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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

Department of the Treasury
Internal Revenue Service

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

2009

For calendar year 2009, or tax year beginning

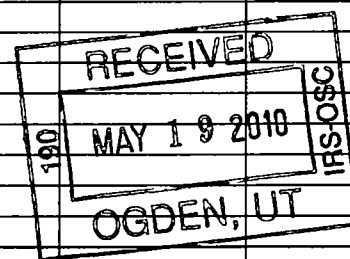
, 2009, and ending

, 20

G Check all that apply: ☐ Initial return ☐ Initial return of a former public charity ☐ Final return
☐ Amended return ☐ Address change ☐ Name change

Use the IRS label. Otherwise, print or type. See Specific Instructions.	Name of foundation The Westfield Insurance Foundation		A Employer identification number 20-3816760	
	Number and street (or P O box number if mail is not delivered to street address) Room/suite PO Box 5001		B Telephone number (see page 10 of the instructions)	
	City or town, state, and ZIP code Westfield Center, OH 44251-5001		C If exemption application is pending, check here <input type="checkbox"/>	
			D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>	
H Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation				
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ▶ \$ 12,212,210 J Accounting method: <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____				
F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>				

Part I 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) Sch #A 175,000				
	2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities	322,601	322,601		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	(211,680)			
	b Gross sales price for all assets on line 6a 821,208				
	7 Capital gain net income (from Part IV, line 2)				
	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	285,921	322,601			
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc.				
	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) Sch. #1	3,491			
	17 Interest				
	18 Taxes (attach schedule) (see page 14 of the instructions)				
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)				
	24 Total operating and administrative expenses. Add lines 13 through 23	3,491			
25 Contributions, gifts, grants paid	247,405			513,500	
26 Total expenses and disbursements. Add lines 24 and 25	250,896	0		513,500	
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements	35,025				
b Net investment income (if negative, enter -0-)		322,601			
c Adjusted net income (if negative, enter -0-)					



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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	15,824	4,833	4,833
	2	Savings and temporary cash investments Sch. #2	86,754	97,708	97,708
	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 16 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) #2	3,143,236	3,545,470	3,545,470
	b	Investments—corporate stock (attach schedule) . Sch. #2	7,099,397	8,555,984	8,555,984
	c	Investments—corporate bonds (attach schedule)			
	11	Investments—land, buildings, and equipment: basis ▶			
Liabilities		Less: accumulated depreciation (attach schedule) ▶			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)			
	14	Land, buildings, and equipment: basis ▶			
		Less: accumulated depreciation (attach schedule) ▶			
	15	Other assets (describe ▶ Accrued Investment Income)	25,063	8,215	8,215
	16	Total assets (to be completed by all filers—see the instructions. Also, see page 1, item I)	10,370,274	12,212,210	12,212,210
	17	Accounts payable and accrued expenses			
	18	Grants payable	1,907,487	1,641,392	
	19	Deferred revenue			
Net Assets or Fund Balances	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)	1,907,487	1,641,392	
		Foundations that follow SFAS 117, check here ▶ <input checked="" type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.			
	24	Unrestricted	8,462,787	10,570,818	
	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			
Net Assets or Fund Balances	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)	8,462,787	10,570,818	
	31	Total liabilities and net assets/fund balances (see page 17 of the instructions)	10,370,274	12,212,210	

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	8,462,787
2	Enter amount from Part I, line 27a	2	35,025
3	Other increases not included in line 2 (itemize) ▶ Unrealized Gain / Rounding	3	2,073,006
4	Add lines 1, 2, and 3	4	10,570,818
5	Decreases not included in line 2 (itemize) ▶	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	10,570,818

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 Schedule #3			
b				
c				
d				
e				

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a			
b			
c			
d			
e			

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

(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
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	(211,680)
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	

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.

(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))
2008	922,095	11,782,962	.07826
2007	810,202	16,343,875	.04957
2006	298,579	5,213,925	.05727
2005	0	80,806	.00000
2004			

2	Total of line 1, column (d)	2	.18510
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	.04628
4	Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4	10,625,897
5	Multiply line 4 by line 3	5	491,767
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	3,226
7	Add lines 5 and 6	7	494,993
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	510,274

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 or determination letter: _____ (attach copy of 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		3,226
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		0
3	Add lines 1 and 2	3		3,226
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4		0
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5		3,226
6	Credits/Payments:			
a	2009 estimated tax payments and 2008 overpayment credited to 2009	6a	3,100	
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		3,100
8	Enter any penalty for underpayment of estimated tax. Check here <input checked="" 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		126
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 2010 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 XV</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"/> <u>Ohio</u>		
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 2009 or the taxable year beginning in 2009 (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		✓
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		✓
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	✓	
Website address ► <u>www.guidestar.org</u>				
14	The books are in care of ► <u>Westfield Group</u>	Telephone no. ►	<u>330-887-6907</u>	
	Located at ► <u>PO Box 5001, Westfield Center, OH</u>	ZIP+4 ►	<u>44251-5001</u>	
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here.	►	<input type="checkbox"/>	
	and enter the amount of tax-exempt interest received or accrued during the year	►	15	

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 type="checkbox"/> Yes <input checked="" 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)?	1b	
Organizations relying on a current notice regarding disaster assistance check here		<input 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 2009?	1c	✓
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 2009, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2009? <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	✓
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 2009 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? (<i>Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2009.</i>)	3b	
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	✓
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 2009?	4b	✓

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)? **5b** ☐ Yes ☒ No
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? **6b** ☐ Yes ☒ No
If "Yes" to 6b, file Form 8870.
- 7a** At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☒ No
- b** If yes, did the foundation receive any proceeds or have any net income attributable to the transaction? **7b** ☐ Yes ☒ No

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors**1 List all officers, directors, trustees, foundation managers and their compensation (see 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
See Schedule #7				

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)***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
None		

Total number of others receiving over \$50,000 for professional services ▶

Part IX-A Summary of Direct Charitable Activities

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

	Expenses
1 None	
2	
3	
4	

Part IX-B Summary of Program-Related Investments (see page 24 of the instructions)

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

	Amount
1 None	
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:		
	See Schedule #4		
a	Average monthly fair market value of securities	1a	10,777,385
b	Average of monthly cash balances	1b	10,328
c	Fair market value of all other assets (see page 24 of the instructions)	1c	0
d	Total (add lines 1a, b, and c)	1d	10,787,713
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	10,787,713
4	Cash deemed held for charitable activities. Enter 1 1/2 % of line 3 (for greater amount, see page 25 of the instructions)	4	161,816
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	10,625,897
6	Minimum investment return. Enter 5% of line 5	6	531,295

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	531,295
2a	Tax on investment income for 2009 from Part VI, line 5	2a	3,226
b	Income tax for 2009. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	3,226
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	528,069
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	528,069
6	Deduction from distributable amount (see page 25 of the instructions)	6	
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	528,069

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	513,500
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	513,500
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	3,226
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	510,274

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 2008	(c) 2008	(d) 2009
1 Distributable amount for 2009 from Part XI, line 7				528,069
2 Undistributed income, if any, as of the end of 2009:				
a Enter amount for 2008 only			0	
b Total for prior years: 20____, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2009:				
a From 2004				
b From 2005				
c From 2006			36,685	
d From 2007			1,136	
e From 2008			341,457	
f Total of lines 3a through e	379,278			
4 Qualifying distributions for 2009 from Part XII, line 4: ► \$ <u>513,500</u>				
a Applied to 2008, 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 2009 distributable amount				513,500
e Remaining amount distributed out of corpus	0			
5 Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a))	14,569			14,569
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	364,709			
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 2008. Subtract line 4a from line 2a. Taxable amount—see page 27 of the instructions			0	
f Undistributed income for 2009. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2010				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 2004 not applied on line 5 or line 7 (see page 27 of the instructions)	0			
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a	364,709			
10 Analysis of line 9:				
a Excess from 2005				
b Excess from 2006		22,116		
c Excess from 2007		1,136		
d Excess from 2008		341,457		
e Excess from 2009		0		

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

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2009, 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) 2009	(b) 2008	(c) 2007	(d) 2006	
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 2/3 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 28 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).)

Ohio Farmers Insurance Co. through 100% owned subsidiaries, Westfield Insurance Co. & Westfield National Insurance Co.

- 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:

See attached Community Grant Fund Guidelines

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

See attached Community Grant Fund Guidelines

- c** Any submission deadlines:

See attached Community Grant Fund Guidelines

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

See attached Community Grant Fund 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
a <i>Paid during the year</i> See Schedule #5				513,500
Total			3a	513,500
b <i>Approved for future payment</i> See Schedule #6				2,134,000
Total			3b	2,134,000

1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?		Yes	No
a Transfers from the reporting foundation to a noncharitable exempt organization of:			
(1) Cash	1a(1)		✓
(2) Other assets	1a(2)		✓
b Other transactions:			
(1) Sales of assets to a noncharitable exempt organization	1b(1)		✓
(2) Purchases of assets from a noncharitable exempt organization	1b(2)		✓
(3) Rental of facilities, equipment, or other assets	1b(3)		✓
(4) Reimbursement arrangements	1b(4)		✓
(5) Loans or loan guarantees	1b(5)		✓
(6) Performance of services or membership or fundraising solicitations	1b(6)		✓
c Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c		✓
d If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received.			

[illegible]

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? ☐ Yes ☒ No

b If "Yes," complete the following schedule.

(a) Name of organization	(b) Type of organization	(c) Description of relationship

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer or fiduciary) is based on all information of which preparer has any knowledge.

Signature of officer or trustee

5/13/2010

Director
Title

Sign Here

Paid Preparer's Use Only	
---	--

Preparer's
signature

Date _____

Check if self-employed ► ☐

Preparer's identifying
number (see **Signature** on
page 30 of the instructions)

Firm's name (or yours if self-employed), address, and ZIP code

EIN ►

Phone no

WESTFIELD INSURANCE FOUNDATION
EIN 20-3816760
2009 990-PF
SCHEDULE A

Part I, Line 1: Contributions Received

	Donation Date	Cash Received
Westfield Group Foundation	8/14/2009	175000

WESTFIELD INSURANCE FOUNDATION
EIN 20-3816760
2009 990-PF
SCHEDULE 1

Part I, Line 16c: Other professional fees

Regulatory Fees	\$ 200.00
Tax Payments	<u>3,291.00</u>
Total Other Professional Fees	<u>\$ 3,491.00</u>

WESTFIELD INSURANCE FOUNDATION
 EIN 20-3816760
 2009 990-PF
 SCHEDULE 2

Beginning of Year	End of Year	
	Book Value	Fair
(End of Year	(End of Year	Market
Market Value)	Market Value)	Value
12/31/2008	12/31/2009	12/31/2009
(column a)	(column b)	(column c)

Part II, Line 2: Savings & Temporary Cash Investments:

JP Morgan US Govt Institutional	86,754	97,708	97,708
---------------------------------	--------	--------	--------

Part II, Line 10a: Investments - US and State Government Obligations:

Ishares - (Lehman)Barclays TIPS Bd Fd	565,668	592,230	592,230
Ishares - GS\$ Investop Corp Bd	1,067,325	1,171,688	1,171,688
Ishares - (Lehman) Barclays 7-10 Yr Treasury Bd Fd	985,300	1,134,080	1,134,080
Ishares - DJ US Real Estate	524,943	647,472	647,472
	<u>3,143,236</u>	<u>3,545,470</u>	<u>3,545,470</u>

Part II, Line 10b: Investments - Corporate Stock:

Ishares - MSCI EAFE Index Fund	2,020,270	2,284,999	2,284,999
Ishares - Russell 1000 Value - Large Cap	1,522,740	1,816,710	1,816,710
Ishares - Russell 1000 Growth - Large Cap	1,115,506	1,370,875	1,370,875
Ishares - Russell 2000 Growth - Small Cap	381,450	510,525	510,525
SPDR TR - Unit Ser 1 Standard & Poors	1,256,141	1,551,245	1,551,245
SPDR SER TR - DJ Wilshire Small Cap Val	803,290	1,021,630	1,021,630
	<u>7,099,397</u>	<u>8,555,984</u>	<u>8,555,984</u>

Part IV: Capital Gains and Losses for Tax on Investment Income

[illegible]

WESTFIELD INSURANCE FOUNDATION
EIN 20-3816760
2009 990-PF
SCHEDULE 4

PART X: Minimum Investment Return

Line 1a: Average FMV of Securities

Assets Held More Than One Year

Assets Held More Than One Year			FMV	FMV	AVERAGE
			1/1/2009	12/31/2009	FMV 12/31/2009
5,700	shares	Ishares - Barclays TIPS Bd Fd	565,668	592,230	578,949
10,250	shares	Ishares - GS\$ Investop Corp Bd	1,041,913	1,067,538	1,054,725
10,000	shares	Ishares - Barclays 7-10 Yr Treasury Bd Fd	985,300	886,000	935,650
14,100	shares	Ishares - DJ US Real Estate	524,943	647,472	586,208
41,335	shares	Ishares - MSCI EAFE Index Fund	1,854,288	2,284,999	2,069,643
30,750	shares	Ishares - Russell 1000 Value - Large Cap	1,522,740	1,765,050	1,643,895
27,500	shares	Ishares - Russell 1000 Growth - Large Cap	1,019,150	1,370,875	1,195,013
7,500	shares	Ishares - Russell 2000 Growth - Small Cap	381,450	510,525	445,988
13,920	shares	SPDR TR - Unit Ser 1 Standard & Poors	1,256,141	1,551,245	1,403,693
15,150	shares	SPDR SER TR - DJ Wilshire Small Cap Val	642,209	857,490	749,849
					<u>10,663,612</u>

Assets Held Less Than One Year

			DAYS	FMV	AVERAGE
			HELD	12/31/09	FMV
					12/31/09
500	shares	Ishares - GS\$ Investop Corp Bd	114	52,075	16,265
500	shares	Ishares - GS\$ Investop Corp Bd	71	52,075	10,130
2,000	shares	Ishares - Barclays 7-10 Yr Treasury Bd Fd	114	177,200	55,345
800	shares	Ishares - Barclays 7-10 Yr Treasury Bd Fd	71	70,880	13,788
900	shares	Ishares - Russell 1000 Value - Large Cap	114	51,660	16,135
2,900	shares	SPDR SER TR - DJ Wilshire Small Cap Val	157	164,140	70,603
51,130	shares	JP Morgan US Govt Institutional	129	51,130	18,071
29,204	shares	JP Morgan US Govt Institutional	93	29,204	7,441
17,375	shares	JP Morgan US Govt Institutional	32	17,375	1,523
					<u>113,772</u>

Total on line 1a

10,777,385

Line 1b: Cash Balance Average

	Balance	Balance	Average
	1/1/2009	12/31/2009	Balance
Total on line 1b	<u>15,824</u>	<u>4,833</u>	<u>10,328</u>

Total on 1d

10,787,713

WESTFIELD INSURANCE FOUNDATION
EIN 20-3816760
2009 990-PF
SCHEDULE 5

Organization	Address	City	ST	Zip Code	Foundation Status of Recipient	Purpose of Grant or Contribution	Amount
Cleveland Foundation	1422 Euclid Avenue Suite 1510	Cleveland	OH	44115	509(a)(1)	To support economic development efforts in Northeast Ohio	33,000
Greater Twin Cities United Way	404 S 8th Street	Minneapolis	MN	55404	509(a)(1)	To support community-wide needs	1,173
Habitat for Humanity of Summit County	1177 Rosemary Blvd	Akron	OH	44306	509(a)(1)	To build affordable housing for low-income families	5,000
Playhouse Square Foundation	1501 Euclid Ave Ste 200	Cleveland	OH	44115	509(a)(1)	To support building of broadcast theatre for public television and radio	300,000
The University of Akron	Department of Development	Akron	OH	44325	509(a)(1)	To support the advancement council	2,000
The University of Akron	Department of Development	Akron	OH	44325	509(a)(1)	To support the Center for Information Technologies and eBusiness	1,500
The University of Akron	Department of Development	Akron	OH	44325	509(a)(1)	To support the school of Accountancy	2,000
The University of Akron Foundation	PO Box 2203	Akron	OH	44325	509(a)(1)	To support the Medina County University Center	100,000
United Way of Ashland County	132 W Main St Lower Level, Ste A	Ashland	OH	44805	509(a)(1)	To support community-wide needs	1,615
United Way of Central Indiana	PO Box 88409	Indianapolis	IN	46208	509(a)(1)	To support community-wide needs	827
United Way of Delaware County	40 N Sandusky St	Delaware	OH	43015	509(a)(1)	To support community-wide needs	215
United Way of Greater Cleveland	1331 Euclid Ave	Cleveland	OH	44115	509(a)(1)	To support community-wide needs	755
United Way of Greater Knoxville	1301 Hannah Ave	Knoxville	TN	37921	509(a)(1)	To support community-wide needs	107
United Way of Greater Stark County	4825 Higbee Ave NW	Canton	OH	44718	509(a)(1)	To support community-wide needs	2,040
United Way of Greater Toledo	One Stranahan Sq Ste 114	Toledo	OH	43604	509(a)(1)	To support community-wide needs	99
United Way of Lancaster County	630 Janet Ave	Lancaster	PA	17601	509(a)(1)	To support community-wide needs and community impact priority areas	5,626
United Way of Medina County	703 N Court Street	Medina	OH	44256	509(a)(1)	To support community-wide needs and community impact priority areas	50,611
United Way of Portage County	PO Box 845	Ravenna	OH	44266	509(a)(1)	To support community-wide needs	107
United Way of Summit County	PO Box 1260	Akron	OH	44309	509(a)(1)	To support community-wide needs	3,213
United Way of Darke County	PO Box 716	Greenville	OH	45331	509(a)(1)	To support community-wide needs	86
Heart of Western Michigan United Way	118 Commerce Ave SW, Suite 100	Grand Rapids	MI	49503	509(a)(1)	To support community-wide needs	129
United Way of Williamson County	209 Gothic Court Suite 107	Franklin	TN	37067	509(a)(1)	To support community-wide needs	536
United Way of the Greater Dayton area	184 Salem Ave	Dayton	OH	45406	509(a)(1)	To support community-wide needs	322
United Way of Wayne and Holmes Counties	PO Box 548	Wooster	OH	44691	509(a)(1)	To support community-wide needs	2,324
United Way of York County	PO Box 1663	York	PA	17405	509(a)(1)	To support community-wide needs	215
Total Cash							513,500

WESTFIELD INSURANCE FOUNDATION
EIN 20-3816760
2009 990-PF
SCHEDULE 6

Part XVb, Approved for future payment

Donee	Purpose	Amount
Playhouse Square Foundation 1501 Euclid Avenue, Suite 200 Cleveland, OH 44115	Support the Idea Center Studio	1,800,000
University of Akron 302 Buchtel Common Akron, OH 44325	Support the University of Akron Medina County University Center	300,000
Cleveland Plus Economic Growth Foundation The Higbee Building 100 Public Square, Suite 210 Cleveland, OH 44113-2291	Support the Cleveland Plus Economic Development	34,000
Total approved future payments		<u><u>2,134,000</u></u>

WESTFIELD INSURANCE FOUNDATION
EIN 20-3816760
2009 990-PF
SCHEDULE 7

Part VIII, Line 1: Information About Officers, Directors, Trustees, and Foundation Managers

<u>Name and address</u>	<u>Title and average hours devoted per week</u>	<u>Compensation</u>	<u>Contributions to employee benefit plans and deferred comp</u>	<u>Expense account</u>
Robert J Joyce PO Box 5001 Westfield Center, OH 44251	Director, 50 hrs/wk	0	0	0
Robert Krsowaty PO Box 5001 Westfield Center, OH 44251	Director, 50 hrs/wk	0	0	0
Troy Gail PO Box 5001 Westfield Center, OH 44251	Director, 50 hrs/wk	0	0	0
Edward Largent PO Box 5001 Westfield Center, OH 44251	Director, 25 hrs/wk	0	0	0
James Clay PO Box 5001 Westfield Center, OH 44251	Director, 25 hrs/wk	0	0	0
Jani Davis PO Box 5001 Westfield Center, OH 44251	Director, 20 hrs/wk	0	0	0
Frank Carrino PO Box 5001 Westfield Center, OH 44251	Director, 50 hrs/wk	0	0	0
Patricia Schiesswohl PO Box 5001 Westfield Center, OH 44251	Director, 25 hrs/wk	0	0	0



Community Grant Fund Guidelines

Mission: *Westfield's commitment to community investment and business success is built on sharing knowledge and building trust. We achieve success by strengthening public awareness and understanding of insurance, supporting the institution of home ownership and economic health, and empowering people to take control of their lives.*

Community Grant Fund requests should demonstrate a clear connection to a community grant fund focus area.

Safety and Education – Westfield will consider supporting programs that

- Promote safe choices and protection from hazards that relate to property and casualty insurance
- Strengthen public awareness and understanding of insurance
- Create innovative learning opportunities with emphasis on building business and financial literacy for youth and adults

Human Services – Westfield primarily supports Human Services programs through donations to the United Way and will consider supporting additional programs that

- Empower people to take control of their lives and work toward positive change

Restrictions:

Westfield Insurance funds only charitable, non-profit organizations as defined by section 501(c)(3) of the IRS tax code. We refrain from funding the following types of organizations, activities or purposes:

- Organizations outside of Westfield operating territories
- Organizations with Internal Revenue 509(a)(3), Type III status
- Annual operating budgets for United Way agencies
- Individuals or individual endeavors
- Membership, fraternal or labor organizations
- Religious organizations (unless they are of benefit to the public)
- Programs designed in full or in part to promote religious or political doctrines and/or programs that represent a conflict of interest for employees or the company
- Program advertising
- Fundraising benefits, sponsorship or other events
- Individual attendance to conferences or seminars
- Individual youth and adult athletic teams and associations
- Multiple grant requests per organization per year
- Multi-year gifts, endowments, capital campaigns
- Organizations that discriminate on the basis of race, sex, sexual orientation, age or religion
- Health- or medical-related organizations, unless program fits within stated giving guidelines
- Academic scholarship programs/student exchange programs (*programs supported by Westfield Insurance and Westfield Agents Association are not included in the Community Investment grant request process*)

Previous grants are not considered as precedent for additional support. Proposals should not be submitted in binders or videotapes, CD-ROMS and/or other costly manners.

Grant Request Format

If your organization's program aligns with one of Westfield's focus areas and does not fall within limitations, please submit one unbound copy of a proposal in the following format

I. Application

Complete and submit the application included at the end of this document

II. Cover Letter

On one page of the organization's letterhead, summarize the project its purpose, the grant amount requested, the program activities and the population that will benefit from the grant.

III. Program detail (1- 3 pages)

Provide a written summary of your project or program with the following details. Respond to each item, using each item as a header. If you are unable to include the detail, please address the reason as to why it is unavailable for inclusion

1. How the project/program relates to your mission **and** a Westfield community grant fund focus area
2. Statement of need including statistics and/or evidence of support
3. Specific goals and objectives of the project or program
4. Audience demographics (age, location, youth, adults, families, females, etc)
5. How many will benefit from the project or program
6. Explanation of how the effectiveness of the project will be measured and communicated to Westfield and the community
7. How the grant will be used specifically
8. Project/program budget
9. Organization budget for current fiscal year with year-to-date status (project/program included as a line item)
10. List of other funding sources for the current year, including gift amounts committed and/or requested
11. United Way funding received for the past four years, if applicable
12. Explanation of efforts to minimize duplication within the community
13. Explanation of collaboration with other partners on project/program, include partner(s)' name(s)
14. If opportunities exist, how will Westfield Insurance's support be communicated (i.e. brochure, Web site, press release)? If applicable, use the name **Westfield Insurance**

The Westfield grant review committee will review all requests for the above criteria before making final decisions to accept or decline a request.

IV. Required Documentation

Include the following documents along with the application, cover letter and program/project detail. If any item is not applicable, include a statement explaining as to why it is not included.

- Organization's history and mission
- Recently audited financial statements
- Most recent 990
- Endowment spending policy (if applicable)
- One example of each of the following.
 1. Annual report
 2. Organizational brochure
 3. Newsletter
 4. Program brochure
- IRS letter of determination of 501(c)(3)
- Name(s) of Westfield employee(s) and description of involvement, if applicable
- List of key staff members and qualifications, or an organizational chart
- Names and affiliations of officers of board members plus a brief narrative on the board's operations that answers the following questions
 1. Term limits of board members
 2. Standing committees of the board
 3. Fundraising responsibility of board members
 4. Frequency the full board receives financial reports
 5. Frequency of board meetings
 6. What (if any) long range or strategic plan has the board adopted

Submitting the Grant Request and Follow-up

Submit application, cover letter, program detail and attachments to

Westfield Insurance Community Grant Fund
One Park Circle
Westfield Center, OH 44251-5001
330 887.6150
janidavis@westfieldgrp.com

Deadlines for submission.

Grant requests are reviewed quarterly. Requests must be received four weeks in advance of grant review committee meetings to be considered, please note the schedule below

Requests submitted by:

February 27, 2009
May 29, 2009
August 28, 2009
October 30, 2009

will be reviewed on:

March 27, 2009
June 26, 2009
September 25, 2009
December 4, 2009*

*Requests from organizations that have received funding in prior years will not be reviewed until the December 4, 2009 meeting

Requests for grants less than \$5,000

Requests that meet the criteria are submitted to the grant review committee for consideration. Applicants are notified regarding the grant review committee's final decision within 45 days of submission.

Requests for grants \$5,000 and over

Organizations requesting more than \$5,000 must contact Westfield Insurance, community investment, prior to submitting request. Community investment may schedule a meeting between appropriate representatives of Westfield and the requesting organization. Depending on the size and nature of the request, additional information not specified in the guidelines may be requested by Westfield.

Westfield Insurance Community Grant Application

Organization Information

Organization Name _____

Date ____/____/____

Address _____

Contact Name / Title _____

City, State Zip _____

Phone with area code _____

Employer Identification Number (EIN) _____

E-mail _____

Community Grant Focus Area (circle one) Safety and Education

Human Services

Additional Information

Project name _____

Project start date ____/____/____

Project end date ____/____/____

Resources Requested _____

This application was prepared by _____

Print name _____

Signature _____

If monetary, amount requested by organization

\$ _____

Position with the agency _____

Westfield Insurance contributions to this organization in the previous four years

Year _____ \$ _____

Year _____ \$ _____

Year _____ \$ _____

Year _____ \$ _____

Are you a United Way affiliated agency? ☐ Yes ☐ No

If yes, provide the name(s) of the United Ways and the amount(s) your agency has received for the past four years in your program detail.

Application endorsement

If a Westfield employee or agency partner is involved with this request, (as a board member, volunteer, funding source or otherwise interested community member), include endorsement below

Print Name _____

Signature _____

Daytime phone with area code _____

Email _____

Mail with additional program detail and required attachments:

Westfield Insurance Community Grant Fund
One Park Circle
Westfield Center, OH 44251-5001