Form **990-PF** 

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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 2023 Open to Public Inspection

For cale	ndar year 2023 or tax year beginning		, and ending		
Name o	f foundation			A Employer identification	number
Laf	ayette Family Foundation	ı		26-1586475	
	and street (or P.O. box number if mail is not delivered to street a		Room/suite		
155	Littlefield Ave			(207) 862-	8000
	town, state or province, country, and ZIP or foreign po	ostal code		C If exemption application is p	
-	gor, ME 04401				
	k all that apply:	Initial return of a fo	ormer public charity	<b>D</b> 1. Foreign organization	s check here
<b>u</b> 01100	Final return	Amended return	inter public enancy		
	Address change	Name change		2. Foreign organizations me check here and attach co	eeting the 85% test,
H Chec	k type of organization: X Section 501(c)(3) ex			E If private foundation sta	
		Other taxable private founda	tion	under section 507(b)(1	
		ng method: X Cash	Accrual	<b>F</b> If the foundation is in a	
		her (specify)		under section 507(b)(1	
\$	521,209. (Part I, colum		s.)		
Part	Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not	(a) Revenue and	(b) Net investment	(c) Adjusted net	(d) Disbursements
	(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a).)	expenses per books	income	income	for charitable purposes (cash basis only)
1	Contributions, gifts, grants, etc., received	69,063.		N/A	
2	Check if the foundation is not required to attach Sch. B				
3	Interest on savings and temporary cash investments	722.	722	•	Statement 1
4	Dividends and interest from securities	8,333.	8,333	•	Statement 2
54	a Gross rents				
	Net rental income or (loss)				
68	Net gain or (loss) from sale of assets not on line 10				
n <u>n</u>	Gross sales price for all assets on line 6a				
Revenue	Capital gain net income (from Part IV, line 2)		0	•	
<u>ه</u> ۳	Net short-term capital gain				
9	Income modifications Gross sales less returns				
10a	Gross sales less returns and allowances				
1	Less: Cost of goods sold				
(	Gross profit or (loss)				
11	Other income				
12	Total. Add lines 1 through 11	78,118.	9,055		
13	Compensation of officers, directors, trustees, etc.	0.	0	•	0.
14	Other employee salaries and wages				
	Pension plans, employee benefits				
မ္တိ 16a	a Legal fees	<u> </u>			
l le	Accounting fees Stmt 3	6,308.	2,523	•	3,785.
	Cother professional fees				
	Interest	<b>D</b> 2			^
12 Administrative 15 15 15	Taxes Stmt 4	73.	0	•	0.
19 19	Depreciation and depletion				
	Оссиралсу				
	Travel, conferences, and meetings				
22 au	Printing and publications				
bu 23	Other expenses				
24	Total operating and administrative	£ 201	2 5 2 2		2 705
23 24 25	expenses. Add lines 13 through 23	6,381. 45,000.	2,523	•	3,785. 45,000.
20	Contributions, gifts, grants paid	45,000.			45,000.
26	Total expenses and disbursements.	51,381.	2,523		48,785.
	Add lines 24 and 25	51,301.	4,545	•	40,/03.
	Subtract line 26 from line 12:	26,737.			
	A Excess of revenue over expenses and disbursements Net investment income (if negative, enter -0-)	40,131.	6,532		
	Adjusted net income (if negative, enter -0-)		0,552	N/A	
	For Paperwork Reduction Act Notice, see instruction	<b>S</b> . 323501 12-20-23		-1/21	Form <b>990-PF</b> (2023)

1

(2023) Form **9** 

Foi	m 99	0-PF (2023) Lafayette Family Foundat	ion	26-2	1586475 Page 2
P	art	II Balance Sheets Attached schedules and amounts in the description	Beginning of year	End of	year
	αιι	column should be for end-of-year amounts only.	(a) Book Value	(b) Book Value	(c) Fair Market Value
	1	Cash - non-interest-bearing	61,684.	79,367.	79,367.
		Savings and temporary cash investments	179,759.	225,385.	225,385.
		Accounts receivable			
		Less: allowance for doubtful accounts			
	4	Pledges receivable			
		Less: allowance for doubtful accounts			
	5	Grants receivable			
		Receivables due from officers, directors, trustees, and other			
	0				
	-	disqualified persons			
	'	Other notes and loans receivable			
		Less: allowance for doubtful accounts			
ets		Inventories for sale or use			
Assets		Prepaid expenses and deferred charges			
٩		Investments - U.S. and state government obligations	100.000	100.000	
		Investments - corporate stock Stmt 5	109,963.	109,963.	216,457.
		Investments - corporate bonds			
	11	Investments - land, buildings, and equipment: basis			
		Less: accumulated depreciation			
	12	Investments - mortgage loans			
	13	Investments - other	36,572.	0.	0.
	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)	387,978.	414,715.	521,209.
	17	Accounts payable and accrued expenses			
		Grants payable			
~		Deferred revenue			
Liabilities		Loans from officers, directors, trustees, and other disqualified persons			
bili	21	Mortgages and other notes payable			
Lia		Other liabilities (describe )			
		/			
	23	Total liabilities (add lines 17 through 22)	0.	0.	
	20	Foundations that follow FASB ASC 958, check here			
		and complete lines 24, 25, 29, and 30.			
ces	24	Net assets without donor restrictions			
<u>a</u>	25	Net assets with donor restrictions			
Ba	20	Foundations that do not follow FASB ASC 958, check here			
or Fund Balances		and complete lines 26 through 30.			
Ē	00		250,000.	250,000.	
		Capital stock, trust principal, or current funds	0.	0.	
sets	27	Paid-in or capital surplus, or land, bldg., and equipment fund	137,978.	164,715.	
As	28	Retained earnings, accumulated income, endowment, or other funds		414,715.	
Net Assets	29	Total net assets or fund balances	387,978.	414,/15.	
~	30	Total liabilities and net assets/fund balances	387,978.	414,715.	
P	art	III Analysis of Changes in Net Assets or Fund Ba	lances		
1	Total	net assets or fund balances at beginning of year - Part II, column (a), line 2	00		
1		st agree with end-of-year figure reported on prior year's return)		1	387,978.
•					26,737.
					0.
		r increases not included in line 2 (itemize)			414,715.
		lines 1, 2, and 3			414,/15.
5	000	eases not included in line 2 (itemize)		5	0.

5		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	Ι	414,715.

Form 990-PF (2023)

_		ayette Family Fo							26-158	6475	Page <b>3</b>
Pa	(a) List and describe	and Losses for Tax on In the kind(s) of property sold (for exa arehouse; or common stock, 200 shs	mple, real estate			( <b>b)</b> How ac P - Purc D - Dona	hase		ate acquired ., day, yr.)	<b>(d)</b> Dat (mo., da	
1a						0 000					
b	NO	NE									
C											
d											
е		I	1								
	(e) Gross sales price	(f) Depreciation allowed (or allowable)		or other ba pense of sa					) Gain or (loss plus (f) minus		
a											
b											
<u> </u>											
d											
e	Complete only for assets showi	l ng gain in column (h) and owned by t	the foundation of	n 12/31/60	2				(Col (b) goin	minua	
		(i) Adjusted basis	1			_	C	(I) Gains ol. (k), bi	s (Col. (h) gain ut not less tha	minus n -0-) <b>or</b>	
	(i) FMV as of 12/31/69	as of 12/31/69		ess of col. ol. (j), if an					es (from col. (		
a											
b											
<u> </u>											
_ <u>d</u> e											
3 N 11 P	f gain, also enter in Part I, line 8, art I, line 8	apital loss) { If (loss), enter -C ss) as defined in sections 1222(5) ar , column (c). See instructions. If (los sed on Investment Incom	nd (6): s), enter -0- in			$\frac{\int 2}{3}$	4948	- 500	instructio	ns)	
		described in section 4940(d)(2), che						- <u>כר</u>		115)	
Ia		letter: (at						1			91.
h		enter 1.39% (0.0139) of line 27b. Ex					cuonsy				
2		l. (b)									
2	Tax under section 511 (domes	tic section 4947(a)(1) trusts and taxa	able foundations	only; othe	rs, ente	r -0-)		2	2		0.
3								3	}		91.
4		stic section 4947(a)(1) trusts and tax						4			0.
5	Tax based on investment inco	me. Subtract line 4 from line 3. If ze	ero or less, enter	-0				5	;		91.
6	Credits/Payments:										
a		and 2022 overpayment credited to 20		6a				0.			
b		tax withheld at source		6b				0.			
C		$(tension of time to file (Form 8868)_{})$		6c				0.			
d		ly withheld		6d				0.			0
7		ld lines 6a through 6d						7			0.
8		/ment of estimated tax. Check here									0.
9		and 8 is more than line 7, enter <b>amo</b>									91.
10		e than the total of lines 5 and 8, enter	r the <b>amount ov</b>	erpaid							
11	Enter the amount of line 10 to	be: Credited to 2024 estimated tax					Refunde	ed   1 <sup>.</sup>	1	000	

Form **990-PF** (2023)

# Form 990-PF (2023) Lafayette Family Foundation Part VI-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		Yes	No
	any political campaign?	1a		x
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition	1b		x
-	If the answer is "Yes" to <b>1a</b> or <b>1b</b> , attach a detailed description of the activities and copies of any materials published or	12		
	distributed by the foundation in connection with the activities.			
c	Did the foundation file Form 1120-POL for this year?	1c		x
	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year:			
u	(1) On the foundation. $\qquad 0.$ (2) On foundation managers. $\qquad 0.$			
۵	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation			
Ū	managers. \$0.			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS?	2		x
-	If "Yes," attach a detailed description of the activities.			<u> </u>
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or			
0		3		x
10	bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a		X
	If "Yes," has it filed a tax return on Form 990-T for this year?	4b		
	Was there a liquidation, termination, dissolution, or substantial contraction during the year?	5		x
5		5		
6	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:			
	<ul> <li>By language in the governing instrument, or</li> <li>By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law</li> </ul>			
			Х	
7	remain in the governing instrument?	6	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		л	
89	Enter the states to which the foundation reports or with which it is registered. See instructions.			
u	ME			
h	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate)			
	of each state as required by General Instruction G? If "No," attach explanation	8b	х	
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			
v	year 2023 or the tax year beginning in 2023? See the instructions for Part XIII. If "Yes," complete Part XIII	9		x
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10		X
		"		
	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?			<u> </u>
12		12		x
13		13	Х	
10	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?		~~	L
14	The books are in care of Jonathan Withee Telephone no. (207)	862	-80	00
	Located at 155 Littlefield Ave., Bangor, ME			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of <b>Form 1041</b> - check here			$\Box$
	and enter the amount of tax-exempt interest received or accrued during the year [15]	N	/A	<u>`</u>
16	At any time during calendar year 2023, did the foundation have an interest in or a signature or other authority over a bank,		Yes	No
	securities, or other financial account in a foreign country?	16		X
	See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the			
	foreign country			
		rm <b>99</b> 0	)-PF	(2023)

Form 990-PF (2023) Lafayette Family Foundation	26-158	5475	Page 5
Part VI-B Statements Regarding Activities for Which Form 4720 May Be Required			Ť
File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			res 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?		1a(1)	X
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from)			
a disqualified person?		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)	<u> </u>
(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)	<u> </u>
<b>b</b> If any answer is "Yes" to 1a(1)-(6), did <b>any</b> 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			
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 2023?		1d	<u> </u>
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 2023, did the foundation have any undistributed income (Part XII, lines			
6d and 6e) for tax year(s) beginning before 2023?		2a	X
If "Yes," list the years , , , ,			
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	ct		
valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attack	h		
statement - see instructions.)	N/A	2b	
c If the provisions of section 4942(a)(2) are being applied to <b>any</b> of the years listed in 2a, list the years here.			
,,,,			
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time			
during the year?		3a	<u> </u>
<b>b</b> If "Yes," did it have excess business holdings in 2023 as a result of (1) any purchase by the foundation or disqualified persons af			
May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to d	ispose		
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 2023.)		3b	
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		4a	<u> </u>
<b>b</b> Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose bad at here a series of the fact the fac			v
had not been removed from jeopardy before the first day of the tax year beginning in 2023?		4b	

Form **990-PF** (2023)

Form 990-PF (2023) Lafayette Family Foundation	26-158	6475	F	<sup>5</sup> age <b>6</b>
Part VI-B Statements Regarding Activities for Which Form 4720 May Be Required (continuent)	nued)			
5a During the year, did the foundation pay or incur any amount to:			Yes	No
(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>b</b> If any answer is "Yes" to 5a(1)-(5), did <b>any</b> 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	N/A	5b		
<b>c</b> Organizations relying on a current notice regarding disaster assistance, check here				
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?	N/A	5d		
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?		6a		_X
<b>b</b> Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?		6b		X
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?		7a		_X
b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?	N/A	7b		
8 Is the foundation subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or				
excess parachute payment(s) during the year?		8		Х

#### Part VII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors 1.1.4. - 11 - 44 .... . . . . . . . - -1 - 42

1 List all officers, directors, trustees, and foundation managers and	their compensation.			
(a) Name and address	<b>(b)</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
J. Daniel Lafayette III	President			
155 Littlefield Avenue				
Bangor, ME 04401	2.00	0.	0.	0.
Carla J. Lafayette	Vice Presiden	t		
155 Littlefield Avenue				
Bangor, ME 04401	2.00	0.	0.	Ο.
Jacqueline A. Rawcliffe	Treasurer/Sec	retary		
155 Littlefield Avenue				
Bangor, ME 04401	2.00	0.	0.	0.
Chris Austin	Registered Ag	ent		
155 Littlefield Avenue				
Bangor, ME 04401	2.00	0.	0.	0.
2 Compensation of five highest-paid employees (other than those in	ncluded on line 1). If none, e	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

Form 990-PF (2023)

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# Form 990-PF (2023) Lafayette Family Foundation 26-1586475 Page 7 Part VII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued) 3 Five highest-paid independent contractors for professional services. If none, enter "NONE." (a) Name and address of each person paid more than \$50,000 (c) Compensation (b) Type of service NONE 0 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 Expenses number of organizations and other beneficiaries served, conferences convened, research papers produced, etc. 1None Ο. 2 3 4 Part VIII-B Summary of Program-Related Investments Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2. Amount 1None Ο. 2 All other program-related investments. See instructions. 3 0. Total. Add lines 1 through 3 Form 990-PF (2023)

Ρ	Part IX Minimum Investment Return (All domestic foundations must complete this part. Foreign for	undations	s, see instructions.)
1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a		1a	195,395.
b	Average of monthly cash balances	1b	270,701.
C	Fair market value of all other assets (see instructions)	1c	0.
d		1d	466,096.
е	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	466,096.
4	Cash deemed held for charitable activities. Enter 1.5% (0.015) of line 3 (for greater amount, see instructions)	4	6,991.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3	5	459,105.
6	Minimum investment return. Enter 5% (0.05) of line 5	6	22,955.
P	<b>Part X</b> Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations a	and certair	1
_	foreign organizations, check here and do not complete this part.)		22,955.
1	Minimum investment return from Part IX, line 6	1	22,955.
	Tax on investment income for 2023 from Part V, line 5 2a 91.		
b			01
C		2c	91.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	22,864.
4	Recoveries of amounts treated as qualifying distributions	4	22,864.
5	Add lines 3 and 4	5	22,004.
6	Deduction from distributable amount (see instructions)	6	22,864.
<u>/</u>	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XII, line 1	7	22,004.
Ρ	Qualifying Distributions (see instructions)		
1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
a		1a	48,785.
b		1b	0.
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		3a	
b		3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part XII, line 4	4	48,785.
		•	Form <b>990-PF</b> (2023)

## Form 990-PF (2023)

# Lafayette Family Foundation

Part XII Undistributed Income (see instructions)

	(a)	(b)	(C)	(d)
	Corpus	Years prior to 2022	2022	2023
1 Distributable amount for 2023 from Part X, line 7				22,864.
2 Undistributed income, if any, as of the end of 2023:				
<b>a</b> Enter amount for 2022 only			0.	
<b>b</b> Total for prior years:				
,,		0.		
3 Excess distributions carryover, if any, to 2023:				
a From 2018 296, 285.				
<b>b</b> From 2019 77,966.				
c From 2020 26,920.				
d From 2021 38,108.				
e From 2022 16,389.				
f Total of lines 3a through e	455,668.			
4 Qualifying distributions for 2023 from				
Part XI, line 4: \$ 48,785.			0.	
<b>a</b> Applied to 2022, but not more than line 2a			0.	
<b>b</b> Applied to undistributed income of prior		0.		
years (Election required - see instructions)		0.		
<b>c</b> Treated as distributions out of corpus	0.			
(Election required - see instructions)	0.			22,864.
d Applied to 2023 distributable amount	25,921.			22,004.
e Remaining amount distributed out of corpus	23,921.			
5 Excess distributions carryover applied to 2023 (If an amount appears in column (d), the same amount must be shown in column (a).)	0.			0.
6 Enter the net total of each column as indicated below:				
<b>a</b> Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	481,589.			
<b>b</b> Prior years' undistributed income. Subtract				
line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
<b>d</b> Subtract line 6c from line 6b. Taxable				
amount - see instructions		0.		
e Undistributed income for 2022. Subtract line				
4a from line 2a. Taxable amount - see instr			0.	
f Undistributed income for 2023. Subtract				
lines 4d and 5 from line 1. This amount must				
be distributed in 2024				0.
7 Amounts treated as distributions out of				
corpus to satisfy requirements imposed by				
section 170(b)(1)(F) or 4942(g)(3) (Election	•			
may be required - see instructions)	0.			
8 Excess distributions carryover from 2018				
not applied on line 5 or line 7	296,285.			
9 Excess distributions carryover to 2024.	105 204			
Subtract lines 7 and 8 from line 6a	185,304.			
10 Analysis of line 9: a Excess from 2019 77,966.				
c Excess from 2021 38,108. d Excess from 2022 16,389.				
e Excess from 2023 25,921.				
				Form <b>000-DF</b> (0000)

9

323581 12-20-23

Form **990-PF** (2023)

Form 990-PF (2023) Lafayette	e Family Fo	oundation		26-15	86475 Page 1
Part XIII Private Operating Fou	ndations (see ins	tructions and Part VI	A, question 9)	N/A	
<b>1 a</b> If the foundation has received a ruling or de					
foundation, and the ruling is effective for 20					
<b>b</b> Check box to indicate whether the foundation	on is a private operatin	g foundation described i	n section	4942(j)(3) or49	42(j)(5)
2 a Enter the lesser of the adjusted net	Tax year		Prior 3 years		
income from Part I or the minimum	( <b>a</b> ) 2023	<b>(b)</b> 2022	(c) 2021	( <b>d</b> ) 2020	(e) Total
investment return from Part IX for					
each year listed					
<b>b</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: <b>a</b> "Assets" alternative test - enter:					
(1) Value of all assets					
(2) Value of assets qualifying					
under section 4942(j)(3)(B)(i)					
<b>b</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 Inform	ation (Complet	e this part only i	f the foundation	had \$5,000 or mor	e in assets

#### 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 7

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

#### None

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

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

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

### See Statement 6

**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:

323601 12-20-23

Form 990-PF (2023)

3 Grants and Contributions Paid During the Ye	ar or Approved for Future I	Payment		
Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year				
Northern Light Eastern Maine Medical		PC	Melanoma research to	
Center Foundation			find a cure for	
PO Box 931			melanoma	
Bangor, ME 04402-0931				30,000
Dana-Farber Cancer Institute Inc.		₽C	Melanoma Fund for	
10 Brookline Place West, 6th Floor			research to find a	
Brookline, MA 02445			cure for melanoma	15,000
				,
Total				45,000
<b>b</b> Approved for future payment				
None				
Total	l	<u> </u>		C

# Part XV-A

# -A Analysis of Income-Producing Activities

	Unrelated	business income	Excluded	by section 512, 513, or 514	( )
Enter gross amounts unless otherwise indicated.	(a) Business	(b) Amount	(C) Exclu- sion code	(d) Amount	(e) Related or exempt function income
1 Program service revenue:	code	, inount	code	Anount	
a					
b					
c					
d					
e					
T					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash			14	722	
investments			14	722.	
4 Dividends and interest from securities			14	0,333.	
5 Net rental income or (loss) from real estate:					
a Debt-financed property					
<b>b</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					
9 Net income or (loss) from special events					
<b>10</b> Gross profit or (loss) from sales of inventory					
11 Other revenue:					
a					
b					
C					
d					
e					
2 Subtotal. Add columns (b), (d), and (e)		0.		9,055.	0.
13 Total. Add line 12, columns (b), (d), and (e)					9,055.
(See worksheet in line 13 instructions to verify calculations.)					
Part XV-B Relationship of Activities to	o the Accom	plishment of Exe	empt Pu	urposes	
		-		-	
Line No. Explain below how each activity for which incom			contributed	l importantly to the accompli	shment of
the foundation's exempt purposes (other than t	by providing funds	s for such purposes).			
N/A					

ו-990 ו	PF (2023) Lafay	ette Family Foundation	26-1586	475	Pa	age <b>13</b>
irt X			d Relationships With Noncharita	able		
	· · ·				<b>X</b>	
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?						
	1 0					
(1) (	Cash			1a(1)		X
				1a(2)		X
				1b(1)		X
				1b(2)		X
						X
(4) Reimbursement arrangements						X
						X
(6) Performance of services or membership or fundraising solicitations						X
c Sharing of facilities, equipment, mailing lists, other assets, or paid employees						X
If the	answer to any of the above is	"Yes," complete the following schedule. Column (b) should alw	vays show the fair market value of the goods, ot	ther ass	ets,	
			e in any transaction or sharing arrangement, she	ow in		
colur						
ine no.	(b) Amount involved		(d) Description of transfers, transactions, and sh	aring arra	angemer	nts
		N/A				
	Did tl           (othe           Trans           (1) (           (2) (           Other           (1) (           (2) (           (1) (           (2) (           (3) F           (3) F           (4) F           (5) L           (6) F           Shari           If the           or se           column	Information Resempt Organ           Did the organization directly or indii           (other than section 501(c)(3) organ           Transfers from the reporting foundation           (1) Cash           (2) Other assets           Other transactions:           (1) Sales of assets to a noncharita           (2) Purchases of assets from a noil           (3) Rental of facilities, equipment,           (4) Reimbursement arrangements           (5) Loans or loan guarantees           (6) Performance of services or me           Sharing of facilities, equipment, ma           If the answer to any of the above is or services given by the reporting for column (d) the value of the goods,	Information Regarding Transfers to and Transactions an Exempt Organizations         Did the organization directly or indirectly engage in any of the following with any other organizatio (other than section 501(c)(3) organizations) or in section 527, relating to political organizations? Transfers from the reporting foundation to a noncharitable exempt organization of:         (1) Cash       (2) Other assets         (2) Other assets       (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         Sharing of facilities, equipment, mailing lists, other assets, or paid employees         If the answer to any of the above is "Yes," complete the following schedule. Column (b) should alw or services given by the reporting foundation. If the foundation received less than fair market value column (d) the value of the goods, other assets, or services received.	Information Regarding Transfers to and Transactions and Relationships With Noncharita         Exempt Organizations         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?         Transfers from the reporting foundation to a noncharitable exempt organization of:       (1) Cash         (2) Other assets       (1) Cash section 50 assets to a noncharitable exempt organization         (2) Purchases of assets from 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       (5) Loans or loan guarantees         (6) Performance of services or membership or fundraising solicitations         Sharing of facilities, equipment, mailing lists, other assets, or paid employees         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, shucculum (d) the value of the goods, other assets, or services received.         (a) Namount involved       (c) Name of noncharitable exempt organization	Information Regarding Transfers to and Transactions and Relationships With Noncharitable Exempt Organizations         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?         Transfers from the reporting foundation to a noncharitable exempt organization of:       1a(1)         (1) Cash       1a(2)         (2) Other assets       1a(2)         Other transactions:       1b(1)         (1) Sales of assets from a noncharitable exempt organization       1b(1)         (2) Purchases of assets from a noncharitable exempt organization       1b(2)         (3) Rental of facilities, equipment, or other assets       1b(3)         (4) Reimbursement arrangements       1b(4)         (5) Loans or loan guarantees       1b(5)         (6) Performance of services or membership or fundraising solicitations       1c         1t 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 asset 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.	Information Regarding Transfers to and Transactions and Relationships With Noncharitable Exempt Organizations         Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c)       Yes         (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?       Ia(1)       Ia(2)         Transfers from the reporting foundation to a noncharitable exempt organization of:       Ia(1)       Ia(2)         (1) Cash       (2) Other assets       Ia(2)         Other transactions:       Ib(1)       Ia(2)         (1) Sales of assets to a noncharitable exempt organization       Ib(2)         (3) Rental of facilities, equipment, or other assets       Ib(3)         (4) Reimbursement arrangements       Ib(4)         (5) Loans or loan guarantees       Ib(6)         (6) Performance of services or membership or fundraising solicitations       Ib(6)         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 Ist	the foundation directly or indirectly aff	iliated with, or related to, one or i	more tax-exempt organiz	ations described		
in s	section 501(c) (other than section 501	I(c)(3)) or in section 527?				Yes X No
b⊳lf‴	'Yes," complete the following schedule.	•				
	(a) Name of organiza	ition (b	) Type of organization		(c) Description of re	elationship
	N/A					
Sign	Under penalties of perjury, I declare that I and belief, it is true, correct, and complete			tion of which prepare		May the IRS discuss this return with the preparer shown below? See instr.
Here				CFO		🔄 🔀 Yes 🗌 No
	Signature of officer or trustee	r	Date	Title		L
	Print/Type preparer's name	Preparer's signa	ture	Date	Check if	PTIN
					self- employed	

			self- employed	
Joseph R. Byrne	Joseph R. Byrne	05/01/24		P01289281
Firm's name Berry Dunn	McNeil & Parker, LLC	1	Firm's EIN 01	-0523282
_				
Firm's address 2211 Congr	ess St			
Portland,	ME 04102		Phone no. (2	07)775-2387
				Form <b>990-PF</b> (2023)
	Firm's name Berry Dunn	Firm's name Berry Dunn McNeil & Parker, LLC	Firm's name Berry Dunn McNeil & Parker, LLC Firm's address 2211 Congress St	Joseph R. ByrneJoseph R. Byrne05/01/24Firm's nameBerry Dunn McNeil & Parker, LLCFirm's EIN 01Firm's address2211Congress St

# Schedule B

(Form 990)

Department of the Treasury Internal Revenue Service

Name of the organization

# **Schedule of Contributors**

OMB No. 1545-0047

Attach to Form 990, 990-EZ, or 990-PF. Go to www.irs.gov/Form990 for the latest information. 2023

Employer identification number

26-158647	5
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Lafayette	Family	Foundation	
Organization type (check one):			

Filers of:	Section:
Form 990 or 990-EZ	501(c)( ) (enter number) organization
	4947(a)(1) nonexempt charitable trust <b>not</b> treated as a private foundation
	527 political organization
Form 990-PF	X 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

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

#### Special Rules

- For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990), 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 (entering "N/A" in column (b) instead of the contributor name and address), 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 for an *exclusively* set of the parts unless to the set of the parts unless the **General Rule** applies to the parts unl

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

For Paperwork Reduction Act Notice, see the instructions for Form 990, 990-EZ, or 990-PF.

Schedule B (Form 990) (2023)

Name of organization

Employer identification number

26-1586475

### Lafayette Family Foundation

Part I Contributors (see instructions). Use duplicate copies of Part I if additional space is needed. (a) (d) (b) (c) Name, address, and ZIP + 4 No. **Total contributions** Type of contribution 1 Cecil and Karen Loyd X Person Payroll 6745 Cross Gate St. 5,000. Noncash \$ (Complete Part II for Cumming, GA 30040 noncash contributions.) (a) (b) (c) (d) Type of contribution No. Name, address, and ZIP + 4 **Total contributions** 2 John D. & Carla Lafayette III X Person Payroll 89 Main Road North 25,000. Noncash \$ (Complete Part II for Hamoden, ME 04444 noncash contributions.) (a) (b) (c) (d) Name, address, and ZIP + 4 **Total contributions** Type of contribution No. 3 Lafayette West Lebanon, LLC X Person Payroll 7,254. 155 Littlefield Ave. Noncash \$ (Complete Part II for Bangor, ME 04401 noncash contributions.) (a) (b) (c) (d) Name, address, and ZIP + 4 **Total contributions** Type of contribution No. Person Payroll Noncash \$ (Complete Part II for noncash contributions.) (a) (b) (c) (d) No. Name, address, and ZIP + 4 **Total contributions** Type of contribution Person Payroll Noncash (Complete Part II for noncash contributions.) (c) (d) (a) (b) **Total contributions** No. Name, address, and ZIP + 4 Type of contribution Person Payroll Noncash (Complete Part II for noncash contributions.)

Schedule B (Form 990) (2023)

323452 12-26-23

15 2023.03040 LAFAYETTE FAMILY FOUNDATI 79599\_\_1

12310501 757052 79599

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
		\$	

16

Noncash Property (see instructions). Use duplicate copies of Part II if additional space is needed.

Schedule B (Form 990) (2023)

# 12310501 757052 79599

2023.03040 LAFAYETTE FAMILY FOUNDATI 79599\_\_1

Employer identification number

Page 3

26-1586475

Lafayette Family Foundation

Name of organization

Part II

	B (Form 990) (2023)			Page 4
Name of c	organization			Employer identification number
Lafay	ette Family Foundation			26-1586475
Part III	Exclusively religious, charitable, etc., contributi from any one contributor. Complete columns (a)	ons to organizations described in s	ection 501(c)(7), (8), or (10) the	at total more than \$1,000 for the year
	completing Part III, enter the total of exclusively religious,	charitable, etc., contributions of \$1,000 or	less for the year. (Enter this info. or	nce.) \$
(a) No.	Use duplicate copies of Part III if additional :	space is needed.		
from Part I	(b) Purpose of gift	(c) Use of gift	(d) Desc	ription of how gift is held
		(e) Transfer of g	ift	
	Turneferre la nome o debuce o		Deletionship of tree	
	Transferee's name, address, a		Relationship of tran	nsferor to transferee
(a) No.			( ) =	
from Part I	(b) Purpose of gift	(c) Use of gift	(d) Desc	ription of how gift is held
		(e) Transfer of g	ift	
	Transferee's name, address, a	nd ZIP + 4	Relationship of trar	nsferor to transferee
(a) No. from	(b) Purpose of gift	(c) Use of gift	(d) Desc	ription of how gift is held
Part I				<u> </u>
		e) Transfer of g	ift	
		(0)		
	Transferee's name, address, a	nd ZIP + 4	Relationship of trar	nsferor to transferee
(a) No.				
from Part I	(b) Purpose of gift	(c) Use of gift	(d) Desc	ription of how gift is held
		(e) Transfer of g	ift	
	Transforce's name address a	nd <b>7</b> ID + 4	Polationship of tran	seferer to transferee
	Transferee's name, address, a			nsferor to transferee
323454 12-26	۱ ۵-23	I		Schedule B (Form 990) (2023)

# 12310501 757052 79599

17 2023.03040 LAFAYETTE FAMILY FOUNDATI 79599\_\_1

	st on Sav:	ings and Tem	porary	Cash In	vestments	Statement 1
Source		(a Reve Per B	nue		(b) vestment come	(c) Adjusted Net Income
Various			722.		722.	
Total to Part I, li	ne 3		722.		722.	
Form 990-PF	Dividend	ls and Inter	est fro	m Secur	ities	Statement 2
Source	Gross Amount	Capital Gains Dividend	Re	(a) venue Books	(b) Net Inves ment Inco	2
Infinex Investment Inc.	8,333	3.	0.	8,333.	8,33	3.
To Part I, line 4	8,333	3.	0.	8,333.	8,33	3.
Form 990-PF		Accounti	ng Fees			Statement 3
Form 990-PF Description		Accounti (a) Expenses Per Books	ng Fees (b Net In ment I	vest-	(c) Adjusted Net Incom	(d) Charitable
		(a) Expenses	(b Net In ment I	vest-	Adjusted	(d) Charitable
Description	- - 1, ln 16b =	(a) Expenses Per Books	(b Net In ment I	vest- ncome	Adjusted	(d) Charitable e Purposes
Description Accounting Fees To Form 990-PF, Pg	- _ 1, ln 16b =	(a) Expenses Per Books 6,308.	(b Net In ment I	vest- ncome 2,523.	Adjusted	(d) Charitable Purposes 3,785.
Description Accounting Fees	- 1, ln 16b =	(a) Expenses Per Books 6,308. 6,308.	(b Net In ment I	vest- ncome 2,523. 2,523.	Adjusted	(d) Charitable Purposes 3,785. 3,785. Statement 4 (d) Charitable
Description Accounting Fees To Form 990-PF, Pg Form 990-PF		(a) Expenses Per Books 6,308. 6,308. Tax (a) Expenses	(b Net In ment I 	vest- ncome 2,523. 2,523.	Adjusted Net Income (c) Adjusted	(d) Charitable Purposes 3,785. 3,785. Statement 4 (d) Charitable

= =

Form 990-PF Corporate Stock	Corporate Stock		
Description	Book Value	Fair Market Value	
6988 Shares Bar Harbor BankShares Com Stock 300 Shares Camden Natl Corp Com Stock	102,958. 7,005.	205,168. 11,289.	
Total to Form 990-PF, Part II, line 10b	109,963.	216,457.	

Form 990-PF Grant Application Submission Information Sta Part XIV, Lines 2a through 2d

Statement 6

Name and Address of Person to Whom Applications Should be Submitted

Lafayette Family Foundation C/O Jacqueline Rawcliffe, Treasurer 155 Littlefield Avenue Bangor, ME 04401

Telephone Number

207-862-8000

Form and Content of Applications

No particular format required.

Any Submission Deadlines

None

Restrictions and Limitations on Awards

None

Form 990-PF

Statement 7

Name of Manager

J. Daniel Lafayette III Carla J. Lafayette