69,590	10,051	59,539	
BUILDING IMPROVEMENTS	8,888	815	8,073	
BUILDING IMPROVEMENTS	6,484	419	6,065	
BUILDING IMPROVEMENTS	36,923	1,018	35,905	
FURNISHINGS & EQUIPMENT	7,403	403	7,000	

TY 2020 Other Assets Schedule**Name:** WARDWELL HOME FOR THE AGING INC**EIN:** 01-0213987**Other Assets Schedule**

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
ORIGINATION FEE, NET OF AMORTIZATION	5,832	5,301	5,301
FOGG MEMORIAL HOME FUND	1,542,539	1,796,833	1,796,833

TY 2020 Other Expenses Schedule**Name:** WARDWELL HOME FOR THE AGING INC**EIN:** 01-0213987**Other Expenses Schedule**

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ADMINISTRATION	8,635	0	8,635	253
EXTERMINATOR	805	0	805	24
FIRE SAFETY & SECURITY	9,104	0	9,104	267
FOOD SERVICE	47,630	0	47,630	1,398
GROUNDS MAINTENANCE	13,796	0	13,796	405
INSURANCE	33,032	0	33,032	970
MANAGEMENT FEES	65,289	0	65,289	1,915
MISCELLANEOUS	25,665	0	25,665	751
OTHER RESIDENT SERVICES	13,456	0	13,456	395
PAYROLL FEES	18,060	549	17,511	514

Other Expenses Schedule

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
REPAIRS & MAINETENANCE	92,493	0	92,493	2,715
RUBBISH & SNOW REMOVAL	14,299	0	14,299	420
TRUST MANAGEMENT FEES	28,260	28,260	0	0
UTILITIES	103,645	0	103,645	3,043
AMORTIZATION	94	0	94	0

TY 2020 Other Income Schedule**Name:** WARDWELL HOME FOR THE AGING INC**EIN:** 01-0213987**Other Income Schedule**

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
RENTS FROM WARDWELL HOME	1,265,207		1,265,207
MISCELLANEOUS INCOME	3,820		3,820

TY 2020 Other Increases Schedule**Name:** WARDWELL HOME FOR THE AGING INC**EIN:** 01-0213987**Other Increases Schedule**

Description	Amount
UNREALIZED GAIN ON INVESTMENTS	606,971

TY 2020 Other Liabilities Schedule**Name:** WARDWELL HOME FOR THE AGING INC**EIN:** 01-0213987

Description	Beginning of Year - Book Value	End of Year - Book Value
SECURITY DEPOSITS	64,094	62,170

TY 2020 Taxes Schedule**Name:** WARDWELL HOME FOR THE AGING INC**EIN:** 01-0213987**Taxes Schedule**

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
REAL ESTATE TAXES	29,076	0	29,076	854

Schedule B
(Form 990, 990-EZ,
or 990-PF)
Department of the Treasury
Internal Revenue Service

Schedule of Contributors
▶ Attach to Form 990, 990-EZ, or 990-PF.
▶ Go to www.irs.gov/Form990 for the latest information.

OMB No. 1545-0047
2020

Name of the organization
WARDWELL HOME FOR THE AGING INC

Employer identification number
01-0213987

Organization type (check one):

Filers of:

Section:

Form 990 or 990-EZ

- 501(c)() (enter number) organization
- 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation
- 527 political organization

Form 990-PF

- 501(c)(3) exempt private foundation
- 4947(a)(1) nonexempt charitable trust treated as a private foundation
- 501(c)(3) taxable private foundation

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

General Rule

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

Special Rules

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

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

Name of organization
WARDWELL HOME FOR THE AGING INC

Employer identification number
01-0213987

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	ESTATE OF ERWIN C WARREN 71 HILLS BEACH ROAD BIDDEFORD, ME 04005	\$ 25,000	<input checked="" type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash (Complete Part II for noncash contributions.)
		\$	<input type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash (Complete Part II for noncash contributions.)
		\$	<input type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash (Complete Part II for noncash contributions.)
		\$	<input type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash (Complete Part II for noncash contributions.)
		\$	<input type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash (Complete Part II for noncash contributions.)
		\$	<input type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash (Complete Part II for noncash contributions.)

Name of organization WARDWELL HOME FOR THE AGING INC	Employer identification number 01-0213987
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Part II Noncash Property			
(a) No. from Part I	(b) Description of noncash property given <small>(see instructions). Use duplicate copies of Part II if additional space is needed.</small>	(c) FMV (or estimate) (See instructions)	(d) Date received
-	_____ _____ _____	_____ \$	_____
-	_____ _____ _____	_____ \$	_____
-	_____ _____ _____	_____ \$	_____
-	_____ _____ _____	_____ \$	_____
-	_____ _____ _____	_____ \$	_____

Name of organization
WARDWELL HOME FOR THE AGING INC

Employer identification number
01-0213987

Part III Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of exclusively religious, charitable, etc., contributions of \$1,000 or less for the year. (Enter this information once. See instructions.) ▶ \$ _____
Use duplicate copies of Part III if additional space is needed.

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	_____ _____	_____ _____	_____ _____
(e) Transfer of gift			
Transferee's name, address, and ZIP 4		Relationship of transferor to transferee	
_____ _____		_____ _____	

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	_____ _____	_____ _____	_____ _____
(e) Transfer of gift			
Transferee's name, address, and ZIP 4		Relationship of transferor to transferee	
_____ _____		_____ _____	

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	_____ _____	_____ _____	_____ _____
(e) Transfer of gift			
Transferee's name, address, and ZIP 4		Relationship of transferor to transferee	
_____ _____		_____ _____	

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	_____ _____	_____ _____	_____ _____
(e) Transfer of gift			
Transferee's name, address, and ZIP 4		Relationship of transferor to transferee	
_____ _____		_____ _____	