

Form **990-PF**

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

OMB No. 1545-0047

2022

Department of the Treasury
Internal Revenue Service

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

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

Open to Public Inspection

For calendar year **2022** or tax year beginning , and ending

Name of foundation CHRISTINE E. MOSER FOUNDATION		A Employer identification number 06-1353117
Number and street (or P.O. box number if mail is not delivered to street address) C/O SCALISE, 35 PEARL ST. SUITE 301	Room/suite	B Telephone number (see instructions) 860-229-0369
City or town, state or province, country, and ZIP or foreign postal code NEW BRITAIN CT 06051		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) \$ 634,029	J Accounting method: <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>
(Part I, column (d), must be on cash basis.)		

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)
Revenue	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	286	286		
	4 Dividends and interest from securities	19,124	19,124		
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	-37,217			
	b Gross sales price for all assets on line 6a 246,045				
	7 Capital gain net income (from Part IV, line 2)		0		
	8 Net short-term capital gain			0	
	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) STMT 1	85	85			
12 Total. Add lines 1 through 11	-17,722	19,495	0		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc.	0			
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule) SEE STMT 2	2,273	1,136		1,137
	b Accounting fees (attach schedule)				
	c Other professional fees (attach schedule) STMT 3	192			192
	17 Interest				
	18 Taxes (attach schedule) (see instructions) STMT 4	2,575	33		
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (att. sch.) STMT 5	1,059	5,728		524
	24 Total operating and administrative expenses. Add lines 13 through 23	6,099	6,897	0	1,853
	25 Contributions, gifts, grants paid	36,500			36,500
26 Total expenses and disbursements. Add lines 24 and 25	42,599	6,897	0	38,353	
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements	-60,321				
b Net investment income (if negative, enter -0-)		12,598			
c Adjusted net income (if negative, enter -0-)			0		

For Paperwork Reduction Act Notice, see instructions.

Form **990-PF** (2022)

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	8,213	647	647
	2 Savings and temporary cash investments	56,987		
	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 (att. schedule)			
	Less: allowance for doubtful accounts	0		
	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) SEE STMT 6	545,942	594,692	633,382
	c Investments – corporate bonds (attach schedule)			
	11 Investments – land, buildings, and equipment: basis			
Less: accumulated depreciation (attach sch.)				
12 Investments – mortgage loans				
13 Investments – other (attach schedule)				
14 Land, buildings, and equipment: basis				
Less: accumulated depreciation (attach sch.)				
15 Other assets (describe)				
16 Total assets (to be completed by all filers – see the instructions. Also, see page 1, item I)	611,142	595,339	634,029	
Liabilities	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable (attach schedule)			
	22 Other liabilities (describe)			
	23 Total liabilities (add lines 17 through 22)	0	0	
Net Assets or Fund Balances	Foundations that follow FASB ASC 958, check here and complete lines 24, 25, 29, and 30. <input checked="" type="checkbox"/>			
	24 Net assets without donor restrictions	611,142	595,339	
	25 Net assets with donor restrictions			
	Foundations that do not follow FASB ASC 958, check here and complete lines 26 through 30. <input type="checkbox"/>			
	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)	611,142	595,339		
30 Total liabilities and net assets/fund balances (see instructions)	611,142	595,339		

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	611,142
2 Enter amount from Part I, line 27a	2	-60,321
3 Other increases not included in line 2 (itemize) SEE STATEMENT 7	3	44,518
4 Add lines 1, 2, and 3	4	595,339
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	595,339

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (for example, real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)		(b) How acquired P – Purchase D – Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a	SEE WORKSHEET			
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				
b				
c				
d				
e				
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69.				(i) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
(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		
a				
b				
c				
d				
e				

2 Capital gain net income or (net capital loss)	If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7	2	-37,217
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	-3

Part V Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 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. Date of ruling or determination letter: (attach copy of letter if necessary—see instructions)	1	175
b All other domestic foundations enter 1.39% (0.0139) of line 27b. Exempt foreign organizations, enter 4% (0.04) of Part I, line 12, col. (b)		
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-)	2	0
3 Add lines 1 and 2	3	175
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-)	4	0
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5	175
6 Credits/Payments:		
a 2022 estimated tax payments and 2021 overpayment credited to 2022	6a	1,300
b Exempt foreign organizations – tax withheld at source	6b	
c Tax paid with application for extension of time to file (Form 8868)	6c	
d Backup withholding erroneously withheld	6d	
7 Total credits and payments. Add lines 6a through 6d	7	1,300
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	
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	1,125
11 Enter the amount of line 10 to be: Credited to 2023 estimated tax 1,125 Refunded	11	

Part VI-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition		X
If the answer is "Yes" to 1a or 1b , attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.		
c Did the foundation file Form 1120-POL for this year?		X
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?		X
If "Yes," attach a detailed description of the activities.		
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?	N/A	
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year?		X
If "Yes," attach the statement required by <i>General Instruction T</i> .		
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: ● By language in the governing instrument, or ● By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XIV	X	
8a Enter the states to which the foundation reports or with which it is registered. See instructions. CT		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by <i>General Instruction G</i> ? If "No," attach explanation	X	
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 2022 or the tax year beginning in 2022? See instructions for Part XIII. If "Yes," complete Part XIII		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X
11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule. See instructions		X
12 Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement. See instructions		X
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	X	
Website address N/A		
14 The books are in care of ROBERT A. SCALISE, JR. Telephone no. 860-229-0369 35 PEARL ST, SUITE 301		
Located at NEW BRITAIN CT ZIP+4 06051		
15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 – check here	<input type="checkbox"/>	
and enter the amount of tax-exempt interest received or accrued during the year		15
16 At any time during calendar year 2022, 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?		X
See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country		

Part VI-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?		X
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	1a(1)	
.....	1a(2)	X
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	1a(3)	X
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	1a(4)	X
(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)?	1a(5)	X
(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.)	1a(6)	X
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	N/A	1b
c Organizations relying on a current notice regarding disaster assistance, check here	<input type="checkbox"/>	
d 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 2022?	N/A	1d
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 2022, did the foundation have any undistributed income (Part XIII, lines 6d and 6e) for tax year(s) beginning before 2022?	2a	X
If "Yes," list the years 20, 20, 20, 20		
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement – see instructions.)	N/A	2b
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. 20, 20, 20, 20		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	3a	X
b If "Yes," did it have excess business holdings in 2022 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 2022.)	N/A	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 2022?	4b	X

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

		Yes	No
5a During the year did the foundation pay or incur any amount to:			
(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	5a(1)		X
(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?	5a(2)		X
(3) Provide a grant to an individual for travel, study, or other similar purposes?	5a(3)		X
(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d) (4)(A)? See instructions	5a(4)		X
(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?	5a(5)		X
b If any answer is "Yes" to 5a(1)–(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance? See instructions	5b		N/A
c Organizations relying on a current notice regarding disaster assistance, check here		<input type="checkbox"/>	
d 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? If "Yes," attach the statement required by Regulations section 53.4945–5(d).	5d		N/A
6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	6a		X
b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? If "Yes" to 6b, file Form 8870.	6b		X
7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	7a		X
b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?	7b		N/A
8 Is the foundation subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment(s) during the year?	8		X

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

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

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
ROBERT A. SCALISE JR. 35 PEARL STREET, SUITE 301 NEW BRITAIN CT 06051	TRUSTEE 1.00	0	0	0
MARY ENGELS 35 PEARL STREET, SUITE 301 NEW BRITAIN CT 06051	TRUSTEE 1.00	0	0	0

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

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

Total number of other employees paid over \$50,000 **0**

Part VII 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		

Part VIII-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 SEE STATEMENT 8	
2	
3	
4	

Part VIII-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 N/A	
2	
All other program-related investments. See instructions.	
3	
Total. Add lines 1 through 3	

Part IX 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	644,706
b	Average of monthly cash balances	1b	32,277
c	Fair market value of all other assets (see instructions)	1c	0
d	Total (add lines 1a, b, and c)	1d	676,983
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	676,983
4	Cash deemed held for charitable activities. Enter 1.5% (0.015) of line 3 (for greater amount, see instructions)	4	10,155
5	Net value of noncharitable-use assets. Subtract line 4 from line 3	5	666,828
6	Minimum investment return. Enter 5% (0.05) of line 5	6	33,341

Part X 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 IX, line 6	1	33,341
2a	Tax on investment income for 2022 from Part V, line 5	2a	175
b	Income tax for 2022. (This does not include the tax from Part V.)	2b	
c	Add lines 2a and 2b	2c	175
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	33,166
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	33,166
6	Deduction from distributable amount (see instructions)	6	
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XII, line 1	7	33,166

Part XI 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	38,353
b	Program-related investments – total from Part VIII-B	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
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 XII, line 4	4	38,353

Part XII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2021	(c) 2021	(d) 2022
1 Distributable amount for 2022 from Part X, line 7				33,166
2 Undistributed income, if any, as of the end of 2022:				
a Enter amount for 2021 only			2,843	
b Total for prior years: 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2022:				
a From 2017				
b From 2018				
c From 2019				
d From 2020				
e From 2021				
f Total of lines 3a through e				
4 Qualifying distributions for 2022 from Part XI, line 4: \$ 38,353				
a Applied to 2021, but not more than line 2a			2,843	
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 2022 distributable amount				33,166
e Remaining amount distributed out of corpus	2,344			
5 Excess distributions carryover applied to 2022 (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	2,344			
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 2021. Subtract line 4a from line 2a. Taxable amount – see instructions				
f Undistributed income for 2022. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2023				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required—see instructions)				
8 Excess distributions carryover from 2017 not applied on line 5 or line 7 (see instructions)				
9 Excess distributions carryover to 2023. Subtract lines 7 and 8 from line 6a	2,344			
10 Analysis of line 9:				
a Excess from 2018				
b Excess from 2019				
c Excess from 2020				
d Excess from 2021				
e Excess from 2022	2,344			

Part XIII Private Operating Foundations (see instructions and Part VI-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 2022, 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 IX for each year listed

	Tax year				(e) Total
	(a) 2022	(b) 2021	Prior 3 years		
			(c) 2020	(d) 2019	
b 85% (0.85) of line 2a					
c Qualifying distributions from Part XI, 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 IX, line 6, for each year listed					
c "Support" alternative test – enter:					
(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

Part XIV 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).)
SEE STATEMENT 9

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:
SEE STATEMENT 10

b The form in which applications should be submitted and information and materials they should include:
SEE STATEMENT 11

c Any submission deadlines:
ONGOING

d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors:
ROCKY HILL, CT AREA AND OTHER SELECTED ORGANIZATIONS.

Part XIV 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>				
GOODSPEED OPERA HOUSE FOUND PO BOX A EAST HADDAM CT 06423	NONE	501C3	KIDS NIGHTS	10,000
LITERACY VOLUNTEERS 20 HIGH STREET NEW BRITAIN CT 06051	NONE	501C3	COMMUNITY	10,000
ALBANO BALLET COMPANY 15 GIRARD AVENUE HARTFORD CT 06105	NONE	501C3	PROGRAMMING	1,500
COMMUNITY FOUNDATION OF GREATER 74A VINE STREET NEW BRITAIN CT 06052	NONE	501C3	GREATER GOOD	10,000
CT COUNCIL FOR PHILANTHROPY 75 CHARTER OAK AVE HARTFORD CT 06106	NONE	501C3	PROGRAMMING	5,000
Total			3a	36,500
b <i>Approved for future payment</i>				
N/A				
Total			3b	

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

1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?
a Transfers from the reporting foundation to a noncharitable exempt organization of:
(1) Cash
(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. 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.

Table with 4 columns: (a) Line no., (b) Amount involved, (c) Name of noncharitable exempt organization, (d) Description of transfers, transactions, and sharing arrangements. Row 1 contains 'N/A'.

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. Row 1 contains 'N/A'.

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: [Signature] Date: [Date] Title: TRUSTEE

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

Paid Preparer Use Only
Print/Type preparer's name: CHRISTOPHER B. CONLEY
Preparer's signature: [Signature]
Date: 11/13/23
Check [] if self-employed
Firm's name: GUILMARTIN, DIPIRO & SOKOLOWSKI, LLC
Firm's address: 505 MAIN ST MIDDLETOWN, CT 06457-2809
PTIN: P00936552
Firm's EIN: 06-0971998
Phone no.: 860-347-5689

Capital Gains and Losses for Tax on Investment Income

Form **990-PF****2022**

For calendar year 2022, or tax year beginning

, and ending

Name

Employer Identification Number

CHRISTINE E. MOSER FOUNDATION**06-1353117**

(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) ANNALY CAPITAL MGMT REIT	P	09/28/21	12/29/22
(2) AREX CAPITAL CORP	P	11/18/20	12/29/22
(3) ATLANTICA SUSTAINABLE	P	07/21/21	12/29/22
(4) BEST BUY	P	09/28/21	12/29/22
(5) BLACKROCK CORE BOND	P	07/21/21	12/29/22
(6) BLACKROCK TAXABL MUNI	P	07/23/21	12/29/22
(7) BLACKSTONE INC	P	03/05/21	12/29/22
(8) DOW INC	P	06/03/20	12/29/22
(9) ETSY INC	P	01/09/20	12/29/22
(10) FREEMPORT-MCMORAN INC	P	10/13/21	12/29/22
(11) GAMING & LEISURE PPT REIT	P	07/16/21	12/29/22
(12) ISHARES MSCI CANADA EFT	P	04/06/21	12/29/22
(13) ISHARES MSCI SAUDI ARABIA	P	04/06/21	12/29/22
(14) KYNDRYL HOLDIBG INC	P	07/22/21	12/29/22
(15) NOV INC	P	03/19/21	12/29/22

(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)
(1) 4,446		7,090	-2,644
(2) 6,999		6,106	893
(3) 4,959		6,929	-1,970
(4) 5,446		7,279	-1,833
(5) 46,792		73,141	-26,349
(6) 23,744		36,513	-12,769
(7) 7,822		6,622	1,200
(8) 7,451		6,122	1,329
(9) 5,067		6,783	-1,716
(10) 7,774		7,262	512
(11) 8,045		7,250	795
(12) 14,084		14,851	-767
(13) 15,514		14,839	675
(14) 111		294	-183
(15) 10,083		7,246	2,837

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

(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	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
(1)			-2,644
(2)			893
(3)			-1,970
(4)			-1,833
(5)			-26,349
(6)			-12,769
(7)			1,200
(8)			1,329
(9)			-1,716
(10)			512
(11)			795
(12)			-767
(13)			675
(14)			-183
(15)			2,837

Capital Gains and Losses for Tax on Investment Income

Form **990-PF****2022**

For calendar year 2022, or tax year beginning

, and ending

Name

Employer Identification Number

CHRISTINE E. MOSER FOUNDATION**06-1353117**

(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) PAYPAL HOLDINGS	P	11/22/17	12/29/22
(2) PIONEER NATURAL RES	P	12/09/20	12/29/22
(3) SOUTHWEST AIRLINES	P	11/18/20	12/29/22
(4) SPDR EURO STOXX	P	04/06/21	12/29/22
(5) STARWOOD PPTY TRUST REIT	P	01/24/20	12/29/22
(6) CRESTWOOD EQUITY PART	P	11/18/20	12/29/22
(7) ANNALY CAPITAL MGT	P	09/28/21	09/27/22
(8) CAPITAL GAIN DISTRIBUTION			
(9)			
(10)			
(11)			
(12)			
(13)			
(14)			
(15)			

(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)
(1) 2,324		2,542	-218
(2) 13,686		6,907	6,779
(3) 4,847		6,788	-1,941
(4) 38,402		44,548	-6,146
(5) 6,848		7,184	-336
(6) 10,935		6,958	3,977
(7) 5		8	-3
(8) 661			661
(9)			
(10)			
(11)			
(12)			
(13)			
(14)			
(15)			

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

(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	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
(1)			-218
(2)			6,779
(3)			-1,941
(4)			-6,146
(5)			-336
(6)			3,977
(7)			-3
(8)			661
(9)			
(10)			
(11)			
(12)			
(13)			
(14)			
(15)			

Federal Statements**Statement 1 - Form 990-PF, Part I, Line 11 - Other Income**

Description	Revenue per Books	Net Investment Income	Adjusted Net Income
PORTFOLIO INCOME	\$ 85	\$ 85	\$
TOTAL	\$ 85	\$ 85	\$ 0

Statement 2 - Form 990-PF, Part I, Line 16a - Legal Fees

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
LEGAL FEES	\$ 2,273	\$ 1,136	\$	\$ 1,137
TOTAL	\$ 2,273	\$ 1,136	\$ 0	\$ 1,137

Form 990-PF, Part I, Line 16b - Accounting Fees

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
ACCOUNTING AND TAX RETURNS PREPA	\$	\$	\$	\$
TOTAL	\$ 0	\$ 0	\$ 0	\$ 0

Statement 3 - Form 990-PF, Part I, Line 16c - Other Professional Fees

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
WEBSITE DESIGN	\$ 192	\$	\$	\$ 192
TOTAL	\$ 192	\$ 0	\$ 0	\$ 192

Federal Statements**Statement 4 - Form 990-PF, Part I, Line 18 - Taxes**

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
EXCISE TAX	\$ 2,542	\$	\$	\$
FOREIGN TAX	33	33		
TOTAL	\$ 2,575	\$ 33	\$ 0	\$ 0

Statement 5 - Form 990-PF, Part I, Line 23 - Other Expenses

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
EXPENSES	\$	\$	\$	\$
INSURANCE	1,047	524		524
INVESTMENT FEES		5,192		
DUES & SUBSCRIPTIONS				
MISCELLANEOUS	12	12		
TOTAL	\$ 1,059	\$ 5,728	\$ 0	\$ 524

Statement 6 - Form 990-PF, Part II, Line 10b - Corporate Stock Investments

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
ABBOTT LABS COM	\$ 5,058	\$ 5,058	COST	\$ 7,027
ALPHABET INC CLA	4,958	4,958	COST	10,588
AMAZON.COM INC	6,158	6,158	COST	6,720
APPLE INC	3,946	3,946	COST	9,355
COSTCO WHOLESALE CORP	3,427	3,427	COST	8,674
META PLATFORMS INC	6,349	6,349	COST	2,768
JOHNSON & JOHNSON	9,118	9,118	COST	12,189
JP MORGAN CHASE & CO	6,244	6,244	COST	8,046
MICROSOFT CORP	4,117	4,118	COST	10,792
NUCOR CORP	7,181	7,181	COST	9,490
NVIDIA CORP	2,741	2,741	COST	9,353
PAYPAL HLDGS INC	2,542	2,542	COST	2,350

Federal Statements

Statement 6 - Form 990-PF, Part II, Line 10b - Corporate Stock Investments (continued)

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
THERMO FISHER SCIENTIFIC	\$ 1,003	\$ 1,003	COST	\$ 13,767
WALMART STORES	4,534	4,534	COST	6,664
NUVEEN TAXABLE INCOME	37,080	37,080	COST	25,344
NEXTERA ENERGY	6,844	6,844	COST	7,608
SOUTHWEST AIRLINES	6,788	6,788	COST	4,882
WALT DISNEY CO	7,337	7,337	COST	3,649
ADOBE INC	6,880	6,880	COST	4,038
CHEVRON CORPORATION	13,546	13,546	COST	25,667
DOW INC	6,122	6,122	COST	7,407
UNITEDHEALTH GROUP INC	5,850	5,850	COST	11,664
VALERO ENERGY CORP	6,810	6,810	COST	16,111
SPDR INDEX SHARES FUNDS EURO STOXX	44,548	44,548	COST	37,849
ARES CAPITAL CORP	6,106	6,106	COST	6,908
BLACKROCK CORE BOND TRUST	73,222	73,222	COST	46,658
BLACKROCK TAXABLE MUNI BOND	37,014	36,927	COST	23,610
CATERPILLAR INC	6,809	6,809	COST	9,343
CHIPOTLE MEXICAN GRILL	5,720	5,720	COST	8,325
CRESTWOOD EQUITY PARTNERS	6,958	6,958	COST	10,921
ETSY INC	6,783	6,783	COST	4,911
FEDEX	6,469	6,469	COST	6,582
FREEPORT-MCMORAN INC	7,262	7,262	COST	7,676
MARATHON PETROLEUM CORP	5,841	5,841	COST	18,855
PIONEER NATURAL RESOURCES	6,907	6,907	COST	13,703
STARWOOD PROPERTY TRUST INC	7,184	7,184	COST	6,837
AMERICAN EXPRESS	7,320	7,320	COST	6,206
ANNALY CAPITAL MANAGEMENT	7,382	7,189	COST	4,406
ATLANTICA SUSTAINABLE INFR	7,345	7,208	COST	4,896
BESTBUY CO	7,279	7,279	COST	5,374
BLACKSONE INC	6,890	6,844	COST	7,790
EXPEDIA GROUP INC	7,045	7,045	COST	4,292
GAMING & LEISURE	7,252	7,252	COST	8,074
HONEYWELL INTERNATIONAL	7,310	7,310	COST	7,286
INTERNATIONAL BUS MACH	7,007	7,007	COST	7,326
KYNDRYL HLDGS INC	294	294	COST	111
LINDE PLC	7,230	7,230	COST	7,828
NOV INC	7,246	7,246	COST	10,173
OCCIDENTAL PETROLEUM CORP	7,157	7,157	COST	14,362

Federal Statements**Statement 6 - Form 990-PF, Part II, Line 10b - Corporate Stock Investments (continued)**

<u>Description</u>	<u>Beginning of Year</u>	<u>End of Year</u>	<u>Basis of Valuation</u>	<u>Fair Market Value</u>
ORACLE CORP	\$ 7,347	\$ 7,347	COST	\$ 6,621
PFIZER INC	7,366	7,366	COST	8,813
SCHNEIDER NATIONAL INC	7,516	7,516	COST	6,973
TESLA INC	6,977	6,977	COST	2,956
WP CAREY INC	14,833	14,794	COST	15,083
ISHARES TRUST	14,839	14,839	COST	15,314
ISHARES INC	14,851	14,851	COST	13,976
US TREASUR NT		24,059	COST	24,035
US TREASUR NT 4.5		25,192	COST	25,156
TOTAL	<u>\$ 545,942</u>	<u>\$ 594,692</u>		<u>\$ 633,382</u>

Statement 7 - Form 990-PF, Part III, Line 3 - Other Increases

Description	Amount
UNREALIZED GAIN	\$ 44,518
TOTAL	\$ 44,518

Statement 8 - Form 990-PF, Part VIII-A, Line 1 - Summary of Direct Charitable ActivitiesDescription

APPLY AND DEVOTE THE PROPERTY AND INCOME EXCLUSIVELY FOR CHARITABLE, RELIGIOUS, SCIENTIFIC, LITERARY OR EDUCATIONAL PURPOSES, EITHER DIRECTLY OR BY CONTRIBUTIONS TO ORGANIZATIONS DULY AUTHORIZED TO CARRY SUCH ACTIVITIES;

SEE LIST OF GRANTS AWARDED IN SEC. XV 3.

Statement 9 - Form 990-PF, Part XIV, Line 1a - Managers Who Contributed Over 2% or \$5,000Name of Manager

FOUNDATION IS FUNDED BY AN INVESTMENT PORTFOLIO CONTRIBUTED BY CHRISTINE MOSER (DECEASED)

Statement 10 - Form 990-PF, Part XIV, Line 2a - Name, Address and Email for ApplicationsDescription

C/O ERICSON, SCALISE & MANGAN, PC 860-229-0369
35 PEARL STREET NEW BRITAIN CT 06051
RSCALISE@ESMLAW.COM

Statement 11 - Form 990-PF, Part XIV, Line 2b - Application Format and Required ContentsDescription

THE ORGANIZATION ACCEPTS THE COMMON GRANT APPLICATION FORM DEVELOPED BY THE CONNECTICUT COUNCIL FOR PHILANTHROPY. THE APPLICATION CAN BE FOUND ON THE ORGANIZATION'S WEBSITE: CHRISTINEMOSERFOUNDATION.ORG

Form 990-PF, Part XIV, Line 2c - Submission DeadlinesDescription

ONGOING

22034 CHRISTINE E. MOSER FOUNDATION

06-1353117

Federal Statements

FYE: 12/31/2022

Form 990-PF, Part XIV, Line 2d - Award Restrictions or Limitations

Description

ROCKY HILL, CT AREA AND OTHER SELECTED ORGANIZATIONS.

Electronic Funds Withdrawal - EstimatesForm **990-PF****2023**

For calendar year 2023 or tax year beginning _____, ending _____

Name CHRISTINE E. MOSER FOUNDATION	Employer Identification Number 06-1353117
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Form Payment Record

This record is included with the IRS electronic file for taxpayers who elect to pay their estimated taxes by electronic funds withdrawal

Quarter	<u>4</u>
Routing Transit Number	<u>211170101</u>
Bank Account Number	<u>100010068766</u>
Type of Account	<u>CHECKING</u>
Taxpayer Phone Number	<u>860-229-0369</u>
Requested Payment Date	<u>12/15/23</u>
Amount of Estimated Tax Payment	<u>300</u>

DO NOT SUBMIT THIS DOCUMENT TO THE IRS

Federal Statements**Form 990-PF, Part XIV, Line 1a - Managers Who Contributed Over 2% or \$5,000**

<u>Name of Manager</u>	<u>Amount</u>
FOUNDATION IS FUNDED BY AN INVESTMENT PORTFOLIO CONTRIBUTED BY CHRISTINE MOSER (DECEASED)	\$ _____
TOTAL	\$ <u>0</u>

Taxable Interest on Investments

<u>Description</u>	<u>Amount</u>	<u>Unrelated Business</u>	<u>Exclusion Code</u>	<u>Postal Code</u>	<u>US Obs (\$ or %)</u>
INTEREST - SCHWAB	\$ 246		14		
INTEREST - TD	40		14		
TOTAL	\$ <u>286</u>				

Taxable Dividends from Securities

<u>Description</u>	<u>Amount</u>	<u>Unrelated Business</u>	<u>Exclusion Code</u>	<u>Postal Code</u>	<u>US Obs (\$ or %)</u>
DIVIDENDS - SCHWAB	\$ 2,199		14		
DIVIDENDS - TD	16,925		14		
TOTAL	\$ <u>19,124</u>				

Other Investment Income

<u>Description</u>	<u>Amount</u>	<u>Unrelated Business</u>	<u>Exclusion Code</u>	<u>Postal Code</u>
PORTFOLIO INCOME	\$ 85			14
TOTAL	\$ <u>85</u>			