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Form **990-PF**Department of the Treasury
Internal Revenue Service**Return of Private Foundation**
or Section 4947(a)(1) Nonexempt Charitable Trust
Treated as a Private Foundation

OMB No 1545-0052

2009

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

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 changeUse the IRS
label.
Otherwise,
print
or type.
See Specific
Instructions.

Name of foundation

Anderson Foundation

A Employer identification number

34-6528868

Number and street (or P O box number if mail is not delivered to street address)

P.O. Box 119

Room/suite

B Telephone number (see page 10 of the instructions)

419 893-5050

City or town, state, and ZIP code

Maumee, OH 43537

C If exemption application is
pending, check here ☐D 1 Foreign organizations, check here ☐2 Foreign organizations meeting the
85% test, check here and attach
computation ☐E If private foundation status was terminated
under section 507(b)(1)(A), check here ☐F If the foundation is in a 60-month termination
under section 507(b)(1)(B), check here ☐H Check type of organization ☒ Section 501(c)(3) exempt private foundation☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation

I Fair market value of all assets at end

J Accounting method ☒ Cash ☐ Accrual

of year (from Part II, col (c), line

☐ Other (specify) _____

16) \$ 9,201,832.00

(Part I, column (d) must be on cash basis.)

Part I Analysis of Revenue and Expenses (The
total of amounts in columns (b), (c), and (d)
may not necessarily equal the amounts in
column (a) (see 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)1 Contributions, gifts, grants, etc., received (attach schedule)
2 Check ☐ if the foundation is not required to
attach Sch. B.

13,000.00

3 Interest on savings and temporary cash investments

12,519.00

12,519.00

4 Dividends and interest from securities

231,346.00

231,346.00

5a Gross rents

b Net rental income or (loss)

-777,206.00

6a Net gain or (loss) from sale of assets not on line 10

b Gross sales price for all
assets on line 6a 8,766,692.02

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

-520,341.00

243,865.00

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)

115,862.00

100,975.00

14,887.00

17 Interest

4,162.00

4,162.00

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)

836.00

836.00

24 Total operating and administrative expenses.
Add lines 13 through 23

120,860.00

105,973.00

14,887.00

25 Contributions, gifts, grants paid

323,333.00

323,333.00

26 Total expenses and disbursements. Add lines 24 and 25

444,193.00

105,973.00

338,220.00

27 Subtract line 26 from line 12

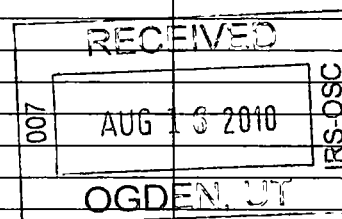
a Excess of revenue over expenses and disbursements

-964,534.00

b Net investment income (if negative, enter -0-)

137,892.00

c Adjusted net income (if negative, enter -0-)



we

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	581,044.00	-8,948.00	-8,948.00
	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 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			
	10 a Investments - U S and state government obligations (attach schedule)			
	b Investments - corporate stock (attach schedule)	65,950.00	160,512.00	160,512.00
	c Investments - corporate bonds (attach schedule),	0.00		
	11 Investments - land, buildings, and equipment basis			
Less accumulated depreciation (attach schedule) ▶				
12 Investments - mortgage loans				
13 Investments - other (attach schedule)	8,363,365.00	7,894,261.00	9,050,268.00	
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)	9,010,359.00	8,045,825.00	9,201,832.00	
Liabilities	17 Accounts payable and accrued expenses			
	18 Grants payable	0.00	0.00	
	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)			
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	0.00	0.00	
	25 Temporarily restricted	0.00	0.00	
	26 Permanently restricted	0.00	0.00	
	Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. ▶ <input type="checkbox"/>			
	27 Capital stock, trust principal, or current funds	0.00	0.00	
	28 Paid-in or capital surplus, or land, bldg, and equipment fund	0.00	0.00	
	29 Retained earnings, accumulated income, endowment, or other funds	9,010,359.00	8,045,825.00	
	30 Total net assets or fund balances (see page 17 of the instructions)	9,010,359.00	8,045,825.00	
	31 Total liabilities and net assets/fund balances (see page 17 of the instructions)	9,010,359.00	8,045,825.00	

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	9,010,359.00
2 Enter amount from Part I, line 27a	2	-964,534.00
3 Other increases not included in line 2 (itemize) ▶	3	
4 Add lines 1, 2, and 3	4	8,045,825.00
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	8,045,825.00

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 ATTACHMENT				
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 8,766,692.02		9,543,898.35	-777,206.33
b			
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(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	
a			-777,206.33
b			
c			
d			
e			

2 Capital gain net income or (net capital loss)	<div style="display: inline-block; vertical-align: middle;"> { If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 } </div>	2	-777,206.33
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.	<div style="display: inline-block; vertical-align: middle;"> } </div>	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.

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))
2008	280,693.00	8,801,099.11	0.0319
2007	957,432.00	9,247,827.00	0.1035
2006	506,985.00	5,707,184.00	0.0888
2005	467,290.00	4,951,706.00	0.0944
2004	460,365.00	4,478,399.00	0.1028

2 Total of line 1, column (d)	2	0.4214
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	0.0843
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4	8,184,844.69
5 Multiply line 4 by line 3	5	689,982.41
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	1,378.92
7 Add lines 5 and 6	7	691,361.33
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	338,220.00

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

1 a 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 ruling letter if necessary - see instructions)		1	2,758.00
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b			
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	2,758.00
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	2,758.00
6 Credits/Payments			
a 2009 estimated tax payments and 2008 overpayment credited to 2009	6a	4,445.00	
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	4,445.00	
8 Enter any penalty for underpayment of estimated tax Check here <input type="checkbox"/> if Form 2220 is attached	8		
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9		
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	1,687.00	
11 Enter the amount of line 10 to be Credited to 2010 estimated tax	11	1,687.00	Refunded

Part VII-A Statements Regarding Activities

	Yes	No
1 a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)? 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		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation \$ (2) On foundation managers \$		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers \$		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4 a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?	X	
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), and Part XV	X	
8 a Enter the states to which the foundation reports or with which it is registered (see page 19 of the instructions) OHIO		
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? If "No," attach explanation	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2009 or the taxable year beginning in 2009 (see instructions for Part XIV on page 27)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

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		X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	
Website address				
14	The books are in care of <u>Matthew C. Anderson</u> Telephone no <u>419 893-5050</u>			
	Located at <u>480 W. Dussel Drive, Maumee, OH</u> ZIP + 4 <u>43537</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 <u>15</u>			

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)?	1b	X
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	X
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		
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		
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? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2009)	3b	
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2009?	4b	X

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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**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** ☒

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****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
Matthew C. Anderson	Chairman	0.00		
Michael J Anderson, Richard P. Anderson, Jeffrey W. Anderson, John P. Kraus	Trustees	0.00		
Richard M. Anderson, Lu Stauffer				
All located at: 480 W. Dussel Drive Maumee, OH 43537				

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	
2	
3	
4	

Part IX-B Summary of Program-Related Investments (see page 23 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	
2	
All other program-related investments See page 24 of the instructions	
3	
Total. Add lines 1 through 3 ▶	

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

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	7,603,467.00
b Average of monthly cash balances	1b	706,020.00
c Fair market value of all other assets (see page 24 of the instructions)	1c	
d Total (add lines 1a, b, and c)	1d	8,309,487.00
e Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	
Acquisition indebtedness applicable to line 1 assets	2	
Subtract line 2 from line 1d	3	8,309,487.00
Cash deemed held for charitable activities. Enter 1 1/2 % of line 3 (for greater amount, see page 25 of the instructions)	4	124,642.31
Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	8,184,844.69
Minimum investment return. Enter 5% of line 5	6	409,242.23

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)

Minimum investment return from Part X, line 6	1	409,242.23
a Tax on investment income for 2009 from Part VI, line 5	2a	2,758.00
b Income tax for 2009 (This does not include the tax from Part VI)	2b	
c Add lines 2a and 2b	2c	2,758.00
Distributable amount before adjustments. Subtract line 2c from line 1	3	406,484.23
Recoveries of amounts treated as qualifying distributions	4	
Add lines 3 and 4	5	406,484.23
Deduction from distributable amount (see page 25 of the instructions)	6	
Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	406,484.23

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

Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes		
a Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	1a	338,220.00
b Program-related investments - total from Part IX-B	1b	
Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
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	
Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	338,220.00
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	
Adjusted qualifying distributions. Subtract line 5 from line 4	6	338,220.00

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				406,484.23
2 Undistributed income, if any, as of the end of 2009				
a Enter amount for 2008 only				
b Total for prior years 20__ 20__ 20__				
3 Excess distributions carryover, if any, to 2009				
a From 2004 239,463.00				
b From 2005 227,631.00				
c From 2006 227,179.00				
d From 2007 545,876.00				
e From 2008 0.00				
f Total of lines 3a through e	1,240,149.00			
4 Qualifying distributions for 2009 from Part XII, line 4 ► \$ 338,220.00				
a Applied to 2008, but not more than line 2a . . .				
b Applied to undistributed income of prior years (Election required - see page 26 of the instructions)				
c Treated as distributions out of corpus (Election required - see page 26 of the instructions)				
d Applied to 2009 distributable amount				338,220.00
e Remaining amount distributed out of corpus . .				
5 Excess distributions carryover applied to 2009 . (If an amount appears in column (d), the same amount must be shown in column (a))	68,264.23			68,264.23
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	1,171,884.77			
b Prior years' undistributed income Subtract line 4b from line 2b				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed				
d Subtract line 6c from line 6b Taxable amount - see page 27 of the instructions				
e Undistributed income for 2008 Subtract line 4a from line 2a Taxable amount - see page 27 of the instructions				
f Undistributed income for 2009 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2010				
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)				
8 Excess distributions carryover from 2004 not applied on line 5 or line 7 (see page 27 of the instructions)	171,198.77			
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a	1,000,686.00			
10 Analysis of line 9				
a Excess from 2005 . . . 227,631.00				
b Excess from 2006 . . . 227,179.00				
c Excess from 2007 . . . 545,876.00				
d Excess from 2008 . . . 0.00				
e Excess from 2009 . . . 0.00				

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

1 a 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)

2 a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed

Tax year	Prior 3 years				(e) Total
	(a) 2009	(b) 2008	(c) 2007	(d) 2006	
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))

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.

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 statement

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

see attached statement

c Any submission deadlines

see attached statement

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

see attached statement

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

<div>Recipient</div> <div>Name and address (home or business)</div>	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 attached statement				323,333.00
Total.			▶ 3a	323,333.00
b <i>Approved for future payment</i> see attached statement				83,667.00
Total.			▶ 3b	83,667.00

Form **990-PF** (2009)

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	12,519.00	
4 Dividends and interest from securities			14	231,346.00	
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			18	-777,206.00	
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)				-533,341.00	
13 Total. Add line 12, columns (b), (d), and (e)				-533,341.00	-533,341.00

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

[illegible]

Schedule of Contributors

OMB No 1545-0047

2009

▶ Attach to Form 990, 990-EZ, or 990-PF.

Name of the organization

Employer identification number

Anderson Foundation

34-6528868

Organization type (check one)

Filers of:

Section:

Form 990 or 990-EZ

- ☐ 501(c)() (enter number) organization
- ☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation
- ☐ 527 political organization

Form 990-PF

- ☒ 501(c)(3) exempt private foundation
- ☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation
- ☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.

Note. Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

General Rule

- ☒ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II.

Special Rules

- ☐ For a section 501(c)(3) organization filing Form 990 or 990-EZ that met the 33 $\frac{1}{3}$ % support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), and received from any one contributor, during the year, a contribution of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, aggregate contributions of more than \$1,000 for use *exclusively* for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals. Complete Parts I, II, and III.
- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions for use *exclusively* for religious, charitable, etc., purposes, but these contributions did not aggregate to more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Do not complete any of the parts unless the **General Rule** applies to this organization because it received nonexclusively religious, charitable, etc., contributions of \$5,000 or more during the year. ▶ \$ _____

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

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

Schedule B (Form 990, 990-EZ, or 990-PF) (2009)

Name of organization

Anderson Foundation

Employer identification number

34-6528868

Part I Contributors (see instructions)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
1	Paul Anderson P.O. Box 119 Maumee, OH 43537	\$ 13,000.00	Person <input checked="checked" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)

ANDERSON FOUNDATION INFORMATION FOR APPLICANTS

General Policies

The Anderson Foundation strives to enhance the quality of life in communities in which the donor company, The Andersons, has business operations.

The Foundation will consider requests from organizations that have received 501(c)(3) tax-exempt status from the Internal Revenue service and which are not classified as private foundations under the Internal Revenue Code 509. State and local government requests are also considered

Grants are made for general operations, specific projects, start-up funds and capital campaigns. As a general rule, the Foundation will not serve as the major or sole funder of a project

Grants are not made to individuals; to endowment funds; to church building or operating funds; or to the building or operation funds of elementary schools

Formal Grant Proposals

Grant proposals are accepted at any time. Foundation meetings are held quarterly – March, June, September and December, usually the third Monday of the month. Requests are to be received at least three weeks in advance of the meeting date. If the proposal is received in completed form by the deadline it will be presented in that month. Special circumstances sometimes inhibit this process, however, and a request may need to be held for a subsequent meeting. In either case, the applicant will be notified as to the status of the request.

The Foundation does not use an application form. Please submit not more than five typewritten pages that include the following items:

- A request for a specific amount with an explanation of how the funds will be used
- A description of the organization, including the statement of the organization's purposes and objectives
- An explanation of the need the drive or project intends to address, the geographical area and population to be served and a timetable for the drive or project
- The name(s) and qualifications of the person(s) who will administer the grant and how the success of the project will be evaluated, if appropriate.

Attachments to the Formal Grant Proposal

Every proposal should include the following attachments:

- A copy of the organization's most recent tax-exempt ruling statement from the Internal Revenue Service
- A list of the organization's officers and directors
- A financial report for the most recently completed year of operation
- An organizational budget for the current operation year showing anticipated expenses and income by sources. If the request is for a capital drive or specific project, a budget showing both expenses and income for the drive or project should also be included. In addition, a projected budget for the next operation year is also requested.
- A donors list showing private, corporate and foundation contributors to the organization during the past 12 months and in what month each contribution was given

Applications without the basic information and attachments listed above may not be considered until all such material is made available to the Foundation

Organizations that have received a grant from the Anderson Foundation within the past 12 months may not have to submit some of the material indicated above. Such applicants are advised to contact the Foundation before submitting their material

In some cases, the staff of the Foundation may find it necessary to contact the applicant and/or members of the organization's board of directors. Therefore, the telephone number of the contact person should be included with the proposal

Applications should be directed to:

Ms Fredi Heywood
Foundation Services Administrator
Anderson Foundation
608 Madison Avenue, Suite 1540
Toledo, Ohio 43604

Phone (419) 243-1706

Telephone inquiries are welcome

March/2000

Anderson Foundation
January 1, 2009 - December 31, 2009

Tax year 2009
Tax ID #:34-6528868

<u>Grantee</u>	<u>Amount</u>	<u>Program Area</u>
4-H Foundation of Illinois 106 Taft House 1401 S. Maryland Drive Urbana, IL 61801	250.00	AGRICULTURE..
AgriInstitute 72 ½ West Main Street Danville, IN 46122	500.00	AGRICULTURE
Albion/Homer United Way 203 S. Superior Street Albion, MI 49224	3,000.00	HUMAN SERVICES
ASSETS Toledo 2200 Jefferson Ave. 1 st . Floor Toledo, OH 43604	5,000.00	HIGHER EDUCATION
Beach House Family Shelter 915 N. Erie St. Toledo, OH 43604	2,500.00	HUMAN SERVICES
Bittersweet Farms 12660 Archbold Whitehouse Rd. Whitehouse, OH 43571	5,500.00	HUMAN SERVICES
Black Swamp Conservancy 115 W. Front Street Perrysburg, OH 43551	2,500.00	ENVIRONMENTAL
Boy Scouts of America (Erie Shores) 1 Stranahan Square, Ste226 Toledo, OH 43604	2,500.00	OTHER.
Boy Scouts of America (Sagamore) 518 N. Main Street P.O. Box 865 Kokomo, IN 46903-0865	250.00	OTHER
Boys and Girls Clubs of Toledo	1,000.00	HUMAN SERVICES

Anderson Foundation
January 1, 2009 - December 31, 2009

Tax year 2009
Tax ID #:34-6528868

<u>Grantee</u>	<u>Amount</u>	<u>Program Area</u>
2250 N. Detroit Avenue Toledo, OH 43606		
Camp Tecumseh YMCA 12635 W. Tecumseh Bend Road Brookston, IN 47923	16,666.67	EDUCATIONAL
Capitol Area United Way (Lansing) 1111 Michigan Avenue Suite 300 East Lansing, MI 48823	800.00	HUMAN SERVICES
Carroll County Sheriff 410 Main Street Delphi, IN 46923	4,300.00	OTHER
Carroll County United Fund 102 S. Union Street Delphi, IN 46923	6,200.00	HUMAN SERVICES
Central City Ministry 1933 Spielbush Avenue Toledo, OH 43624	5,000.00	RELIGION
Champaign County Farm Bureau 801 N. County Fair Drive Champaign, IL 61821	2,300.00	HUMAN SERVICES
Darke County United Way, Inc. P.O. Box 716 Greenville, OH 45331-0716	3,000.00	HUMAN SERVICES
FFA Foundation of Ohio 717A East 17 th Avenue Columbus, OH 43211	250.00	AGRICULTURE
FFA National Foundation P.O. Box 68960 Indianapolis, IN 46268-0960	2,750.00	AGRICULTURE
Fifty Men and Women of Toledo	2,500.00	HIGHER EDUCATION

Anderson Foundation
January 1, 2009 - December 31, 2009

Tax year 2009
Tax ID #:34-6528868

<u>Grantee</u>	<u>Amount</u>	<u>Program Area</u>
P.O. Box 3557 Toledo, OH 43608		
Foundation for Life 3454 Oak Alley Court Toledo, OH 43606	2,500.00	EDUCATIONAL
Girl Scouts of Western Ohio 2244 Collingwood Blvd. Toledo, OH 43620-1100	3,500.00	OTHER
Illinois Agricultural Leadership Fndt. 100 South Campbell P.O. Box 160 McComb, IL 61455-0160	500.00	AGRICULTURE
Jay County United Way Jay County Courthouse P. O. Box 204 Portland, IN 47371	2,000.00	HUMAN SERVICES
Junior Achievement of Champaign 1817 S. Neil Street Champaign, IL 61820	2,500.00	EDUCATIONAL
Kid's Unlimited 8927 Royal Oak Drive Holland, OH 43528	5,000.00	PRIMARY EDUC.
Little Sisters of the Poor 930 South Wynn Road Oregon, OH 43616	2,000.00	HUMAN SERVICES
Maumee Valley Country Day School 1715 S. Reynolds Road Toledo, OH 43614	10,000.00	EDUCATIONAL
Maumee Valley Historical Society 1031 River Road Maumee, OH 43537	1,000.00	CULTURE
Montgomery Area United Way	2,400.00	HUMAN SERVICES

Anderson Foundation
January 1, 2009 - December 31, 2009

Tax year 2009
Tax ID #:34-6528868

<u>Grantee</u>	<u>Amount</u>	<u>Program Area</u>
P.O. Box 6135 Montgomery, AL 36106		
Neighborhood Properties, Inc. 2753 West Central Avenue Toledo, OH 43606	500.00	HUMAN SERVICES
Ohio Foundation of Ind. Colleges 21 East State Street, Ste. 11 Columbus, OH 43215-4202	15,000.00	HIGHER EDUCATION
Ohio Grantmakers Forum 37 West Broad St, Ste. 80 Columbus, OH 43215	1,250.00	OTHER
PathStone 2-453 County Road V Liberty Center, OH 43532	250.00	AGRICULTURE
Prevent Blindness Ohio 2200 Jefferson Ave., Ste. 2020 Toledo, OH 43624	250.00	HEALTH
Salvation Army, Toledo Area 620 North Erie Street Toledo, OH 43697-0798	500.00	HUMAN SERVICES
Sauder Village P.O. Box 235 Archbold, OH 43502	2,500.00	CULTURE
SCORE Toledo 2200 Jefferson, 1 st Floor Toledo, OH 43604	2,500.00	OTHER
Society of St. Vincent de Paul 1001 Washington Street Toledo, OH 43604	5,000.00	HUMAN SERVICES
St. Josephs County United Fund	2,800.00	HUMAN SERVICES

Anderson Foundation
January 1, 2009 - December 31, 2009

Tax year 2009
Tax ID #:34-6528868

<u>Grantee</u>	<u>Amount</u>	<u>Program Area</u>
132 Main Street P.O. Box 577		
St. Ursula Academy 4025 Indian Road Toledo, OH 43606	16,666.67	SECONDARY EDUC.
Sunshine Foundation, Inc. 7223 Maumee Western Road Maumee, OH 43537	5,000.00	HUMAN SERVICES
The House of Emmanuel 1946 N. 13th Street, Suite 380 Toledo, OH 43624	2,500.00	HUMAN SERVICES
The Salvation Army Columbus 966 East Main Street Columbus, OH 43205	300.00	HUMAN SERVICES
The Sight Center 1002 Garden Lake Parkway Toledo, OH 43614	2,000.00	HUMAN SERVICES
Tiffin/Seneca United Way 174 Jefferson St. P.O. Box 368 Tiffin, OH 44883-0368	300.00	HUMAN SERVICES
Toledo Community Foundation 300 Madison Avenue, Ste. 1300 Toledo, OH 43604	50,000.00	OTHER
Toledo Harbor Light Preservation Fund C/o Maumee Bay Resort 1750 Park Road, # 2 Oregon, OH 43618	500.00	CULTURE
Toledo Opera Association 425 Jefferson Ste. 601 Toledo, OH 43604	1,000.00	CULTURE

Anderson Foundation
January 1, 2009 - December 31, 2009

Tax year 2009
Tax ID #:34-6528868

<u>Grantee</u>	<u>Amount</u>	<u>Program Area</u>
Toledo School for the Arts 333 14 th Street Toledo, OH 43604	14,333.33	SECONDARY EDUC.
Toledo Symphony Orchestra P.O. Box 407 Toledo, OH 43697-0407	15,000.00	CULTURE
Toledo Zoological Society P.O. Box 140130 Toledo, OH 43614-0801	18,666.67	EDUCATIONAL
Toledoans USA 442 Floyd Street Toledo, OH 43620	2,500.00	HUMAN SERVICES
United Fund of Jackson County Indiana P.O. Box 94 Seymour, IN 47274	1,000.00	HUMAN SERVICES
United Way Loaned Executive Program One Stranahan Square Toledo, OH 43604	6,000.00	HUMAN SERVICES
United Way of Butte and Anaconda P.O. Box 4447 Butte, MT 59702-4447	200.00	HUMAN SERVICES
United Way of Cass County 401 E. Broadway Logansport, IN 46947	19,350.00	HUMAN SERVICES
United Way of Central Georgia 277 Martin Luther King, Jr. W. Suite 301 Macon, GA 31201-3470	100.00	HUMAN SERVICES
United Way of Central Ohio 360 South 3 rd Street Columbus, OH 43215	7,600.00	HUMAN SERVICES

Anderson Foundation
January 1, 2009 - December 31, 2009

Tax year 2009
Tax ID #:34-6528868

<u>Grantee</u>	<u>Amount</u>	<u>Program Area</u>
United Way of Champaign County 404 West Church Street Champaign, IL 61820	5,000.00	HUMAN SERVICES
United Way of Darlington P.O. Box 2 Darlington, SC 29540-2128	150.00	HUMAN SERVICES
United Way of Dekalb County 215 E. 9 th Street Auburn, IN 46706	800.00	HUMAN SERVICES
United Way of Delaware County, Inc. P.O. Box 968 Muncie, IN 47308	500.00	HUMAN SERVICES
United Way of Fulton County 604 S. Shoop Ave., Ste. 122 Wauseon, OH 43567	1,500.00	HUMAN SERVICES
United Way of Greater Lima 616 S. Collett Street Lima, OH 45805	4,250.00	HUMAN SERVICES
United Way of Hillsdale County Box 203 Hillsdale, MI 49242	600.00	HUMAN SERVICES
United Way of Horry County, Inc. P.O. Box 673 Conway, SC 29528-5195	150.00	HUMAN SERVICES
United Way of Sandusky County 103 S. Front Street Fremont, OH 43420-3021	1,000.00	HUMAN SERVICES
United Way of South Mississippi, Inc. P.O. Box 2128 Gulfport, MS 39595-2128	400.00	HUMAN SERVICES
United Way of Trumbull County	300.00	HUMAN SERVICES

Anderson Foundation
January 1, 2009 - December 31, 2009

Tax year 2009
Tax ID #:34-6528868

<u>Grantee</u>	<u>Amount</u>	<u>Program Area</u>
3601 Youngstown Road, SE Warren, OH 44484-2832		
United Way of Wells County 122 LaMar Street, Ste. 118 Bluffton, IN 46714	1,500.00	HUMAN SERVICES
University of Illinois Development Dept. Campbell Hall 300 North Goodwin Avenue Urbana, IL 61801-2316	750.00	CULTURE
University of Toledo Foundation 2810 West Bancroft, MS 319 Toledo, OH 43606	5,000.00	HIGHER EDUCATION
UT College of Business-Brunner Society Institutional Advancement 2801 W. Bancroft, MS 318 Toledo, OH 43606	1,000.00	HIGHER EDUCATION
Virtual Media Foundation 713 Champagne Avenue Bowling Green, OH 43402	2,000.00	CULTURE
Volunteers of America of Northwest Ohio. 1127-1201 Champlain Street Toledo, OH 43604	100.00	HUMAN SERVICES
Wabash County United Way P.O. Box 2 Wabash, IN 46992	100.00	HUMAN SERVICES
Women Blessing Women 223 Page Street Toledo, OH 43620	500.00	HUMAN SERVICES
YMCA 1550 N. Superior St., 2 nd . Floor Toledo, OH 43604	1,000.00	HUMAN SERVICES
YMCA Chance for Change	5,000.00	HUMAN SERVICES

Anderson Foundation
January 1, 2009 - December 31, 2009

Tax year 2009
Tax ID #:34-6528868

<u>Grantee</u>	<u>Amount</u>	<u>Program Area</u>
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7 E. Bancroft St. Toledo, OH 43620		
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***** Grand Total *****

323,333.34

ANDERSON FOUNDATION # 34-6528868
TAX SCHEDULE - FORM 990-PF
CALENDAR YEAR 2009

Line 16c - Other Professional Fees

DESCRIPTION	TOTAL EXPENSE AMOUNT	%	INVESTMENT RELATED AMOUNT	%	EXEMPT PURPOSE AMOUNT
Mill Creek Capital Advisors	78,151	100	78,151	-	-
General Accounting	1,800	40%	720	60%	1,080
Finance	12,900	100%	12,900		
Administration	<u>23,011</u>	40%	<u>9,204</u>	60%	<u>13,807</u>
Total	<u><u>115,862</u></u>		<u><u>100,975</u></u>		<u><u>14,887</u></u>

ANDERSON FOUNDATION #34-6528868
TAX SCHEDULE - FORM 990-PF
CALENDAR YEAR 2009

Part I, Line 18 - Taxes

Foreign taxes	4,162	
Total	<u>4,162</u>	Line 18

Part I, Line 23 - Other Expenses

Filing fees - Ohio Attorney General	200	
Misc Expenses	355	
Bank fees	<u>281</u>	
Total	<u>836</u>	Line 23

ANDERSON FOUNDATION #34-6528868
TAX SCHEDULE - FORM 990-PF
CALENDAR YEAR 2009

Part II, line 10b - Investments - corporate stock

<u>Description</u>	<u>(b) Book value</u>	<u>(c) Fair market value</u>
2,000 shares Waterford Bank	160,512	160,512
	<u>160,512</u>	<u>160,512</u>

Part II, line 13 - Investments - other

<u>Description</u>	<u>(b) Book value</u>	<u>(c) Fair market value</u>
Delaware Large Cap Value Fund	526,872	608,696
Agincourt AGIN CFI Fund	2,672,781	2,691,533
Fred Alger Small Growth Fund	157,918	180,315
Alta Large Cap Growth Fund	503,497	620,451
Mill Creek Funding Fund	159,142	159,142
Mill Creek FXD Inc MF/ETF	1,704,106	2,520,332
MFS Large Cap Value Fund	498,254	597,510
AIM Int'l Growth Fund	365,267	428,302
Alliance Bernstein BPH-011177	366,805	404,475
Moody Aldrich Small Cap Value Fund	144,179	173,048
Alger All Cap Growth Fund	736,690	613,426
Midpoint Food And Ag Fund, L P	58,750	53,038
	<u>7,894,261</u>	<u>9,050,268</u>

* Mill Creek Capital Advisors LLC manages our portfolio of mutual funds and fixed income securities

Part IV, line 1 - Capital Gains and Losses for Tax on Investment Income

(a) Description of property sold	(c) Date acquired	# of Shares	(d) Date sold	(e) Gross sales price	(g) Cost or other basis	(h) Gain or (loss)
Mill Creek Capital Advisors, LLC Portfolio						
Delaware Large Cap Value Fund	various	various	various	64,368 84	68,106 09	(3,737 25)
Alliancebernstein Intl Value Fund	various	various	various	86,970 86	77,610 73	9,360 13
Mill Creek Mutual FD ETF	various	various	various	2,300,306 31	3,149,804 70	(849,498 39)
Fred Alger Mid Cap Growth Fund	various	various	various	199,497 00	189,958 37	9,538 63
Alta Large Cap Growth Fund	various	various	various	94,855 07	119,079 34	(24,224 27)
Mill Creek FXD Inc MF-ETF	various	various	various	3,576,548 77	3,313,699 44	262,849 33
MFS Large Cap Value Fund	various	various	various	189,729 34	216,315 68	(26,586 34)
AIM Int'l Growth Fund	various	various	various	75,384 82	98,114 67	(22,729 85)
Moody Aldrich Small Cap Value Fund	various	various	various	264,346 72	258,193 66	6,153 06
Congress Mid Cap Growth Fund	various	various	various	168,140 42	224,298 61	(56,158 19)
Fred Alger ALL Cap Growth Fund	various	various	various	799,123 08	769,563 89	29,559 19
Mill Creek	various	various	various	254,494 25	394,384 50	(139,890 25)
Mill Creek Mutual FD ETF Capital Gain Distributions per 1099				297 00	0 00	297 00
National Financial Services, LLC						
Alliancebernstein Intl Value Fund	various	various	various	22,967 40	19,927 43	3,039 97
Aginccourt Cap Mgmt - CFI	various	various	various	406,859 77	402,789 14	4,070 63
Fred Alger Mid Cap Growth Fund	various	various	various	14,273 64	6,616 66	7,656 98
Fred Alger Small Cap Growth Fund	various	various	various	22,240 98	19,057 51	3,183 47
MFS Large Cap Value Fund	various	various	various	21,113 13	20,792 84	320 29
AIM Int'l Growth Fund	various	various	various	1,728 28	1,747 60	(19 32)
Moody Aldrich Small Cap Value Fund	various	various	various	24,420 49	24,493 50	(73 01)
Fred Alger ALL Cap Growth Fund	various	various	various	160,127 15	150,445 29	9,681 86
Aginccourt Cap Mgmt - CFI				18,898 70	18,898 70	0 00
				<u>8,766,692.02</u>	<u>9,543,898.35</u>	<u>(777,206.33)</u>

* Mill Creek Capital Advisors LLC manages our portfolio of mutual funds and fixed income securities