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

OMB No 1545-0052

2008

Note. The foundation may be able to use a copy of this return to satisfy state reporting requirements

For calendar year 2008, or tax year beginning December 1, 2008, and ending November 30, 2009G Check all that apply ☐ Initial return ☐ Final return ☐ Amended return ☐ Address change ☐ Name change

Use the IRS label. Otherwise, print or type. See Specific Instructions.	Name of foundation <u>H. C. Gemmer Family Christian Fdn.</u>		A Employer identification number <u>35 6036300</u>
	Number and street (or P.O. box number if mail is not delivered to street address)	Room/suite	B Telephone number (see page 10 of the instructions) <u>(317) 788-2844</u>
	City or town, state, and ZIP code <u>Indianapolis, IN 46217-0061</u>		C If exemption application is pending, check here <input type="checkbox"/>
H Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation			D 1. Foreign organizations, check here <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) <u>\$ 744,216</u>			D 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
J Accounting method <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ (Part I, column (d) must be on cash basis)			E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
			F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see page 11 of the instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received (attach schedule)	<u>1,600</u>			
	2 Check <input type="checkbox"/> if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments	<u>6,743</u>	<u>6,743</u>		
	4 Dividends and interest from securities	<u>15,914</u>	<u>15,914</u>		
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10				
	b Gross sales price for all assets on line 6a				
	7 Capital gain net income (from Part IV, line 2)		<u>0</u>	<u>0</u>	
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
b Less. Cost of goods sold					
c Gross profit or (loss) (attach schedule)					
11 Other income (attach schedule)					
12 Total. Add lines 1 through 11	<u>24,257</u>	<u>22,657</u>			
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	<u>1,000</u>	<u>400</u>		<u>600</u>
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)				
	c Other professional fees (attach schedule) <u>PIA</u>	<u>7,088</u>	<u>7,088</u>		
	17 Interest	<u>640</u>			
	18 Taxes (attach schedule) (see page 14 of the instructions)				
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings	<u>1,891</u>			<u>1,891</u>
	22 Printing and publications	<u>70</u>			<u>70</u>
23 Other expenses (attach schedule) <u>P.O. Box</u>					
24 Total operating and administrative expenses. Add lines 13 through 23	<u>10,689</u>	<u>7,488</u>			
25 Contributions, gifts, grants paid	<u>36,200</u>			<u>36,200</u>	
26 Total expenses and disbursements. Add lines 24 and 25	<u>46,889</u>	<u>7,488</u>		<u>38,761</u>	
27 Subtract line 26 from line 12.	<u>(22,632)</u>				
a Excess of revenue over expenses and disbursements		<u>15,169</u>			
b Net investment income (if negative, enter -0-)					
c Adjusted net income (if negative, enter -0-)					

Part II Balance Sheets

Attached schedules and amounts in the description column should be for end-of-year amounts only. (See instructions.)

		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash—non-interest-bearing	227,112	161,358	164,465
	2 Savings and temporary cash investments			
	3 Accounts receivable ▶ Less: allowance for doubtful accounts ▶			
	4 Pledges receivable ▶ Less: allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see page 15 of the instructions)			
	7 Other notes and loans receivable (attach schedule) ▶ Less: allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments—U S and state government obligations (attach schedule)			
	b Investments—corporate stock (attach schedule)			
	c Investments—corporate bonds (attach schedule)			
	11 Investments—land, buildings, and equipment basis ▶ Less: accumulated depreciation (attach schedule) ▶			
	12 Investments—mortgage loans			
	13 Investments—other (attach schedule)	781,341	511,263	519,751
	14 Land, buildings, and equipment basis ▶ Less: accumulated depreciation (attach schedule) ▶			
15 Other assets (describe ▶)				
16 Total assets (to be completed by all filers—see the instructions. Also, see page 1, item I)	1,008,453	672,621	744,216	
Liabilities	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable (attach schedule)			
	22 Other liabilities (describe ▶)			
	23 Total liabilities (add lines 17 through 22)	0	0	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ <input type="checkbox"/> and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds			
	28 Paid-in or capital surplus, or land, bldg, and equipment fund			
	29 Retained earnings, accumulated income, endowment, or other funds			
	30 Total net assets or fund balances (see page 17 of the instructions)	1,008,453	672,621	
	31 Total liabilities and net assets/fund balances (see page 17 of the instructions)	1,008,453	672,621	

Part III Analysis of Changes in Net Assets or Fund Balances

1 Total net assets or fund balances at beginning of year—Part II column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	1,008,453
2 Enter amount from Part I, line 27a	2	(22,632)
3 Other increases not included in line 2 (itemize) ▶	3	
4 Add lines 1, 2, and 3	4	985,821
5 Decreases not included in line 2 (itemize) ▶ <i>Capital Losses on Sales</i>	5	313,200
6 Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	672,621

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse, or common stock, 200 shs. MLC Co.)		(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a	See Attached Schedule			
b				
c				
d				
e				
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)	
a			(299,261)	
b				
c				
d				
e				
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69				(i) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any		
a				
b				
c				
d				
e				
2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }			2	(299,261)
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6). If gain, also enter in Part I, line 8, column (c) (see pages 13 and 17 of the instructions). If (loss), enter -0- in Part I, line 8			3	(155)

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

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income.)

If section 4940(d)(2) applies, leave this part blank

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☒ No
 If "Yes," the foundation does not qualify under section 4940(e). Do not complete this part.

1 Enter the appropriate amount in each column for each year, see page 18 of the instructions before making any entries

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2007	46,707	888,405	.05257
2006	55,968	969,676	.05772
2005	37,039	925,905	.04000
2004	42,076	887,028	.04743
2003	33,513	842,228	.03979
2 Total of line 1, column (d)			2 .23751
3 Average distribution ratio for the 5-year base period—divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years			3 .04750
4 Enter the net value of noncharitable-use assets for 2008 from Part X, line 5			4 708,795
5 Multiply line 4 by line 3			5 33,669
6 Enter 1% of net investment income (1% of Part I, line 27b)			6 152
7 Add lines 5 and 6			7 33,821
8 Enter qualifying distributions from Part XII, line 4 If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions on page 18			8 38,761

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the instructions)

1a	Exempt operating foundations described in section 4940(d)(2). Check here <input type="checkbox"/> and enter "N/A" on line 1 Date of ruling letter. (attach copy of ruling letter if necessary—see instructions)			
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b	1	152.00	
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)			
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	2		
3	Add lines 1 and 2	3	152.00	
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4		
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5	152.00	
6	Credits/Payments			
a	2008 estimated tax payments and 2007 overpayment credited to 2008	6a		
b	Exempt foreign organizations—tax withheld at source	6b		
c	Tax paid with application for extension of time to file (Form 8868)	6c		
d	Backup withholding erroneously withheld	6d		
7	Total credits and payments. Add lines 6a through 6d	7		
8	Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8		
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	152.00	
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10		
11	Enter the amount of line 10 to be Credited to 2009 estimated tax <input type="checkbox"/> Refunded <input type="checkbox"/>	11		

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		<input checked="" type="checkbox"/>
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)? <i>If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.</i>		<input checked="" type="checkbox"/>
c Did the foundation file Form 1120-POL for this year?		<input checked="" type="checkbox"/>
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation <input type="checkbox"/> \$ _____ (2) On foundation managers <input type="checkbox"/> \$ _____		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input type="checkbox"/> \$ _____		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If "Yes," attach a detailed description of the activities</i>		<input checked="" type="checkbox"/>
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? <i>If "Yes," attach a conformed copy of the changes</i>		<input checked="" type="checkbox"/>
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		<input checked="" type="checkbox"/>
b If "Yes," has it filed a tax return on Form 990-T for this year?		<input checked="" type="checkbox"/>
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If "Yes," attach the statement required by General Instruction T</i>		<input checked="" type="checkbox"/>
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?		<input checked="" type="checkbox"/>
7 Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col. (c), and Part XIV</i>		<input checked="" type="checkbox"/>
8a Enter the states to which the foundation reports or with which it is registered (see page 19 of the instructions) <input type="checkbox"/>		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? <i>If "No," attach explanation</i>		<input checked="" type="checkbox"/>
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2008 or the taxable year beginning in 2008 (see instructions for Part XIV on page 27)? <i>If "Yes," complete Part XIV</i>		<input checked="" type="checkbox"/>
10 Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses</i>		<input checked="" type="checkbox"/>

Part VII-A Statements Regarding Activities (continued)

- 11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see page 20 of the instructions) **11** ☐ Yes ☒ No
- 12 Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008? **12** ☐ Yes ☒ No
- 13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? **13** ☒ Yes ☐ No
- Website address ▶ N/A
- 14 The books are in care of ▶ Elden Hartman Telephone no. ▶ 317-188-2844
Located at ▶ 6430 Bonneville Dr., Indianapolis, IN ZIP+4 ▶ 46237-5035
- 15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041—Check here ☐ and enter the amount of tax-exempt interest received or accrued during the year **15**

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

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

- | | Yes | No |
|--|-----------|-------------------------------------|
| 1a During the year did the foundation (either directly or indirectly) | | |
| (1) Engage in the sale or exchange, or leasing of property with a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No | | |
| (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No | | |
| (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No | | |
| (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No | | |
| (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No | | |
| (6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No | | |
| b If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here <input type="checkbox"/> | 1b | <input checked="" type="checkbox"/> |
| c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2008? | 1c | <input checked="" type="checkbox"/> |
| 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 2008, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2008? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
If "Yes," list the years ▶ 20 . . . , 20 . . . , 20 . . . , 20 . . . | | |
| b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see page 20 of the instructions) | 2b | <u>N/A</u> |
| c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.
▶ 20 . . . , 20 . . . , 20 . . . , 20 . . . | | |
| 3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No | | |
| b If "Yes," did it have excess business holdings in 2008 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2008.) | 3b | <u>N/A</u> |
| 4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? | 4a | <input checked="" type="checkbox"/> |
| b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2008? | 4b | <input checked="" type="checkbox"/> |

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

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

- (1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☒ No
- (2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☒ No
- (3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☒ No
- (4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see page 22 of the instructions) ☐ Yes ☒ No
- (5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☒ No

b If any answer is "Yes" to 5a(1)–(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see page 22 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here ☐

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

If "Yes," attach the statement required by Regulations section 53.4945–5(d)

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? ☐ Yes ☒ No

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? ☐ Yes ☒ No
If you answered "Yes" to 6b, also file Form 8870

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☒ No

b If yes, did the foundation receive any proceeds or have any net income attributable to the transaction? ☐ Yes ☒ No

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors*See Attached List of Board*

1 List all officers, directors, trustees, foundation managers and their compensation (see page 22 of the instructions).

(a) Name and address	(b) Title and average hours per week devoted to position	(c) Compensation (if not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
David Gemmer St. Petersburg, FL	Pres. 0	0	0	0
Myrna Gemmer St. Petersburg, FL	Past Pres. 0	0	0	0
Raymond Brown Fishers, IN	Secy 0	0	0	0
Elden Hartman Indianapolis, IN	Exec. VP & Treas. 1	\$1,000.00	0	0

2 Compensation of five highest-paid employees (other than those included on line 1—see page 23 of the instructions). If none, enter "NONE."

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

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

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued) **N/A****3** Five highest-paid independent contractors for professional services (see page 23 of the instructions). If none, enter "NONE."

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
N/A		

Total number of others receiving over \$50,000 for professional services **▶****Part IX-A** Summary of Direct Charitable Activities **N/A**

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

Expenses

1		
2		
3		
4		

Part IX-B Summary of Program-Related Investments (see page 23 of the instructions) **N/A**

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

Amount

1	
2	
All other program-related investments. See page 24 of the instructions.	
3	

Total. Add lines 1 through 3 **▶**

Part X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see page 24 of the instructions.)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
a	Average monthly fair market value of securities	1a	527,126
b	Average of monthly cash balances	1b	192,463
c	Fair market value of all other assets (see page 24 of the instructions)	1c	
d	Total (add lines 1a, b, and c)	1d	719,589
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	
2	Acquisition indebtedness applicable to line 1 assets	2	0
3	Subtract line 2 from line 1d	3	719,589
4	Cash deemed held for charitable activities. Enter 1 1/2 % of line 3 (for greater amount, see page 25 of the instructions)	4	10,794
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	708,795
6	Minimum investment return. Enter 5% of line 5	6	35,440

Part XI Distributable Amount (see page 25 of the instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ☐ and do not complete this part.)

1	Minimum investment return from Part X, line 6	1	35,440
2a	Tax on investment income for 2008 from Part VI, line 5	2a	152
b	Income tax for 2008 (This does not include the tax from Part VI)	2b	0
c	Add lines 2a and 2b	2c	152
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	35,288
4	Recoveries of amounts treated as qualifying distributions	4	0
5	Add lines 3 and 4	5	35,288
6	Deduction from distributable amount (see page 25 of the instructions)	6	0
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	35,288

Part XII Qualifying Distributions (see page 25 of the instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
a	Expenses, contributions, gifts, etc.—total from Part I, column (d), line 26	1a	38,761
b	Program-related investments—total from Part IX-B	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	38,761
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b (see page 26 of the instructions)	5	152
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	38,609

Note. The amount on line 6 will be used in Part V, column (b) in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years.

Part XIII Undistributed Income (see page 26 of the instructions)

	(a) Corpus	(b) Years prior to 2007	(c) 2007	(d) 2008
1 Distributable amount for 2008 from Part XI, line 7				35,288
2 Undistributed income, if any, as of the end of 2007			0	
a Enter amount for 2007 only		0		
b Total for prior years 20____, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2008				
a From 2003				
b From 2004				
c From 2005				
d From 2006				
e From 2007				
f Total of lines 3a through e	13,464			
4 Qualifying distributions for 2008 from Part XII, line 4 ▶ \$ 38,761			0	
a Applied to 2007, but not more than line 2a		0		
b Applied to undistributed income of prior years (Election required—see page 26 of the instructions)		0		
c Treated as distributions out of corpus (Election required—see page 26 of the instructions)	0			
d Applied to 2008 distributable amount	3,473			35,288
e Remaining amount distributed out of corpus	0			0
5 Excess distributions carryover applied to 2008 (If an amount appears in column (d), the same amount must be shown in column (a))				
6 Enter the net total of each column as indicated below:	16,937			
a Corpus Add lines 3f, 4c, and 4e Subtract line 5				
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		
d Subtract line 6c from line 6b Taxable amount—see page 27 of the instructions		0		
e Undistributed income for 2007 Subtract line 4a from line 2a Taxable amount—see page 27 of the instructions			0	
f Undistributed income for 2008 Subtract lines 4d and 5 from line 1. This amount must be distributed in 2009				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see page 27 of the instructions)	0			
8 Excess distributions carryover from 2003 not applied on line 5 or line 7 (see page 27 of the instructions)	0			
9 Excess distributions carryover to 2009. Subtract lines 7 and 8 from line 6a	16,937			
10 Analysis of line 9:				
a Excess from 2004				
b Excess from 2005				
c Excess from 2006				
d Excess from 2007				
e Excess from 2008				

Part XIV Private Operating Foundations (see page 27 of the instructions and Part VII-A, question 9)

N/A

- 1a** If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2008, enter the date of the ruling ▶
- b** Check box to indicate whether the foundation is a private operating foundation described in section ☐ 4942(j)(3) or ☐ 4942(j)(5)

	Tax year	Prior 3 years			(e) Total
	(a) 2008	(b) 2007	(c) 2006	(d) 2005	
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon					
a "Assets" alternative test—enter					
(1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test—enter $\frac{1}{2}$ of minimum investment return shown in Part X, line 6 for each year listed					
c "Support" alternative test—enter					
(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(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 XV **Supplementary Information** (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year—see page 27 of the instructions.)

- 1 Information Regarding Foundation Managers.**
- a** List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000). (See section 507(d)(2).)

NONE

- 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. (see page 28 of the instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d.

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

Elden Hartman, P.O. Box 17061, Indianapolis, IN 46217-0061 (317) 788-2844

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

See Attached Information & Guidelines

- c Any submission deadlines:

May 1 and Oct.

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

See Attached Guidelines

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
<i>a Paid during the year</i>				
Total				▶ 3a <u>36,200</u>
<i>b Approved for future payment</i>				
Total				▶ 3b <u>0</u>

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated

Enter gross amounts unless otherwise indicated		Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See page 28 of the instructions)
		(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1	Program service revenue					
a						
b						
c						
d						
e						
f						
g	Fees and contracts from government agencies					
2	Membership dues and assessments					
3	Interest on savings and temporary cash investments			14	6,743	
4	Dividends and interest from securities			14	15,914	
5	Net rental income or (loss) from real estate					
a	Debt-financed property					
b	Not debt-financed property					
6	Net rental income or (loss) from personal property					
7	Other investment income					
8	Gain or (loss) from sales of assets other than inventory					
9	Net income or (loss) from special events					
10	Gross profit or (loss) from sales of inventory					
11	Other revenue: a					
b						
c						
d						
e						
12	Subtotal. Add columns (b), (d), and (e)				22,657	
13	Total. Add line 12, columns (b), (d), and (e)					22,657

(See worksheet in line 13 instructions on page 28 to verify calculations.)

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

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes) (See page 28 of the instructions)
	N/A

H.C. GEMMER FAMILY CHRISTIAN FOUNDATION
MAY 30, 2009 BOARD MEETING
SUMMARY OF GRANT PROPOSALS

<u>GRANT REQUESTOR</u>	<u>PURPOSE OF GRANT</u>	<u>AMOUNT REQUESTED</u>	<u>AMOUNT GRANTED</u>
1. Action for Peace Team Atlantic Southeast District Church of the Brethren P.O. Box 148 Sebring, FL 33871	Family Peace Camp Labor Day Weekend 2009, Peacemaker Awards, and Support for Peace Advocates and Pastors in Local Churches	\$ 2,000.00	<u>1,000.00</u>
2. Asian Help Services 609 E. 29 th Street Indianapolis, IN 46205	Healthy Lives Project to Provide Free Counseling and Advocacy Services to Asian Immigrants	\$ 2,000.00	<u>2,000.00</u>
3. Baxter Branch YMCA 7900 S. Shelby Street Indianapolis, IN 46227	Laurelwood Public Housing Community Summer Day Camp	\$ 2,000.00	<u>2,000.00</u>
4. Church World Service P.O. Box 968 Elkhart, IN 46515	Ecumenical Accompaniment Programme in Palestine and Israel (EAPPI)	\$ 3,000.00	<u>2,000.00</u>
5. Claude McNeal Productions P.O. Box 441130 Indianapolis, IN 46244	ACT OUT Ensemble Show on Theme of World Peace and Conflict Resolution	\$ 3,000.00	<u>0</u>
6. Dayton International Peace Museum 208 West Monument Ave. Dayton, OH 45402-3015	Assist in Publication of <i>Planet Gazimbo in Galaxy Zamz</i> , a Children's Story that Teaches Lessons of Peace	\$ 3,000.00	<u>Decline</u>
7. Earlham School of Religion 228 College Avenue Richmond, IN 47374	Assist in Bringing Bill Morse to Richmond to Promote Cambodian Self Help Demining (CSHD) NGO	\$ 1,500.00	<u>1,500.00</u>
8. The Hope Movement 17000 North Bay Road, Ste. 808 Sunny Isles Beach, FL 33160	Haven of Hope Center in Escuintla, Guatemala or Project Nourishment Initiative in Haiti	\$ 1,000.00	<u>0</u>

- | | | | |
|--|---|----------------------------|-----------------|
| 9. Indiana Coalition Acting to Suspend Executions (InCASE)
P.O. Box 44005
Indianapolis, IN 46244 | Support a Statewide Public Education Campaign INSPIRE
(Indiana Speakout on Innocence & Reform by the Exonerated) | \$ 5,000.00 | <u>2,000.00</u> |
| 10. Indiana Development Council
619 E. Dupont Rd. #267
Fort Wayne, IN 46825 | Support for Faith-Based Program to Provide Transitional Housing to Nonviolent Ex-Offenders | \$ 1,500.00 | <u>1,500.00</u> |
| 11. IU East-School of Humanities and Social Sciences
Middlefork Hall
2325 Chester Boulevard
Richmond, IN 47374-1289 | Support to Bring the Folk Play "Swamp Gravy" to Richmond in November 2009 for Freshman Seminar Focus on Diversity | \$ 3,000.00 | <u>0</u> |
| 12. On Earth Peace
P.O. Box 188
New Windsor, MD 21776-0188 | Youth Peace Travel Team for 2009 Summer Program at Seven Church of Brethren Camps | \$ 2,500.00 | <u>2,500.00</u> |
| 13. Victory Inner-City Ministries
2327 E. 10 th St.
Indianapolis, IN 46201 | Victory Village Shoppe and Indy Urban Farm Projects | \$ 1,000.00 to \$ 5,000.00 | <u>0</u> |

TOTAL GRANTED: \$ 18,500

14. Church Federation of Greater Indpls. 2,000

15. Peace Learning Center 2,000

ADDENDUM TO SUMMARY OF GRANT PROPOSALS
MAY 30, 2009 BOARD MEETING
H.C. GEMMER FAMILY CHRISTIAN FOUNDATION

LATE PROPOSALS

<u>Requesting Organization</u>	<u>Purpose of Grant</u>	<u>Amount Sought</u>	<u>Amount Granted</u>
14. Church Federation of Greater Indianapolis 1100 W. 42 nd St. Ste. 345 Indianapolis, IN 46208	Ecumenical Project for Reconciliation and Healing (EPRH) Program	\$ 3,000.00	<u>2,000.00</u>

Note: This proposal was mailed on 5/12/09 to an incorrect address. They made the same mistake in May 2008, and the proposal was returned as undeliverable, as was this. Angelique Walker-Smith apologized and said she had a new assistant. She said she would understand if we rejected the proposal because of its lateness. I told her the deadline for our Fall meeting proposals is October 1, 2009.

15. Peace Learning Center 6040 DeLong Road Indianapolis, IN 46254	Gang Prevention and Intervention Peace School Program at IPS #15	\$ 3,000.00	<u>2,000.00</u>
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Note: This proposal was just plain late. It was mailed on 5/21/09.

NOVEMBER 21, 2009 BOARD MEETING

H.C. GEMMER FAMILY CHRISTIAN FOUNDATION, INC.

AMENDED SUMMARY OF PROPOSALS

<u>Organization Name/Address</u>	<u>Purpose of Grant</u>	<u>Amount Sought</u>	<u>Action Taken</u>
1. Church World Service P.O. Box 968 Elkhart, IN 46515-0968	Ndikwe Primary School in Murang'a Kenya and their Scouting Program	\$ 2,000.00	<u>2,000.00</u>
2. Dayton International Peace Museum 708 Mill Ridge Circle Union, OH 45322	Employment of Full-Time Executive Director to Strengthen the Organization and Assist in its Development	\$ 2,000.00	<u>2,000.00</u>
3. FCNL Education Fund 245 2 nd St. NE Washington, DC 20002	Publication and Dissemination of a Pamphlet by Margery Abbott on the Historical Relationship between Quakers And Government	\$ 3,000.00	<u>\$ 500.00</u>
4. Global Ministries P.O. Box 1986 Indianapolis, IN 46206-1986	Church of Christ in Thailand Project to Assist the Ethnic Hill Groups Gain Citizenship and Governmental Services	\$ 3,000.00	<u>3,000.00</u>
5. Hope Crisis Response Network P.O. Box 2123 Elkhart, IN 46515	Recovery Work in Indiana for Victims of 2008 Floods	\$ 1,500.00	<u>1,500.00</u>
6. On Earth Peace P.O. Box 188 New Windsor, MD 21776-0188	Faith-Based Conflict Transformation Skills Training for Staff of Seven Church of Brethren Camps in Four Districts	\$ 2,500.00	<u>2,500.00</u>
7. Peer Information Center for Teens Richmond High School Richmond, IN 47374	Funding for Richmond High School Students Mix it Up at Lunch and No Name Calling Activities	\$ 1,500.00	<u>1,500.00</u>
8. Women in Transition 408 N. Wayne St. #130 Angola, IN 46703	Purchase of 60 Alcoholics Anonymous "Big Books", 40 Daily Meditation Books, and 24 Recovery Bibles	\$ 1,170.40	<u>1,200.00</u>
9. Bethany Theological Seminary 615 National Road West Richmond, IN 47374-4019	Cross Cultural Travel Seminar to Marburg, Germany Fostering Exchange of Ideas and Promoting Understanding Among Future and Current Pastors of Different Nationalities	\$ 3,000.00	<u>1,500.00</u>
10. Claude McNeal Productions P.O. Box 441130 Indianapolis, IN 46244	ACT OUT Ensemble Program Support for Presentations on Bullying and Teasing and Peaceful Conflict Resolution for IPS Students	\$ 2,000.00	<u>2,000.00</u>
TOTAL: \$			<u>17,700.00</u>

H.C. GEMMER FAMILY CHRISTIAN FOUNDATION, INC.

FINANCIAL REPORT FY 2008 (12/01/08 - 11/30/09)

		12 Month		(11/30/09)
Description of Asset		Income	Cost Basis	Market Value
Savings and Temporary Cash Investments				
1	Board of Church Ext., CD 130135 Due 11/22/10	\$3,847 00	\$105,000.00	\$107,357.00
2	Board of Church Ext., CD 131674 Due 4/14/11	\$2,000.00	\$40,000 00	\$40,750.00
3	Merrill Lynch Bank	\$106.00	\$16,358.00	\$16,358.00
4	Citi Bank, CD Due 4/27/09 (Matured)	\$790 00	\$0.00	\$0.00
SUB-TOTAL:		\$6,743.00	\$161,358.00	\$164,465.00
Securities and Other Investments		Dividends	Cost Basis	Market Value
5	American Income Fund *	\$1,994.00	\$0.00	\$0.00
6	American Growth Fund *	\$138.00	\$0.00	\$0.00
7	American Capital World Growth & Inc *	\$290.00	\$0 00	\$0.00
8	Calvert Social Inv Fund *	\$114 00	\$0.00	\$0.00
9	Davis NY Venture Fund *	\$92 00	\$0.00	\$0 00
10	Fidelity Adv Leveraged Fund *	\$56 00	\$0.00	\$0.00
11	Franklin Income Fund *	\$860.00	\$0 00	\$0.00
12	Franklin Mutual Qualified Fund *	\$212 00	\$0 00	\$0.00
13	Jennison Utility Fund *	\$240.00	\$0 00	\$0.00
14	Loomis Sayles Investment Grade Bond Fund *	\$1,015.00	\$0.00	\$0.00
15	Loomis Sayles Strategic Income Fund *	\$1,100.00	\$0.00	\$0 00
16	Oppenheimer International Bond Fund **	\$2,950 00	\$0 00	\$0 00
* Sold 04/01/09				
** Sold 04/01/09 and 7/21/09				
17	Chevron Corp.	\$173.00	\$8,880.00	\$10,145 00
18	Chubb Corp.	\$147.00	\$8,885 00	\$10,529.00
19	Coca Cola	\$164 00	\$8,963.00	\$11,440.00
20	Dollar Tree Inc	\$0 00	\$8,970.00	\$9,794.00
21	Enbridge Inc.	\$178 00	\$8,922.00	\$13,256.00
22	Exelon Corporation	\$152.00	\$6,574 00	\$6,986.00
23	Exxon Mobil Corp.	\$110.00	\$8,984 00	\$9,759.00
24	Johnson and Johnson	\$166.00	\$9,000 00	\$10,683.00
25	Kellogg Company	\$168 00	\$8,843 00	\$12,356.00
26	Kimberly Clark	\$99.00	\$8,933 00	\$10,885.00
27	Medtronic Inc.	\$123.00	\$8,853 00	\$12,732.00
28	Microsoft Corp.	\$47.00	\$9,019.00	\$10,735.00
29	Northeast Utilities	\$148.00	\$6,643.00	\$7,474.00
30	Oracle Corp.	\$72.00	\$8,938 00	\$10,598.00
31	Raytheon Company	\$57.00	\$8,531 00	\$9,533 00
32	Sanofi Aventis Spon Adr	\$268 00	\$6,689 00	\$9,110.00
33	Telefonica SA Spain Adr	\$171.00	\$6,660.00	\$8,230.00
34	Travelers Companies	\$126.00	\$8,780.00	\$11,002.00
35	Unilever NV NY	\$197.00	\$6,652.00	\$10,321 00
36	Verizon Communications Company	\$300.00	\$6,671.00	\$6,764 00

37	Xcel Energy Inc.	\$176.00	\$6,628.00	\$7,315.00
38	Amex Technology Select SPDR	\$169.00	\$15,840.00	\$21,533.00
39	Blackrock HL SC Opp. Inst	\$0.00	\$13,878.00	\$17,992.00
40	Health Care Select SPDR	\$196.00	\$18,528.00	\$23,470.00
41	Ishares Barclays 1-3 Year	\$649.00	\$66,451.00	\$66,621.00
42	Ishares Barclays MBS Bond	\$90.00	\$4,227.00	\$4,334.00
43	Permanent Portfolio Fund	\$0.00	\$43,962.00	\$43,989.00
44	Rydex ETF Tr. Russell Top	\$192.00	\$34,075.00	\$38,860.00
45	Sector SPDR Consumers Stpl	\$308.00	\$18,519.00	\$23,165.00
46	SPDR Barclay Capital 1-3 Months	\$15.00	\$42,200.00	\$42,191.00
47	SPDR Barclays Cap Tips	\$102.00	\$6,746.00	\$7,100.00
48	Vanguard Short Term Bond	\$1,142.00	\$61,661.00	\$63,240.00
49	Virtus Global	\$280.00	\$14,158.00	\$17,609.00
50	AT&T Inc (Sold 7/21/09)	\$209.00	\$0.00	\$0.00
51	The Oakmark Equity & Income Fund (Sold 7/21/09)	\$0.00	\$0.00	\$0.00
52	Ishares Barclays 20+ Years (Sold 7/21/09)	\$149.00	\$0.00	\$0.00
53	Ishares Lehman 3-7 Years (Sold 7/21/09)	\$183.00	\$0.00	\$0.00
54	Novartis ADR. (Sold 7/21/09)	\$0.00	\$0.00	\$0.00
55	Procter & Gamble Company (Sold 7/21/09)	\$81.00	\$0.00	\$0.00
56	Wal-Mart Stores, Inc (Sold 7/21/09)	\$46.00	\$0.00	\$0.00
57	Northrop Grumman Corp. (Sold 7/28/09)	\$0.00	\$0.00	\$0.00
SUB-TOTAL:		\$15,914.00	\$511,263.00	\$579,751.00
TOTAL:		\$22,657.00	\$672,621.00	\$744,216.00

	Long Term Capital Gains	Date of Purchase	Gain or Loss	Cost Basis	Sales Price
1	Franklin Mutual Qualified Fund	7/18/07	\$1,006.00	***	***
2	Loomis Sayles Strat. Inc Fund	7/18/07	\$242.00	***	***
3	Oppenheimer Int'l. Bond Fund	7/18/07	\$400.00	***	***
4	Loomis Sayles Invst Gr Bnd Fund	7/18/07	\$91.00	***	***
5	American Income Fund	7/18/07	-\$45,969.00	\$106,527.00	\$60,558.00
6	American Growth Fund	7/18/07	-\$24,199.00	\$53,021.00	\$28,822.00
7	American Capital Wrld Gr & Inc.	7/18/07	-\$26,575.00	\$54,075.00	\$27,500.00
8	Calvert Social Inv. Fund	4/18/07	-\$9,994.00	\$27,521.00	\$17,525.00
10	Davis NY Venture Fund	7/18/07	-\$24,907.00	\$50,162.00	\$25,255.00
11	Fidelity Adv. Lev. Fund	7/18/07	-\$31,495.00	\$51,238.00	\$19,743.00
12	Franklin Income Fund	7/18/07	-\$45,488.00	\$105,558.00	\$60,070.00
13	Franklin Mutual Qualified Fund	7/18/07	-\$22,496.00	\$53,531.00	\$31,035.00
14	Jennison Utility Fund	7/18/07	-\$33,913.00	\$58,305.00	\$24,392.00
15	Loomis Sayles Invst Gr Bnd Fund	8/31/07	-\$8,524.00	\$51,461.00	\$42,937.00
16	Loomis Sayles Strat. Inc. Fund	7/18/07	-\$16,117.00	\$52,203.00	\$36,086.00
17	Oppenheimer Int'l Bond Fund	7/18/07	-\$10,276.00	\$105,611.00	\$95,335.00
18	Citi Bank CD	4/16/07	\$0.00	\$32,000.00	\$32,000.00
19	AT&T Inc.	4/01/09	-\$309.00	\$6,597.00	\$6,288.00
20	Ishare Barclay's 20+ Years	4/01/09	-\$2,144.00	\$17,545.00	\$15,401.00
21	Ishares Lehman 3-7 Years	4/01/09	-\$840.00	\$33,244.00	\$32,404.00
22	Vanguard Short Term Bond	4/01/09	\$264.00	\$21,601.00	\$21,865.00
23	Novartis ADR.	4/01/09	\$1,375.00	\$8,965.00	\$10,340.00

24	Northrop Grumman Corp	7/21/09	-\$514.00	\$8,867.00	\$8,353.00
25	Procter & Gamble Co	7/21/09	\$1,311.00	\$8,876.00	\$10,187.00
26	Amex Technology Select SPDR	7/21/09	\$518.00	\$2,640.00	\$3,158.00
26	Wal-Mart Stores, Inc	7/21/09	-\$708.00	\$8,974.00	\$8,266.00
	TOTAL:		-\$299,261.00		

Short Term Capital Gains

1	Franklin Income Fund	12/04/08	\$48.00	***	***
2	Franklin Mutual Qualified Fund	12/24/08	\$1,964.00	***	***
3	Loomis Sayles Strat Inc Fund	12/30/08	\$52.00	***	***
4	Oppenheimer Int'l Bond Fund	12/31/08	\$383.00	***	***
5	Loomis Sayles Invst. Gr. Bnd Fund	1/07/09	\$523.00	***	***
6	American Income Fund	6/23/08	-\$533.00	\$3,626.00	\$3,093.00
7	American Growth Fund	12/24/08	\$0.00	\$19.00	\$19.00
8	American Capital Wrld Gr & Inc	6/26/08	-\$247.00	\$1,009.00	\$762.00
9	Jennison Utility Fund	6/20/08	-\$104.00	\$451.00	\$347.00
10	Fidelity Adv. Leveraged Fund	12/15/08	-\$3.00	\$64.00	\$61.00
11	Franklin Mutual Qualified Fund	9/09/08	-\$128.00	\$3,422.00	\$3,294.00
12	Franklin Income Fund	4/03/08	-\$1,134.00	\$6,011.00	\$4,877.00
13	Oppenheimer Int'l Bond Fund	12/31/08	-\$22.00	\$314.00	\$292.00
14	Oppenheimer Int'l Bond Fund	4/30/08	-\$348.00	\$5,563.00	\$5,215.00
15	Loomis Sayles Invst Gr. Bnd. Fund	4/04/08	-\$202.00	\$3,044.00	\$2,842.00
16	Loomis Sayles Strat. Inc. Fund	4/29/08	-\$370.00	\$3,452.00	\$3,082.00
17	Calvert Social Inv. Fund	6/27/08	-\$33.00	\$247.00	\$214.00
18	Davis NY Venture Fund	12/02/08	-\$1.00	\$83.00	\$82.00
***	LT and ST Gains Reinvested After Payment				
	TOTAL:		-\$155.00		

Contributions Received

1	Myrna Gemmer	12/01/08	\$1,600.00
	TOTAL:		\$1,600.00

H. C. GEMMER FAMILY CHRISTIAN FOUNDATION
FY 2008 GRANTS AND EXPENSES
12/01/08 -- 11/30/09

Grants Paid		Date of Check	Amount
1.	Atlantic Southeast District Church of Brethren Action for Peace Team	5/30/2009	\$ 1,000.00
2.	Asian Help Services	5/30/2009	\$ 2,000.00
3.	Baxter Branch YMCA	5/30/2009	\$ 2,000.00
4.	Church Federation of Greater Indianapolis	5/30/2009	\$ 2,000.00
5.	Church World Service	5/30/2009	\$ 2,000.00
6.	Earlham School of Religion	5/30/2009	\$ 1,500.00
7.	InCASE	5/30/2009	\$ 2,000.00
8.	Indiana Development Council	5/30/2009	\$ 1,500.00
9.	On Earth Peace	5/30/2009	\$ 2,500.00
10.	Peace Learning Center	5/30/2009	\$ 2,000.00
11.	Church World Service	11/21/2009	\$ 2,000.00
12.	Dayton International Peace Museum	11/21/2009	\$ 2,000.00
13.	FCNL Education Fund	11/21/2009	\$ 500.00
14.	Global Ministries	11/21/2009	\$ 3,000.00
15.	Hope Crisis Response Network	11/21/2009	\$ 1,500.00
16.	On Earth Peace	11/21/2009	\$ 2,500.00
17.	Peer Information Center for Teens	11/21/2009	\$ 1,500.00
18.	Women in Transition	11/21/2009	\$ 1,200.00
19.	Bethany Theological Seminary	11/21/2009	\$ 1,500.00
20.	Claude McNeal Productions	11/21/2009	\$ 2,000.00
TOTAL:		\$	36,200.00

Expenses Incurred		Date of Check	Amount
1.	Postmaster - P.O. Box Rental	2/11/2009	\$ 70.00
2.	IRS - Net Investment Income Tax	4/15/2009	\$ 640.00
3.	Merrill Lynch - PIA Advisory Fee	4/28/2009	\$ 2,251.50
4.	Postmaster - Mailing Proposals to Board	5/18/2009	\$ 38.95
5.	Marjorie Dilling - Travel Expenses for Board Meeting	5/30/2009	\$ 102.00
6.	Annabel Hartman - Reimbursement for Meals for Meeting	5/30/2009	\$ 112.50
7.	Jean McCutchan - Travel Expenses for Board Meeting	5/30/2009	\$ 234.44
8.	David Gemmer - Travel Expenses for Board Meeting	5/30/2009	\$ 460.87
9.	Merrill Lynch - PIA Advisory Fee	7/7/2009	\$ 2,344.74
10.	Merrill Lynch - PIA Advisory Fee	10/6/2009	\$ 2,491.39
11.	Merrill Lynch - Fee for 6 Checks Written	11/30/2009	\$ 0.90
12.	Annabel Hartman - Reimbursement for Meals for Meeting	11/21/2009	\$ 106.25
13.	Jean McCutchan - Travel Expenses for Board Meeting	11/21/2009	\$ 250.00
14.	David Gemmer - Travel Expenses for Board Meeting	11/21/2009	\$ 472.34
15.	Marjorie Dilling - Travel Expenses for Board Meeting	11/21/2009	\$ 113.00
16.	Elden Hartman - Honorarium for Services as Exec. VP & Treas.	11/21/2009	\$ 1,000.00
TOTAL:		\$	10,688.88

H. C. Gemmer Family Christian Foundation

P.O. Box 17061, Indianapolis, IN 46217-0061

(317) 788-2844 • ebhartman@sbcglobal.net

GRANT GUIDELINES & INFORMATION

Background: The H.C. Gemmer Family Christian Foundation was created in 1956 by a gift of Hiram C. and Edith Gemmer, and was substantially grown in 1993 by a gift from the estate of H. Robert Gemmer. The primary charitable interests of the founders were causes promoting peace, justice, sobriety and racial harmony. The founders were also strong supporters of the ecumenical movement and the cooperative work of local, state, national and world councils of churches. The main emphases of the Foundation's grant making are in these **primary funding areas**:

Peace

- Promotion of alternatives to violence, militarism, and war
- Promotion of peace on the personal, community, national and international levels
- Promotion of programs fostering conflict resolution, conflict management, peace education, mediation, and reconciliation
- Promotion of programs that reduce arms and violence, and foster exchange and understanding among nations and cultures
- Promotion of programs addressing the prevention and treatment of domestic violence and cruelty

Economic Justice and Human Rights

- Promotion of programs that provide and protect the basic economic rights of food, clothing, shelter, medical care, education, and employment for all, especially for the poor
- Promotion of programs seeking to enhance human dignity and protect human rights
- Promotion of programs that work for racial justice, and in defense of civil rights, women's rights, and lesbian/gay/bisexual/transgender rights
- Promotion of programs that demonstrate the desire, practical means and intention to promote greater harmony and understanding among persons of different national origins, ethnic backgrounds and races

Ecumenical and Inter-Faith Cooperation

- Promotion of programs and organizations that increase the understanding and cooperation of our brothers and sisters in different Christian traditions, as well as different faith traditions

Sobriety

- Promotion of abstinence from consumption of alcohol or illegal drugs
- Promotion of programs that treat drug and alcohol addiction, and foster recovery

Funding Priorities

- Organizations that demonstrate a commitment to grassroots participation
- Organizations or projects with a small enough budget that a grant in the range of \$1,000 to \$3,000 would make a significant impact
- Organizations with financial stability, thoughtful strategy, sound operations, and dynamic leadership
- Organizations that collaborate, share information and develop strategies to extend their impact and reach
- Organizations that evaluate their practices, programs and grants to improve their effectiveness
- Organizations that skillfully use communications to disseminate information to the greatest number of people
- Projects or programs of a one-time nature
- Seed money for the start-up of a new program
- Organizations with relatively low administrative and fundraising costs
- Organizations that demonstrate their commitment to diversity and equal opportunity with regard to race, gender, class and culture, in the composition of their board and staff, and program activities

Funding Prohibitions

- Grants to an individual for travel, study, or similar purpose, or to organizations sponsoring a request intended for the use by, or for the benefit of, a single individual
- Grants for political purposes or lobbying activities, or otherwise attempting to influence legislation
- Grants to organizations not organized and operated exclusively for purposes described in Section 501(c)(3) of the Internal Revenue Code
- Grants for endowments, building funds, or other major capital expenditures
- Grants for multi-years (applicants may apply again in subsequent years)
- Grants for more than \$3,000
- Grants for operational deficits, financial emergencies, or debt retirement

Grant Application Process

Applications for grants must be presented to the Executive Vice-President of the Foundation in writing, and should be as brief as appropriate to present the necessary facts about the applicant and the project for which the grant is being sought. There is no required application form, but requests should include the following:

- A cover letter signed by the chief executive, board president, or authorized official of the organization making the request, including the name, title, telephone number, and e-mail address of the person to contact regarding the grant
- A narrative proposal describing the applicant organization, the project for which funds are being sought, the persons to be served, and the number of persons affected
- A statement by the applicant on plans for sustaining the proposed project or program beyond the grant period, if appropriate
- A statement of policy and practice with regard to diversity and inclusiveness of the organization
- A detailed budget for the proposed project, the grant amount sought from the Foundation, and the date the funds will be needed
- Names of corporations, foundations, and other major sources being approached to fund this proposal, with dollar amounts indicating which sources are committed, pending, or planned
- The names and occupations/affiliations of the organization's current board of directors or trustees
- A copy of the applicant's most recent determination letter from the IRS stating that the applicant is exempt from federal taxation as defined by Section 501(c)(3) of the Internal Revenue Code (Applicants with a different name from that shown in the IRS letter must provide documentation explaining the discrepancy.)
- Organizations claiming tax-exempt status under a central organization must provide documentation of their membership in that organization
- The deadline for submitting grant proposals to the Foundation is May 1st for the Spring meeting, and October 1st for the Fall meeting
- The Foundation's Spring and Fall meetings are normally held the weekend after Memorial Day and the weekend before Thanksgiving
- Applicants must mail the original grant proposal and 10 copies of the proposal and attachments to:
Elden Hartman, Executive Vice President
H.C. Gemmer Family Christian Foundation
P.O. Box 17061
Indianapolis, IN 46217-0061
- The Executive Vice President will inform eligible applicants of the decision made by the Board of Directors regarding their proposal, and transmit grant checks, generally within one week after the board meetings

For Additional Information: Elden Hartman at (317) 788-2844 or ebhartman@sbcglobal.net

**Board of Directors
H.C. Gemmer Family Christian Foundation
2009-2010**

**President
Emeritus:**

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