



2025 ANNUAL REPORT

# Watertown Foundation

*CELEBRATING*



100

*YEARS OF*

*CONNECTING OUR COMMUNITY*

*THROUGH GIVING*



# Presidents Message



## Watertown Foundation

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Post Office Box 117  
Watertown, CT 06795

Dear Members and Friends,

It is an honor and privilege that the Board of Trustees of the Watertown Foundation celebrates 100 years of Connecting Our Community Through Giving.

On October 6, 1925, David Woodward met with local leaders to form a foundation with the intent to receive gifts and use them for charitable, educational, literary, scientific, historical, or religious purposes in order to make Watertown a better place to live.

The success of the foundation depends on the contributions of our community and our members. The Watertown Foundation Board of Trustees thank you all for your support and trust ensuring the mission continues for generations to come.

This year the Watertown Foundation, with the support of its members and donors, awarded \$101,000 in Scholarships to thirty-two Watertown students and \$100,000 in grants to thirty-nine organizations.

We are proud to announce that we have achieved our goal of welcoming 100 new Centennial members. We appreciate these community members for helping us achieve this goal and look forward to continued support from all our members.

The Trustees of the Watertown Foundation are most grateful to Linda Merriman and her family for their generous donation of \$50,000 to fund the Next Generation Fund to be used as a matching gift incentive to double each contribution of the past year. The Merriman family represents the third generation of the Watertown Foundation founding members since 1925.

The Centennial Celebration Committee, co-chaired by Susan Atkins and Paula Labonte with the support of the foundation board, exceeded its goal to increase our exposure in the community by highlighting 100 years of philanthropy. From an amazing exhibit at the Watertown History Museum, to the Seward Johnson Sculptures around town, to the production of Rusty Dyer's video reflecting the foundation's community impact, to the soon-to-be-completed Watertown Foundation Centennial Corner at Echo Lake Road and Buckingham Street, the Watertown Foundation has served our community in the past, present, and most importantly, in the future!

It has been an honor to serve as president of this organization for the past two years. I want to acknowledge the commitment of the Board of Trustees, as well as the volunteer members of the Grants Committee and Scholarship Committee, for donating their time and talent for the benefit of our community. Our incoming President, Ted Heavenrich, will lead this organization into our next generation of Connecting our Community Through Giving.

Thank you and God bless you all.

Sincerely,

A handwritten signature in black ink that reads "Marcia B. Killeen".

Marcia B. Killeen, President

*October 6, 1925*



**M'Fingal Inn Bungalow**

**Seventy people were invited to the M'Fingal Inn Bungalow to join and invest into the Watertown Foundation**



**David Woodward**  
*Founding Father and first President*



**Harley F. Roberts**  
*First Vice President*

# Centennial Members

*Welcome to our 100+ new members who have joined since 2020*

Taryn Agati  
Kathryn Agati  
Alexandra Agati and Chaz Plungis  
Dr. Lance Banwell and Maria Moffo  
Peter and Amy Julia Becker  
Brian and Carey Bellagamba  
Joshua Bernegger, Chief of Police  
Eric C. Berthel  
Suzanne M. Bly-Bozzuto  
Amanda Bohnsack  
Stephen Briotti  
Jake Burr  
Marie Butterly  
Joe Caligiuri  
Caroline L. Carew  
Christopher T. Carew  
Donald J. Carew  
Steven and Mary Rosengrant Chiappalone  
Dale K. Ciccarelli, MST  
Mallory Merriman Constantine  
Lawrence Crimmins  
Ned and Lisa Dalton  
D'Amico & Pettinicchi LLC  
Kevin and Jill Danaher  
Douglas and Kristi D'Andrea  
Ronald and Paula D'Andrea  
Samuel C. Davidson  
Lisa and Anthony Debany  
Rex A. Decker  
Robert and Debra Desena  
Anthony DiBona  
Renee Dominguez, Deputy Chief of Police  
Lori DosSantos  
Christine, Mark and Domenic Faressa  
Dr. James and Mrs. Eileen Flint  
Brienne Foley  
Warren and Donna Ford  
Suzanne Franson  
Michael Ganem  
Kelly Gereski  
Golden Technology Services Inc.  
Sybil Goodkin  
Ric Gotay and Cat Gentry  
Greater Waterbury YMCA  
Shannon Guidotti  
Lee and Troy Harden  
Roberta Hardt  
Jason Healy  
Marc Hess  
Holy Disciples Parish  
William and Karen Hosking

Hubbard Hall  
J&R Computers  
Sandra and Norman Jellinghaus  
Jimmy's of Watertown  
Barbara Kennedy  
Justine and Alphonse Kuncas  
David J. LaCasse  
Edward A. Lawson  
John Lynch  
Mr. and Mrs. Laurent Madeux Sr.  
John A. and Renate H. Marshall  
Nancy Maton  
Alan Mickel  
Shelby and Sam Moskaluk  
Michael and Nora Myers  
Charles Neumann  
Peter and Kippy North  
Jim and Nicola O'Rourke  
William and Margaret Palomba  
Joe and Linda Polletta  
Joe Polletta, Jr.  
Diane Pollutro  
Maria Zamora and Jonathon Ramsay  
Al Reiff  
Robert and Lisa Retallick  
Dona Rintelman  
Richard R. Rozanski, Jr.  
Rachael Ryan  
Michael and Kendra Shade Scapeccia  
Charles and Christine Shield  
Showcase Realty ~ John Donato, Jr.  
Siemon Company  
Rev. Anthony J. Smith  
Sarah W. Surber  
Paul Swiatek  
Andrew Taylor  
Brendan and Lisa Tesch  
Jeffrey and Karen Tesch  
The Lombard Group  
Kathleen M. Thomas  
Tim and Katherine Upson  
J. Paul Vance, Jr.  
Margret Warner  
Waterbury Smiles ~ Dr. Luciano Marini  
Watertown Fire Department  
Sean J. Williams  
Walter and Kathleen Williams  
Rita Wolfe  
Jennifer M. Zaccagnini  
Dr. Peter Zilahy ~ Zilahy Wellness Center



# Year in Review



## Annual Report 2025

**Contributions Received** \$131,301

**Financial Position**

|              |             |
|--------------|-------------|
| Revenue      | \$307,189   |
| Expenditures | \$292,823   |
| Net assets   | \$6,053,920 |

**Scholarships Awarded**

Thirty-three scholarships \$101,000

**Community Service Grants Awarded**

Thirty-nine community service grants \$100,000

**New Members Proposed**

Dr. Lance Banwell & Maria Moffo  
Amanda Bohnsack  
Stephen Briotti  
Marie Butterly  
Mallory Merriman Constantine  
Kevin and Jill Danaher  
Ronald and Paula D'Andrea  
Samuel C. Davidson  
Rex A. Decker  
Robert and Debra Desena  
Dr. James & Mrs. Eileen Flint  
Brianne Foley  
Suzanne Franson  
Michael Ganem

Kelly Gereski  
Golden Technology Services Inc.  
Sybil Goodkin  
Ric Gotay and Cat Gentry  
Shannon Guidotti  
Lee and Troy Harden  
Marc Hess  
Sandra and Norman Jellinghaus  
David J. LaCasse  
John Lynch  
Mr. and Mrs. Laurent Madeux Sr.  
Nancy Maton  
Charles Neumann  
Peter and Kippy North

Jim and Nicola O'Rourke  
Diane Pollutro  
Al Reiff  
Richard R. Rozanski, Jr.  
Siemon Company  
Rev. Anthony J. Smith  
Sarah W. Surber  
Andrew Taylor  
Kathleen M. Thomas  
Tim and Katherine Upson  
Dr. Luciano Marini, Waterbury Smiles  
Walter and Kathleen Williams  
Dr. Peter Zilahy - Zilahy Wellness Center

*The Watertown Foundation is grateful for the support of Dale K. Ciccarelli and Sam Moskaluk, J&R Computers. Their generous gifts of time and talent enable the foundation to give more to our community. With special appreciation to the Law Office of Slavin, Stauffacher & Scott LLC for administrative support of the Watertown Foundation. We also thank our Trustees for their volunteer efforts supporting the work of the foundation.*

# Financial Position



|                                                          | Year ending<br>August 31, 2025 | Year ending<br>August 31, 2024 |
|----------------------------------------------------------|--------------------------------|--------------------------------|
| <b>Revenue</b>                                           |                                |                                |
| Contributions                                            | \$131,301                      | \$672,497                      |
| New Member Dues                                          | \$7,560                        | \$1,750                        |
| Events                                                   | \$10,338                       | \$9,120                        |
| Interest and Dividends                                   | \$157,990                      | \$127,484                      |
| <b>Total Revenue</b>                                     | <b>\$307,189</b>               | <b>\$810,851</b>               |
| <br><b>Expenditures</b>                                  |                                |                                |
| Grants                                                   | \$117,000                      | \$80,000                       |
| Scholarships                                             | \$101,000                      | \$99,000                       |
| General                                                  | \$2,200                        | \$3,076                        |
| Investment Management Fees                               | \$27,752                       | \$24,156                       |
| Events                                                   | \$10,034                       | \$12,754                       |
| Administrative and Fund raising                          | \$34,837                       | \$11,236                       |
| <b>Total Expenditures</b>                                | <b>\$292,823</b>               | <b>\$230,222</b>               |
| <br><b>Net Results for the Year</b>                      | <b>\$14,366</b>                | <b>\$580,629</b>               |
| <br><b>Realized and unrealized Gain from Investments</b> | <b>\$365,343</b>               | <b>\$534,107</b>               |
| <b>Change in Net Assets</b>                              | <b>\$379,709</b>               | <b>\$1,114,736</b>             |
| <br><b>Net Assets - Beginning of the Year</b>            | <b>\$5,674,211</b>             | <b>\$4,559,475</b>             |
| <b>Net Assets - Ending of the Year</b>                   | <b>\$6,053,920</b>             | <b>\$5,674,211</b>             |

# Officers & Trustees

## 2024 - 2025

President  
Marcia Killeen  
Vice President  
Ted Heavenrich  
Secretary  
Paula LaBonte  
Treasurer  
Paul Jessell  
Trustees  
Term Ending 2025  
Margaret Long McKee  
Linda Merriman  
Margret Warner  
Term Ending 2026  
Tina Agati  
Joe Caligiuri  
Paul Jessell  
Term Ending 2027  
Susan Atkins  
Marcia Killeen  
Paula LaBonte  
Term Ending 2028  
Justin Golden  
Ted Heavenrich  
Susan Santopietro  
Term Ending 2029  
Amy Julia Becker  
Douglas D'Andrea  
William Dunbar

## 2025 - 2026

President  
Ted Heavenrich  
Vice President  
Joe Caligiuri  
Secretary  
Paula LaBonte  
Treasurer  
Paul Jessell  
Trustees  
Term Ending 2026  
Joe Caligiuri  
Paul Jessell  
Christine Shields  
Term Ending 2027  
Susan Atkins  
Marcia Killeen  
Paula LaBonte  
Term Ending 2028  
Justin Golden  
Ted Heavenrich  
Susan Santopietro  
Term Ending 2029  
Amy Julia Becker  
Douglas D'Andrea  
William Dunbar  
Term Ending 2030  
Margaret Long McKee  
Linda Merriman  
Margret Warner

## Past Presidents

|                          |      |                            |      |                        |      |
|--------------------------|------|----------------------------|------|------------------------|------|
| David Woodward           | 1925 | John T. Reardon            | 1958 | Carey R. Geghan        | 1993 |
| Harley F. Roberts        | 1926 | Earle W. Couch             | 1960 | Richard Bozzuto        | 1995 |
| William J. Munson        | 1927 | Wooster B. Curtiss         | 1962 | Roger A. Chace         | 1997 |
| Dr. M. Heminway Merriman | 1930 | Harold H. Smith            | 1964 | Dwight F. Miller, M.D. | 1999 |
| Harry H. Heminway        | 1932 | Charles S. Hungerford, Jr. | 1966 | Stedman G. Sweet       | 2001 |
| Charles S. Hungerford    | 1934 | Heminway Merriman          | 1968 | Robert H. LaBonne, Sr. | 2003 |
| Fletcher W. Judson       | 1936 | Wilbur H. Caney            | 1970 | Richard H. Wick        | 2005 |
| S. Kellogg Plume         | 1938 | E. Edward Thompson         | 1972 | James S. Zoldy, Jr.    | 2007 |
| Alexander J. Campbell    | 1940 | John H. S. Candee          | 1974 | Susan Atkins           | 2009 |
| Paul Cruikshank          | 1942 | Mabelle Camp               | 1976 | William Dunbar         | 2011 |
| Arthur P. Hickcox        | 1943 | John H. Cassidy, Jr.       | 1977 | Paul Jessell           | 2013 |
| Merritt W. Atwood        | 1945 | John S. Brady              | 1979 | Joseph Kinsella        | 2015 |
| Gerald C. Low            | 1946 | William H. Eppehimer       | 1981 | Margaret Durkee        | 2017 |
| Adrian V. S. Lindsley    | 1947 | Carol Gilbert              | 1983 | Linda Merriman         | 2019 |
| Thayer Baldwin           | 1949 | Joseph E. Horzempa         | 1985 | Tina Agati             | 2021 |
| F. Stillman Hyde         | 1951 | Roberta Czarsty            | 1987 | Marcia Killeen         | 2023 |
| Dr. J. H. Root, Jr.      | 1954 | Henry Long, Jr.            | 1989 |                        |      |
| John N. Carley           | 1956 | Barbara W. Mahoney         | 1991 |                        |      |

## Past Honorees

### Past Annual Meeting Honorees

The Trustees of the Watertown Foundation established an annual recognition of local individuals, families, businesses and organizations in appreciation of their extraordinary commitment to the Watertown/Oakville community.

|      |                                                                        |      |                                                                               |
|------|------------------------------------------------------------------------|------|-------------------------------------------------------------------------------|
| 2013 | M. Heminway Merriman                                                   | 2018 | The Dunbar Family<br>of Copes Waste Solutions<br>Watertown Historical Society |
| 2014 | Henry Long & The Long Family                                           | 2019 | Brian Flaherty<br>Former State Representative                                 |
| 2015 | Watertown Library Association                                          | 2021 | Watertown Garden Club                                                         |
| 2016 | Robert H. Labonne, Sr. & Labonne's Market<br>Watertown Fire Department | 2022 | The Life and Legacy of Kathleen M. Scully                                     |
| 2017 | Richard C. Bozzuto Family<br>Former State Senator Rob Kane             | 2023 | Watertown Area Asso. of Special Citizen                                       |
|      |                                                                        | 2024 | Carolyn's Place                                                               |

## Committees

### Executive

The Executive Committee is composed of the officers of the Board of Trustees, including the immediate past president as well as a member of the board at large. Its purpose is future planning for consistency and growth to insure the role of the Watertown Foundation in our community.

|                           |                                |
|---------------------------|--------------------------------|
| Marcia Killeen, President | Ted Heavenrich, Vice President |
| Tina Agati                | Paul Jessell                   |
| Susan Atkins              | Paula LaBonte                  |

### Finance and Investment

The Finance and Investment Committee is responsible for proposing the annual spending budget to the Trustees of the Foundation for grants and scholarships based on the organization's Investment Policy Statement. The Committee is also charged with oversight of the Foundation's investment policy, selecting its investment manager(s) and direction of the invested funds. The Foundation's investments are professionally managed by the investment firm of Halsey Associates, Inc.

|                        |                   |
|------------------------|-------------------|
| Paul Jessell, Chairman | Marcia Killeen    |
| Susan Atkins           | Paula LaBonte     |
| Douglas D'Andrea       | Susan Santopietro |
| William Dunbar         | Margret Warner    |
| Ted Heavenrich         |                   |

(Continued)



# *Committees*

## *Grants*

Financial assistance applications from non-profit community organizations for Non-Recurring Capital Improvement Grants are considered annually by the Grants Committee. Proposed capital expenditures must conform to the Foundation By-Law requirements that it be for charitable, educational, literary, scientific, historical or religious purposes. Application deadline is mid-August and awards are announced at a later date.

|                         |                    |
|-------------------------|--------------------|
| Paula LaBonte, Chairman | Jacqueline Cassidy |
| Susan Atkins            | William Donston    |
| Amy Julia Becker        | MaryAnn Rosa       |
| Joe Caligiuri           | Susan Santopietro  |
| Robert Campbell         | Margret Warner     |

## *Scholarships*

Scholarships are awarded annually to graduating high school seniors living in Watertown. Application deadline is April 1; Committee deliberations are in May; and awards are made in early June.

|                                |                     |
|--------------------------------|---------------------|
| Tina Agati, Co-Chairman        | Louise Porto        |
| Margaret McKee, Co-Chairman    | Jim Scully          |
| Ted Heavenrich, Chair Emeritas | Alison Villanueva   |
| Joe Caligiuri                  | Margret Warner      |
| Lisa Fekete                    | Jennifer Zaccagnini |
| Justin Golden                  |                     |

## *Marketing and Development*

The Marketing and Development Committee has the responsibility to promote the objectives and activities of the Watertown Foundation. Increasing membership and financial support are the goals of this committee.

|                            |                   |
|----------------------------|-------------------|
| Tina Agati, Co-Chairman    | Linda Merriman    |
| Justin Golden, Co-Chairman | Christine Shields |
| Lisa Carew                 | Margret Warner    |
| Courtney Ligi              |                   |

## *Nominating*

Volunteers have kept the Watertown Foundation viable for almost a century. The Nominating Committee is charged to encourage members to actively participate in the work of the Foundation committees.

|                |                |
|----------------|----------------|
| Tina Agati     | Paul Jessell   |
| Susan Atkins   | Marcia Killeen |
| William Dunbar | Paula LaBonte  |
| Ted Heavenrich |                |

# *Individual Trust Funds*

## *2024-2025 Contributions*

Ricky Bozzuto Memorial Scholarship  
 Jeffrey Allen Chace Memorial  
 Phebeana V. Gerulaitis Trust  
 William and Ann Long  
 Kathleen M. Scully Memorial Scholarship  
 Stedman and Patricia Sweet  
 Jacqueline and James S. Zoldy, Jr.

### Individual Trust Funds – Total donations through August 31, 2025

|                                                              |           |                                                                                                                                                                                                           |           |
|--------------------------------------------------------------|-----------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------|
| Alan Atwood                                                  | \$2,815   | William and Jeannette Mecabe Memorial                                                                                                                                                                     | \$3,100   |
| Ricky Bozzuto Memorial Scholarship                           | \$71,629  | M. Heminway Merriman 2nd Scholarship                                                                                                                                                                      | \$150,000 |
| Jeffrey Allen Chace Memorial                                 | \$13,720  | Carol Gilbert and Dwight Miller                                                                                                                                                                           | \$1,140   |
| Florence Chase Bequest                                       | \$5,728   | John and Eileen Mills Memorial                                                                                                                                                                            | \$990     |
| Mabelle Camp Bequest                                         | \$5,000   | Joyce Mordenti Scholarship                                                                                                                                                                                | \$25,000  |
| Concerned Citizens for the<br>Preservation of Watertown      | \$2,698   | John and Carol B. Carroll Noyes                                                                                                                                                                           | \$3,383   |
| Earle Couch Bequest                                          | \$7,478   | John and Kathleen O'Neill, Jr.                                                                                                                                                                            | \$8,250   |
| Helen & John Crane Bequest                                   | \$39,914  | Julia A. Recker Bequest                                                                                                                                                                                   | \$25,000  |
| Roberta and Joseph Czarsty, M.D. Memorial                    | \$4,825   | Kathleen M. Scully<br>Memorial Scholarship                                                                                                                                                                | \$21,935  |
| Reinhold and Katie DeWitt<br>Educational Fund                | \$171,316 | David Siemon Memorial                                                                                                                                                                                     | \$2,500   |
| Raymond Donohoe                                              | \$1,950   | Stedman and Patricia Sweet                                                                                                                                                                                | \$38,975  |
| William H. and Margaret E. Eppehimer<br>Memorial Scholarship | \$100,000 | Sidni K. Undercuffler Memorial                                                                                                                                                                            | \$67,150  |
| Carey R. Geghan                                              | \$6,370   | William Varno Memorial                                                                                                                                                                                    | \$1,025   |
| Phebeana V. Gerulaitis Trust                                 | \$674,269 | Laurence E. Wagner                                                                                                                                                                                        | \$6,500   |
| Edward Gionta Memorial                                       | \$7,000   | Town of Watertown Scholarship                                                                                                                                                                             | \$57,327  |
| Gay H. Jackson Memorial                                      | \$10,000  | Educators Memorial                                                                                                                                                                                        | \$3,635   |
| Fletcher Judson                                              | \$124,081 | <i>(Esther Baldwin, Tess Beauchamp, Charles Coor,<br/>Eleanor Curtis, Jeannete Mecabe, Carl E. Richmond,<br/>Ruth Richmond, Margery Rixford, Barbara Schuyler,<br/>Althea Sweeney, and William Varno)</i> |           |
| LOFPC Memorial for Joseph Moody                              | \$3,573   | David Woodward Scholarship                                                                                                                                                                                | \$350,000 |
| Henry L. and Mary D. Long                                    | \$121,029 | J. B. Woolson Bequest                                                                                                                                                                                     | \$10,728  |
| William and Ann Long                                         | \$12,100  | Jacqueline and James S. Zoldy, Jr.                                                                                                                                                                        | \$15,788  |
| Crystal Lukowski Memorial Scholarship                        | \$13,500  |                                                                                                                                                                                                           |           |
| Barbara Mahoney                                              | \$1,490   |                                                                                                                                                                                                           |           |
| Robert J. McGough Memorial                                   | \$5,450   |                                                                                                                                                                                                           |           |

# *Business Community Trust Funds*

## **Business Community Trust Funds Total Donations through August 31, 2025**

### **Wooster Society: \$5,000 or more**

*(Maiden name of region circa 1674; first house built 1700)*

|                                          |           |
|------------------------------------------|-----------|
| AT&T                                     | \$5,000   |
| Atkins, Susan and Victor                 | \$7,250   |
| Dunbar, Janet and William                | \$39,900  |
| Eastern Awnings Systems                  | \$30,000  |
| Engineered Sinterings and Plastic        | \$6,500   |
| Litchfield Bancorp                       | \$5,000   |
| PPG Industries for Keeler and Long, Inc. | \$25,000  |
| Siemon Company Fund                      | \$22,233  |
| Taft School                              | \$34,590  |
| Thomaston Savings Bank                   | \$31,100  |
| Watertown Plastics                       | \$25,000  |
| Woodward Fund                            | \$500,000 |

### **Westbury Society: \$1,000 - \$4,999**

*(Region incorporated as the Society of Westbury in 1738)*

|                                       |         |
|---------------------------------------|---------|
| Baribault Oil Company, Inc.           | \$3,400 |
| BTS Graphics and Printing             | \$4,300 |
| Cablevision Services Corporation      | \$4,000 |
| Wells Fargo Bank – Main Street Branch | \$3,000 |

### **Watertown Society: up to \$2,499**

*(Town name since 1780)*

|                                      |         |
|--------------------------------------|---------|
| A & S Contractors, LLC               | \$2,000 |
| Angels Watching Over You             | \$200   |
| Allstar Appliance                    | \$300   |
| Connecticut Fire & Water Restoration | \$1,500 |
| Lori Bonaldi, C.P.A.                 | \$660   |
| Brothers' Tree Service               | \$200   |
| Colonair Insurance Agency, LLC       | \$100   |
| Dzinski Polzella, C.P.A., LLC        | \$600   |
| G & W Management, Inc.               | \$2,000 |
| Garassino Excavating                 | \$100   |
| Gar-San Corporation                  | \$100   |
| Raymond Jewelers                     | \$300   |
| Staywell Health Center               | \$100   |
| Peter Germain Interiors              | \$100   |
| Resource Development Associates      | \$200   |
| Water Systems Specialties, LLC       | \$100   |
| Watertown Fire Department            | \$1,900 |

## *Join Us! Become a Member*

**H**elp continue the Watertown Foundation's legacy of support for the many special qualities that make Watertown an extraordinary community. Membership in the Watertown Foundation is open to the public.

A donor may support the Foundation's continuing work with an unrestricted gift of any amount. Our donors are individuals, families, businesses, and charitable organizations. Donors may give cash, stock, retirement assets, bequests and other planned gifts.

Designating the Watertown Foundation as the recipient of a *Memorial Donation* continues the memory and spirit of a deceased family member or friend. *In Honor Of* gifts for living relatives or friends in lieu of holiday or birthday gifts can celebrate the event in a meaningful way. *Memorial Donations* and *In Honor Of* donations are received throughout the year. Acknowledgement is sent to the donor and a complete listing of gifts is sent to the family or party.

The Foundation's assets are professionally managed with oversight by the Finance Committee and Board of Trustees.

### **Trust Funds**

The Watertown Foundation will create a special fund in your name, in the name of your family or business, or in honor of any person or organization you choose. You receive tax benefits in the year your gift is made. Your gift will be placed into an endowment fund that is invested over time, and earnings from the fund are used to make grants addressing community needs. Your gift, and all future earnings from your gift, will provide support for scholarships and organizations helping people and programs in perpetuity. Donors may also leave charitable assets upon their death in the form of a bequest in a will or trust, retirement plan designations, or beneficiary designation in a life insurance policy.

### **Distribution from Named Trust Funds**

Each year the Board of Trustees establishes the amounts to be awarded in scholarships and grants, based on the endowment's market value and the success of its investments. This distribution policy strives to maintain the "purchasing power" of the funds over the long term to protect against inflation so that today's assets are not diminished in the future. The Board does not assess fees in the administration of Trust Funds or in the awarding of grants or scholarships.

## Donors

### Total Contributions Received 2024-2025

#### Gifts of \$5,000 and over

Gerulaitis Fund  
Linda Merriman  
Sted Sweet  
Jim and Jackie Zoldy

#### Gifts of \$1,000 to \$4,999

Anonymous  
Susan and Victor Atkins  
Peter and Amy Julia Becker  
Angela Bozzuto  
Christine Bozzuto  
Mallory Merriman Constantine  
William and Janet Dunbar  
Henry Durkee,  
In Memory of Peg Durkee  
Anne Fitzgerald  
Greater Waterbury  
Chamber of Commerce  
Ted Heavenrich  
Jack and Jennifer Hogan  
William W. Long  
Northwest Community Bank  
Christopher Riano  
Susan and John Santopietro  
United Way of Greater Waterbury

#### Gifts of \$500 to \$999

Anonymous  
Tina and Sal Agati  
Baribault Fuel  
Vincent Capece  
Roger and Heather Chace  
Henry Durkee  
Ed and Alison Godin  
Justin Golden  
Paula and Joel Labonte  
Courtney Ligi  
Mr. and Mrs. Anthony Luccaro  
Paul Maddox  
The Taft School

#### Gifts of \$100 to \$499

Anonymous  
Tina Agati, In Memory of  
Anthony, Berte and Daniel Bell  
Dr. Lance Banwell and Maria Moffo

Antoinette Barber  
Ralph and Elaine Biondi  
Larry and Janette Black  
Eileen Blais  
Amanda Bohnsack  
Elizabeth A. Bozzuto  
Stephen Briotti  
BTS Graphics ~ Tom Taylor  
Rocco Calabrese  
Lisa Lamphier Carew  
In Memory of her Grandfather,  
State Senator Eugene H. Lamphier  
Jackie Cassidy  
Rev. John M. Cooney  
Craig and Margaret Czarsty  
Ned and Lisa Dalton  
Kevin and Jill Danaher  
Douglas and Kristi D'Andrea  
Rex A. Decker  
Ken Demirs  
Robert and Debra Desena  
Catherine R. Dinsmore  
Kelly Donston  
Richard H. Dyer Jr.  
Michael Fleming  
Suzanne Franson  
Michael Ganem  
Golden Technology Services Inc.  
Sybil Goodkin  
Ric Gotay and Cat Gentry  
Lee L. and Troy L. Harden  
Roberta Hardt  
William and Karen Hosking  
Sandra and Norman Jellinghaus  
Jacqueline and Karl Kuegler,  
In Memory of Kathy Scully  
Justine and Alphonse Kuncas  
Andrew Kvaal,  
In Memory of Alan Atwood  
John W. Lombard  
John Lynch  
Mr. and Mrs. Laurent Madeux Sr.  
Nancy Maton  
James and Betsy Maxwell  
Robert McCarthy  
Joseph McGrail  
Margaret and John McKee,  
In Memory of Henry Long  
Michael and Nora Myers  
Charles Neumann

Peter and Kippy North  
Oakville American Legion Post 195  
Jim and Nicola O'Rourke  
Diane Pollutro  
Robert and Elizabeth Porter  
Mark and Kathleen Raimo  
Al Reiff  
Dona Rintelman  
Stephen and Lorelei Robey  
Richard R. Rozanski, Jr.  
Gail Sangree  
Don and Diane Schmidt  
Siemon Company  
Rev. Anthony J. Smith  
Andrew Taylor  
Kathleen M. Thomas  
Ken Turnquist  
Tim and Katherine Upson  
Dr. Luciano Marini Waterbury Smiles  
Watertown Fire Department  
WHS Class of 1964  
Walter and Kathleen Williams  
Joan C. Wilson  
Peter Zilahy

#### Gifts under \$100

Carolyn S. Baeder  
Ron and Violet Bushka  
Marie Butterly  
Evelyn Russo DAR  
Trumbull-Porter Chapter  
Samuel C. Davidson  
Nancy and Jay Fischer  
Brian Flaherty  
Brianna Foley  
Jim Gambardella  
Kelly Gereski  
Shannon Guidotti  
Marc Hess  
Jack Hoey  
Cia Killeen, In Memory of Ricky Bozzuto  
Tom and Deb Krayske  
David J. LaCasse  
Lydia Mann  
Ronald Mayne  
George Pettinico  
David and Deborah Pope  
Mary Beth Stevens  
Sarah W. Surber  
The Taft School Charity Drive

## Angela "Pidge" Bozzuto Memorial Donations

Tina and Sal Agati  
Susan and Victor Atkins  
Cynthia Palkimas and  
Mary Atkinson  
Claudia Baio & Family and  
Frank Baio, Jr. & Family  
Dustin and Ann Johnson-Bly  
Christine Bozzuto  
Lisa C. Cerverizzo

Law Offices of  
Leonard M. Crone  
Melissa A. Farley  
Sheila Huddleston and  
Stephen Frazzini  
Donald M. Gerarde  
Judy Ann Gerarde  
Trisha Elser Grim  
Richard and Elizabeth Hammell

Paula and Joel Labonte  
Rosemary LaPorte  
Angela Guardiano and  
Sharon Lausier  
Stella Maturo and  
Clara Lomma  
Randall S. McHugh  
Robin Mitchell

Chief Justice Raheem Mullins &  
Asso. Justices of the Supreme Court  
Nancy and Timothy Strini  
Dennis and Maria Toft  
Barbara and  
William Thompson Tolley  
Wilson and Annette Trombley



# *Community Service Grants*

## *2025*

### **For The Arts**

|                                  |                       |            |
|----------------------------------|-----------------------|------------|
| Arts & Culture Collaborative     | Two desks             | \$2,000.00 |
| Landmark Community Theatre, Inc. | Exterior enhancements | \$1,500.00 |
| Mattatuck Museum                 | Hobo Dataloggers      | \$3,000.00 |
| Palace Theater                   | Signage and equipment | \$2,000.00 |

### **For Our Churches**

|                                    |                    |            |
|------------------------------------|--------------------|------------|
| All Saints Christ Episcopal Church | Roofing            | \$3,000.00 |
| First Congregational Church        | Window replacement | \$3,000.00 |
| Holy Disciples Parish              | HVAC system        | \$5,000.00 |
| Methodist Church of Watertown      | Window replacement | \$5,000.00 |
| Thrive Church                      | HVAC system        | \$2,000.00 |

### **For Our Education**

|                                  |                            |            |
|----------------------------------|----------------------------|------------|
| Children's Community School      | Room dividers              | \$2,000.00 |
| Holy Disciples Catholic School   | Computers                  | \$3,000.00 |
| Judson School PTO                | Outdoor classroom          | \$2,000.00 |
| Polk School PTO                  | Water system               | \$1,500.00 |
| John Trumbull Primary School PTO | Smart tvs & computer books | \$3,000.00 |

### **For Heritage Enhancement**

|                                |                                     |            |
|--------------------------------|-------------------------------------|------------|
| Railroad Museum of New England | Exterior restoration                | \$2,000.00 |
| Trumbull-Porter DAR            | Tree maintenance, stone restoration | \$4,000.00 |
| Watertown History Museum       | Replacement windows                 | \$3,000.00 |
| Watertown Tennis Club          | Clubhouse shingle repairs           | \$2,000.00 |

### **For Human Services**

|                                          |                                  |            |
|------------------------------------------|----------------------------------|------------|
| Acts 4 Ministry, Inc.                    | Computer station                 | \$2,000.00 |
| American Legion Post 195 Wtn             | Flooring                         | \$3,000.00 |
| Caring for Bethlehem, Inc.               | Shelving                         | \$500.00   |
| Carolyn's Place                          | Flooring                         | \$4,000.00 |
| CT Institute for the Blind/Oak Hill      | Property enhancement             | \$2,800.00 |
| Flanders Nature Center & Land Trust      | Display and signage              | \$2,000.00 |
| Healing Hoofbeats of CT                  | Equipment                        | \$2,800.00 |
| PrimeCare, Inc.                          | Parking lot paving               | \$2,500.00 |
| Quilts That Care                         | Equipment                        | \$800.00   |
| Safe Haven of Greater Waterbury          | Porch repairs                    | \$3,000.00 |
| Southmayd Home, Inc.                     | Walkway & railing repairs        | \$3,000.00 |
| The Donkey's Cross Inc.                  | Pavilion kit                     | \$1,500.00 |
| VFW Post 7330 Auxiliary                  | Shed                             | \$2,000.00 |
| Watertown Area Asso. of Special Citizens | Social & recreational activities | \$3,000.00 |
| Watertown Lions Club, Inc.               | Family Wildlife Day              | \$500.00   |

### **For Our Youth**

|                                         |                      |            |
|-----------------------------------------|----------------------|------------|
| Boys & Girls Club of Greater Waterbury  | Exterior railings    | \$3,000.00 |
| Oakville Watertown Youth Athletic Assn. | Shed                 | \$2,000.00 |
| Park Central                            | Facility renovations | \$2,000.00 |
| Waterbury YMCA - Camp Mataucha          | Shed                 | \$4,100.00 |
| Watertown First Robot Inc.              | Robotics kit         | \$5,000.00 |
| WHS Gridiron Club                       | Trap chute           | \$1,500.00 |

**\$100,000.00**

# 2025 Scholarships

## Thirty-three Scholarships totaling \$101,000

|                                                                                                     |                        |                 |             |
|-----------------------------------------------------------------------------------------------------|------------------------|-----------------|-------------|
| Ricky Bozzuto Memorial Scholarship                                                                  | Caleb McGaffey-Schipul | WHS             | \$2,000     |
| Reinhold & Katie DeWitt Scholarship                                                                 | Ava Kyle               | WHS             | \$3,000     |
| Reinhold & Katie DeWitt Scholarship                                                                 | Kevin Tran             | WHS             | \$3,000     |
| William & Janet Dunbar Scholarship                                                                  | Isabella Lombardo      | HCHS            | \$2,000     |
| Eppehimer Memorial Scholarship                                                                      | Mark Albino            | WHS             | \$3,000     |
| Fletcher Judson Memorial Scholarship                                                                | Jenna Sharoh           | WHS             | \$3,000     |
| M. Heminway Merriman 2nd Scholarship                                                                | Nathan Oun             | HCHS            | \$5,000     |
| Joyce Mordenti Scholarship                                                                          | Gabriella Johnson      | WHS             | \$1,500     |
| Northwest Community Bank Scholarship                                                                | Madelyn Neibel         | HCHS            | \$1,500     |
| Kathleen M. Scully Memorial Scholarship                                                             | Juliana Meglio         | WHS             | \$2,000     |
| Town of Watertown Scholarship                                                                       | Olivia Brown           | Westover        | \$1,500     |
| Watertown Foundation Centennial and<br>Watertown HS Class of 1964 Scholarships                      | Gianna Cipriano        | Kaynor          | \$1,500     |
|                                                                                                     | Besiana Dauti          | WHS             | \$1,000     |
|                                                                                                     | Dominic Soeprasetyo    | WHS             | \$1,000     |
| Watertown Foundation Scholarship: Year 1 of 4<br>Year 2 of 4<br>Year 3 of 4<br>Year 4 of 4          | Maura McDonnell        | WHS             | \$2,000     |
|                                                                                                     | Joshua Albarracin      |                 | \$2,000     |
|                                                                                                     | Melanie Martinelli     |                 | \$2,000     |
|                                                                                                     | Olivia Eshoo           |                 | \$2,000     |
| Watertown Foundation Scholarship: Year 1 of 4<br>Year 2 of 4<br>Year 3 of 4<br>Year 4 of 4          | Sophie Bergeron        | WHS             | \$4,000     |
|                                                                                                     | Ella Kijak             |                 | \$4,000     |
|                                                                                                     | Jasmine Pham           |                 | \$4,000     |
|                                                                                                     | Grace Kenney           |                 | \$4,000     |
| Watertown Foundation Scholarship                                                                    | Andrew Brown           | WHS             | \$4,000     |
|                                                                                                     | Sebastian Creter       | WHS             | \$4,000     |
|                                                                                                     | Sarah Krayske          | WHS             | \$5,000     |
| Watertown Foundation Past Presidents Scholarship                                                    | Harrison Gowell        | WHS             | \$5,000     |
| Watertown Oakville Chamber of Commerce<br>Antonacci Family STEM Scholarship<br>Business Scholarship | Sarah Krayske          | WHS             | \$1,500     |
|                                                                                                     | Tyler Egan             | WHS             | \$1,500     |
| David Woodward Scholarship                                                                          | Hailey Correia         | WHS             | \$5,000     |
| David Woodward Scholarship:                                                                         | Year 1 of 4            | Olivia VanDyke  | WHS \$5,000 |
|                                                                                                     | Year 2 of 4            | Luke Lawton     | \$5,000     |
|                                                                                                     | Year 3 of 4            | Giacomo Rinaldi | \$5,000     |
|                                                                                                     | Year 4 of 4            | Torri DiStefano | \$5,000     |

# *History of Scholarships*



**2015**  
**20 Scholars: \$30,000**



**2016**  
**22 Scholars: \$37,000**



**2017**  
**26 Scholars: \$55,000**



**2018**  
**26 Scholars: \$74,000**



**2019**  
**25 Scholars: \$66,000**

**2020**  
**26 Scholars: \$71,000**



# *History of Scholarships*



**2021**  
**28 Scholars: \$83,500**



**2022**  
**28 Scholars: \$89,500**



**2023**  
**28 Scholars: \$89,500**



**2024**  
**30 Scholars: \$95,000**



**2025**  
**32 Scholars: \$101,000**



# *Events throughout the years*





# *Events throughout the years*





# *Events throughout the years*





# *Events throughout the years*



# *Watertown Foundation Centennial Committee*

The first meeting of the “Centennial Committee” was held in September 2022. Charged with planning for the 100<sup>th</sup> Anniversary of the Watertown Foundation, we were tasked with three objectives:

1. To gain 100 new members by October 2025.
2. To award \$100,000 in Scholarships and \$100,000 in Grants in 2025.
3. To increase our exposure in the community as we highlight 100 years of philanthropy.

As we celebrate this milestone anniversary, our motto “Connecting our Community through Giving” continues to drive our course. The Watertown Foundation is a circle of giving; the more people who give to the Foundation, the more the Foundation can give to others.

We are happy to report that we have met and surpassed our initial goals!

1. We have welcomed 101 new members to our Foundation to date.
2. In 2025, we distributed \$101,000 to 32 local scholars and awarded \$100,000 to 39 non-profit organizations, schools, and churches.
3. Hosting the six Seward Johnson sculptures from August through October has increased our exposure, and the new Watertown Foundation Centennial Corner will serve as a remarkable reminder of our support to countless individuals and organizations in our past, present, and future.

It was during the 99<sup>th</sup> Annual Meeting and Dinner in October 2024 that Linda Merriman, a past president and current trustee, announced a major donation in honor of the Merriman family as founding members of the Watertown Foundation, and their continued support through three generations. The Merriman Family pledged \$50,000 to establish the ***Next Generation Fund*** to serve as a match with a goal of raising \$100,000 by October 2025. To date, the fund has raised \$58,986, exceeding the goal Linda established! Sincere thanks to Linda and her children, as well as to every donor who contributed to this effort.

We are so very grateful to the many people who have enabled us to do all that we embarked upon and extend a heartfelt **Thank you to all!**

We look forward to our second century of philanthropy. Please join us as we continue our mission of “Connecting Our Community Through Giving.”

***Susan Atkins and Paula Labonte***  
Centennial Committee Co-Chairs



# *Community Exhibit of Seward Johnson Sculptures*

In celebration of the Watertown Foundation Centennial Celebration, the foundation was honored to host an Art Experience on loan from The Seward Johnson Atelier for all to enjoy from August to October 2025.





## *Watertown Foundation, Our Heritage*

On October 6, 1925, fifty residents of Watertown met with David Woodward at M'Fingal Inn Bungalow. He informed his guests of his love for the Town and his desire to do what he could to make it a better place in which to live. He had therefore concluded that the organization of a Foundation, incorporated under the laws of the State, should be undertaken for the purpose of receiving and maintaining funds and using the income therefrom to improve the social and living conditions of the town. He explained that he had some experience in the organization of a similar Foundation in Atlanta, Georgia and that six residents of Watertown had pledged \$500 a year as a nucleus of such funds.

He suggested that an opportunity be afforded to each resident of Watertown who was likely to be interested in the establishment of the Foundation to become one of its Charter Members by subscribing to a pledge to contribute to it not less than \$100. By such action all persons subscribing before October 21, 1925 would be declared and forever known as Charter Members of the Foundation. These subscribers would form a temporary organization to function until the Foundation had been incorporated.

All present on October 6, 1925 approved Mr. Woodward's suggestions. Mr. Horace D. Taft was elected Chairman and Mr. John L. Scott, Secretary of the meeting then held by those present. Residents of Watertown were invited to become Charter Members under the plans outlined by Mr. Woodward. A plan of organization at a meeting of the Charter Members was held at the M'Fingal Inn Bungalow on October 21, 1925.

Within a short time, a total of ninety-five residents of Watertown applied for Charter memberships. The Foundation was organized as a Corporation without capital stock on December 4, 1925.

On July 15, 1926, Mr. Woodward made a gift of \$5,000 to the Foundation for the purpose of establishing a Student Aid Fund. He stated that loans should be made from this fund of a reasonable amount to any Watertown student or graduate of Taft School on the basis of scholastic merit, financial need, and contributions to school and community.

The Foundation received \$10,000 from the estate of David Woodward. Mr. Woodward left Watertown as a young man becoming a successful and prominent citizen of Atlanta, Georgia, and he maintained a home in Watertown where he and his family spent several weeks each summer. David Woodward died July 16, 1931.

The Foundation received \$7,475 from the estate of Harley F. Roberts, who died April 29, 1930. He was a long time master at Taft School and was very active in good works in Watertown.

Representatives of the Scovill and Merriman families gave the Foundation the Community House property in 1942. The building and grounds through the years had been the headquarters of many public groups, which were charged only nominal rents by the civic-minded owners. Among the organizations so favored were the Watertown Civic Union, the Red Cross, the Visiting Nurses Association, Veterans of Foreign Wars and the American Legion. The management of this property, which also contained a theatre, stores, bowling alley and a large room for social events, became quite a problem for the Foundation to handle. It was therefore decided to sell the property, which was accomplished in 1950, and from the sale about \$60,000 was received.

Through the years the Watertown Foundation has been the recipient of many generous donations and bequests. As a tax-exempt, non-profit community foundation the Foundation identifies, combines and invests the charitable gifts of its members to benefit the community through supportive grants to non-profit organizations within a 15 mile radius of Watertown, and academic scholarships to graduating community senior students.