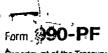


See a Social Security Number? Say Something! Report Privacy Problems to https://public.resource.org/privacy Or call the IRS Identity Theft Hotline at 1-800-908-4490





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

OMB No 1545-0052 Treated as a Private Foundation 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. For calendar year 2011 or tax year beginning and ending Name of foundation A Employer identification number Retirement Research Foundation 36-2429540 Number and street (or P O box number if mail is not delivered to street address) Room/suite B Telephone number 8765 West Higgins Road 430 (773)714-8080 City or town, state, and ZIP code C If exemption application is pending, check here 60631-4170 <u>Chicago, IL</u> Initial return G Check all that apply: Initial return of a former public charity D 1. Foreign organizations, check here Final return Amended return Foreign organizations meeting the 85% test, check here and attach computation Address change Name change Check type of organization: Section 501(c)(3) exempt private foundation E If private foundation status was terminated Section 4947(a)(1) nonexempt charitable trust Other taxable private foundation under section 507(b)(1)(A), check here I Fair market value of all assets at end of year | J Accounting method: Cash X Accrual If the foundation is in a 60-month termination Other (specify) (from Part II, col. (c), line 16) under section 507(b)(1)(B), check here 118,942,696. (Part I, column (d) must be on cash basis.) ▶\$ Part I Analysis of Revenue and Expenses (b) Net investment (c) Adjusted net (d) Disbursements or charitable purposes (cash basis only) (a) Revenue and (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a).) expenses per books income ıncome N/A Contributions, gifts, grants, etc., received Check X if the foundation is not required to attach Sch B Interest on savings and temporary cash investments 901 901 Statement 2,233,756 2,233,756 4 Dividends and interest from securities Statement 120 5a Gross rents b Net rental income or (loss) 10,418,211 68 Net gain or (loss) from sale of assets not on line 10 Gross sales price for all assets on line 6a 15,009,647. 7 Capital gain net income (from Part IV, line 2) 8 Net short-term capital gain Income modifications Gross sales less returns and allowences b Less Cost of goods sold c Gross profit or (10ss) V. 16 Š 3 3 14 Ò 1, 33 pts _ - + 4 , _ -39,157 329,180 11 Other income Statement 1 -12,6<u>92,025</u> Total. Add lines through 11 982,048 355,487 76.772. 278.715. 557,434 15,131 5<u>42,303.</u> 14 Other employee salaries and wages 291,572. 17.616. 273,956. Pension plans, employee benefits 15 3,115 700. 16a Legal fees Stmt 2,415. Stmt 5 60,275 48,775. 11,500. **b** Accounting fees

Expenses c Other professional fees Stmt 6 1,809,104 1,671,555. 137,549. and Administrative <u>599,293</u> <u>599,293</u>. 0. 17 Interest Stmt 7 349,993. 50,052. 0. 18 9,924 992. 19 Depreciation and depletion 113,248. 325. <u>101,923.</u> 20 Occupancy 35,711 757. 34,954. Travel, conferences, and meetings 3,860. 257. 3,603. Printing and publications 22 96,597 3,312 93,285. Operating 23 Stmt Other expenses 24 Total operating and administrative 4,285,613. 2,496,537 1,480,203. expenses. Add lines 13 through 23 7,002,629 4,448,053. 25 Contributions, gifts, grants paid 26 Total expenses and disbursements. 288,242 2,496,537 5,928,256. Add lines 24 and 25 27 Subtract line 26 from line 12: 1,693,806 8 Excess of revenue over expenses and disbursements 10,195,488 b. Net investment income (if negative, enter -0-) N/A c Adjusted net income (if negative, enter -0-) 123501 12-02-11 LHA For Paperwork Reduction Act Notice, see instructions. Form **990-PF** (2011),

Fo	orm 9	90-PF(2011) Retirement Research Fou			2429540 Page 2
	Part	Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only	Beginning of year	End o	
Ξ			(a) Book Value	(b) Book Value	(c) Fair Market Value
	1	Cash - non-interest-bearing	4 065 550	200 510	200 510
		Savings and temporary cash investments	1,267,579.	300,512.	300,512.
	3	Accounts receivable -	-		
		Less: allowance for doubtful accounts		-	
	4	Pledges receivable -	_		
	1_	Less: allowance for doubtful accounts		"- -	
	1 _	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other			
	ļ	disqualified persons			
	7	Other notes and loans receivable	4		
	1.	Less: allowance for doubtful accounts			
ets	8	Inventories for sale or use		0.540	
Assets	9	Prepaid expenses and deferred charges	8,460.		
		Investments - U.S. and state government obligations Stmt 10			1,824,091.
	1	Investments - corporate stock Stmt 11	5,842,929.		
	1	Investments - corporate bonds Stmt 12	870,046.	1,110,894.	1,110,894.
	11	Investments - land, buildings, and equipment basis	1		
	1	Less accumulated depreciation			
	12	Investments - mortgage loans			
	13	Investments - other Stmt 13	113,603,038.	109,108,131.	109,108,131.
	14	Land, buildings, and equipment basis ► 197,708.		-	
	1	Less accumulated depreciation Stmt 9 ▶ 146,255.	16,021.	51,453.	51,453.
	15	Other assets (describe ▶)			
	16	Total assets (to be completed by all filers)			<u>118,942,696.</u>
	17	Accounts payable and accrued expenses	190,772.		
	18	Grants payable	1,832,686.	4,387,262.	
es	19	Deferred revenue .			
Liabilities	20	Loans from officers, directors, trustees, and other disqualified persons			
寶	21	Mortgages and other notes payable		· · · · · · · · · · · · · · · · · · ·	
_	22	Other liabilities (describe >)			
	ŀ				
	23	Total liabilities (add lines 17 through 22)	2,023,458.	4,642,744.	
		Foundations that follow SFAS 117, check here			
		and complete lines 24 through 26 and lines 30 and 31.			
Fund Balances	24	Unrestricted .	121,197,262.	114,299,952.	
튵	25	Temporarily restricted			
8	26	Permanently restricted			
בַ		Foundations that do not follow SFAS 117, check here			
		and complete lines 27 through 31.			
Assets or	27	Capital stock, trust principal, or current funds			
Še	28	Paid-in or capital surplus, or land, bldg., and equipment fund			
Š	29	Retained earnings, accumulated income, endowment, or other funds			
ž	30	Total net assets or fund balances	121,197,262.	114,299,952.	
_	1				
	31	Total liabilities and net assets/fund balances	123,220,720.	118,942,696.	
_	art	Analysis of Changes in Net Assets or Fund B	lalances		
_	ai l			· · · · · · · · · · · · · · · · · · ·	
1	Total	net assets or fund balances at beginning of year - Part II, column (a), line	30		
	•	t agree with end-of-year figure reported on prior year's return)		1	121,197,262.
2	Enter	amount from Part I, line 27a		2	1,693,806.
3	Other	increases not included in line 2 (itemize)		3	0.
		ines 1, 2, and 3		4	122,891,068.
5	Decre	eases not included in line 2 (itemize) <u>Unrealized Sec</u>	urity Deprecia	ation 5	8,591,116.
6	Total	net assets or fund balances at end of year (line 4 minus line 5) - Part II, co	olumn (b), line 30	6	114,299,952.
	• • •				Form 990-PF (2011)

123511 12-02-11

Form 990-PF (2011) Ret Part IV Capital Gains	irement Res	earch Foundax on Investmen	lation t Income		_		3	6-242	9540	Page 3
(a) List and desc	cribe the kind(s) of proper arehouse; or common sto	ty sold (e.g., real estate,		(b) I	low ac - Purc - Dona	cquired hase ation	(c) Date a (mo., da		(d) Dat (mo., da	
1a							•			
See Attached	Statement									
										
<u>d</u>		· · · · · · · · · · · · · · · · · · ·								
_e	1			<u></u>	-	ļ				
(e) Gross sales price	(f) Depreciation all (or allowable)	(0)	st or other basis expense of sale					ain or (loss) (f) minus (
8				_			. —.			
<u>b</u>										
<u>C</u>		· · · · · · · · · · · · · · · · · · ·								
15 000 647			4 501 43	_					0 410	-011
e 15,009,647.	a cain in column (h) and	owned by the foundation	4,591,43	0.			0.0		0,418	<u>, 211.</u>
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 (k) Excess of col. (i) col. (ii) as of 12/31/69 over col. (j), if any					il. (k), but n	ol. (h) gain i ot less than (from col. (t	-0-) or			
a	· - · · · · · · · · · · · · · · · · · ·									
b	·		· · · · · · · · · · · · · · · · · · ·							
С								<u> </u>		
d										<u> </u>
е								1	0,418	<u>,211.</u>
2 Capital gain net income or (net ca		, also enter in Part I, line s), enter -0- in Part I, line		}	2			1	0,418	,211.
3 Net short-term capital gain or (los		1222(5) and (6):								
If gain, also enter in Part I, line 8,	column (c).			\downarrow						
If (loss), enter -0- in Part I, line 8 Part V Qualification U	nder Section 494	Mal for Paduage	Toy on Not	<u> </u>	3	ont In		N/A		
		• • • • • • • • • • • • • • • • • • • •			-,	ient m	COITIE			
(For optional use by domestic private	toundations subject to ti	ie section 4940(a) tax or	i net investment ind	come	-)					
f section 4940(d)(2) applies, leave th	ns part blank.									
Alan the foundation lights for the cont		budable ansaud of an								□
Was the foundation liable for the sect		• •	•	100?					Yes	X No
f "Yes," the foundation does not qual Enter the appropriate amount in 6					-					
	Jacii columnior each yea		making any entile						(d)	
(a) Base period years Calendar year (or tax year beginnii	Adjusted gu	(b) alifying distributions	Net value of nor	(c) nchari	ıtable-	use assets	, ,	Distribi col. (b) divi	(d) ution ratio	(c))
2010	<u> </u>	5,885,346.				9,220		COL (D) GIVI		51872
2009		8,380,409.				$\frac{3,220}{1,344}$		 -		79306
2008		9,734,268.				$\frac{1}{4}, \frac{34}{248}$				568 4 1
2007		10,607,232.				9,464				51324
2006		9,410,234.				$\frac{3}{6},\frac{4}{7}$				56943
2000		J, 410, 434.	<u> </u>	<u> </u>	. 4.	0,703			•.0.	10343
? Total of line 1, column (d)							2		31	L6286
Average distribution ratio for the 5	5-vear hase neriod - divid	e the total on line 2 hy 5	or by the number	of ves	are			_		.0200
the foundation has been in exister	•	tile total on the 2 by 5,	or by the number (OI yes	21.5		3		0.6	<u> </u>
the footbatton has been in exister	ice ii iess tilali 5 years						-			<u> </u>
Enter the net value of noncharitab	le-use assets for 2011 fro	om Part X, line 5					4	12:	1,147	<u>.588.</u>
Multiply line 4 by line 3							5		7,663	<u>433.</u>
Enter 1% of net investment incom	e (1% of Part I, line 27b)						6		101	955.
Add lines 5 and 6			-				7		7,765	388.
Enter qualifying distributions from	Part XII, line 4						8		5,969	076.
If line 8 is equal to or greater than See the Part VI instructions.	line 7, check the box in P	art VI, line 1b, and comp	lete that part using	g a 1%	6 tax r	ate.				

18 Evempt operating Coundations described in section 4940(a)(2), tenks here ▶ □ and enter *\(\text{N} \) on time 1. Obtain of Intigot of determination liter: (altable dough of later in time certification) (b) Domestic foundations that meet the section 4940(a) requirements in Part V, check here ▶ □ and enter 1% of Part I, line 270. All other domestic boundations that meet the section 4940(a) (a) requirements in Part V, check here ▶ □ and enter 1% of Part I, line 270. All other domestic boundations 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 taxabile foundations only, Others enter -0-) 3 Add lines 1 and . 3 Add lines 1 and . 5 Tax based on in westment income. Subtract line 4 from line 3.1/200 or less, enter -0- 5 Tax based on investment income. Subtract line 4 from line 3.1/200 or less, enter -0- 6 Credits/Paymentis: 2 2011 estimated tax payments and 2010 overpayment credited to 2011 5 Evempt foreign organizations - tax withheld at source 1 Exp and with application for extension of frime to life form 8868) 6 Bectus withholding erroreceivally withheld 1 Total credits and payments. Add lines 6 sturouph 64 8 Enter any penalty for underspyrment of estimated tax. Check here 【3] if Form 2200 is attached 1 Total credits and payments. Add lines 6 sand 8, incredit than line 7, enter a mount everal 10 Overpayment. If line 7 is more than line 7, enter a mount everal 11 Enter the annound of lines 10 to the Credited by 2012 estimated tax. Part VII-A Estimated tax Part VII-A Estimated tax Part VII-A Estimated tax Part VII-A Estimated tax Part VII-A Estimated tax by a line of the activities 1a During the tax year, did the foundation attempt to influence any national, astato, or local legislation or did it participate or intervee in any potation. It is not because of the activities of the activities. 1b did to incompance of the activities. 1c During the tax year, did the foundati		n 990-PF (2011) Retirement Research Foundation art VI Excise Tax Based on Investment Income (Section 4940(a), 4	19 4	40(b), 4	1940(e			2429 - see i i			Page 4
Date of ruling or determination letter:	12	Exempt operating foundations described in section 4940(d)(2), check here and enter	"N/A	A" o	n line 1.)					
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ▶ and enter 1% of the 27b. e All other domestic foundations enter 2% of the 27b. Exempt foreign organizations ontife 4% of Part I, line 12, col. (b). 2 Tax under section 511 (domestic section 4947(a)(1) trusts and tixabile foundations only. Others enter -0-) 3 Add lines 1 and 2 4 Substitle A (income) tax (domestic section 4947(a)(1) trusts and tixabile foundations only. Others enter -0-) 5 Tax based on investment income. Subtract line 4 from line 3, if zero or less, enter -0- 5 CredibiPayments: 2 203, 9110. 5 Tax based on investment income. Subtract line 4 from line 3, if zero or less, enter -0- 5 CredibiPayments: 2 201 testimated tax payments and 2010 overpayment credied to 2011 5 Evempt foreign organizations - tax withheld at source 1 Ear pay enth application for extension of time to file (form 8889) 8 Bea		• • • • • • • • • • • • • • • • • • • •				(anoi			i			
of Part I, line 27b 2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others entier -0-) 3 And lines 1 and 2 3 Log 3, 910. 5 Subbits A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others entier -0-) 5 Tax hased on investment income. Subtract line 4 from line 3. If zero or less, enter -0- 5 Tax hased on investment income. Subtract line 4 from line 3. If zero or less, enter -0- 5 Tax hased on investment income. Subtract line 4 from line 3. If zero or less, enter -0- 5 Tax hased on investment income. Subtract line 4 from line 3. If zero or less, enter -0- 5 Tax hased on investment income. Subtract line 4 from line 3. If zero or less, enter -0- 5 Tax devent line or granuzarons - tax withheld at source 6- 6 Exempt foreign organizarons - tax withheld at source 6- 6 Exempt foreign organizarons - tax withheld at source 6- 6 Exempt foreign organizarons - tax withheld at source 6- 6 Exempt foreign organizarons - tax withheld at source 6- 6 Exempt foreign organizarons - tax withheld at source 6- 6 Exempt foreign organizarons - tax withheld at source 6- 6 Exempt foreign organizarons - tax withheld at source 6- 6 Exempt foreign organizarons - tax withheld at source 6- 6 Exempt foreign organizarons - tax withheld at source 6- 6 Exempt foreign organizarons - tax withheld at source 6- 6 Exempt foreign organizarons - tax withheld at source 6- 6 Exempt foreign organizarons - tax withheld at source 6- 6 Exempt foreign organizarons - tax withheld at source 6- 6 Exempt foreign organizarons - tax with line 7 is more than the total of lines 5 and 8, enter the amount overpail 6- 7 Total credit on 10 line 10 to 8 credited to 20 c	t							1	ľ	20	3.9	10.
All other domestic foundations enter 2% of the 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-) 3 Add lines 1 and 2 4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only, Others enter -0-) 5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0- 6 Credits/Payments; 2 2011 estimated tax payments and 2010 overpayment credited to 2011 8 Exempt foreign organizations - tax withheld at source 7 Tax part of with application for extension of time to file (Form 8868) 8 Eet and the payments. Add lines 5 and 8 is more than line 7, enter amount owed 9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed 9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount ower paid 10 Total credits and payments. Add lines 5 and 8 is more than line 7, enter amount ower paid 11 Enter the amount of line 10 to be: Credited to 2012 estimated tax ▶ 7 Tax 12 Later ments. Regarding Activities 1a During the tax year, did the fromation attempt to mitigance any national, state, or local legislation or did it participate or intervene in any political campaign? 1a During the tax year, did the fromation attempt to mitigance any national, state, or local legislation or did it participate or intervene in any political campaign? 1b If a statements Regarding Activities 1a During the tax year, did the fromation attempt to mitigance any national, state, or local legislation or did it participate or intervene in any political campaign? 1b If a statements Regarding Activities 1a During the tax year, did the fromation attempt to mitigance any national, state, or local legislation or did it participate or intervene in any political campaigns. Participate or intervene in any political campaigns. 1b If the foundation in the first intervene in the activities. 1c During the foundation in connection w											- 1	
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) 4 Add lines 1 and 2 5 Substite A (mcome) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) 5 Tax hased on investment income. Subtract five 4 from line 3. It zero or less, enter -0- 5 Tax hased on investment income. Subtract five 4 from line 3. It zero or less, enter -0- 5 Tax hased on investment income. Subtract five 4 from line 3. It zero or less, enter -0- 5 Tax hased on investment income. Subtract five 4 from line 3. It zero or less, enter -0- 5 Tax passed on investment income. Subtract five 4 from line 3. It zero or less, enter -0- 5 Tax passed on investment income. Subtract five 4 from 2010 treat income 5 from 2		•	Part	t I. I	ine 12. co	ol. (b).	}					
3 Add kines 1 and 2 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) 5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0- 5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0- 5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0- 5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0- 5 Tax path and papication for extension of time to file (Form 8888) 6 Beacup withholding erroneously withhold 6 Tax path and application for extension of time to file (Form 8888) 6 Beacup withholding erroneously withhold 7 Total credits and payments. Add lines 8 through 6d 8 Enter any penalty for underpayment of estimated tax. Check here In 1 from 2220 is attached 8 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount oved 9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount oved 10 Tax based on the subtract line 7 is more than the total of lines 5 and 8, enter the amount overpaid 11 Enter the amount of line 10 to bit, Credited to 2012 estimated tax. Part amount overpaid 12 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? 15 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? 15 During the tax year, did the foundation attempt to millience any national, state, or local legislation or did it participate or intervene in any political campaign? 16 During the tax year, did the foundation of the activities or the carrier in the foundation file Form 1120-POL for this year? 17 Und the foundation file Form 1120-POL for this year? 18 Has the foundation engages and propriously reported to the IRS, in its governing instrument, or highly any or of the activa	_					` , -		2]			0.
4 Subulble A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only, Others enter -0-					- ,					20	3.9	10.
5 Tax based on investment Income. Subtract line 4 from line 3. If zero or less, enter -0- Credits/Payments: a 2011 estimated tax payments and 2010 overpayment credited to 2011 b Exempt foreign organizations - tax withhild at source CT axp and with application for extension of time to file (Form 8868) d Backup withholding erroneously withheld CT 7 52,000. 8 Entire any penalty for underpayment of estimated tax. Check here	4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Other	rs en	nter	-0-)						<u>-,, -</u>	
6 CreditsPayments: a 2011 estimated tax payments and 2010 overpayment credited to 2011 be Exempt foreign organizations - tax withheld at source c Tax paid with application for extension of time to file (Form 8868) 6e d Backup withholding erroneously withheld 7 Total credits and payments. Add lines 6a through 6d 8 Total credits and payments. Add lines 6a through 6d 8 Total credits and payments. Add lines 6a through 6d 8 Total credits and payments. Add lines 6a through 6d 9 Total credits and payments. Add lines 6a through 6d 9 Total credits and payments. Add lines 6a through 6d 9 Total credits and payments. Add lines 6a through 6d 9 Total credits and payments. Add lines 6a through 6d 9 Total credits and payments. Add lines 6a through 6d 9 Total credits and payments. Add lines 6a through 6d 10 Overpayment. If line 7 is more than 16b total of lines 5 and 8, enter the amount overpaid 11 Enter the amount of line 10 to be, Credited to 2012 estimated tax by Refunded by 11 Part VII-A Statements Regarding Activities 1a During the tax year, add the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign? 1a During the tax year, and the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign? 1b Du of spend more than 510 Ourng the year (either directly or indirectly) for political purposes (see instructions for definition)? 1b X 1th an answers is Yes's to the or 1b, attach a detailed description of the activities. 2 Dut the foundation fie Form 112-PDL for this year? 2 Dut the foundation fie Form 112-PDL for this year? 3 Has the foundation engaged in any activities that have not previously reported to the IRS; in its governing instrument, articles of incorporation, or bybasis, or other similar instrument and previously reported to the IRS, in its governing instrument, articles of incorporation, or bybasis, or other similar instrument and previously reported to the IR	_		-		-,					20	3.9	
a 2011 estimated tax payments and 2010 overpayment credited to 2011 b Exempt foreign organizations - tax withheld at source 6	-	,									<u>- , , -</u>	
Description or panneations - tax withheld at source © Tax paid with application for extension of time to file (Form 8868) © Backup withholding erroneously withheld Total credits and payments. Add lines 6s through 6d Total credits and payments. Add lines 6s through 6d Einter any pentity for undersyment of estimated tax. Check here ☑ if Form 2220 is attached © Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed © Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed © Tax due. If the total of lines 5 and 8 is more than the total of lines 5 and 8, enter the amount overpaid © Tax due. If the total of lines 5 and 8 is more than the total of lines 5 and 8, enter the amount overpaid Enter the amount of line 10 to be. Credited to 2012 estimated tax. Part VII-A Statements Regarding Activities 1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did if participate or intervere in any political campaign? b Did is spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? If the answer is "Yes" to 1 ar 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities. D In the foundation file Form 1120-POL for this year? (1) On the foundation in file of the Title-POL for this year? Enter the reimbursement (if any) by and by the foundation during the year foundation managers. S O. Enter the reimbursement (if any) by and by the foundation during the year foundation managed in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities. 3 Has the foundation neade 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 detailed business gross concein 61,100 or more during the	-	·	Sa I	ĺ		52.0	000.]			
E Tax paid with application for extension of time to file (Form 8868) d Backup withholding erroneously withhold 7 Total credits and payments. Add lines 6a through 6d 8 Enter any penalty for underpayment of estimated tax. Check here [X] if Form 2220 is attached 8 13,193. 17 Total credits and payments. Add lines 6a through 6d 8 Enter the total of lines 5 and 8 is more than the 7, enter amount owed 9 155,103. 10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount owed 11 Enter the amount of line 10 to be. Credited to 2012 estimated tax ► 12 Dung 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? 1a Dung 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? 1a Dung 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? 1a Dung 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? 1b Did in spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? 1b 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. 1c Did the foundation. Participate of the 10 file (see instruction 3) and participate or 10 file (see instruction 3) and participate or 10 file (see instruction 3) and participate or 10 file (see instruction 4) and participate or 10 file (see instruction 5) and participate (see instructions) and participate (see instruction				t					ļ			
d Backup withholding erroeously withheld 7 Total credits and payments. Add lines 6a through 6d 7 Total credits and payments. Add lines 6a through 6d 7 Total credits and payments. Add lines 6a through 6d 8 B 3, 1.93. 9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed 9 1.55												
7 Total credits and payments. Add lines 6a through 6d 8 Enter any penalty for underpayment of estimated tax. Check here IX if Form 2220 is attached 9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed 9 155,103. 10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount owed 10 The enter the amount of line 10 to be: Credited to 2012 estimated tax 11 Enter the amount of line 10 to be: Credited to 2012 estimated tax 12 During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any optifical campaign? 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 optifical campaign? 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 optifical campaign? 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 optifical campaign? 1b If the answer is "Yes" to Ta or 1b, attach a detailed description of the activities. 1b If the answer is "Yes" to Ta or 1b, attach a detailed description of the activities. 2 Did the foundation flie Form 1120-POL for this year? 2 Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. So 0. (2) On foundation managers. So 0. 2 Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. So 0. 3 X 1b Has the foundation manager in any activities that have not previously been reported to the IRS? 1 Yes, attach a detailed description of the activities. 3 Has the foundation managers of the changes. 4 Did the foundation have unrelated businesses gross income of \$1,000 or more during the year? 4 If Yes, has if flied a tax return on Form 990-T for				H					İ			
8 Enter any penalty for underpayment of estimated tax. Check here IX if Form 2220 is attached 9 155,103. 10 Overpayment. If line 7 is more than line 7, enter a mount owed 10 Overpayment. If line 7 is more than line 7, enter a mount owerpaid 11 Enter the amount of line 10 to be: Credited to 2012 estimated tax. ► 12 During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or interview in any political campaign? 1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or interview in any political campaign? 1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or interview in any political campaign? 1a X 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. 1 Dut in the foundation file Form 1120-P01, for this year? 2 Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year. (1) On the foundation. ► S O. 2 In "Yes," attach a detailed description of the activities. 3 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. 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 detailed description of the activities. 3 A X 4 Dut the foundation have alreaded business gross income of \$1,000 or more during the year? 5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? 7 A X If "Yes," attach the statement required by General Instruction II. 8 A X In the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: 8					_			7	ľ	5	2.0	00.
9 1 at due. If the total of lines 5 and 8 is more than the 101 of Norepayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid 11 Enter the amount of line 10 to be: Credited to 2012 estimated tex ▶ Refunded ▶ 11 Part VII-A Statements Regarding Activities 1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign? 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? 1b Did is spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? 1b 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. 2 Did the foundation file form 1120-P01. for this year? 3 Enter the rembursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ \$ 0. (2) On foundation managers. ▶ \$ 0. (3) On foundat	_	· · · · · · · · · · · · · · · · · · ·	ď									
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid 11 Enter the amount of line 10 to be: Orefitted to 2012 estimated tax ▶ 10 11			u									
11 Enter the amount of time 10 to be: Credited to 2012 estimated tax ▶ Refunded ▶ 11 Part VII-A Statements Regarding Activities 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? 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? 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? 1 b Did is spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? 1 the answer is "Yes" to 1a or 1b, attach a detailed description of the activities. 2 b Did the foundation in form 120-POL for this year? 3 c Enter the reimbursement (if any) paid by the foundation during the year. 4 b Did the foundation. ▶ \$ 0. (2) On foundation managers. ▶ \$ 0. 2 Has the foundation engaged in any activities that have not previously been reported to the IRS? 1 if "Yes," attach a detailed description of the activities. 3 a X a B Did the foundation have unrelated business gross income of \$1,000 or more during the year? 4 b Did the foundation have unrelated business gross income of \$1,000 or more during the year? 5 b Was there a liquidation, termination, dissolution, or substantial contraction during the year? 1 if "Yes," attach the statement required by General Instruction T. 3 b We share a liquidation, termination, dissolution, or substantial contraction during the year? 5 b Was there a liquidation, termination, dissolution, or substantial contraction during the year? 1 if "Yes," attach the statement required by General Instruction T. 3 b We share a liquidation, termination, dissolution, or substantial contraction during the year? 5 c We by state legislation that effectively amends the governing instrument so that	-									_ <u></u>	<u> </u>	.03.
Part VII-A Statements Regarding Activities 1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign? 1b		·				Refund	ad 🖢					
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? b Did it spend more than \$100 during the year (either directly) or indirectly) for political purposes (see 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. c Did the foundation file Form 1120-PDL for this year? d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year. (1) On the foundation. ▶ \$ 0. (2) On foundation managers. ▶ \$ 0. E Enter the rembursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ \$ 0. 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. 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 4a Did the foundation have unrelated business gross income of \$1,000 or more during the year? 4b If "Yes," has if filed a tax return on Form 990-T for this year? 4b Was there a liquidation, termination, dissolution, or substantial contraction during the year? 4b Was there a liquidation, termination, dissolution, or substantial contraction during the year? 4c Was there a liquidation, termination, dissolution, or substantial contraction during the year? 4c Was there a liquidation, termination, dissolution, or substantial contraction during the year? 4c Was there a liquidation, termination, dissolution, or substantial contraction during the year? 4c Was there a liquidation, termination, dissolution, or substantial contraction with the state law remain in the governing instrument, or						Titolane	<u></u>	'-	<u>. </u>	_		
any political campaign? b Did it spend more than \$100 during the year (either directly) or indirectly) for political purposes (see 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. D Id the foundation lie Form 1120-P0L for this year? d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year. (1) On the foundation. ▶ \$ 0	-		ח חר	r dia	d it partic	nate or ir	tervene	ın			Yes	No
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see 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. c Did the foundation file Form 1120-POL for this year? d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (11) On the foundation. ► \$ 0. (2) On foundation managers. ► \$ 0. e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ► \$ 0. 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. 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 4a Did the foundation have unrelated business gross income of \$1,000 or more during the year? b If "Yes," has it filed a tax return on Form 990-T for this year? Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T. A return remain 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? Theys," complete Part II, col. (c), and Part XV. 8a Enter the states to which the foundation reports or with which it is registered (see instructions) It I, MI 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 9 Is the foundation claiming status as a private			,,,,		o it partio	pato or ii	101 70110			10		
## 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. © Did the foundation file Form 1120-POL for this year? In the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation. ► \$ O. (2) On foundation managers. ► \$ O. Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ► \$ O. Has the foundation engaged in any activities that have not previously been reported to the IRS? ## "Yes," attach a detailed description of the activities. 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? ## "Yes," attach a conformed copy of the changes ## Ab Did the foundation have unrelated business gross income of \$1,000 or more during the year? ## Wes, has it filed a tax return on Form 990-T for this year? ## Wes, has it filed a tax return on Form 990-T for this year? ## Wes, as the featurement required by General Instruction T. ## 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? ## Did the foundation have at least \$5,000 in assets at any time during the year? ## Wes, "complete Part II, col. (c), and Part XV. ## Title, MI ## It 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 ## It is 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		• •	1000	ine	structions	for defin	tion\2					
distributed by the foundation in connection with the activities. c Did the foundation file Form 1120-P0L for this year? d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year			•					d or			-	
c Did the foundation file Form 1120-POL for this year? d Enter the amount (if any), of tax on political expenditures (section 4955) imposed during the year (1) On the foundation. ▶ \$ 0. (2) On foundation managers. ▶ \$ 0. e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ \$ 0. 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. 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 4a Did the foundation have unrelated business gross income of \$1,000 or more during the year? 4b If 'Yes,' has if filed a tax return on Form 990-T for this year? 5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If 'Yes,' attach the statement required by General Instruction T. 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? 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. 8a Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ 11. 1 If he 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 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 2011 or the taxable year beginning in 2011 (see inst			Opic	.s c	or arry rri	ateriais p	<i>-</i>					
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year. (1) On the foundation. 8		•								10		v
(1) On the foundation. (1) On the foundation. (2) On foundation managers. (3) C. (4) Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. (5) C. (8) Has the foundation engaged in any activities that have not previously been reported to the IRS? (8) 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 (8) If "Yes," has if filed a tax return on Form 990-T for this year? (8) If "Yes," has if filed a tax return on Form 990-T for this year? (9) Was there a liquidation, termination, dissolution, or substantial contraction during the year? (9) Was there a liquidation, termination, dissolution, or substantial contraction during the year? (9) Was there a liquidation, termination, dissolution, or substantial contraction during the year? (1) *Yes," attach the statement required by General Instruction T. (1) *A requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: (2) *By language in the governing instrument, or (3) *B yanguage in the governing instrument, or (4) *B yanguage in the governing instrument, or (6) *B y state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument? (1) *If "Yes," complete Part II, col. (c), and Part XV. (2) *B Enter the states to which the foundation reports or with which it is registered (see instructions) (2) *If "Yes," complete Part II, col. (c) *A 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 (9) *If the foundation clamming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2011 or the taxable year be										16		A_
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ \$ 0.2 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. 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 4a Did the foundation have unrelated business gross income of \$1,000 or more during the year? 5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? 6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: 8 By language in the governing instrument, or 8 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? 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. 8a Enter the states to which the foundation reports or with which it is registered (see instructions) 1 Li, MI 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 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 2011 or the taxable year beginning in 2011 (see instructions for Part XIV)? If "Yes," complete Part XIV 9 X 10 Did any persons become substantial contributors during the tax year? ""Yes," attach a schedule insting their names and addresses	ū						٥			-		-
managers. \$ 0.* 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. 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 4a Did the foundation have unrelated business gross income of \$1,000 or more during the year? 4b If "Yes," has it filed a tax return on Form 990-T for this year? 5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T. 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? 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. 8a Enter the states to which the foundation reports or with which it is registered (see instructions) 11, MI 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 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 2011 or the taxable year beginning in 2011 (see instructions for Part XIV)? If "Yes," complete Part XIV 9 X 10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses			-			foundate			,			1
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. 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 4a Did the foundation have unrelated business gross income of \$1,000 or more during the year? 4b If "Yes," has it filed a tax return on Form 990-T for this year? 5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? 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? 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. 8a Enter the states to which the foundation reports or with which it is registered (see instructions) 1 IL, MI 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 9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(i)(3) or 4942(i)(5) for calendar year 2011 or the taxable year beginning in 2011 (see instructions for Part XIV)? If "Yes," complete Part XIV 9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(i)(5) for calendar year 2011 or the taxable year beginning in 2011 (see instructions for Part XIV)? If "Yes," complete Part XIV 9 Is defined any persons become substantial contributors during the tax year? If "Yes," attach a schedule issting their names and addresses	e		LAA	11413	poseu on	TOUTIUELI	<i>7</i> 11					
If "Yes," attach a detailed description of the activities. 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 4a Did the foundation have unrelated business gross income of \$1,000 or more during the year? 4b If "Yes," has it filed a tax return on Form 990-T for this year? 5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? 16 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: 17 By language in the governing instrument, or 18 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? 19 Did the foundation have at least \$5,000 in assets at any time during the year? 20 If "Yes," complete Part II, col. (c), and Part XV. 21 L, MI 22 If "Wes," 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 29 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 2011 or the taxable year beginning in 2011 (see instructions for Part XIV)? If "Yes," complete Part XIV 10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses 3	2									2		v
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 4a Did the foundation have unrelated business gross income of \$1,000 or more during the year? 4b If "Yes," has it filed a tax return on Form 990-T for this year? 5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? 6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: 8 by language in the governing instrument, or 8 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? 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. 8a Enter the states to which the foundation reports or with which it is registered (see instructions) 1 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 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 2011 or the taxable year beginning in 2011 (see instructions for Part XIV)' If "Yes," complete Part XIV 9 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	2											A
bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes 4a Did the foundation have unrelated business gross income of \$1,000 or more during the year? 4b If "Yes," has it filed a tax return on Form 990-T for this year? 5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? 6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: 8 By language in the governing instrument, or 8 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? 7 Did the foundation have at least \$5,000 in assets at any time during the year? 16 If "Yes," complete Part II, col. (c), and Part XV. 8a Enter the states to which the foundation reports or with which it is registered (see instructions) 11 J. MI 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 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 2011 or the taxable year beginning in 2011 (see instructions for Part XIV)? If "Yes," complete Part XIV 9 X 10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	9	•	ııma	ant	articles o	funcorno	ration o	r				İ
4a X	J		uiiio	,,,	ai lioica c	писогро	ianon, o	•		2		_ v
b If "Yes," has it filed a tax return on Form 990-T for this year? 5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? 6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: 8 By language in the governing instrument, or 8 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? 7 Did the foundation have at least \$5,000 in assets at any time during the year? 16 If "Yes," complete Part II, col. (c), and Part XV. 8a Enter the states to which the foundation reports or with which it is registered (see instructions) 1 IL, MI 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 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 2011 or the taxable year beginning in 2011 (see instructions for Part XIV)? If "Yes," complete Part XIV 9 X 10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	40										Y	
5									Ì			
If "Yes," attach the statement required by General Instruction T. 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? 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. 8a Enter the states to which the foundation reports or with which it is registered (see instructions) IL, MI 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 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 2011 or the taxable year beginning in 2011 (see instructions for Part XIV)? If "Yes," complete Part XIV 9 X 10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses 10 X									Ì		22	Y
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? 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. 8a Enter the states to which the foundation reports or with which it is registered (see instructions) IL, MI 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 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 2011 or the taxable year beginning in 2011 (see instructions for Part XIV)? If "Yes," complete Part XIV 9 X 10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses 10 X	•											
 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? 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. 8a Enter the states to which the foundation reports or with which it is registered (see instructions) ► TL, MT 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 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 2011 or the taxable year beginning in 2011 (see instructions for Part XIV)? If "Yes," complete Part XIV 9 X 10 Did any persons become substantial contributors during the tax year? if "Yes," attach a schedule listing their names and addresses 10 X 	e	·										
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? 7 Did the foundation have at least \$5,000 in assets at any time during the year? 8 Enter the states to which the foundation reports or with which it is registered (see instructions) 11, M1 15 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 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 2011 or the taxable year beginning in 2011 (see instructions for Part XIV)? If "Yes," complete Part XIV 9 X 10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses 10 X	Ü	, , , , , , , , , , , , , , , , , , , ,	•									
remain in the governing instrument? 7 Did the foundation have at least \$5,000 in assets at any time during the year? 16 **Yes," complete Part II, col. (c), and Part XV. 8a Enter the states to which the foundation reports or with which it is registered (see instructions) **II.,MI** 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 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 2011 or the taxable year beginning in 2011 (see instructions for Part XIV)? If "Yes," complete Part XIV 9 X 10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses 10 X			actio	one	that con	flict with	he etate	law				
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. 8a Enter the states to which the foundation reports or with which it is registered (see instructions) IL, MI 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 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 2011 or the taxable year beginning in 2011 (see instructions for Part XIV)? If "Yes," complete Part XIV 9 X 10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses			CCIIC	0113	illat con	inct with	iic state	1417		6	Y	
## State of the states to which the foundation reports or with which it is registered (see instructions) ### TL , MI 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 9	7	· · · · · · · · · · · · · · · · · · ·										
Enter the states to which the foundation reports or with which it is registered (see instructions) IL, MI 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 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 2011 or the taxable year beginning in 2011 (see instructions for Part XIV)? If "Yes," complete Part XIV ID Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses 10 X	•	•										
TI, MI 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 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 2011 or the taxable year beginning in 2011 (see instructions for Part XIV)? If "Yes," complete Part XIV 9 X 10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses 10 X	g.		•						į	į		1
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 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 2011 or the taxable year beginning in 2011 (see instructions for Part XIV)? If "Yes," complete Part XIV 9 X 10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses 10 X	va	·		_		· · · · · ·						
of each state as required by General Instruction G? If "No," attach explanation 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 2011 or the taxable year beginning in 2011 (see instructions for Part XIV)? If "Yes," complete Part XIV 10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses 10 X	h		nev (Gan	peral (or o	esionate						
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 2011 or the taxable year beginning in 2011 (see instructions for Part XIV)? If "Yes," complete Part XIV 10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses 10 X	U		.oy (اات		-orginalo	,		1	8h	x	1
year 2011 or the taxable year beginning in 2011 (see instructions for Part XIV)? If "Yes," complete Part XIV 10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses 10 X	٥		n 40.	1421	(i)/3) or 4	942(i)(5)	for cale	ndar	}	<u> </u>		
Did any persons become substantial contributors during the tax year? if "Yes," attach a schedule listing their names and addresses 10 X	J			-		~ -(1)(0)	.u. uaic			ا		x
The state of the s	10					d address:			Ì			
		and any parties of the second	any t	a resi	1101103 4(1	- <u>guul 6556</u>			Forn		-PF	

Part VII-A Statements Regarding Activities (continued)		h 990-PF (2011) Retirement Research Foundation 36-2	429540		Page 5
section 512(0)(13)? If If Yes, a trainch schedule (see instructions) 2. Of the foundation make a distribution to adone advected fund over which the foundation or a disqualified person had advesory privileges? If Yes, a track statement (see instructions) 3. Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address > http://www.rrf.org 1. The books are in care of Pirame Prye Located at > 876.5 W. Higgins Road, Suite 430, Chicago, II. 201. 201. 201. 201. 201. 201. 201. 201.	P	art VII-A Statements Regarding Activities (continued)			
12 Did the foundation make a distribution to a donor advesed tund over which the foundation or a disqualified person had advisory privileges? If Yes, "Stant's statement (see instructions) 13 Did the foundation comply with the public inspaction requirements for its annual returns and exemption application? Website address ▶ LELDI / New YIFF. OXG 14 The blooks are incer of ▶ LIEDE FYPG. To Yill the public inspaction requirements for its annual returns and exemption application? Website address ▶ LIEDE FYPG. To Yill You've YIFF. OXG 15 Section 4947(x) founexempt furtherst received or accrued during the year 16 A rany time during cliendar year 2011, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? Pourties. A rany time during cliendar year 2011, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? Pourties. A received the properties of the property with a disqualified person? Pourties. A received the property of the account in a foreign country. Pourties. B Statements Regarding Activities for Which Form 4720 May Be Required. File Form 4720 if any item is checked in the "Yee" column, unless an exception applies. File Form 4720 if any item is checked in the "Yee" column, unless an exception applies. File Form 4720 if any item is checked in the "Yee" column, unless an exception applies. File Form 4720 if any item is checked in the "Yee" column, unless an exception applies. File Form 4720 if any item is checked in the "Yee" column, unless an exception applies. File Form 4720 if any item is checked in the "Yee" column, unless an exception applies. File Form 4720 if any item is checked in the "Yee" column, unless an exception applies. File Form 4720 if any item is checked in the "Yee" column, unless an exception applies. File Form 4720 if any item is checked in the "Yee" column, unless an exception applies. Fil	11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of		\	
If Yes, * attach statement (see instructions) Dot the foundation comply with the pubble inspection requirements for its annual returns and exemption application? Website address ▶ http://www.rrf.org 1 The books aim near of I ★ Leries Frye Located at ▶ 8765 W. Higgins Road, Suite 430, Chicago, II. 7/744 ▶ 50631 15 Section 4947(a)(1) oncempt chartable trusts filing From 999 Fin iteu of Form 1041 - Check here and enter the anount of tax-evempt interest received or accrued during the year 14. At any time during calendar year 2011, do the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for Form TD F 90-22.1. If Yes, enter the name of the foreign country? Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required File Form 4720 if any them is checked in the "Yes" column, unless an exception applies. File Form 4720 if any them is checked in the "Yes" column, unless an exception applies. File Form 4720 if any them is checked in the "Yes" column, unless an exception applies. File Form 4720 if any them is checked in the "Yes" column, unless an exception applies. File Form 4720 if any them is checked in the "Yes" column, unless an exception applies. File Form 4720 if any them is checked in the "Yes" column, unless an exception applies. File Form 4720 if any them is checked in the "Yes" column, unless an exception applies. File Form 4720 if any them is checked in the "Yes" column, unless an exception applies. File Form 4720 if any them is checked in the "Yes" column, unless an exception applies. File Form 4720 if any them is checked in the "Yes" column, unless an exception applies. File Form 4720 if any them is checked in the "Yes" column, unless an exception applies. File Form 4720 if any them is checked in the "Yes" column, unless an exception applies. File Form 4720 if any them is checked in the "Yes" column, unless an exception		section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
18 Dut the foundation comply with the public inspection requirements for its annual returns and exemption application? 18 The books are in care of ▶ Irene Frye Telephone no. ▶ 77.3 – 71.4 – 80.80 19 The books are in care of ▶ Irene Frye Telephone no. ▶ 77.3 – 71.4 – 80.80 10 The books are in care of ▶ Irene Frye Telephone no. ▶ 77.3 – 71.4 – 80.80 11 The books are in care of ▶ Irene Frye Telephone no. ▶ 77.3 – 71.4 – 80.80 12 Section 49.74(1) nonexempt charitable trusts filing from 990.9F in the of Form 104.1 – Check here and enter the amount of tax-exempt interest received or accrued during the year 15 A dary time during cliendar year 2011, do the foundation have an interest in or a signature or other authority over a bank, securities, or other inancial account in a foreign country? 25 See the instructions for exceptions and filing requirements for Form TD F 90-22.1. If Yes, enter the name of the foreign country 26 File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. 10 Juring the year did the foundation (sather directly or indirectly); 11 Engage in the sale or exchange, or lessing of property with a disqualified person? 22 Borrow money from, land money to, or otherwise extend credit to (or accept it from) a disqualified person? 23 File Form 4720 if any item in the sale or exchange, or lessing of property with a disqualified person? 24 File Form 4720 in a contract to a disqualified person? 25 File Form 4720 in a contract to a disqualified person? 26 File Form 4720 in a contract notice regarding desistent assistance (or accept it from) a disqualified person? 27 File Form 4720 in a current notice regarding desistent assistance (see instructions)? 28 Agree to a symmetry to a government official? (Exception, Chack No* if the foundation appear to make a girant to or to employ the efficial for a period after termination of government service, if terminating within 90 days.) 29 Agree to a symmetry formination for the period desistent assistance	12		'		
Website address P https://www.rrf.org 1 Table books are in care of P Irone Fyve Located at P 8765 W. Higgins Road, Suite 430, Chicago, II 15 Section 4947(a)(1) nonexempt characterist trusts filing form 990-PF in lieu of Form 1041 - Check here and enter the manufor it as exemptin interest received or accrued during the year 16. At any time during calendar year 2011, do the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for Form TD F 90-22.1. If Yes,* enter the name of the foreign country 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. 1a buring the year did the foundation (either directly or indirectly): (1) Engage in the sale or exchange, or leasing of properly with a disqualified person? (2) Borrow money from, lead money for, or chimses excend credit for accept it from) a disqualified person? (3) Furnats goods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or reimbures the expenses of, a disqualified person? (5) Transfer any income or assets to a disqualified person (or make any of etherson? (6) Agree to pay money or property to a government folical? (Exception, Check 'No' if the foundation agreet to make a grant to rio to employ the official for a period after termination of government service, if terminating within 90 days.) b I any answer symp on a current notice regarding dasset assistance (see instructions)? (Organizations reflying or a current notice regarding dasset assistance (see instructions)? (Organizations reflying or a current notice regarding dasset assistance (see instructions)? (Organizations reflying or a current notice regarding dasset assistance (see instructions)? (Organizations reflying or a darget organization and except the file of the file o			<u> </u>		X
Technolos are in care of Irene Frye	13		13	X	
Located at N 8765 W. Higgins Road, Suite 430, Chicago, IL Section 4947(a)(1) nonexempt charactele trusts filing form 990-Fin fleu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accreed during the year 16. At any time during celendar year 2011, dot the foundation have an interest in or a signature or other authority over a bank, securities, or other financial scoontin a foreign country? See the instructions for exceptions and filing requirements for Form 1D F 90-22.1. If Yes, enter the name of the foreign country? Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required File Form 4720 if any frem is checked in the "Yes" column, unless an exception applies. 1 a 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? (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or reimburs the expenses of, a desqualified person? (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a desqualified person (or make any of either available for the benefit or use of a desqualified person (or make any of either available for the person of the person of the person of the complex to a desqualified person of the foundation agreed to make a grant to or to employ the official or a period after termination of government service, if terminating within 90 days). b) If any answer is "Yes" to 14(1)-(6), did any of the acts fall to qualify under the exceptions described in Regulations section 53-64(1)-30 or in a current notice regarding desaster assistance check here 0 but the foundation angage in a provise in a complex than a complex to the first day of the tax year beginning in 2011? 1 Taxes on failure to distribute income (sect			714 0	000	
15 Section 4947(a)(1) nonexempt charatable trusts filing Form 990-PF in lieu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year 16 At any time during calendar year 2011, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a loverign country? See the instructions for exceptions and filing requirements for Form 1DF 90-22.1. If Yes, enter the name of the foreign country? 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. 1 During the year and the foundation (either directly or indirectly): 1 Engage in the sale or exchange, or leasing to property with a disqualified person? 2 Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? 3 Furnish goods, services, or facilities to (or accept them from) a disqualified person? 4 Peys Compensation to, or ayor reimbruse the expenses of, a disqualified person? 5 Transfer any income or assets to a disqualified person? or make any or eimbruse the expenses of, a disqualified person? 6 Agree to any money to 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, it ferrination within government official? (Exception, Check 'No' if the foundation disquage in a prior year in any of the acts featoried in 1a, other than exception described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance check here 2 Did the foundation engage in a prior year in any of the acts featoried in 1a, other than excepted acts, that were not corrected before the first day of the taxys beginning in 2011? 2 Taxes on failure to distribute incomer (escention 4942) (does not applying the provisions of section 4942(a)(2) (relating to incorrect val	14				
and enter the amount of fax-exempt interest received or accrued during the year 16. At any time during calendar year 2011, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filling requirements for Form ID F 90-22.1. If Yes," enter the name of the foreign country Part VII-B. Statements Regardling Activities for Which Form 4720 May Be Required File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. 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? (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? (3) Furnish pods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? (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) (or make any of either available for the benefit or use of a disqualified person)? (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.) b If any answer is 'Yes' to 1a(1)-(6), did any of the acts fail to qualify under the exception described in Regulations section 3494(1)(3) or in a current notice regarding diseaster assistance (see instructions)? Organizations relying on a current notice regarding diseaster assistance (see instructions)? Organizations relying on a current notice regarding diseaster assistance (see instructions)? Organizations relying on a current notice regarding diseaster assistance (see instructions)? It were all the foundation organe and 9442(1) (all the found	4-		<u>00031</u>		$\overline{}$
16 At any time during calendar year 2011, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country	15	· · ·	N	-	· L
Securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for Form TD F 90-22.1. If 'Yes,' enter the name of the foreign country.' Part VII-B Statements Regardling Activities for Whitch Form 4720 May Be Required File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. 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? Yes X No 2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? Yes X No 3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? X Yes No 4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? X Yes No 5) Transfer any income or assets to a disqualified person (or make any of either available (or the benefit or use of a disqualified person)? Yes X 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.) Yes X No b If any answer is Yes' to 1a(1)-(6), did any of the acts fall to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? Yes X No 1b X Yes X No Yes X No	16	· · · · · · · · · · · · · · · · · · ·			No
See the instructions for exceptions and filing requirements for Form TD F 90-22.1. If Yes, enter the name of the foreign country 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. 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? Yes X No (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? Xes Xes No (3) Furnish goods, services, or facilities to (or accept it from from) a disqualified person? Xes No (4) Pay compensation to, or pay or relimburs the expenses of, a disqualified person? Xes 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)? Yes Xes 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.) Yes Xes No b If any answer is "Yes" to Ta(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53-4941(6)-3 or in a current notice regarding dissater assistance check here No Yes Xes No Yes Xes No Yes Xes No Yes Xes	10		16	103	l
File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. 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? (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or relimburse the expenses of, a disqualified person? (5) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (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.) b If any answer is 'Yes' to 1a(1)-(6), did any of the acts fait to qualify under the exceptions described in Regulations section 53-441(0)-3 or in a current notice regarding dissater assistance (see instructions)? Organizations relying on a current notice regarding dissater assistance (see instructions)? Organizations relying on a current notice regarding dissater assistance (see instructions)? Organizations relying on a current notice regarding dissater assistance (see instructions)? 1b				1	
File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. 1 a During the year did the foundation (either drecky or indirectly); (1) Engage in the sale or exchange, or leasing of property with a disqualified person? (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or relimburse the expenses of, a disqualified person? (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? or make any of either available for the benefit or use of a disqualified person? (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.) b I trany inserves in 'Yes' to 14(1-6), do all any of the acts fast to quality under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance (see instructions)? 2 Taxes on faiture to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(3) of 4942(5)(5): 1 **Extra **Intervent** 1 **Extra **Interven					
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? (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? (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) (or make any of either available for the benefit or use of a disqualified person) (or make any of either available for the benefit or use of a disqualified person) (e) 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.) 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(g)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance cleck here b) Oit the foundation engage in a prior year in any of the acts searched in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2011? 2 Taxes on faultie to distribute incomer (section 4942(a)(2) to all years listed, answer 'No' and attach statement - see instructions.) 1a At the end of tax year 2011, did the foundation have any undistributed incomer (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2011? If 'Yes,' list the years' undistributed incomer? (If applying section 4942(a)(2) (relating to no correct valuation of assets) to the year's undistributed incomer? (If applying section 4942(a)(2) (relating to no correct valuation of assets) to the year's undistributed income	Pá				
(1) Engage in the sale or exchange, or leasing of property with a disqualified person? (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? (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)? (6) Agree to pay money or property to a government official? (Exception. Check 'No' if the foundation arged to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) 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 53.941(1/3) or in a current notice regarding disaster assistance check here c bid 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 2011? 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(i)(3) or 4942(i)(5)): a At the end of tax year 2011, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2011? 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 instructions.) b If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4943(a)(7) to dis		File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.		Yes	No
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? (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)? (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.) 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 instructions)? Organizations relying on a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance (see instructions)? 1b	1a				
a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? (5) Transter any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? (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.) 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 instructions)? Organizations relying on a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance (see instructions)? 1b			No		
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? (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)? (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 persod after termination of government service, if terminating within 90 days.) 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 instructions)? Criganizations relying on a current notice regarding disaster assistance (see instructions)? Criganizations relying on a current notice regarding disaster assistance (see instructions)? Criganizations relying on a current notice regarding disaster assistance (see instructions)? Criganizations relying on a current notice regarding disaster assistance (see instructions)? Criganizations relying on a current notice regarding disaster assistance (see instructions)? Criganizations relying on a current notice regarding disaster assistance (see instructions)? 1b					
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? (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)? (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.) 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(a)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here 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 2011? 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(a)(3) or 4942(a)(3) or 4942(a)(5)). a At the end of tax year 2011, did the foundation have any undistributed income (lines 6d and 6e, Parl XIII) for tax year(s) beginning before 2011? If Yes, Its the years b 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 instructions.) N/A c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. b compared to the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? If Yes, I did it have excess business holdings in 2011 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of t					
(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? (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.) b) If any answer is 'Yes' to 1a(1)-(6), did any of the acts fair to qualify under the exceptions described in Regulations section 53-491(qi)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance (see instructions)? 1b					
for the benefit or use of a disqualified person)? (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.) 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(0)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here 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 2011? 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 2011, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2011? If 'Yes,' list the years Is the did in 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 instructions.) N/A b If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. Ag 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 grift 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 2011.) N/A 4b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purposes? b Did the foundation make any investm			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.) 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 instructions)? Organizations relying on a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance (see instructions)? Organization a current notice regarding disaster assistance (see instructions)? Takes on failure to distribute income year in any of the act secribed in 1a, other than excepted acts, that were not corrected before the first day of the tax year self-incomental see instructions and of the tax year self-incomental secritic distributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2011? If 'Yes, Ist the 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 instructions.) N/A 2b If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. All the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commi			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.) b If any answer is 'Yes' to 1a(1)-(6), did amy of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here 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 2011? 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 2011, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2011? If 'Yes,' list the years \[\subset \] 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 instructions.) If 'Yes,' did if have excess business holdings in 2011 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 2011.) A Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? b Old the foundation invest during the year any amount in a manner that would jeopardize its charitable purpose that had not been removed					
termination of government service, if terminating within 90 days.) 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 instructions)? Organizations relying on a current notice regarding disaster assistance check here 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 2011? 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(i)(3) or 4942(i)(5)): a At the end of tax year 2011, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2011? If Yes," list the years \[\begin{array}{ c c c c c c c c c c c c c c c c c c c					
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 instructions)? Organizations relying on a current notice regarding disaster assistance (see instructions)? 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 2011? Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(i)(3) or 4942(i)(5)): At the end of tax year 2011, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2011? If "Yes," list the years 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 instructions.) If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. If the provisions of section 4942(a)(b) are being applied to any of the years listed in 2a, list the year			No		
section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here 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 2011? 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(i)(3) or 4942(i)(5)): a At the end of tax year 2011, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2011? 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 instructions.) c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. D	b				
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 2011? 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(i)(3) or 4942(i)(5)): a At the end of tax year 2011, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2011? If 'Yes,' list the years \			1b		X
before the first day of the tax year beginning in 2011? 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 2011, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2011? If "Yes," list the years \		Organizations relying on a current notice regarding disaster assistance check here	$\square \mid$		
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 2011, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2011? If "Yes," list the years \	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			
defined in section 4942(j)(3) or 4942(j)(5)): a At the end of tax year 2011, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2011? If "Yes," list the years \[\]			<u>1c</u>		X
a At the end of tax year 2011, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2011? If "Yes," list the years 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 instructions.) If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. If the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? If "Yes," did it have excess business holdings in 2011 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 2011.) If the foundation invest during the year any amount in a manner that would jeopardize its charitable purpose? If the provisions of section 4942(a)(2) (relating to incorrect valuation (N/A) If the provisions of section 4942(a)(2) (relating to incorrect valuation (N/A) If the provisions of section 4942(a)(2) (relating to incorrect valuation (N/A) If the provisions of section 4942(a)(2) (relating to incorrect valuation (N/A) If the provisions of section 4942(a)(2) (relating to incorrect valuation (N/A) If the provisions of section 4942(a)(2) (relating to incorrect valuation (N/A) If the provisions of section 4942(a)(2) (relating to incorrect valuation (N/A) If the provisions of section 4942(a)(2) (relating to incorrect valua	2				
before 2011? If "Yes," list the years Description 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 instructions.) C if the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.					
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 instructions.) c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.	а		Na		
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 instructions.) c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? Dif "Yes," did it have excess business holdings in 2011 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 2011.) A Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purpose? 4			NO		
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 instructions.) c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.	h				
statement - see instructions.) c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ——————————————————————————————————	•				
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.			A 2b)	
during the year? b If "Yes," did it have excess business holdings in 2011 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 2011.) 1 A Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 2 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 2011?	c				
during the year? b If "Yes," did it have excess business holdings in 2011 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 2011.) 1 A Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 2 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 2011?		> ,,,,			
b If "Yes," did it have excess business holdings in 2011 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 2011.) 4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 4b 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 2011? 4b X	3a				
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 2011.) 4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 4b 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 2011? 4b X			No		
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 2011.) 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 2011? 4b X	b	• • • • • • • • • • • • • • • • • • • •]	
Form 4720, to determine if the foundation had excess business holdings in 2011.) 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 2011? 4b X					
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 2011? 4b 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 2011? 4b X	٠.			-	
had not been removed from jeopardy before the first day of the tax year beginning in 2011?			48		Λ_
	0		Ah.		¥
		nad necessaritements from populary octors are mist out or ane ask year beginning in 2011:		-PF	

Form 990-PF (2011) Retirement Research Four			36-24295	40 Pa	ge 6
Part VII-B Statements Regarding Activities for Which	Form 4720 May Be I	Required (contin	nued)		
5a During the year did the foundation pay or incur any amount to:				l l	
(1) Carry on propaganda, or otherwise attempt to influence legislation (section	, ,,		es 🗶 No	1 1	
(2) Influence the outcome of any specific public election (see section 4955);	or to carry on, directly or indir			1 1	
any voter registration drive?			es X No		
(3) Provide a grant to an individual for travel, study, or other similar purposes	•	Y	es X No	;]	
(4) Provide a grant to an organization other than a charitable, etc., organization	on described in section				
509(a)(1), (2), or (3), or section 4940(d)(2)?		Y	es 🗶 No		
(5) Provide for any purpose other than religious, charitable, scientific, literary	, or educational purposes, or				
the prevention of cruelty to children or animals?		Y	es X No		
b if any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify un	der the exceptions described	in Regulations	1	1	
section 53.4945 or in a current notice regarding disaster assistance (see instri	uctions)?		N/A	5b	
Organizations relying on a current notice regarding disaster assistance check t	here				
c If the answer is "Yes" to question 5a(4), does the foundation claim exemption (from the tax because it mainta	ined	1	†	
expenditure responsibility for the grant?	N	I/A 🔲 Y	es 🔲 No		
If "Yes," attach the statement required by Regulations section 53.494	5-5(d).				
6a Did the foundation, during the year, receive any funds, directly or indirectly, to	pay premiums on				
a personal benefit contract?		Y	es X No		
b Did the foundation, during the year, pay premiums, directly or indirectly, on a	personal benefit contract?			6ь і	X
If "Yes" to 6b, file Form 8870.					
7a At any time during the tax year, was the foundation a party to a prohibited tax s	shelter transaction?		es X No		
b If "Yes," did the foundation receive any proceeds or have any net income attrib				7b	_
Information About Officers, Directors, Trust		nagers. Highl			
Part VIII Paid Employees, and Contractors			See Stat	ement	15
1 List all officers, directors, trustees, foundation managers and their	compensation.	•			
	(b) Title, and average hours per week devoted	(c) Compensation	(d) Contributions to employee benefit plans and deferred	(e) Expens account, ot	șe
(a) Name and address	to position	(If not paid, enter -0-)	and deterred compensation	account, of	ner Es
					_
See Statement 14		355,487.	24,373.		0.
	1				
	1				
	1				
		 - -	-		
	1				
2 Compensation of five highest-paid employees (other than those inc	luded on line 1) If none	enter "NONE "	1	<u> </u>	_
2 Compensation of the highest paid employees (other than those inc	(b) Title, and average	I I I I I I I I I I I I I I I I I I I	(d) Contributions to employee benefit plans	(e) Expens	
(a) Name and address of each employee paid more than \$50,000	` 'hours per week `	(c) Compensation	and deferred	account, of	her
No	devoted to position		compensation	allowance	<u>s</u>
	Program Offic		00 006		_
Higgins #430, Chicago, IL 60631	40.00	148,640.	22,296.		<u>O.</u>
	Program Offic				_
Higgins #430, Chicago, IL 60631	40.00	130,340.	19,551.		<u>o.</u>
	Office Mgr				_
Higgins #430, Chicago, IL 60631	40.00	72,543.	10,881.		<u>o.</u>
	Program Offic	1			
Higgins #430, Chicago, IL 60631	40.00	71,584.	10,738.	(<u>0.</u>
	Exec Asst				
Higgins #430, Chicago, IL 60631	40.00	60,523.	9,078.	(0.
Total number of other employees paid over \$50,000			•		5

Form 990-PF (2011) Retirement Research Foundation		429540 Page 7
Part VIII Information About Officers, Directors, Trustees, Foundat Paid Employees, and Contractors (continued)	ion Managers, Highly	
3 Five highest-paid independent contractors for professional services. If none, enter	"NONE."	
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
Global Endowment Management	Investment	
100 N Tryon St, Charlotte, NC 28202	Management	1,685,005.
Naomi M Stanhaus		
1847 N Howe Street, Chicago, IL 606145125	Program Consultan	t 100,850.
Varey & Vaccariello CPAs PC - 617 E Golf Road		
#107, Arlington Heights, IL 60005	Accounting and Ta	x 52,575.
	<u> </u>	
	_	
	<u> </u>	
Fotal number of others receiving over \$50,000 for professional services Part IX-A Summary of Direct Charitable Activities	· · · · · · · · · · · · · · · · · · ·	▶ 3
		
List the foundation's four largest direct charitable activities during the tax year. Include relevant statistic number of organizations and other beneficiaries served, conferences convened, research papers produ		Expenses
None	550, 510.	
None		
		0.
)		
	<u> </u>	
Part IX-B Summary of Program-Related Investments		
Describe the two largest program-related investments made by the foundation during the tax year on li	nes 1 and 2.	Amount
None		
		0
		0.
All other program-related investments. See instructions.		
rai odioi program rolatee mireouniones. Oce moducionos.		
· · · · · · · · · · · · · · · · · · ·		
Total, Add lines 1 through 3		0.
		Form 990-PF (2011)

F	Part X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations	ndations	s, see instructions)
1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		 -
а		1a	122,403,194.
b	Average of monthly cash balances	1b	589,281.
C		1c	
d	Total (add lines 1a, b, and c)	1d	122,992,475.
е	Reduction claimed for blockage or other factors reported on lines 1a and		
	1c (attach detailed explanation) 1e 0.		
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	122,992,475.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	1,844,887.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	121,147,588.
6	Minimum investment return. Enter 5% of line 5	6	6,057,379.
P	art XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations are foreign organizations check here and do not complete this part.)	d certain	
1	Minimum investment return from Part X, line 6	1	6,057,379.
2a	Tax on investment income for 2011 from Part VI, line 5		
b	Income tax for 2011. (This does not include the tax from Part VI.) 2b 64,689.		
C	Add lines 2a and 2b	2c	268,599.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	5,788,780.
4	Recoveries of amounts treated as qualifying distributions	4	34,200.
5	Add lines 3 and 4	5	5,822,980.
6	Deduction from distributable amount (see instructions)	6	0.
7_	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	5,822,980.
P	art XII Qualifying Distributions (see instructions)		
1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
8	Expenses, contributions, gifts, etc total from Part I, column (d), line 26	1a	<u>5,928,256.</u>
b	Program-related investments - total from Part IX-B	1b	<u> </u>
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	40,820.
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)	3Ь	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	<u>5,969,076.</u>
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	5	0.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	5,969,076.
	Note. The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation of	ualifies f	or the section

Form **990-PF** (2011)

4940(e) reduction of tax in those years.

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2010	(c) 2010	(d) 2011
Distributable amount for 2011 from Part XI, line 7				5,822,980.
2 Undistributed income, if any, as of the end of 2011				3/322/233
a Enter amount for 2010 only			0.	
b Total for prior years:				
		0.		
3 Excess distributions carryover, if any, to 2011:				
a From 2006				
b From 2007 3,569,810.				
c From 2008 8,795,657.				
dFrom 2009 3,156,668.				
e From 2010 367, 868.	15 000 002			
f Total of lines 3a through e	15,890,003.			
4 Qualifying distributions for 2011 from Part XII, line 4: ▶ \$5,969,076.				
a Applied to 2010, but not more than line 2a			0.	
b Applied to undistributed income of prior				
years (Election required - see instructions)		0.		
c Treated as distributions out of corpus				
(Election required - see instructions)	0.			
d Applied to 2011 distributable amount	0.			5,822,980.
e Remaining amount distributed out of corpus	146,096.			3,022,900.
5 Excess distributions carryover applied to 2011	0.			0.
(If an amount appears in column (d), the same amount -must be shown in column (a))-				
6 Enter the net total of each column as indicated below:				
& Corpus Add lines 3f, 4c, and 4e Subtract line 5	16,036,099.			
b Prior years' undistributed income. Subtract				
line 4b from line 2b		0.		
e 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 instructions		0.		
e Undistributed income for 2010. Subtract line				
4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2011. Subtract				
lines 4d and 5 from line 1. This amount must				
be distributed in 2012				0.
7 Amounts treated as distributions out of				
corpus to satisfy requirements imposed by				
section 170(b)(1)(F) or 4942(g)(3)	0.			
8 Excess distributions carryover from 2006				
not applied on line 5 or line 7	0.		· · · · · · · · · · · · · · · · · · ·	
9 Excess distributions carryover to 2012.	16 026 000			
Subtract lines 7 and 8 from line 6a	16,036,099.			
0 Analysis of line 9:				
a Excess from 2007 3,569,810.				
b Excess from 2008 8,795,657.				
c Excess from 2009 3,156,668. d Excess from 2010 367,868.			İ	
e Excess from 2011 146, 096.				
6 LACOUS HUMI 20 11 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1				5 000 DE (0044)

123581 12-02-11 Form **990-PF** (2011)

Part XIV Private Operating E	<u>ient Researc</u>	ch Foundation	I A guestion (1)		6-2429540	Page 10
			-A, question 9)	N/A		
		· · · · · ·	.			
			.n.aastian	4040(1)(2) ==	4040(3)(5)	
		ng roundation described		4942(j)(3) or	4942(j)(5)	
		(b) 2010	Prior 3 years (c) 2009	(d) 200	8 (e) Tot	ta l
	(4) 2011	(0) 2010	(6) 2003	(0) 2000	5 (e) 10t	<u> </u>
•	· · · · · · · · · · · · · · · · · · ·	 				
						
· ·						
•			<u> </u>			
<u>•</u>						
•						
• •						
· ·						
a "Assets" alternative test - enter:						
Part XIV Private Operating Foundations (see instruction 1 a If the foundation has received a ruling or determination letter that it is a prince foundation, and the ruling is effective for 2011, enter the date of the ruling be Check box to indicate whether the foundation is a private operating foundation. It is a private operating foundation is a private operating foundation in the control of the adjusted net income from Part I or the minimum investment return from Part X for each year listed be 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 Complete 3a, b, or c for the alternative test relied upon:						
			 			
2/3 of minimum investment return						
• •	J					
					<u> </u>	
dividends, rents, payments on						
						
organizations as provided in						
*** ** **						
• • •			ŀ			
' -						
	rmation (Comple	te this part only	if the founds	ation had \$5 000	or more in asse	te
			ii die iodiide	20011 Had \$0,000	or more in asse	, LO
						
	_	than 2% of the total cont	ributions received	by the foundation befor	e the close of any tax	
				•	•	
None						_
			(or an equally large	portion of the ownersh	np of a partnership or	
••	a 10% or greater interes	SL.				
		- ·				
						lf
				oris, complete items 2a,	, U, C, allu u.	
a The name, address, and telephone numb	er of the person to whor	n applications snould be	addressed;			
See Statement 16						
	e submitted and informat	ion and materials they st	nould include:			
c Any submission deadlines:						
d Any restrictions or limitations on awards	, such as by geographica	al areas, charitable fields,	kınds of ınstıtutior	ns, or other factors:		_
123601 12-02-11					Form 990-P	F (2011)
						- 144111

Form **990-PF** (2011)

Part XVI-A **Analysis of Income-Producing Activities**

Enter gross amounts unless otherwise indicated.	Unrelated	business income		led by section 512, 513, or 514	(e)	
	(a)	(b)	(c) Exclu-	(d)	Related or exempt	
1 Program service revenue:	Business code	Amount	sion	Amount	function income	
· ·	1 222	······································	 			
a b	- 		 		·	
C	-		1 1	-	·	
d						
		· · · · · · · · · · · · · · · · · · ·	1			
f						
g Fees and contracts from government agencies						
2 Membership dues and assessments			t			
3 Interest on savings and temporary cash						
investments	!		14	901.		
4 Dividends and interest from securities			14	2,233,756.		
5 Net rental income or (loss) from real estate:				- 1 - 3. · · · · · · · · · · · · · · · · · ·		
a Debt-financed property						
b Not debt-financed property			1 1			
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	10,407,542.	10,669.	
9 Net income or (loss) from special events						
O Gross profit or (loss) from sales of inventory						
1 Other revenue:						
See Statement 17		255,823.		39,157.	34,200.	
b						
c		,,,,				
d						
e						
2 Subtotal. Add columns (b), (d), and (e)		255,823.		12,681,356.	44,869.	
3 Total. Add line 12, columns (b), (d), and (e)				13	12,982,048.	
See worksheet in line 13 instructions to verify calculations)	•					

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

Line No.	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes).								
11a	Unspent Gr								
			·						
	 								
			·						
	-								
					· · · · · · · · · · · · · · · · · · ·				
	Γ								

Form **990-PF** (2011)

123621 12-02-11

Part AVII	Exempt Organizations	s To and Transactions at	nd Relationships with Nonch	aritable	•	
1 Did the or	ganization directly or indirectly engage in any of the	following with any other organization	described in section 501(c) of	\neg	Yes	No
	(other than section 501(c)(3) organizations) or in se	- · · · · ·	• •			
	from the reporting foundation to a noncharitable exe	· · · · · · · · · · · · · · · · · · ·				1
(1) Cash	-	on gameanon on		1a(1)		_x_
(2) Other				1a(2)		X
b Other tran				14(2)		_ _
	s of assets to a noncharitable exempt organization			16(1)		_X_
٠,	hases of assets from a noncharitable exempt organization	vation		1b(2)		X
` '	al of facilities, equipment, or other assets			1b(3)		X
	bursement arrangements			1b(4)		X
	s or loan guarantees			1b(5)		X
` '	ormance of services or membership or fundraising s	nlicitations		1b(6)		X
	of facilities, equipment, mailing lists, other assets, or			10		X
•	wer to any of the above is "Yes," complete the followi		ave show the fair market value of the goods		L	
or service	es given by the reporting foundation. If the foundation of the goods, other assets, or services re	n received less than fair market value			,,,,,	
a) Line no		haritable exempt organization	(d) Description of transfers, transactions, an	d sharing an	rangeme	
-7		I/A	(U) Document of California, and California, and		a igame	
	<u>-</u>	WA.	 			
			 			
			 			
						
						
						
			 			
		_··	 			
		 -	 	_		
						
					_	
			 			
in section	indation directly or indirectly affiliated with, or related 501(c) of the Code (other than section 501(c)(3)) o complete the following schedule.	r in section 527?		Yes	X] No
	(a) Name of organization	(b) Type of organization	(c) Description of relation	isnip		
	N/A					
						
						
Sign Here	r penalties of perjury, I declare that I have examined this return relief, it is true, correct, and complete Declaration of preparer is	(other than taxpayer) is based on all informa	ation of which preparer has any knowledge Executive Director	May the IRS of eturn with the shown below	e prepar (see ins	rer
	nature of-officer or trustee / Print/Type preparer's name PAPP	Date'	Title Check if PTIN			
Paid	N/A	parer's signature	self- employed		400	
Preparer	Downey R. Varey Firm's name ▶ Varey & Vaccar:	iello CPAs PC	Firm's EIN ▶ 36-	00357		
Use Only		lello CPAs PC	FIIIISEIN > 30	JJJ40	20	
Jug Offing	Firm's address ▶ 617 East Golf	Poad Suite 107				
	Arlington Heid		Dhone no QA7	-228-	607	7
	ALITHICON HEI	TILE 1 IN 00002		- <u> </u>		
				1 01111 337 0	,-, ,	(2011)

123822 12-02-11 Retirement Research Foundation
Part IV | Capital Gains and Losses for Tax on Investment Income

	d describe the kind(s) of property so rick warehouse; or common stock, 2		(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a From MCC Inves	tment Management	(Schedule Attach		 	Various
		(Schedule Attach			Various
		K-1 (26-1741307)	P		Various
d From Form 6781		1 1 (20 1/1130//	P		Various
e From Form 6781			P		Various
f Litigation Pro		of Bagig	P		Various
g Capital Gains		OI Dasis		Various	various
h	Dividends			-	
	- · · · · · · · · · · · · · · · · · · ·			 	
1	_				
k				 	<u> </u>
1					
				 	
m n					
<u>n</u>				 -	
0	(6) Depression allowed	(a) Coot or ather bears		Corp or (Issa)	<u> </u>
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale) Gain or (loss) lus (f) minus (g)	
EE4 (21	(or anomatic)		(ε) μ	(I) IIIIIU3 (Y)	-2 000
a 554,621.	<u> </u>	557,423.			<2,802.>
b 4,483,974.		4,034,013.			449,961.
c 9,246,122.				9,	246,122.
d 285,623.					285,623.
e 428,435.					428,435.
f 10,669.					10,669.
g 203.					203.
h					
1					
J					
k					
1	 				
m					
n					
0					
Complete only for assets showing	g gain in column (h) and owned by	the foundation on 12/31/69		ses (from col. (h))	
(i) F.M.V. as of 12/31/69	(j) Adjusted basis	(k) Excess of col. (1)	Gains (excess of	of col. (h) gain ove ot less than "-0-")	r col. (k),
(1) F.IVI.V. as 01 12/3 1/09	as of 12/31/69	over col. (j), if any		ULIESS IIIAII -U-)	
a					<2,802.>
b					449,961.
C				9,	246,122.
d					285,623.
e					428,435.
f					10,669.
g					203.
h					
I					
k					
1					
m					
n					
0					
,L			T		
Capital gain net income or (net cap	oital loss) { If gain, also enter If (loss), enter "-0	in Part I, line 7	2	10.	418,211.
,		<u> </u>			
If gain, also enter in Part I, line 8, i	s) as defined in sections 1222(5) an	(o):			
If (loss), enter "-0-" in Part I, line 8		Ţ	3	N/A	
,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,		·	- 1	/ ^-	

2011 DEPRECIATION AND AMORTIZATION REPORT FORM 990-PF Page 1

990-PF

128102 05-01-11

(D) - Asset disposed

* ITC, Section 179, Salvage, Bonus, Commercial Revitalization Deduction

2011 DEPRECIATION AND AMORTIZATION REPORT FORM 990-PF Page 1

990-PF

)					ĺ	1		
Asset	Description	Date Acquired	Method	Life	S S	Unadjusted Cost Or Basis	Bus % Excl	Reduction In Basis	Basis For Depreciation	Accumulated Depreciation	Current Sec 179	Current Year Deduction
	Office Equipment					-						
<u> </u>	5Office Equipment	VariesSL	•	2.00	16	7,815.			7,815.	7,815.		0
20	20Copy Machine	010606SL		2.00	16	20,295.			20,295.	18,265.		2,030.
23	23Phone System * 990-pF pg 1 motel	040208SL		5.00	16	8,623.			8,623.	4,312.	•	1,724.
						36,733.		0	36,733.	30,392.	0	3,754.
<u>m</u>	3Software	032499SL		5.00	16	12,620.			12,620.	12,620.		0
7	7(D)Software	032499SL		2.00	16	1,333.			1,333.	1,333.		0
	(D)Software											-
16	16(D)Software	070804SL		2.00	16	11,188.	·		11,188.	11,188.		0
18	18(D)Software	VariesSL	·	2.00	16	4,440.			4,440.	4,440.		0
21	(D)SOLUMAIE-NELLOSE 21ect NEUMODE IM WADE	080706SL		5.00	16	1,726.			1,726.	1,553.		173.
30	30CISCO	122111SL		2.00	16	6,130.			6,130.			613.
31	BACKUP SW	122211SL		5.00	16	5,696.			5,696.			570.
	 South Fy i locat Office Equipment Cond motel 					43,133.		0	43,133.	31,134.	0	1,356.
	σ					268,560.		3,872.	264,688.	207,183.	0	9,924.
		-		·								
								_				
128102 05-01-11		:			∀ - (Q)	(D) - Asset disposed		, ITC,	Section 179, Salv	* ITC, Section 179, Salvage, Bonus, Commercial Revitalization Deduction	nercial Revital	zation Deduction

					•		
Form 990-PF Interest	on Savings a	nd Tem	porary C	ash :	Investments	Statement	1
Source						Amount	
Urban Partnership Bank					-	9	01.
Total to Form 990-PF,	Part I, line	3, Co	lumn A		-	9	01.
Form 990-PF D:	ividends and	Inter	est from	Seci	urities	Statement	2
Source		Gross	Amount		pital Gains Dividends	Column (A Amount)
Global Endowment Fund	- II LP	1,	893,016.		0.	1,893,0	16.
Global Endowment Fund	II LP		42,910.		0.	42,9	10.
Mid-Continent Capital	_		298,033. 		203.		30.
Total to Fm 990-PF, Pai	rt I, ln 4	2,	233,959.	-	203.	2,233,7	56. ——
Form 990-PF	01	ther I	ncome	111		Statement	3
Description			(a) Revenue Per Book		(b) Net Invest- ment Income	(c) Adjusted Net Inco	
Returned Grants Unrelated Business Taxa Net Ordinary and Other			34,: 255,	200. 823.	0		
Income and (Losses) fro			39,	157.	39,157	•	
Total to Form 990-PF, I	Part I, line	11	329,	180.	39,157	•	
Form 990-PF		Legal	Fees			Statement	4
Description	Exper		(b) Net Invent Inc		(c) Adjusted Net Income		
General legal fees rela to foundation program activity: Quarles & Bra	_	0.		0.			0.
300 N LaSalle St Chicag 6065 4		3,115.		700.	•	2,4	15.
ro Fm 990-PF, Pg 1, ln	16a 3	3,115.	·	700.	•	2,4	15.
							

Form 990-PF	Accounti	ng Fees	St	tatement 5
Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Auditing&consulting fees:				
Murray, Grishaber LLC 3365 N Arlington Heights Rd	0	0		0
Arlington Heights Rd Arlington Heights IL 60004 Bookkeeping, Payroll and	0. 14,000.			0. 4,000.
Tax Services: Varey &				
Vaccariello CPAs PC	0.	0.		0.
617 E Golf Road Arlington Heights IL 60005	46,275.	38,775.		7,500.
- Fo Form 990-PF, Pg 1, ln 16b	60,275.	48,775.		11,500.
	other Profes	sional Fees	St	tatement 6
	(a)	(<u>b</u>)	(c)	(đ)
Form 990-PF ((a) Expenses		<u> </u>	
Form 990-PF C	(a) Expenses	(b) Net Invest-	(c) Adjusted	(d) Charitable
Form 990-PF Common Secription Convestment management services:	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted	(d) Charitable Purposes
Form 990-PF Common 990-PF Comm	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted	(d) Charitable Purposes
Form 990-PF Common 990-PF Comm	(a) Expenses Per Books	(b) Net Invest- ment Income 0. 0.	(c) Adjusted	(d) Charitable Purposes
Porm 990-PF Convestment management services: Gid Continent Capital LLC So S Wacker Drive Chicago CL 60606 Convestment management services: Global Endowment	(a) Expenses Per Books 0.	(b) Net Invest- ment Income 0. 0.	(c) Adjusted	(d) Charitable Purposes 0.
Pescription Investment management services: Mid Continent Capital LLC 150 S Wacker Drive Chicago IL 60606 Investment management services: Global Endowment Fund II 100 N Tryon St Charlotte	(a) Expenses Per Books 0. 0. 27,652.	(b) Net Investment Income 0. 0. 27,652.	(c) Adjusted	(d) Charitable Purposes 0. 0.
Description Investment management Services: Mid Continent Capital LLC 150 S Wacker Drive Chicago IL 60606 Investment management Services: Global Endowment Fund II 100 N Tryon St Charlotte IC 28202 Program Grant Evaluation	(a) Expenses Per Books 0. 0. 27,652. 0. 1,643,903.	(b) Net Invest- ment Income 0. 0. 27,652. 0. 1,643,903.	(c) Adjusted	(d) Charitable Purposes 0. 0. 0.
Pescription Investment management Services: Mid Continent Capital LLC 150 S Wacker Drive Chicago IL 60606 Investment management Services: Global Endowment Pund II 100 N Tryon St Charlotte MC 28202	(a) Expenses Per Books 0. 0. 27,652. 0. 1,643,903. 137,549.	(b) Net Invest- ment Income 0. 0. 27,652. 0. 1,643,903. 0.	(c) Adjusted	(d) Charitable Purposes 0. 0.

Form 990-PF	Tax	ces	S	tatement 7
Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Excise tax Tax on Foreign Dividends Unrelated Business Income	208,290. 50,052.			0.
Taxes	91,651.	0.		0.
To Form 990-PF, Pg 1, ln 18	349,993.	50,052.	-	0.
Form 990-PF	Other E	Expenses	s	tatement 8
Description	(a) Expenses Per Books		(c) Adjusted Net Income	(d) Charitable Purposes
Computer expense	50,266.			50,266.
Insurance	<u> 17,776.</u>			15_,998.
Office Supplies and Expense	10,771.			10,050
Dues and Memberships Postage and Shipping	9,163. 8,129.			9,163. 7,316.
Organizational Capacity	0,129.	013.		7,310
Building Initiative Expenses	492.	0.		492
To Form 990-PF, Pg 1, ln 23	96,597.	3,312.		93,285
Form 990-PF Depreciation of	f Assets Not	Held for Inv	estment S	tatement 9
Description Of		Accumulated Depreciation		Fair Market Value
Furniture & Fixtures	79,085.	75,213.	3,872.	3,872.
Software	12,620.	12,620.	0.	0.
Office Equipment	7,815.	7,815.	0.	0.
Laser Jet Printer	1,351.	1,351.	0.	0.
Copy Machine Eaton Battery Backup	20,295. 1,173.	20,295. 802.	0. 371.	371 371
-				
Foshiba Strategy Phone	8,623.	6,036.	2,587.	2,587
Poshiba Strategy Phone System CDW Color Printer	1,307.	412.	895.	895
Toshiba Strategy Phone System CDW Color Printer New Office Chairs	1,307. 4,152.	412. 1,245.	895. 2,907.	2,587. 895. 2,907.
Poshiba Strategy Phone System CDW Color Printer	1,307.	412.	895.	895

Retirement Research Founda	tion				36-2429540
HP DL380 G7 KMAT CTO SERVER SERVER INSTALLATION NETWORK VM WARE CISCO NETWORK UPGRADE BACKUP SW Computer Equipment To 990-PF, Part II, ln 14	15, 6, 5, 15,	624. 700. 130. 696. 931.	1,5		0. 14,130. 7. 5,517. 6. 5,126. 0. 0.
	21				
Form 990-PF U.S. and	State/C	ity Gov	vernment	Obligations	Statement 10
Description		U.S. Gov't	Other Gov't	Book Value	Fair Market Value
Mid-Continent Capital-ETF's		X		1,824,091.	1,824,091.
Total U.S. Government Obliga	tions			1,824,091.	1,824,091.
Total State and Municipal Go	vernmen	t Oblig	gations		
Total to Form 990-PF, Part I	I, line	10a		1,824,091.	1,824,091.
Form 990-PF	Cor	porate	Stock		Statement 11
Description				Book Value	Fair Market Value
Mid-Continent Capital-ETF's			,	6,545,075.	6,545,075.
Total to Form 990-PF, Part I	I, line	10b	:	6,545,075.	6,545,075.
Form 990-PF	Cor	porate	Bonds		Statement 12
Description				Book Value	Fair Market Value
Mid-Continent Capital-ETF's			•	1,110,894.	1,110,894.
Total to Form 990-PF, Part I	(, line	10c	•	1,110,894.	1,110,894.
			:		

Form 990-PF	Other	Investments		Stat	ement	13
Description		Valuation Method	Book Valu		marke Value)t
Global Endowment Fund II LP		FMV	109,108,1	31. 109	,108,1	.31.
Total to Form 990-PF, Part II,	line 1	.3	109,108,1	31. 109	,108,1	.31.
Form 990-PF Part VIII - L Trustees a		Officers, D		Stat	ement	14
Name and Address		Title and .vrg Hrs/Wk	Compen- sation	Employee Ben Plan Contrib	Expen	
Nathaniel McParland, MD c/o RRF 8765 W Higgins #430 Chicago, IL 606314170	Ch	airman/Trust 6.00	ee 34,000.	0.		0.
Edward J. Kelly c/o RRF 8765 W Higgins #430 Chicago, IL 606314170	Tr	ustee 4.00	14,000.	0.		0.
Sister Stella Louise Slomka c/o RRF 8765 W Higgins #430 Chicago, IL 606314170	Tr	ustee 3.00	21,500.	0.		0.
Marvin Meyerson c/o RRF 8765 W Higgins #430 Chicago, IL 606314170	Tr	ustee 6.00	26,000.	0.		0.
Ruth Ann Watkins c/o RRF 8765 W Higgins #430 Chicago, IL 606314170	Se	cretary/Trus 3.00	tee 21,500.	0.		0.
Richard J. Kissel c/o RRF 8765 W Higgins #430 Chicago, IL 606314170	Tr	ustee 3.00	21,500.	0.		0.
Irene Frye c/o RRF 8765 W Higgins #430 Chicago, IL 606314170	Ex	ecutive Dire	ctor 162,487.	24,373.		0.
Downey R. Varey c/o RRF 8765 W Higgins #430 Chicago II. 606314170	Tr	easurer/Trus 6.00	tee 23,000.	0.		0.

c/o RRF 8765 W Higgins #430 Chicago, IL 606314170

Retirement Research Foundation			36-	2429540
Thomas E. Chomicz c/o RRF 8765 W Higgins #430 Chicago, IL 606314170	Trustee 6.00	11,500.	0.	0.
Marilyn Hennessy c/o RRF 8765 W Higgins #430 Chicago, IL 606314170	Trustee 6.00	20,000.	0.	0.
Totals included on 990-PF, Page 6	, Part VIII	355,487.	24,373.	0.

Form 990-PF

Officers, Directors, Trustees and Foundation Managers Compensation Explanation Part VIII, Line 1

Statement 15

Person's Name

Downey R Varey Trustee

Compensation Explanation

Mr Varey's compensation as Trustee for the year ended 12/31/11 totaled \$23,000. Mr. Varey also is a partner in the accounting firm of Varey & Vaccariello CPAs PC, which the Foundation paid accounting, consulting and tax related fees totaling \$52,575 for the year ended 12/31/11. All of those services to the Foundation were provided by Mr. Varey, and he was compensated by the accounting firm for them.

16

Form 990-PF

Grant Application Submission Information Part XV, Lines 2a through 2d

Statement

Name and Address of Person to Whom Applications Should be Submitted

Irene Frye, Executive Director, Retirement Research Foundation 8765 W Higgins RD Ste 430 Chicago IL 606314022

Telephone Number

773-714-8080

Form and Content of Applications

See Attachment 1: General Program

See Attachment 2: Occupational Capacity Building Program

See Attachment 3: Accessible Faith Grant Program

Any Submission Deadlines

February 1, May 1, and August 1

Restrictions and Limitations on Awards

See Attachment 4: Program Application Packages

Form 990-PF	Ot	her Revenue		-	Statement 17
Description	Bus Code	Unrelated Business Inc	Excl Code	Excluded Amount	Related or Exempt Func- tion Income
Returned Grants Unrelated Business Taxable Income Net Ordinary and Other Portfolio Income and	523000	255,823.			34,200.
(Losses) from K-1			14 14	39,157.	
Total to Form 990-PF, Pg 12	, ln 11	255,823.	-	39,157.	34,200.

RETIREMENT RESEARCH FOUNDATION CHICAGO, ILLINOIS

FORM 990 PF DECEMBER 31, 2011 36-2429540

GENERAL PROGRAM ATTACHMENT 1 Part XV Page 10 Line 2b Page 1

(773) 714-8080

APPLY

ABOUT RRF GRANTS APPLY NEWS CONTACT US A SEARCH



Grants

Grants

OCB Program

Accessible Faith Program

Home > Grants & Programs > Grants

Grants

PURPOSE

Funding for RRF's general program of grantmaking is given to efforts that support the Foundation's funding interests

- 1. Improve the availability and quality of community-based and long-term services and supports
- 2 Provide new and expanded opportunities for older adults to engage in meaningful roles in society
- 3 Seek causes and solutions to significant problems of older adults
- 4 Increase the number of professionals and paraprofessionals adequately prepared to serve the elder population

Click here to get more detail about the Foundation's funding interests

Grantseekers should also review exceptions—projects that are not funded by RRF

ELIGIBILITY

Nonprofit organizations throughout the United States that focus on advocacy, research, or continuing education and training related to older adults. Direct service requests will be considered *only* from organizations in these seven states: Illinois, Indiana, Iowa, Kentucky, Missoun, Wisconsin and Florida

KEY CHARACTERISTICS

The Foundation gives priority to organizations that embody the following characteristics for success

Nonprofit best practices, such as strong leadership, responsible governance, fiscal responsibility and viability, and ongoing evaluation

Early planning and implementation of strategies to sustain projects for the future

True understanding of, and commitment to, person-centered care that promotes the dignity of older persons and their freedom to make life choices.

Implementation of proven models and approaches that address clearly identified needs and gaps. Use of clearly focused, collaborative efforts to address systemic problems.

Forging strategic partnerships with organizations in the field and funders to achieve better use of resources and sharing of knowledge

DEADLINES

Proposals are due February 1, May 1, and August 1 Decisions are usually made four months after each deadline

RELATED LINKS

Application Package

Case Studies

Mission

Funding Policies

@2011, The Retirement Research Foundation

Privacy Policy | Terms of Use | Site Map

RETIREMENT RESEARCH FOUNDATION CHICAGO, ILLINOIS FORM 990 PF DECEMBER 31, 2011 36-2429540

ORGANIZATIONAL CAPACITY BUILDING INITIATIVE
ATTACHMENT 2
Part XV Page 10 Line 2b
Page 1

(773) 714-8080

APPLY

ABOUT RRF	GRANTS	APPLY	NEWS	CONTACT US	АΑ	SEARCH	
-----------	--------	-------	------	------------	----	--------	--



Grants

Grants

OCB Program

Accessible Faith Program

Home > Grants & Programs > OCB Program

OCB Program

PURPOSE

The Organizational Capacity Building (OCB) Program supports metropolitan Chicago-area nonprofit organizations in making improvements in their governance, management, and organizational capacity RRF recognizes that as stronger organizations, these nonprofits can further enhance and sustain their services to older persons

Two types of funding are available to Chicago-area organizations through RRF's OCB Program

Standard OCB Grants are awarded to help organizations make long-term improvements in their management, governance, or organizational capacity

Flexible OCB Funds are available to help organizations set their capacity-building priorities or get short-term technical assistance to weather tough times

GRANT USE

OCB grants have funded such activities as

Planning (strategic, business, and financial plans) to steer an organization through changes Evaluations to develop outcome measurements and strengthen accountability to constituents and funding sources

Public relations, communications, and marketing to increase awareness and use of services

Financial management and resource development to improve financial systems, explore revenue options, and develop a stronger funding base

Human resources management for professional development, team building, and improving the working environment

Information systems management, including technology enhancements, to improve efficiency and accountability

Restructuring and building relations among organizations to strengthen service delivery, reduce costs, share resources, or achieve other benefits.

Board development including assessment, recruitment, training, and structuring to strengthen governance.

EXCLUSIONS

RRF does not provide funding for renovations or capital improvements, deficits, or one-time events that do not build long-term capacity, i.e., fundraising events or one-time conferences

Generally, organizations must have been in active operation for a minimum of three years and have annual revenue of at least \$75,000, excluding in-kind donations and services.

ELIGIBILITY

Applying organizations must

Be a nonprofit organization, but not a unit of government

Be located in Cook, DuPage, Kane, Kendall, Lake or McHenry County, Illinois

Provide services to elders.

Intentionally give a high priority to older persons

RELATED LINKS

Standard OCB Grant Application Package

Flexible OCB Funds Application Package

©2011, The Retirement Research Foundation

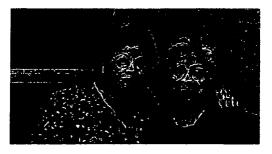
RETIREMENT RESEARCH FOUNDATION CHICAGO, ILLINOIS FORM 990 PF DECEMBER 31, 2011 36-2429540

ACCESSIBLE FAITH GRANT PROGRAM
ATTACHMENT 3
Part XV Page 10 Line 2b
Page 1

(773) 714-8080

APPLY

ABOUT RRF GRANTS APPLY NEWS CONTACT US A SEARCH	ABOUT RRF
---	-----------



Grants

Grants

OCB Program

Accessible Faith Program

Home > Grants & Programs > Accessible Faith Program

Accessible Faith Program

Accessible Pattil I Togran

PURPOSE

The Accessible Faith Program is designed to assist eligible Chicago-area houses of worship to improve physical access that will enable greater participation by older adults in the congregation's programs, services, and activities. Grants are awarded for up to 50 percent of a project's total cost, to a maximum amount of \$30,000.

The deadline for submission of your Application Package is June 1.

GRANT USE

Construction projects: Installing elevators, platform lifts, or inclined platform lifts, constructing permanent ramps; or renovating restrooms for accessibility in existing buildings. These projects generally require a building permit

Purchase and installation of accessibility-related equipment such as assistive listening systems, automatic door openers, etc.

EXCLUSIONS

Grants support stand-alone accessibility improvements, not projects that are part of major new construction or overall large-scale renovation. Grants cannot be used for

Chairlifts because they do not provide accessibility for all people who have difficulty climbing stairs. Used equipment because of the possible lack of required maintenance or warranty

The purchase of accessible vehicles or individual mobility aids, such as wheelchairs or walkers Projects that are already completed

ELIGIBILITY

The faith-based congregation must be

A nonprofit organization that owns the facility where improvements will be made Located in these six Illinois counties. Cook, DuPage, Kane, Kendall, Lake, and McHenry Counties. Offering programs beyond worship services that benefit older adults (age 65 or older). Able to demonstrate financial need as well as the ability to raise sufficient additional funds to complete the project.

RELATED LINKS

Application Package

©2011, The Retirement Research Foundation

Privacy Policy | Terms of Use | Site Map

RETIREMENT RESEARCH FOUNDATION CHICAGO, ILLINOIS FORM 990 PF DECEMBER 31, 2011 36-2429540

APPLICATION PROCEDURES
ATTACHMENT 4
Part XV Page 10 Line 2d
Pages 1 through 7

(773) 714-8080

ABOUT RRF GRANTS APPLY NEWS CONTACT US A SEARCH



Apply

Are You Eligible?

Important First Steps To Apply For A New Grant

Apply: Grants

Application Package

Case Studies

Apply: Standard OCB

Application Package

Case Studies

Apply: Flexible OCB Funds

Apply: Accessible Faith

Application Package

Case Studies

Resources

Evaluation Guidelines

Terms to Know

Home > Apply > Apply: Grants > Application Package

Application Package

Grant Application Procedures

Applications for Foundation Grants are normally considered three times a year **Deadlines for receipt of requests are February 1, May 1, and August 1. Submissions may be postmarked with the deadline date.** We acknowledge, by letter, receipt of all proposals within two weeks. If the date falls on a weekend, proposals postmarked the next business day will be accepted Decisions are usually made four months after each deadline

1 Cover Sheet

The cover sheet is the first required element of your application. It is now a form to be completed electronically, printed out, and included with your proposal. The cover sheet is intended to ensure that you include all information that may strengthen your case for support, and to help the Foundation systematically gather information it needs to assess your proposal. The form is available for download below.

2 Checklist

This form is for your internal use only and does not need to be submitted to the Foundation. It will ensure that you have included all the required components and necessary forms in your application packet. To download the checklist, click here.

Although the Retirement Research Foundation does not use a standard application form, proposals for funds should include the following elements, preferably in this order

1. Cover Sheet

To download the cover sheet, click here

Note: You may need the latest version of Adobe Reader to fill in the form.

To download Adobe Reader, click here.

2. Executive Summary

A separate two- to three-page executive summary that includes project goals, significance, proposed methods, and cost

3. Project Significance

The importance and relevance of the proposed project should be explained. Background information on the issue(s) to be addressed, existing knowledge and gaps, and the anticipated contribution of the project should be detailed.

4. Statement of Objectives

Specific measurable project objectives should be identified clearly, concisely, and completely. The anticipated outcomes and/or accomplishments should be defined.

5. Description of Methods

Proposals to the Foundation fall into four general categories — model projects and service, advocacy for system change, education and training, and research — and each should include the following specific elements

Models Projects and Service: description of program design, target audience(s), change(s) to be effected, resources and method of delivery, activity schedule, and timeline to meet objectives, and evaluation criteria and methods to evaluate project outcomes

Advocacy for System Change: description of strategies planned, list of partners and stakeholders to be organized, identification of decision-makers targeted, scheduling and coordination of activities, methods for outreach and dissemination, and the nature of evidence to be collected about impact.

Education and Training: target group description, educational needs to be met, content, methods, sequence, and location of educational expenence, and evaluation criteria and methods

Research: description of experimental design, procedures to accomplish objectives, sequence of the investigation, types of data to be obtained, the means by which it will be analyzed and interpreted, and

©2011, The Retirement Research Foundation

Privacy Policy | Terms of Use | Site Map

6. Dissemination

Describe plans for disseminating project outcomes and findings. The dissemination plan should be appropriate for both the type and scope of the proposed project. Describe projects to be disseminated and appropriate target audiences for each

7. Budget, Narrative, and Timetable

ethical issues regarding the use of human subjects.

A timetable and line item budget for the project should include both grant funds requested from The Retirement Research Foundation and funds available from other sources for the project Where project personnel are engaged in other projects, the percent of time in and compensation from other projects should be identified, and narrative should accompany the budget. The Foundation normally will not authorize computer purchases to conduct funded projects. The Foundation limits payment of overhead rates to a maximum of 10 percent of project costs.

8. Plans for Continued Support

If the project is expected to operate beyond the period for which grant funds are requested, describe plans for continued support

9. Personnel

Include resumes or curricula vitae (each not to exceed eight pages) for project director(s) and key personnel

10. Applicant Organization

Detail qualifications of applicant organization to implement project. Include a binef history, accomplishments, financial reports, and an annual report

11. Tax-Exempt Status

Provide evidence of tax exempt status under Section 501 (c)(3) of the Internal Revenue Code. Applicants must be designated as a public charity under section 509 (a)(1), 509 (a)(2), or 509 (a)(3). Organizations classified as a private foundation are not eligible for support

IMPORTANT INSTRUCTIONS REGARDING APPLICATION SUBMISSION:

- 1 Requests for funding must be signed by the chief executive officer of the applicant organization
- 2 An original and one copy of the proposal and attachments must be submitted (applicants for research funding should submit an original and two copies) Only one copy of the annual report and financials/audit are needed

(773) 714-8080

ABOUT RRF GRANTS APPLY NEWS CONTACT US A SEARCH



Apply

Are You Eligible?

Important First Steps To Apply For A New Grant

Apply: Grants

Application Package

Case Studies

Apply: Standard OCB

Application Package

Case Studies

Apply: Flexible OCB Funds

Apply: Accessible Faith

Application Package

Case Studies

Resources

Evaluation Guidelines

Terms to Know

Home > Apply > Apply: Standard OCB > Application Package

Application Package

This section contains the following information to assist you in applying for a standard OCB grant.

Proposal Evaluation Criteria
Application Instructions
Proposal Summary Instructions
Proposal Narrative Instructions
Requirements for Proposal Attachments
Cover Sheet

Proposal Evaluation Criteria

The Foundation will use the following criteria in evaluating proposals for standard OCB grants.

There is evidence that the organization provides credible services, is respected by its community, and intentionally gives a high priority to the elderly

The organization clearly identifies the management and/or governance area that an OCB grant would address and its effect on the agency's ability to serve the elderly more efficiently and effectively.

The anticipated outcomes of the OCB grant are clearly described and will positively change the organization and its services to the elderly.

The capacity building activities and time frame are logical and realistic

The organization outlines a reasonable plan to evaluate the outcomes of an OCB grant

The organization identifies team members from its management, staff, board, or others that are appropriate to the nature of the proposed organizational capacity building effort.

If the organization requests a coach, it identifies potential benefits and demonstrates a willingness to accept such guidance.

The proposed use of OCB funds is reasonable and realistically fits the scope of the project. The organization has sufficient financial stability to undertake and sustain the capacity building project.

Back to top

Application Instructions

Please follow these instructions in preparing a proposal for the OCB Program. Download and complete the cover sheet which is at the end of this information. Submit an original and one copy of the cover sheet, your summary, proposal, and attachments. Mail (no fax or e-mail) the application package to

Mary O'Donnell Program Officer The Retirement Research Foundation 8765 West Higgins Road – Suite 430 Chicago, Illinois 60631 (773) 714-8080

Back to top

Proposal Summary Instructions

Provide a one to two page, single-spaced summary in 12-point type

Back to top

Proposal Narrative Instructions

©2011, The Retirement Research Foundation

-Privacy Policy | Terms of Use | Site Map

Respond to these questions in the order listed here. Please number each response and do not skip any questions. Please number the pages.

1. Organization's Background

Describe your organization, the community, and senior population it serves. What services does your organization provide for the elderly? What evidence can you provide that your organization has intentionally designed services for the elderly and that older adults are a high priority for your organization?

Describe your board of directors, i.e., number of members and percentage over age 60, affiliations including business, community and other organizations, and total financial contribution from your board for last year

2. Description of Project Area

Describe the organizational capacity building area that you wish to address.

How does this area currently affect your organization and its ability to provide services for older adults?

If your organization has already taken some steps to address this area, describe them.

What efforts have been made to gain staff and board support for working on these areas and to prepare them for changes that may occur as a result?

3. Project Outcomes

What are the goals and/or outcomes that your organization expects as a result of this organizational capacity building effort? How will the outcomes change your organization?

How will the proposed organizational capacity building project impact the elders served by your organization?

4. Work Plan and Timetable

Describe the organizational capacity building activities that your organization will undertake over the course of the grant. Put the activities in priority order.

Provide a timetable for these activities.

5. Evaluation

How will your organization evaluate whether the outcomes have been achieved?

What quantifiable indicators will be used to provide evidence that the outcomes are achieved?

6. Capacity Building Team/Organizational Commitment

Generally, capacity building involves a working team of staff, board, and volunteers to ensure that changes will be long-term for the organization

Who will serve on your organization's project team and what responsibility will they assume? Who will lead the team?

What current and new staff will be needed for the project? If your organization plans to hire new staff, include a job description.

How will existing staff who are expected to be involved in capacity building handle these activities in addition to their current ones?

Note: If you do not plan to use a team, please justify your decision

7. Coaching Services

The services of a coach may be available during the course of your grant. For a description of the role a coach plays, **click here**. If your organization would be interested in a coach, please respond to the following questions:

Why do you think your organization would benefit from the services of a coach?

What are the particular needs that a coach could help address?

If you have concerns about working with a coach, please indicate them.

Note. If you are not interested in coaching services, please indicate so.

8. Budget Justification

OCB funds generally support consulting and training fees, hardware and software related to information management, and staff and other costs directly related to capacity building activities

Provide a line item budget for each year of funding

Provide a narrative justification, with an explanation and calculation of each line item on the budget.

Application Package | The Retirement Research Foundation

If the project costs more than the amount requested, indicate whether and how much your organization will contribute to the project and/or whether it is seeking funds from other sources. If the balance of funds is not received, indicate how the project will accomplish its objectives with fewer funds or how it will scale back but still accomplish something substantive with less funding.

If your organization is seeking other funds for this project, identify them and indicate the anticipated decision dates.

Back to top

9. Future Financial Support

If there are capacity building activities that will require funding to sustain them after the grant ends, indicate how your organization will continue to support them.

Back to top

Requirements for Proposal Attachments

Please attach the following items to the original and all copies

Your organization's current operating budget showing income and expenses.

A line item budget that shows how the organizational capacity building grant will be used (include an explanation of costs in the narrative section – see #8 above).

Most current audit (only one copy required) or financial statements if your organization does not have an audit (only one copy required).

Resume(s) of principal staff to be involved in the project

If consultant(s) for the project has been identified, include resume(s) and/or information on his/her experience.

IRS letter stating 501(c)3 designation.

Board list showing names and affiliations

Back to top

Cover Sheet

Complete the cover sheet (click here to download) and attach it to the summary of your proposal

Note If the project is a collaboration between or among other organizations, please provide the attachments required for all participating organizations

Back to top

THE RETIREMENT RESEARCH FOUNDATION

(773) 714-8080

ABOUT RRF

GRANTS

APPLY

CONTACT US

AΑ

SEARCH



Apply

Are You Eligible?

Important First Steps To Apply For A New Grant

Apply: Grants

Application Package

Case Studies

Apply: Standard OCB

Application Package

Case Studies

Apply: Flexible OCB Funds

Apply: Accessible Faith

Application Package

Case Studies

Resources

Evaluation Guidelines

Terms to Know

Home > Apply > Apply Flexible OCB Funds

NEWS

Apply: Flexible OCB Funds

RRF's new Flexible OCB Funds offer two forms of assistance to eligible nonprofits serving older adults in Chicagoland.

OCB Readiness Assessments: Enabling the nonprofit to engage an organizational consultant to help prioritize capacity-building opportunities and identify the best first step(s) toward improved organizational capacity

OCB Targeted Consultations: Helping nonprofits make use of technical assistance consultations for addressing short-term issues related to human resources, legal issues, budgeting, accounting, etc

CONTACT & APPLY

To apply for OCB funding for Readiness Assessments

Please review the information sheet and complete the There are no official deadlines, as these funds are accessed through a fast-tracked application process. Generally, funding decisions are made within four to six weeks

To apply for OCB funding for Targeted Consultations

Please review the information sheet and complete the

flexible application form

For more help and information, please contact

Mary O'Donnell, Program Officer

Phone (773) 714.8080

E-mail info@rrf.org

RELATED LINKS

About OCB Program

©2011, The Retirement Research Foundation

Privacy Policy | Terms of Use | Site Map

THE RETIREMENT RESEARCH FOUNDATION

(773) 714-8080

ABOUT RRF GRANTS APPLY NEWS CONTACT US A SEARCH



Apply

Are You Eligible?

Important First Steps To Apply For A New Grant

Apply: Grants

Application Package

Case Studies

Apply: Standard OCB

Application Package

Case Studies

Apply: Flexible OCB Funds

Apply: Accessible Faith

Application Package

Case Studies

Resources

Evaluation Guidelines

Terms to Know

Home > Apply > Apply: Accessible Faith > Application Package

Application Package

Application Form and Checklist Detailed Program Description

Completing Your Application

Past Accessible Faith Grants

One-Page Promotional Flyer

(Please feel free to download and make copies as needed)

Resources

- Download the application in either Word format, pdf format or call 773 714 8080 to request a copy by mail
- 2. The information in the application may be typed or printed. If printed, please use black or blue ink. If typed or prepared by computer, please use at least 10-point type.
- Provide one signed original and one copy of the application form as well as the original and one copy of attachments or supporting materials.
- 4 For construction projects, include one set of several "before" photos with the application. These should be printed photos, not photos on a CD or sent by email. Put your congregation's name and the current date on the back of each photo, as well as a description of what the photo represents.
- 5. Provide ventication of tax-exempt status by **one** of the following methods
 - A. Submit a copy of the congregation's 501(c)(3) determination by the IRS, or
 - B If your congregation is part of a larger denomination that is covered by a group ruling, submit a copy of the IRS group ruling letter and a copy of the page from the official directory showing that your congregation is a member
 - C. If your congregation is independent and not part of a larger denomination, a signed statement by the principal clergy attesting that your congregation meets the following requirements of the Internal Revenue Code applicable to churches, synagogues, mosques, temples, etc.

It is organized and operated exclusively for religious purposes,

Its net earnings will not inure to the benefit of any private individual or shareholder,

No substantial part of its activities will be used to influence legislation,

It will not intervene in political campaigns; and

Its purpose and activities will not be illegal or violate fundamental public policy

If you are unclear about this information, you may wish to refer to the IRS tax guide for Churches and Religious Organizations (See http://www.irs.gov/pub/irs-pdf/p1828.pdf for complete guide) or discuss this with officials from your denomination's central office. If you have questions about this, you may contact The Retirement Research Foundation.

- 6 Do not submit the application in a ring binder, folder, with pages in plastic sleeves, or any other binding or cover.
- Deliver or send the application and supporting materials to The Retirement Research Foundation ATTN Accessible Faith Grant Program 8765 W Higgins Rd Suite 430 Chicago, IL 60631
- 8. The application must be received or postmarked by June 1

©2011, The Retirement Research Foundation

Privacy Policy | Terms of Use | Site Map

RETIREMENT RESEARCH FOUNDATION CHICAGO, ILLINOIS FORM 990 PF DECEMBER 31, 2011 36-2429540

GRANTS PAID
ATTACHMENT A
PART XV
Page 11
DETAILS TO LINE 3a
Pages 1 through 8

Payee Name	Tax		
Payee Address	Status	Request Project Description	<u>Amount</u>
AcademyHealth			
1150 17th Street NW Suite 600		Six month count to an engage a college warm on large terms	
Washington, DC 20036	500(0)(1)	Six-month grant to sponsor a colloquium on long-term care	\$1,000
vvasnington, DC 20036	509(a)(1)	One-year grant to enable the Make Medicare Work	\$1,000
		Coalition to continue building the capacity of Illinois	i
AgeOptions, Inc		service providers to assist consumers with enrollment	
1048 West Lake Street, Suite 300		in Medicare and state programs, and to advocate for	
Oak Park, Illinois 60301-1102	509(a)(1)	needed system changes	\$58,480
	1000(4)(1)	One-year grant to enable the Make Medicare Work	
		Coalition to continue building the capacity of Illinois	f
AgeOptions, Inc	1	service providers to assist consumers with enrollment	
1048 West Lake Street, Suite 300	1	in Medicare and state programs, and to advocate for]
Oak Park, Illinois 60301-1102	509(a)(1)	needed system changes	\$58,481
Alivio Medical Center		Three year grant to decign and implement a chronic	
Alivio Medical Center 966 West 21st Street		Three-year grant to design and implement a chronic disease self-management program for seniors - 'Salud	
Chicago, Illinois 60608	509(a)(1)	a Cualquier Edad' Program - Health at Any Age	\$47,500
Cincago, initiois 60000	303(a)(1)	a Cualquier Euau Flogram - Health at Any Age	\$47,500
Alivio Medical Center		Three-year grant to design and implement a chronic	
966 West 21st Street		disease self-management program for seniors - 'Salud	
Chicago, Illinois 60608	509(a)(1)	a Cualquier Edad' Program - Health at Any Age.	\$47,500
Alliance for Aging Research	 ` ` ` ` ` ` ` ` ` ` ` ` ` ` ` ` ` ` `	 	
750 17th Street, NW	}	1	
Suite 1100			
Washington, DC 20006	509(a)(1)	One-year for 2011 Program Support	\$30,000
	1	I hirty-month grant to replicate a model of palliative care	
Alzheimer's Association		for people with advanced dementia in two skilled care	-
Greater Illinois Chapter	1	facilities and Rainbow Hospice in order to improve	· ·
8430 W Bryn Mawr, Ste. 800		quality of life based on comfort rather than traditional	_
Chicago, Illinois 60631	509(a)(1)	medical care	\$28,237
American Academy of Home Care			ì
Physicians	1	One-year grant to improve efficiency and effectiveness	
P. O Box 1037	E00(a)(1)	of home-based primary care practices serving frail lelders	624 700
Edgewood, Maryland 21040-0337 American Academy of Home Care	509(a)(1)	eideis	\$34,788
Physicians		One-year grant to improve efficiency and effectiveness	
P. O Box 1037	}	of home-based primary care practices serving frail	}
Edgewood, Maryland 21040-0337	509(a)(1)	elders	\$34,788
American Public Health Association	000(4)(1)	Ten-year grant (\$6,000 each year) for awards to six	
800 I Street, N.W.	1	students annually for research excellence in	
Washington, DC 20001-3710	509(a)(2)	gerontological health.	\$6,000
Antioch Missionary Baptist Church	1		
6248 S Stewart Avenue		Eighteen-month grant to renovate a restroom for	
Chicago, Illinois 60621	509(a)(1)	accessibility.	\$10,350
Aurora Family Service, Inc		One-year grant to refine and incorporate an aging-	
3200 West Highland Boulevard		focused curriculum at The Family Therapy Training	
Milwaukee, Wisconsın 53208	509(a)(2)	Institute, a post-graduate professional school.	\$49,524
Bethel New Life, Inc		One-year grant to provide services to older adults with	
4950 W. Thomas Street	1	physical, social, and/or mental impairments to help	
Chicago, Illinois 60651	509(a)(1)	them remain in community settings	\$20,000
Boca Raton Regional Hospital Foundation,			
nc Daniel Basel		One-year grant to provide quality care and improved	
745 Meadows Road	E00/=>/4>	patient outcomes for older adults in an emergency	605.000
Boca Raton, Florida 33486	509(a)(1)	room setting	\$25,000
Brown University		One-year grant for research on the prevalance and	
164 Angell Street, Box 1929	E00/5\/4\	impact of billing Medicare beneficiary stays as	840.000
Providence, Rhode Island 02912	509(a)(1)	outpatient observation.	\$40,000
Carter Temple Christian Methodist Episcopal Church			
7841 S Wabash Avenue	1	Eighteen-month grant to replace chairlifts with exterior	
Chicago, Illinois 60619	509(a)(1)	endosed platform lift.	\$30,000
Jinaaga, iiinlolo ooo ta	303(8)(1)	crisiooda piationni int.	\$30,000

Catholic Chantles of the Archdiocese of			
Chicago			
St Vincent Center	1	One-year grant to train home care aides and the	
721 North LaSalle Street	1	seniors they serve about proper nutrition and healthy	
Chicago, Illinois 60654-3503	509(a)(1)	meal preparation	\$41,139
Center for Medicare Advocacy, Inc		One-year continuation grant to train the National	
1025 Connecticut Avenue NW, Suite 709		Medicare Alliance and maintain an electronic,	
Washington, DC 20036	509(a)(1)	searchable database of Medicare appeals decisions.	\$30,000
Center for Medicare Advocacy, Inc	Ĭ.	One-year continuation grant to train the National	
1025 Connecticut Avenue NW, Suite 709	500(0)(1)	Medicare Alliance and maintain an electronic,	620.000
Washington, DC 20036	509(a)(1)	searchable database of Medicare appeals decisions	\$30,000
Center on Haisted	ì	One year grant for new HomeSharing Program, to match low-income older adult home-sharers with home-	
3656 North Halsted Street		seekers who pay low rent and do chores in exchange	
Chicago, Illinois 60613	509(a)(1)	for low-cost housing	\$30.000
Chicago Alliance to End Homelessness	309(a)(1)	Tor tow-cost riousing	\$30,000
651 West Washington Street, Suite 504		One-year grant for an initiative to improve conditions for	
Chicago, illinois 60661	509(a)(1)	homeless older persons	\$25,000
Chicago Cenacle Retreat and Conference	303(a)(1)	Homeless older persons	Ψ25,000
Center			
513 Fullerton Parkway	Ĭ	One-year grant to install a ramp and automatic doors to	ł
Chicago, Illinois 60614	509(a)(1)	improve access to the retreat center.	\$13,200
O'mongo, minioto occi i	1000(0)(1)	One-year grant to continue the work of Illinois Partners	- 470,200
Children's Home + Aid Society of Illinois	1	for Human Service to develop advocacy skills for	
125 S Wacker		nonprofit organizations in Illinois	
Chicago, Illinois 60606	509(a)(1)	, , , , , , , , , , , , , , , , , , , ,	\$12,500
	1 1 1 1	 	
		One year grant to implement a Mandarın-language	
Chinese American Service League, Inc		version of Healthy IDEAS to screen immigrant Chinese	
2141 South Tan Court	1	seniors for depression and help them learn to manage	
Chicago, Illinois 60616	509(a)(1)	their symptoms using behavioral activation	\$65,000
Coalition of Limited English Speaking			
Elderly			
53 W Jackson Boulevard, Suite 1301	1	One-year grant for a needs assessment and strategic	
Chicago, Illinois 60604-3702	509(a)(1)	planning	\$26,000
Council for Jewish Elderly		Three-year grant to adapt, implement, and evaluate an	
3003 West Touhy Avenue	1	aging in place service model for Orthodox Jewish	
Chicago, Illinois 60645	509(a)(1)	elderly	\$50,000
Council on Foundations	Ţ		
2121 Crystal Drive, Suite 700			
Arlıngton, Virginia 22202	509(a)(1)	One-year grant for 2011 program support	\$12,828
Counseling Center of Lake View			
3225 North Sheffield Avenue	5004.3403	Six-month grant flo assess, identify and prioritize areas	a c aaa
Chicago, Illinois 60657	509(a)(2)	for growth in organizational capacity building.	\$5,000
Counseling Center of Lake View		One-year grant for information technology	
3225 North Sheffield Avenue Chicago, Illinois 60657	500(a)(2)	enhancements and new staffing structures to increase	¢54 700
Donors Forum	509(a)(2)	billing efficiency	\$51,782
208 South LaSalle Street, Suite 1540			
Chicago, Illinois 60604	500(2)(1)	One-year grant for 2011 program support	\$6,170
DuPage Senior Citizens Council	509(a)(1)	One-year grant for 2011 program support	φυ, i / U
1919 South Highland Avenue	1		
Building A, Suite 210		One-year grant to build capacity for resource	
Lombard, Illinois 60148	509(a)(1)	development.	\$32,840
Epworth United Methodist Church	1000(0)(1)		402,070
37W040 Highland Avenue		Eighteen-month grant to renovate two restrooms for	
Elgin, Illinois 60123	509(a)(1)	accessibility and purchase assistive listening devices	\$19,812
	1		
Eskenazı Health Foundation		One-year grant to replicate a model program in which	
1001 W Tenth Street		trained Volunteers serve as limited guardians for	
Indianapolis, Indiana 46202	509(a)(3)	vulnerable, ill older adults with diminished capacity	\$47,274
	1		
Eskenazı Health Foundation		One-year grant to replicate a model program in which	
1001 W Tenth Street	1	trained Volunteers serve as limited guardians for	
Indianapolis, Indiana 46202	509(a)(3)	vulnerable, ill older adults with diminished capacity	\$47,273

Euclid Avenue United Methodist Church	T		
405 S Euclid Avenue		One-year grant to purchase and install multi-media	
Oak Park, Illinois 60302	509(a)(1)	projection screen	\$10,844
		One-year grant to continue to work with the State	
		Health Insurance and Assistance Programs to identify	
Families USA Foundation		and resolve systemic issues within the Medicare	
1201 New York Avenue, NW, Suite 1100	ŀ	Program as implementation of health reform legislation	
Washington, DC 20005	509(a)(1)	begins	\$50,000
First Baptist Church		Eighteen-month grant to install exterior enclosed LU/LA	
15 Oak Avenue		elevator to create accessible entrance and provide	
Aurora, Illinois 60506	509(a)(1)	vertical accessibility	\$30,000
	 	One-year grant to further develop and evaluate a	
Flonda Atlantic University		distance-learning curriculum for nursing home	
777 Glades Rd		professional staff to help reduce unnecessary transfer	
Boca Raton, Florida 33431-0991	509(a)(1)	of residents to acute care hospitals	\$62,500
Florida Atlantic University	+ ` ` ` ` `	One-year grant to design an evaluation method for	
777 Glades Rd		studying outcomes of a required interdisciplinary	
Boca Raton, Flonda 33431-0991	509(a)(1)	genatric team training curriculum	\$25,000
	- 000(0)(1)	genatio toain training carriodis	420,000
Franciscan Sisters of the Sacred Heart			
Office of Congregational Advancement			
9201 West Saint Francis Road		One-year grant to install an accessible entrance at a	
Frankfort, Illinois 60423-8335	509(a)(1)	residence for elderly women religious.	(\$1,586
Franciscan St. Margaret Health	1	1	
5454 Hohman Avenue		One-year grant to expand a volunteer program serving	
Hammond, Indiana 46320	509(a)(1)	incapacitated older adults.	\$30,000
Generations of Hope Development	+ '''	<u> </u>	
Corporation		One year grant supporting national conference on how	
609 West University Avenue		a Generations of Hope Community creates and	
Champaign, Illinois 61820	509(a)(1)	sustains older adults.	\$22,19°
Gerontological Society of America		Six-month grant to initiate a dialogue among Capitol Hill	
1220 L Street NW, Suite 901		staff and the broader legislative community about aging	
Washington, DC 20005	509(a)(1)	issues	\$10,000
Grantmakers in Aging	000(0)(1)	One year support of annual conference, 'Aging Power:	410,000
2001 Jefferson Davis Highway, Suite 504		Building on the Strengths of Individuals, Organizations,	
Arlington, Virginia 22202	509(a)(1)	and Communities '	\$10,000
Grantmakers in Health	303(4)(1)	and Communics	Ψ10,00t
1100 Connecticut Ave., N.W , Suite 1200	1		
Washington, DC 20036	509(a)(1)	One-year grant for 2011 program support.	\$12,000
Guild for the Blind	303(a)(1)	One-year grant for 2011 program support.	\$12,000
65 E. Wacker Place		One-year grant to teach seniors with vision loss how to	
Suite 1010	1	1 , 0	
	500(-)(1)	use their remaining senses for the safe movement from	645.00 6
Chicago, Illinois 60601	509(a)(1)	one place to another	\$15,000
HealthCare Chaplaincy, Inc	1	One-year grant supporting creation of training program	
315 East 62nd Street, 4th Floor		to prepare chaplains for national certification in	-
New York, New York 10065	509(a)(2)	palliative care	\$37,500
		Three-year grant to examine and understand the	
	1	processes and procedures of the Hospital Elder Life	
Hebrew SeniorLife (HSL)		Program (HELP), a model of care to prevent delirium in	
1200 Centre Street		hospitalized older adults, in order to develop guidelines	
Roslindale, Massachusetts 02131-1097	509(a)(1)	for replication in additional sites	\$36,83
Hospice Care Plus, Inc			
208 Kidd Drive		Six-month grant to support a hospice nurse practitioner	
Berea, Kentucky 40403	509(a)(1)	making home visits to older patients in rural Kentucky	\$30,000
Tousing Opportunities and Maintenance for	1		
he Elderly			
419 West Carroll Avenue, FL 2		One-year grant to create and implement a marketing	
Chicago, Illinois 60607-1149	509(a)(1)	plan	\$51,459
llinois Pioneer Coalition	1555(0)(1)	P	401,400
339 York Street		One-year grant to educate long-term care providers on	
Quincy, Illinois 62301	509(a)(2)	topics to advance person-centered care	\$50,300
ndependent Living Community Services,	303(a)(2)	topico to auvance person-centereu care	\$30,30t
nc.		One year grant to continue and expand the Matter of	
	1	One year grant to continue and expand the Matter of	
201 Rive Lagoon Dave #270		Ralance falls prevention program for 300 Miami Dada	
5201 Blue Lagoon Drive, #270 Miami, Florida 33126	509(a)(2)	Balance falls prevention program for 300 Miami-Dade English and Spanish-speaking seniors.	\$25,000

Korean American Community Services		One-year to expand ROCKS, a program that links low-	
4300 North California Avenue		income Korean American seniors to needed programs	
Chicago, Illinois 60618-1514	509(a)(2)	1	\$20,000
Lake County Sponsors	<u> </u>	Nine-month grant to promote community acceptance	
P O Box 726		and zoning approvals for an affordable, supportive	
Libertyville, Illinois 60048	509(a)(1)	senior housing.	\$30,000
Latino Alzheimers and Memory Disorders	 		
Alliance		One-year grant to provide culturally and linguistically	
222 N LaSalle Street, Suite 1450	-	competent support group services to caregivers of	
Chicago, Illinois 60601	509(a)(1)	Latinos with Alzheimer's disease.	\$10,000
Life Quality Institute, Inc	1	Sixteen-month grant to deliver palliative care education	- 475,000
501 S Cherry Street, #700	1	to healthcare and senior service professionals in rural	
Denver, Colorado 80246	509(a)(1)	Colorado	\$33,494
Lincoln Park Village, Inc	10000		400,101
2502 N Clark Street, #225	1	One-year to provide access to programs, services, and	
Chicago, Illinois 60614	509(a)(2)	activities for vulnerable elders with modest incomes.	\$16,500
- Integer miniote oper i	000(a)(2)	detivites for varietable elders wat modest incomes.	\$10,500
Little Company of Mary Hospital Foundation	.]		
2800 W 95th St	` i	One-year grant to support training and certification of	
Evergreen Park, Illinois 60805	509(a)(1)	staff members in hospice and palliative care.	\$9,600
Little Sisters of the Poor, St Joseph's	303(a)(1)	stan members in nospice and pamative care.	\$5,000
Home for the Elderly			
80 West Northwest Highway		One-year grant for life safety improvements at a long-	
Palatine, Illinois 60067	509(a)(1)	term care facility serving low income seniors	675.000
r aratire, illinois 60007	509(a)(1)		\$75,000
Loyola University Medical Center		Une-year grant to continue the development, implementation, and evaluation of an online educational	
2160 South First Avenue		1 '	
1	500/-1/41	program for nurse practitioners on palliative care for	242.27
Maywood, Illinois 60153	509(a)(1)	nursing home residents	\$46,073
Lyric Opera of Chicago		One-year grant support for senior matinee performance	1
20 North Wacker Drive, Suite 860	500/ 1/41	of Donietti's 'Lucia di Lammermoor'	
Chicago, Illinois 60606	509(a)(1)		\$10,000
Maple Park United Methodist Church	ŀ		
11705 South Elizabeth Street		Eighteen-month grant to renovate the church entrance	
Chicago, Illinois 60643	509(a)(1)	for accessibility.	(\$150)
Maple Park United Methodist Church	ļ		
11705 South Elizabeth Street	1	Eighteen-month grant to renovate the church entrance	
Chicago, Illinois 60643	509(a)(1)	for accessibility	(\$150)
Maplewood Housing for the Visually			
Impaired dba Friedman Place			
5527 North Maplewood Avenue	1	One year grant to develop and implement program	
Chicago, Illinois 60625	509(a)(2)	evaluation strategies	\$27,500
Memorial Medical Center			
701 North 1st Street		One-year grant to provide delinum education for	
Springfield, Illinois 62781-0001	509(a)(1)	inpatient nursing staff	\$15,079
Mental Health Association of New York City,			
Inc	1	One-year grant to provide technical assistance to	
50 Broadway, 19th Floor		multiple states working toward effective advocacy for	
New York, New York 10004	509(a)(1)	genatric mental health services	\$37,500
Mercy Housing Lakefront			
120 South LaSalle, Suite 1850		One-year grant to support care coordinators in two new	i
Chicago, Illinois 60603	509(a)(1)	independent affordable senior living sites	\$30,000
Moultrie County Counseling Center			
12 West Harrison Street		One-year grant to launch IMPACT, an evidence-based	
PO Box 163		integrated behavioral health care model for treating	
Sullivan, Illinois 61951	509(a)(1)	depression in a rural primary care setting	\$55,658
Mount Sinai School of Medicine	. ,, ,		—— —
One Gustave L. Levy Place			ľ
Box 1075		Two-year grant for a study on the cost-effectiveness of	j
New York, New York 10029-6594	509(a)(1)	home-based medical care for homebound older adults.	\$78,658
Mount Sinai School of Medicine	(-)(-)	The state of the s	
One Gustave L. Levy Place			į
Box 1075		Two-year grant for a study on the cost-effectiveness of	l
New York, New York 10029-6594	509(a)(1)	home-based medical care for homebound older adults	\$70 650
National Able Network	203(d)(1)	nome-based medical care for nomebound order adults	\$78,658
567 W. Lake Street, Suite 1150		One year grant to expand ample most and sourceling	
Chicago, Illinois 60661-1405	500/5)/4)	One-year grant to expand employment and counseling	£27.27c
omeago, minois occo 1-1400	509(a)(1)	services to low-income seniors.	\$27,275

National Academy of Social Insurance 1776 Massachusetts Avenue, NW - Suite		One year grant to support internships training young	
400	E00/->//	professionals in long-term care services and supports	605.000
Washington, DC 20036-1904 National Academy of Social Insurance	509(a)(1)	in aging policy and research	\$25,000
1776 Massachusetts Avenue, NW - Suite	1	One year grant to support internships training young	
400		professionals in long-term care services and supports	
Washington, DC 20036-1904	509(a)(1)	in aging policy and research.	\$25,000
National Center for State Courts	1000(0)(1)	Two-year continuing grant providing resources on aging	
300 Newport Avenue		issues, elder abuse, and guardianship to state judges	
Williamsburg, Virginia 23185-4147	509(a)(1)	and court personnel	\$59,849
National Committee for Responsive	ļ		
Philanthropy (NCRP)			
1331 H Street, N.W , Suite 200			
Washington, DC 20005	509(a)(2)	One-year grant for 2011 program support	\$15,000
i		Three-year grant to facilitate and accelerate the large-	
		scale replication of two effective evidence-based	1
		programs for older adults (one on fall prevention and	
National Council on Aging, Inc		one to treat depression) and to evaluate an innovative	
1901 L Street, N.W , 4th Floor		tool for helping agencies assess their readiness for and	
Washington, DC 20036	509(a)(2)	ability to implement new programs	\$40,549
	 - : / : /		
		Three-year special initiative to enhance the	
I		development of a new comprehensive model of	
National Council on Aging, Inc		assisting older adults to become more economically	
1901 L Street, N W., 4th Floor		secure by creating, testing, and evaluating new	
Washington, DC 20036	509(a)(2)	technology tools for service providers and consumers	\$75,007
National Hospice and Palliative Care			
Organization, Inc.		One-year support of national effort advocating that	
1731 King Street, Suite 100 Alexandria, Virginia 22314	509(a)(1)	Americans complete advance directives before a health crisis occurs	\$5,000
National Public Radio	509(a)(1)	One-year grant to educate national audience about	\$5,000
635 Massachusetts Avenue, N W.		economic security issues affecting American older]
Washington, DC 20001-3753	509(a)(1)	adults	\$25,000
Northern Illinois Food Bank			
273 Dearborn Court		One-year grant for program expansion to deliver	
Geneva, Illinois 60134	509(a)(1)	nutritious food to vulnerable seniors.	\$40,000
Northwest Side Housing Center			
5007 W Addison Street	1	One-year grant to develop and implement a strategic	
Chicago, Illinois 60641	509(a)(1)	plan	\$20,000
Notre Dame de Chicago Church	1		
1335 West Harrison Street	500(-)(4)	Eighteen-month grant to construct a three-stop elevator	****
Chicago, Illinois 60607 Oak Lawn Bible Church	509(a)(1)	addition.	\$30,000
9435 S 54th Avenue		Eighteen-month grant to replace obsolete vertical	
Oak Lawn, Illinois 60453	509(a)(1)	platform lift	\$27,149
Oakdale Covenant Church	000(4)(1)	pationint	421,140
9440 S Vincennes Avenue	ŀ		
Chicago, Illinois 60620	509(a)(1)	Eighteen-month grant to replace obsolete platform lift.	\$19,100
	1,		
Older Women's League			
1025 Connecticut Avenue, N.W., Suite 701		One -year grant for a public advocacy campaign to	
Washington, District of Columbia 20036	509(a)(1)	raise awareness of older women's employement needs	\$27,000
Orogon Hoolth & Colones Hawarite		Inree-year special initiative to advance end-of-life care	
Oregon Health & Science University Foundation		by catalyzing the spread of POLST (Physician Orders	
1121 SW Salmon Street, Suite 100		for Life sustaining Treatment) across the United States	
Portland, Oregon 97205	500(5)(1)	through small grants, technical assistance and national program office support.	\$110,000
Our Lady of Peace Church	509(a)(1)	program office support.	
7851 South Jeffery Boulevard		One-year grant to install automatic entrance door and	
Chicago, Illinois 60649	509(a)(1)	repair broken sidewalk	\$6,000
Our Lady of Sorrows Basilica Parish			+5,530
3121 W. Jackson Boulevard		Eighteen-month grant to renovate restrooms for	
Chicago, Illinois 60612	509(a)(1)	accessibility	\$19,700
	,	<u> </u>	

Our Lady of the Snows Parish	7		
4810 S Leamington Avenue		One-year grant to update sound and assistive listening	
Chicago, Illinois 60638	509(a)(1)		\$7,334
	1	One-year grant to continue building the capacity of the	
Partners for Sacred Places	ĺ	Chicago regional office to assist local religious	
1700 Sansom Street, Tenth Floor		congregations sustain their buildings and improve their	
Philadelphia, Pennsylvania 19103	509(a)(1)	programs	\$30,000
PEER Services, Inc.		One-year continuing support for a multi-pronged effort	
906 Davis Street		to increase older adults' access to evidence-based	
Evanston, Illinois 60201	509(a)(1)	substance abuse treatment	\$38,500
PeopleCare, Inc			
60 Akenside Road			
Riverside, Illinois 60546	509(a)(1)	Five-month grant resource development consultation.	\$5,000
333 North LaGrange Road		One was great to replicate DEADLC a model assured	
Suite One		One-year grant to replicate PEARLS, a model program	
LaGrange Park, Illinois 60526	500(0)(2)	designed to reduce depressive symptoms among older adults	¢07 500
Planning for Elders in the Central City	509(a)(2)	Three-year grant for education and advocacy to	\$27,500
965 Mission Street, Suite 550		promote safer hospital-to-home transitions for older	
San Francisco, California 94103	509(a)(1)	adults	¢25.052
Praine State Legal Services, Inc.	- Joseph (1)	addito	\$35,052
303 North Main Street, Suite 600		One-year grant to develop a telephone hotline for older	i
Rockford, Illinois 61101	509(a)(1)	adults to improve their access to legal services	\$32,000
	(4)(1)	Six-month grant to train seniors about Social Security,	402,000
		Medicare, and Medicaid programs, build a base of	
Public Action Foundation		activists in Chicago and central Illinois, and develop	
27 E Monroe - Suite 1100		leadership among Illinois Alliance for Retired	
Chicago, Illinois 60603	509(a)(1)	Americans	\$22,150
Paraharu Haarina and Balkatura Cara		Trirec year grant to band capacity or roar naroling	
Rainbow Hospice and Palliative Care 1550 Bishop Court	1	homes for persons with advanced dementia, and	
Park Ridge, Illinois 60056	E00(a)(4)	develop a self-sustaining, specialized dementia care	640.005
Reba Place Church	509(a)(1)	program	\$48,005
535 Custer Avenue		Six-month grant to assess, identify and prioritize areas	
Evanston, Illinois 60202	509(a)(1)	for growth in organizational capacity building	\$3,000
RefugeeONE	303(a)(1)	Tot grown in organizational capacity building	\$5,000
4753 North Broadway		Three-year grant to develop services for two new	
Suite 401		immigrant populations of senior refugees and add a	
Chicago, Illinois 60640	509(a)(1)	mentoring component to the program.	\$50,000
Rehabilitation Institute of Chicago	 	Three-year grant for on-line database to assist	V
345 East Supenor Street		rehabilitation clinicians working with older adult	
Chicago, Illinois 60611	509(a)(1)	patients	\$49,316
	1		
Research Triangle Institute		Two-year grant for research using new data from the	
3040 Cornwallis Road	1	National Assistant Survey to examine 1) the link	
PO Box 12194		between workforce variables and patient care	
Research Triangle Park, North Carolina		outcomes, and 2) characteristics of the immigrant	
27709-2194	509(a)(3)	workforce in institutional long-term care (LTC) settings	(\$26,468)
Rush University Medical Center		Two-year grant to address older adult substance abuse	
1653 West Congress Parkway	1	and medication misuse with an intervention and	
Chicago, Illinois 60612-3833	509(a)(1)	education protocol	\$45,774
Ruth Rales Jewish Family Service of South			
Palm Beach County, Inc			
21300 Ruth & Baron Coleman Boulevard	1	One-year grant for continued support of a transportation	_
Boca Raton, Flonda 33428-1757	509(a)(1)	program that fosters independent living among seniors.	\$16,643
Saint John's Healing Community Board			
222 Goethe Avenue	505/	Six-month grant to determine feasibility of opening an	
Collinsville, Illinois 62234-3306	509(a)(1)	adult day service center in southwestern Illinois.	\$19,004
Saint Joseph Church		Eighteen-month grant to replace obsolete chairlitt with	
10519 Main Street	E00/=\/4\	new vertical platform lift and restripe parking lot to meet	800.000
Richmond, Illinois 60071	509(a)(1)	accessibility requirements	\$26,362
Saint Joseph's Hospital Inc 3001 W Dr Martin Luther King Jr.			
Boulevard		One-year grant for a volunteer program providing	
Tampa, Flonda 33607	500(5)(1)	One-year grant for a volunteer program providing companionship for unfriended people near death	635 500
rampa, rionaa 33007	509(a)(1)	companionship for unificitied people fleat death	\$25,500

New York, New York 10003	509(a)(1)	One-year grant for 2011 program support	\$12,000
79 Fifth Avenue, 4th FI			
The Foundation Center	333(4)(1)		720,200
Chicago, Illinois 60643	509(a)(1)	adults.	\$28,200
9848 South Winchester Avenue	1	and Spanish websites for family caregivers of older	
Terra Nova Films, Inc	509(a)(1)	One-grant to expand and enhance videos on English	φ+υ,υυυ
5145 North California Avenue Chicago, Illinois 60625	500(2)(1)	monitoring program for congestive heart failure patients	\$40,000
Swedish Covenant Hospital		One -year support to expand a home telehealth	
Highland Park, Illinois 60035	509(a)(1)	community-based elderly	\$6,200
2789 Oak Street	500/ 1/4:	older adult care recipients in a program serving	60.000
Volunteers		One-year grant to increase number of volunteers and	
Southeast Lake County Faith in Action			
Milwaukee, Wisconsin 53212	509(a)(1)	into benefits programs.	\$25,000
4041 N Richards St.		One-year grant to educate, screen, and enroll seniors	
Social Development Foundation, Inc.			
Chicago, Illinois 60616	509(a)(1)	restrooms	\$11,698
600 East 35th Street		Eighteen-month grant to construct two new accessible	
Sixth Grace Presbyterian Church			
Des Plaines, Illinois 60016	509(a)(1)	elderly residents with vision loss	\$2,395
310 North River Road		One-year grant to purchase a adaptive equipment for	
Sisters of the Holy Family of Nazareth	JUS(a)(1)	inting continuity, serving women religious	Ψ20,000
585 County Road Z Sinsinawa, Wisconsin 53824-9700	509(a)(1)	Six-month grant to purchase equipment for an assisted living community, serving women religious	\$26,085
Sinsinawa Dominicans		City month group to purchase accurate for an acciety	
Carterville, Illinois 62918	509(a)(1)	return home successfully after a hospital stay.	\$48,018
109 California St.		model in a rural area, designed to enable frail elders to	
Corp		One year grant to test a social work transitional care	
Shawnee Health Service & Development			
Jacksonville, Florida 32207	509(a)(1)	provide sense of purpose to older adults who live alone	\$40,200
2050 Art Museum Drive, Suite 102		One-year grant supporting volunteer opportunities that	
Seniors on a Mission, Inc	1	· · · · · · · · · · · · · · · · · · ·	
Elgin, Illinois 60120	509(a)(1)	volunteer program serving isolated seniors.	\$22,473
101 South Grove Avenue	1	One-year grant to expand a senior companion and	
Senior Services Associates, Inc	(-/(1/	G	
Chicago, Illinois 60611	509(a)(1)	for growth in organizational capacity building.	\$3,000
875 N. Michigan Avenue, Suite 3100		Six-month grant to assess, identify, and prioritize areas	
c/o Regus Offices			
Senior Aid			ΨZ1,000
Chicago, Illinois 60630	509(a)(1)	adults.	\$27,000
5040 North Pulaski		designed to reduce depressive symptoms among older	
Salvation Army	509(a)(1)	entrance One-year grant to replicate PEARLS, a model program	\$30,000
1004 Greenwood Street Evanston, Illinois 60201	500(0)(4)	Eighteen-month grant to construct ramp at main	630 000
Saint Paul's Lutheran Church of Evanston			
	1	· · · · · · · · · · · · · · · · · · ·	
West Chicago, Illinois 60185	509(a)(1)	program for low-income, Hispanic elders	\$12,870
140 N. Oakwood Avenue		One-year support for start-up of a Parish Nurse	
Saint Mary's Parish	(-/(-/		,32,230
Chicago Heights, Illinois 60411	509(a)(1)	accessible	(\$3,003
312 Chicago Road		parking lot and replace it with one that is safe and	
Saint Mark United Church of Christ	509(a)(1)	Eighteen-month grant to remove the existing hazardous	\$23,36
1048 N. Campbell Avenue Chicago, Illinois 60622	509(a)(1)	Eighteen-month grant to construct walkway, entrance ramp, and entrance door for accessibility	\$23,383
Saint Mark Parish		Fighteen month great to construct well-very actions	
St Louis, Missouri 63103	509(a)(1)	services	\$26,939
221 N. Grand Boulevard		curriculum on mobility counseling for providers of aging	
		One-year grant to develop and deliver a training	

The University of Georgia Research	1		
Foundation, Inc		Three-year grant to complete a longitudinal	
617 Boyd Graduate Studies Research		implementation evaluation of the ElderSpint	
Center	1	community, the first elder co-housing experiment in the	
Athens, Georgia 30602-7411	509(a)(1)	country.	(\$2,365)
Thresholds		Fourteen-month grant to continue research on an	
4101 N Ravenswood Avenue	1	integrated mental/physical health care intervention for	
Chicago, Illinois 60613	509(a)(1)	older adults with severe and persistent mental illness.	\$53,445
Touchette Regional Hospitals, Inc	1555(2)(1)	l l	*********
5900 Bond Avenue	1	One-year grant to connect low-income seniors in East	
Centreville, Illinois 62207	509(a)(1)	St Louis with benefits and resources	\$40,000
Treasure Coast Hospice			*********
1201 S E Indian Street		One-year continuation grant to expand a palliative care	
Stuart, Flonda 34997	509(a)(1)	program in area nursing homes.	\$50,000
United Community Center, Inc	111(1)(1)	Two-year grant to coordinate health and social services	
1028 South 9th Street		at a new medical center serving low-income elderly	
Milwaukee, Wisconsin 53204	509(a)(1)	Latinos	\$25,000
		One-year grant to study the quality of care for	
		vulnerable community-dwelling elderly who transition	
University of California, Los Angeles		directly from receiving care in the hospital emergency	
Los Angeles, California 90095-1406	509(a)(1)	department to their homes.	\$63,775
•		Eighteen-month grant for the first national, longitudinal	,
University of Maryland, Baltimore		study of health and cost consequences of inappropriate	
620 West Lexington Street		use of psychopharmacological medications for nursing	
Baltimore, Maryland 21201	509(a)(1)	home residents	\$98,697
	1		
University of Minnesota		Eighteen-month grant to classify different models of	
Office of Sponsored Projects Administration		existing small house nursing homes to determine the	
450 McNamara Alumni Center		most successful way to operate these homes and learn	
200 Oak Street S E		to configure residential long-term care facilities to	
Minneapolis, Minnesota 55455-2070	509(a)(1)	provide the best care for its residents	\$50,000
University of Minnesota	ł	Eighteen-month grant to classify different models of	
Office of Sponsored Projects Administration		existing small house nursing homes to determine the	
450 McNamara Alumni Center		most successful way to operate these homes and learn	
200 Oak Street S E.		to configure residential long-term care facilities to	240 700
Minneapolis, Minnesota 55455-2070	509(a)(1)	provide the best care for its residents	\$49,793
University of South Florida		Fighter as weath asset to test feasibility of a westel	
Division of Sponsored Research		Eighteen-month grant to test feasibility of a model,	
3650 Spectrum Boulevard, Suite 160	500/ \//	faith-based collaborative addressing depression in low-	****
Tampa, Florida 33612	509(a)(1)	income African -American elders.	\$50,000
University of Washington		One wear grant for webinary and technical assistance	
Office of Research		One-year grant for webinars and technical assistance	
Office of Sponsored Programs		to enable service providers to implement one of three	
1100 NE 45th Street, Suite 300		evidence-based programs for identifying and treating	/@470\
Seattle, Washington 98105 Wayne State University		depression among elders	(\$478)
Office of Research and Sponsored			
Programs		Two-year grant for a randomized controlled trial of a	
656 West Kirby		project to bring continuing education on mental health	
Detroit, Michigan 48202	509(a)(1)	and aging to occupational therapists	\$31,911
vvayne State University	JUB(d)(1)	and aging to occupational incrapists	φυ1,σ11
Office of Research and Sponsored			
Programs		Two-year grant for a randomized controlled trial of a	
656 West Kirby		project to bring continuing education on mental health	
Detroit, Michigan 48202	509(a)(1)	and aging to occupational therapists	\$72,363
		-3-3	7,
	 	Total	\$4,163,828
		Add Back Returned Grants included above	\$34,200

RETIREMENT RESEARCH FOUNDATION CHICAGO, ILLINOIS FORM 990 PF DECEMBER 31, 2011 36-2429540

MATCHING GIFTS
ATTACHMENT B
Part XV Page 11
Details to Line 3a
Pages 1 through 3

36-2429540 FORM 990PF PART XV LINE 3b MATCHING GIFTS PROGRAM RETIREMENT RESEARCH FOUNDATION CHICAGO, IL FOR THE YEAR ENDED 12-31-2011

Name	Address	Tax Status	Amount
Services for Adults Staying inTheir Homes	(SASI) 1123 Emerson, #200 Evanston, IL 60201	509(a)(1)	\$750
St John Brebeuf Catholic Church	8307 N. Harlem Avenue Niles, IL 60714	509(a)(1)	\$30,000
Services for Adults Staying inTheir Homes	(SASI) 1123 Emerson, #200 Evanston, IL 60201	509(a)(1)	\$750
St Jude Children's Research Hospital	Workplace Giving-ALSAC 501 St Jude Place Memphis, TN 38105	509(a)(1)	\$300
St Stephen Protomartyr	1267 E. Everett Avenue Des Plaines, IL 60018	509(a)(1)	\$300
Lake Forest Lake Bluff Sr. Citizens Fdn	100 E. Old Mill Road Lake Forest, IL 60045	509(a)(1)	\$600
Shore Community Services, Inc	4232 Dempster Street Skokie, IL 60076	509(a)(1)	\$225
American Occupational Therapy Found	4720 Montgomery Lane P O. Box 31220 Bethesda, MD 20814-1220	509(a)(1)	\$1,050
Generations Incorporated	25 Kingston St , 4th Floor Boston, MA 02111	509(a)(1)	\$1,500
Chicago Symphony Orchestra	220 S Michigan Ave Chicago, IL 60604	509(a)(1)	\$300
Evanston Community Foundation, Inc	1007 Church St , #108 Evanston, IL 60201	509(a)(1)	\$675
St Mark the Evangelist	7117 14th Avenue Kenosha, WI 53143	509(a)(1)	\$300
Wayland Academy	101 N. University Avenue Beaver Dam, WI 53916	509(a)(1)	\$600
St Luke's Episcopal Church	939 Hinman Avenue Evanston, IL 60202	509(a)(1)	\$3,000
Rehabilitation Institute of Chicago	345 E Superior Street Chicago, IL 60611	509(a)(1)	\$300
Dystonia Medical Research Foundation	One East Wacker Dr , Ste 2810 Chicago, IL 60601	509(a)(1)	\$750
Waterwell Productions, Inc.	515 W 46th St , 2nd Floor New York, NY 10036	509(a)(1)	\$600
Seniors Action Service, Inc (SASI)	Services for Adults Staying in their Home 1123 Emerson Street, Ste 200	509(a)(1)	\$750
Bonnet House, Inc	900 N Birch Rd Ft Lauderdale, FL 33304	509(a)(1)	\$900
St Luke's Episcopal Church	939 Hınman Avenue Evanston, IL 60202	509(a)(1)	\$3,000
Little Brothers-Friends of the Elderly	355 N Ashland Avenue Chicago, IL 60607	509(a)(1)	\$1,500
Our Saviour's Lutheran Church	1234 N Arlington Hts Rd Arlington Hts., IL 60004	509(a)(1)	\$6,000
Pillars Community Services	333 N LaGrange Rd., Suite One LaGrange Park, IL 60526	509(a)(1)	\$4,500
St Luke's Episcopal Church	939 Hinman Avenue Evanston, IL 60202	509(a)(1)	\$3,000
NCCNHR	National Consumer Voice for Quality Long-Term Care 1001 Connecticut	509(a)(1)	\$150
Catholic Bishop of Chicago	835 N Rush Street Chicago, IL 60611	509(a)(1)	\$4,500
Wildflowers Institute	1144 Pacific Avenue San Francisco, CA 94133-4212	509(a)(1)	\$1,500
St Scholastica Academy	7416 N Ridge Blvd. Chicago, IL 60645	509(a)(1)	\$1,500
Globalgiving Foundation Inc.	1023 15th St. NW, Suite 1200 Washington, DC 20005	509(a)(1)	\$300
Generations Incorporated	25 Kingston St , 4th Floor Boston, MA 02111	509(a)(1)	\$3,000
Center of Concern	1580 N Northwest Hwy , Ste 310 Park Ridge, IL 60068-1462	509(a)(1)	\$150
LifePath Hospice, Inc	12973 Telecom Pkwy., Ste. 100 Temple Terrace, FL 33637	509(a)(1)	\$300
Lincoln Park Village, Inc	2502 N. Clark Street Chicago, IL 60614	509(a)(1)	\$4,500
MayaWorks, Inc	1732 W Hubbard St., Suite 1A Chicago, IL 60622	509(a)(1)	\$375
Archdiocese of Miami Inc.	9401 Biscayne Blvd Miami Shores, FL 33138	509(a)(1)	\$600
Access Living of Metropolitan Chicago	115 W. Chicago Avenue Chicago, IL 60654	509(a)(1)	\$2,100
Sisters of the Holy Family of Nazareth	310 N River Road Des Plaines, IL 60016	509(a)(1)	\$1,050
Play for P.I N.K , Inc.	175 E. 74th St , Suite 17B New York, NY 10021-3213	509(a)(1)	\$150
The Humane Society of the United States	2100 L Street NW Washington, DC 20037	509(a)(1)	\$600
Center for Tax and Budget Accountability	70 E. Lake Street, Suite 1700 Chicago, IL 60601	509(a)(1)	\$375
St Luke's Episcopal Church	939 Hınman Avenue Evanston, IL 60202	509(a)(1)	\$3,000
Little Brothers-Friends of the Elderly	355 N Ashland Avenue Chicago, IL 60607	509(a)(1)	\$900
St Luke's Episcopal Church	939 Hınman Avenue Evanston, IL 60202	509(a)(1)	\$3,000
City at Peace - National	The Possibility Project 104 W. 27th Street, 12th Floor New York, NY 100	509(a)(1)	\$6,000

Access Living of Metropolitan Chicago	115 W Chicago Avenue Chicago, IL 60654	509(a)(1)	\$1,800
Eastern Michigan University Foundation	P. O Box 972057 Ypsilanti, MI 48197	509(a)(1)	\$150
Family Matters, Inc	7731 N. Marshfield Ave. Chicago, IL 60626	509(a)(1)	\$150
St. Luke's Episcopal Church	939 Hinman Avenue Evanston, IL 60202	509(a)(1)	\$3,000
Aging Care Connections	111 W Harris Ave. LaGrange, IL 60525	509(a)(1)	\$2,250
Seniors Action Service, Inc (SASI)	Services for Adults Staying in their Home 1123 Emerson Street, Ste 200		\$750
Catholic Charities of Chicago	721 N LaSalle Street Chicago, IL 60654-3503	509(a)(1)	\$3,000
St. Mark the Evangelist	7117 14th Avenue Kenosha, WI 53143	509(a)(1)	\$300
Chicago Public Library Foundation	20 N Michigan Ave -Suite 520 Chicago, IL 60602	509(a)(1)	\$1,500
University of Notre Dame du Lac	731 Grace Hall Notre Dame, IN 46556	509(a)(1)	\$9,000
Rev John P Smyth Standing Tall Fdn	Charitable Foundation 1100 N River Road Des Plaines, IL 60016	509(a)(1)	\$300
St Luke's Episcopal Church	939 Hinman Avenue Evanston, IL 60202	509(a)(1)	\$3,000
Lincoln Park Village, Inc	2502 N Clark Street Chicago, IL 60614	509(a)(1)	\$750
Lake Forest Lake Bluff Sr Citizens Fdn.	100 E Old Mill Road Lake Forest, IL 60045	509(a)(1)	\$600
St Raymond de Penafort Church	301 S I-Oka Mt Prospect, IL 60056	509(a)(1)	\$12,000
Seniors Action Service, Inc.(SASI)	Services for Adults Staying in their Home 1123 Emerson Street, Ste 200		\$750
Lincoln Park Zoological Society	2001 N Clark Street Chicago, IL 60614	509(a)(1)	\$150
Benedictine Sisters of Chicago	St Scholastica Monastery 7430 N Ridge Blvd Chicago, IL 60645-1913		\$450
Aging Care Connections	111 W Harris Ave LaGrange, IL 60525	509(a)(1)	\$375
St Luke's Episcopal Church	939 Hinman Avenue Evanston, IL 60202	509(a)(1)	\$3,000
Muscular Dystrophy Association-Chicago	520 W Ene St , #200 Chicago, IL 60654	509(a)(1)	\$150
Art Institute of Chicago	111 S Michigan Avenue Chicago, IL 60603	509(a)(1)	\$600
Housing Opportunities & Maintenance	for the Elderly 1419 W Carroll Avenue, FL 2 Chicago, IL 60607-1149	509(a)(1)	\$750
Housing Opportunities & Maintenance	for the Elderly 1419 W Carroll Avenue, FL 2 Chicago, IL 60607-1149	509(a)(1)	\$1,500
Seniors Action Service, Inc (SASI)	Services for Adults Staying in their Home 1123 Emerson Street, Ste 200		\$300
American Cancer Society, Inc	225 N Michigan Ave., Ste 1200 Chicago, IL 60601	509(a)(1)	\$150
National Parks Conservation Association	777 6th St. NW, Suite 7000 Washington, DC 20001	509(a)(1)	\$300
Rev John P Smyth Standing Tall Fdn.	Chantable Foundation 1100 N River Road Des Plaines, IL 60016	509(a)(1)	\$300
Rev. John P Smyth Standing Tall Fdn.	Chantable Foundation 1100 N River Road Des Plaines, IL 60016	509(a)(1)	-\$300
Seniors Action Service, Inc (SASI)	Services for Adults Staying in their Home 1123 Emerson Street, Ste 200	509(a)(1)	\$1,200
St Luke's Episcopal Church	939 Hinman Avenue Evanston, IL 60202	509(a)(1)	\$1,500
Office of Immigrant Affairs	Archdiocese of Chicago 3525 S. Lake Park Ave Chicago, IL 60653	509(a)(1)	\$1,500
Our Saviour's Lutheran Church	1234 N Arlington Hts Rd Arlington Hts , IL 60004	509(a)(1)	\$15,000
Rev. John P Smyth Standing Tall Fdn.	Charitable Foundation 1100 N River Road Des Plaines, IL 60016	509(a)(1)	\$300
Susan G. Komen Breast Cancer Foundation	Susan G Komen 3-Day 205 N Michigan Ave , Ste. 2630 Chicago, IL 60		\$150
Little Brothers-Friends of the Elderly	355 N Ashland Avenue Chicago, IL 60607	509(a)(1)	\$900
St Scholastica Academy	7416 N. Ridge Blvd Chicago, IL 60645	509(a)(1)	\$1,500
Little Brothers-Friends of the Elderly	355 N. Ashland Avenue Chicago, IL 60607	509(a)(1)	\$300
American Cancer Society, Inc	225 N Michigan Ave., Ste 1200 Chicago, IL 60601	509(a)(1)	\$150
Northwestern University	Matching Gifts 2020 Ridge Avenue, Suite 230 Evanston, IL 60208-4305	509(a)(1)	\$15,200
Rehabilitation Institute of Chicago	345 E Superior Street Chicago, IL 60611	509(a)(1)	\$150
Lincoln Park Village, Inc	2502 N Clark Street Chicago, IL 60614	509(a)(1)	\$3,000
St Baldrick's Foundation Inc	1333 S. Mayflower Ave , #400 Monrovia, CA 91016	509(a)(1)	\$150
The Chicago Community Trust	111 East Wacker, Suite 1400 Chicago, IL 60601	509(a)(1)	\$1,500
MayaWorks, Inc	1732 W Hubbard St , Suite 1A Chicago, IL 60622	509(a)(1)	\$150

RETIREMENT RESEARCH FOUNDATION CHICAGO, IL ATTACHMENT B 36-2429540 FORM 990PF PART XV LINE 3b MATCHING GIFTS PROGRAM FOR THE YEAR ENDED 12-31-2011

			
St. Barnabas Church	10134 S. Longwood Dr. Chicago, IL 60643	509(a)(1)	\$6,000
American Occupational Therapy Found	4720 Montgomery Lane P O Box 31220 Bethesda, MD 20814-1220	509(a)(1)	\$900
St Gabriel Catholic Church	731 N Ocean Blvd. Pompano Beach, FL 33062	509(a)(1)	\$750
Center for Medicare Advocacy, Inc	1025 Connecticut Ave, NW, Ste. 709 Washington, DC 20036	509(a)(1)	\$750
University of Illinois Foundation	1305 West Green Street Urbana, IL 61801-2962	509(a)(1)	\$600
St. Ignatius College Prep.	1076 W. Roosevelt Rd Chicago, IL 60608	509(a)(1)	\$1,500
Chicago Jesuit Academy	5058 W Jackson Blvd Chicago, IL 60644	509(a)(1)	\$1,500
Leo High School	7901 S Sangamon St Chicago, IL 60620	509(a)(1)	\$1,500
The Church of the Three Crosses	333 W. Wisconsin Chicago, IL 60614	509(a)(1)	\$150
University of Wisc. Milwaukee Foundation	1440 E North Ave Milwaukee, WI 53202	509(a)(1)	\$15,000
Wayland Academy	101 N University Avenue Beaver Dam, WI 53916	509(a)(1)	\$600
University of MN Foundation	Lockbox "B" CM 3854 P. O Box 70870 St Paul, MN 55170-3854	509(a)(1)	\$600
Grantmakers in Aging	7333 Paragon Rd , Ste 220 Dayton, OH 45459-4157	509(a)(1)	\$900
Lake Forest Lake Bluff Sr. Crtizens Fdn	100 E Old Mill Road Lake Forest, IL 60045	509(a)(1)	\$600
Saint Xavier University	3700 W. 103rd Street Chicago, IL 60655	509(a)(1)	\$15,900
Central Catholic High School	1201 Airport Road Bloomington, IL 31701	509(a)(1)	\$3,000
Chicago Symphony Orchestra	220 S Michigan Ave Chicago, IL 60604	509(a)(1)	\$300
Evanston Community Foundation, Inc	1007 Church St , #108 Evanston, IL 60201	509(a)(1)	\$450
Generations Incorporated	25 Kingston St , 4th Floor Boston, MA 02111	509(a)(1)	\$1,500
God's Awesome Army Ministries	P. O Box 682528 Houston, TX 77268-2528	509(a)(1)	\$4,200
Greater Chicago Food Depository	4100 W Ann Lurie Place Chicago, IL 60632	509(a)(1)	\$300
Rehabilitation Institute of Chicago	345 E Supenor Street Chicago, IL 60611	509(a)(1)	\$750
Services for Adults Staying inTheir Homes	(SASI) 1123 Emerson, #200 Evanston, IL 60201	509(a)(1)	\$300
Chicago Province of Society of Jesus	2050 N. Clark St. Chicago, IL 60614	509(a)(1)	\$1,500
University of Chicago	1427 E. 60th Chicago, IL 60637	509(a)(1)	\$375
University of Chicago	1427 E 60th Chicago, IL 60637	509(a)(1)	\$750
Little Brothers-Friends of the Elderly	355 N. Ashland Avenue Chicago, IL 60607	509(a)(1)	\$150
St. Jude Children's Research Hospital	Workplace Giving-ALSAC 501 St. Jude Place Memphis, TN 38105	509(a)(1)	\$150
AgeOptions Inc	1048 W Lake Street, Suite 300 Oak Park, IL 60301-1102	509(a)(1)	\$75
Salvation Army	1445 W Broward Blvd Fort Lauderdale, FL 33312	509(a)(1)	\$150
Misencordia Home	6300 North Ridge Chicago, IL 60660	509(a)(1)	\$300
National Religious Retirement Office	3211 4th Street NE Washington, DC 20017-1194	509(a)(1)	\$1,500
Rotary/One Foundation, Inc	65 W Jackson Blvd Chicago, IL 60604	509(a)(1)	\$750
Catholic Relief Services, Inc	228 W Lexington St Bartimore, MD 21201	509(a)(1)	\$900
	TOTAL MATCHING GIFTS	>	\$250,025

RETIREMENT RESEARCH FOUNDATION CHICAGO, ILLINOIS FORM 990 PF DECEMBER 31, 2011 36-2429540

GRANTS APPROVED FOR FUTURE PAYMENT
ATTACHMENT C
Part XV Page 11
Details to Line 3b
Pages 1 through 8

<u>Payee Name</u> Payee Address	<u>Tax</u> Status	Request Project Description	Amount
AgeOptions, Inc.	Status	Request Project Description	<u>Amount</u>
1048 West Lake Street, Suite 300		One-year continued support for the	
Oak Park, Illinois 60301-1102	509(a)(1)	Make Medicare Work Coalition.	\$50,000
AgeOptions, Inc.	303(a)(1)	IVIARE IVIEGICATE VVOIR COMMITTION.	\$30,000
1048 West Lake Street, Suite 300		One-year continued support for the	
Oak Park, Illinois 60301-1102	509(a)(1)	Make Medicare Work Coalition.	\$32,500
AgeOptions, Inc.	000(0)(1)	Make Medicale Volk Coalition.	Ψ32,300
1048 West Lake Street, Suite 300		One-year continued support for the	
Oak Park, Illinois 60301-1102	509(a)(1)	Make Medicare Work Coalition.	\$32,500
Aging Care Connections	555(4)(1)	Make Medicale Vent Country.	402,000
111 West Harris Avenue		One-year grant to plan and launch a	
La Grange, Illinois 60525	509(a)(1)		\$49,830
	300(0)(1)	Ten-year grant (\$6,000 each year) for	410,000
American Public Health Association	1	awards to six students annually for	
800 I Street, N.W.		research excellence in gerontological	
Washington, DC 20001-3710	509(a)(2)	health.	\$6,000
,		Ten-year grant (\$6,000 each year) for	40,000
American Public Health Association		awards to six students annually for	
800 I Street, N.W.		research excellence in gerontological	
Washington, DC 20001-3710	509(a)(2)	health.	\$6,000
		Ten-year grant (\$6,000 each year) for	
American Public Health Association		awards to six students annually for	
800 I Street, N.W.		research excellence in gerontological	
Washington, DC 20001-3710	509(a)(2)	health.	\$6,000
		Ten-year grant (\$6,000 each year) for	
American Public Health Association		awards to six students annually for	
800 I Street, N.W.		research excellence in gerontological	
Washington, DC 20001-3710	509(a)(2)	health.	\$6,000
		Ten-year grant (\$6,000 each year) for	
American Public Health Association		awards to six students annually for	
800 I Street, N.W.		research excellence in gerontological	
Washington, DC 20001-3710	509(a)(2)	health.	\$6,000
		Ten-year grant (\$6,000 each year) for	
American Public Health Association		awards to six students annually for	
800 I Street, N.W.		research excellence in gerontological	
Washington, DC 20001-3710	509(a)(2)	health.	\$6,000
		One-year grant to develop and	
		implement a linguistically and culturally	
Asian Health Coalition		competent colorectal cancer prevention	
180 W. Washington St., Suite 1000		program targeting older Korean-	
Chicago, Illinois 60602	509(a)(1)	Americans.	\$30,000
Benedictine Sisters of Chicago-St.		Six-month grant to evaluate resource	
Scholastica Monastery		development practices, improve	
7430 North Ridge Boulevard	1	development infrastructure, and	
Chicago, Illinois 60645-1913	509(a)(1)	increase donor revenue.	\$35,500
	1	One-year grant for research on the	-
Brown University	1	prevalance and impact of billing	
164 Angell Street, Box 1929		Medicare beneficiary stays as	_
Providence, Rhode Island 02912	509(a)(1)	outpatient observation.	\$35,710

		There were contact and the formal	
		Three year grant to evaluate toward	
Decree Heiroceite		objectives of RRF Initiative to	
Brown University		supporting national expansion of the	
164 Angell Street, Box 1929		Physicians Orders for Life-Sustaining	
Providence, Rhode Island 02912	509(a)(1)		\$20,000
]	Three year grant to evaluate toward	
		objectives of RRF Initiative to	
Brown University		supporting national expansion of the	
164 Angell Street, Box 1929		'Physicians Orders for Life-Sustaining	
Providence, Rhode Island 02912	509(a)(1)	Treatment' paradigm.	\$20,000
		Three year grant to evaluate toward	
		objectives of RRF Initiative to	
Brown University	ļ	supporting national expansion of the	
164 Angell Street, Box 1929		'Physicians Orders for Life-Sustaining	
Providence, Rhode Island 02912	509(a)(1)	Treatment' paradigm.	\$20,000
Chicago Alliance to End Homelessness		One-year continuation grant for an	
651 West Washington Street, Suite		initiative improving the system of	
504	}	resources and services for homeless	
Chicago, Illinois 60661	509(a)(1)	elders.	\$50,000
		One-year grant continuation gant to	
Chinese American Service League,		implement the Chinese-language	
Inc.		version of Healthy IDEAS for	
2141 South Tan Court		depression screening and intervention	
Chicago, Illinois 60616	509(a)(1)	of 400 Chinese seniors.	\$35,000
Community Harvest Food Bank of			700,000
Northeast Indiana, Inc.			
999 East Tillman Road	ĺ	One-year grant to support home-	
P.O. Box 10967		delivered groceries to more than 1,000	
Fort Wayne, Indiana 46855-0967	509(a)(1)	low-income, homebound seniors.	\$25,000
Council on Aging of Martin County, Inc.	000(0)(1)	One-year grant to create a model	420,000
900 SE Salerno Road	İ	geriatric specialty clinic located within a	
Stuart, Florida 34997	509(a)(1)	senior center.	\$50,000
Council on Aging of Martin County, Inc	333(3)(1)	One-year grant to create a model	400,000
900 SE Salerno Road		geriatric specialty clinic located within a	
Stuart, Florida 34997	509(a)(1)	senior center.	\$31,440
Council on Aging of Martin County, Inc.	(-/(-/	One-year grant to create a model	431,140
900 SE Salerno Road		geriatric specialty clinic located within a	
Stuart, Florida 34997	509(a)(1)	senior center.	\$50,000
ottati, i ionaa o ioo.	000(4)(1)	One-year grant to replace a van that	400,000
Dental Lifeline Network - Illinois		transports portable dental equipment	
P.O. Box 211		required to deliver oral health to frail	
Northbrook, Illinois 60065	509(a)(2)	elders and persons with disabilities.	(\$2,783)
TTOTAL DIOCK, IMPLOID DOUG	000(4)(2)	Two-year grant for a training program	(42,703)
Easter Seals, National Office		to transform the culture of adult day	
233 S. Wacker Drive, Suite 2400			
Chicago, Illinois 60606	500(c)(2)	services to deliver person-centered	627.040
Chicago, minois 00000	509(a)(2)	Care.	\$37,212
Foster Scale, National Office		Two-year grant for a training program	
Easter Seals, National Office		to transform the culture of adult day	
233 S. Wacker Drive, Suite 2400	5004 3403	services to deliver person-centered	607 555
Chicago, Illinois 60606	509(a)(2)	care.	\$37,200

Footon Conto National Office		Two-year grant for a training program	
Easter Seals, National Office		to transform the culture of adult day	
233 S. Wacker Drive, Suite 2400	F00(=)(0)	services to deliver person-centered	627.000
Chicago, Illinois 60606	509(a)(2)	care.	\$37,200
 Easter Seals, National Office		Two-year grant for a training program	
233 S. Wacker Drive, Suite 2400		to transform the culture of adult day	
	500(0)(2)	services to deliver person-centered	627 200
Chicago, Illinois 60606	509(a)(2)	care.	\$37,200
Foster Scale National Office		Two-year grant for a training program	
Easter Seals, National Office 233 S. Wacker Drive, Suite 2400	1	to transform the culture of adult day	
, ·	500(5)(2)	services to deliver person-centered	627.000
Chicago, Illinois 60606	509(a)(2)	care.	\$37,200
		One-year grant to continue and expand	
Falsanori Hankk Fassadation		a volunteer guardianship program	
Eskenazi Health Foundation		protecting health, well-being, and safety	1
1001 W. Tenth Street	500(.)(0)	of isolated decisionally-incapable ill	040.545
Indianapolis, Indiana 46202	509(a)(3)	seniors.	\$49,515
		One-year grant to continue and expand	İ
		a volunteer guardianship program	
Eskenazi Health Foundation	į	protecting health, well-being, and safety	
1001 W. Tenth Street		of isolated decisionally-incapable ill	
Indianapolis, Indiana 46202	509(a)(3)	seniors.	\$50,000
		One-year grant to further develop and	
		evaluate a distance-learning curriculum	,
Florida Atlantic University		for nursing home professional staff to	
777 Glades Rd.		help reduce unnecessary transfer of	
Boca Raton, Florida 33431-0991	509(a)(1)	residents to acute care hospitals.	(\$15)
		One-year grant to identify and address	
Greater Chicago Food Depository		the hunger needs of older adults in	
4100 West Ann Lurie Place		Cook County, Illinois through food	252 222
Chicago, Illinois 60632	509(a)(1)	distribution.	\$50,000
		One-year grant supporting creation of	
HealthCare Chaplaincy, Inc.		training program to prepare chaplains	
315 East 62nd Street, 4th Floor		for national certification in palliative	
New York, New York 10065	509(a)(2)	care.	\$37,500
	1	One-year grant to educate all staff at	
Horizon Hospice & Palliative Care		Rush University Medical Center about	
833 West Chicago Avenue	5004 3443	hospice care to assure success of new	***
Chicago, Illinois 60622	509(a)(1)	in-patient hospice unit at Rush.	\$30,000
11-2 11-22 6.5 11-2		One-year grant to educate all staff at	
Horizon Hospice & Palliative Care		Rush University Medical Center about	
833 West Chicago Avenue	500()(4)	hospice care to assure success of new	000 400
Chicago, Illinois 60622	509(a)(1)	in-patient hospice unit at Rush.	\$30,192
International Honor Society of Nursing		<u> </u>	
Foundation		Two-year grant to train and support	
550 W. North Street		nurses for leadership and improved	***
Indianapolis, Indiana 46202	509(a)(1)	care delivery in geriatric settings.	\$76,063
International Honor Society of Nursing			
Foundation		Two-year grant to train and support	
550 W. North Street	 	nurses for leadership and improved	.
Indianapolis, Indiana 46202	509(a)(1)	care delivery in geriatric settings	\$59,972

		10	····
		One-year grant to recruit and train older	
	i	Korean-American volunteers to assist	
Karana Arrada a da da da da da da da da da da da d		other Korean elders through community	
Korean American Community Services	1	outreach, facilitating educational	
4300 North California Avenue		sessions, and enrolling eligible elders in	
Chicago, Illinois 60618-1514	509(a)(2)	public benefits programs.	\$35,000
Legal Aid Society of Palm Beach	ŀ	One year challenge grant to provide	
County, Inc.		legal services protecting low-income	
423 Fern Street, Suite 200		older adults from foreclosure and	
West Palm Beach, Florida 33401	509(a)(2)	financial exploitation.	\$25,000
Mayo Clinic Rochester		One-year grant to study precursors and	<u> </u>
200 First Street SW		consequences of leptin signaling in	
Rochester, Minnesota 55905	509(a)(2)	immunosenesence.	\$49,988
Mayo Clinic Rochester		One-year grant to study precursors and	
200 First Street SW		consequences of leptin signaling in	
Rochester, Minnesota 55905	509(a)(2)	immunosenesence.	\$50,000
Mental Health Association of New York		One-year grant to provide technical	
City, Inc.		assistance to multiple states working	
50 Broadway, 19th Floor	509(a)(1)	toward effective advocacy for geriatric	\$37,500
National Able Network		One-year grant to expand employment	
567 W. Lake Street, Suite 1150		and counseling services to low-income	
Chicago, Illinois 60661-1405	509(a)(1)	seniors.	\$26,000
		Two-year continuing grant providing	
National Center for State Courts]	resources on aging issues, elder	
300 Newport Avenue		abuse, and guardianship to state	
Williamsburg, Virginia 23185-4147	509(a)(1)	judges and court personnel.	\$66,905
		Two-year continuing grant providing	7-5,555
National Center for State Courts		resources on aging issues, elder	
300 Newport Avenue		abuse, and guardianship to state	
Williamsburg, Virginia 23185-4147	509(a)(1)	judges and court personnel.	\$59,849
g, 1g 20.700 1111	000(4)(1)	Three-year special initiative to enhance	Ψ00,040
		the development of a new	
		comprehensive model of assisting older	
		adults to become more economically	
National Council on Aging, Inc.		secure by creating, testing, and	
1901 L Street, N.W., 4th Floor		evaluating new technology tools for	
Washington, DC 20036	500(2)(2)	service providers and consumers.	\$127 24G
vvasilington, DC 20030	509(a)(2)	Three-year special initiative to enhance	\$127,246
		•	
		the development of a new	
		comprehensive model of assisting older	
National Council on Animal Inc		adults to become more economically	
National Council on Aging, Inc.		secure by creating, testing, and	
1901 L Street, N.W., 4th Floor		evaluating new technology tools for	
Washington, DC 20036	509(a)(2)	service providers and consumers.	\$127,247
		Three-year special initiative to enhance	
		the development of a new	
		comprehensive model of assisting older	
		adults to become more economically	
National Council on Aging, Inc.		secure by creating, testing, and	
1901 L Street, N.W., 4th Floor		evaluating new technology tools for	
Washington, DC 20036	509(a)(2)	service providers and consumers.	\$201,250

			
		Three-year special initiative to enhance	
	1	the development of a new	
ł		comprehensive model of assisting older	
		adults to become more economically	
National Council on Aging, Inc.		secure by creating, testing, and	
1901 L Street, N.W., 4th Floor		evaluating new technology tools for	
Washington, DC 20036	509(a)(2)	service providers and consumers.	\$201,250
		Three-year special initiative to enhance	
	1	the development of a new	
		comprehensive model of assisting older	
		adults to become more economically	
National Council on Aging, Inc.		secure by creating, testing, and	
1901 L Street, N.W., 4th Floor		evaluating new technology tools for	
Washington, DC 20036	509(a)(2)	service providers and consumers.	\$196,500
		Three-year special initiative to enhance	4.00,000
		the development of a new	
		comprehensive model of assisting older	
		adults to become more economically	
National Council on Aging, Inc.		secure by creating, testing, and	
1901 L Street, N W., 4th Floor		evaluating new technology tools for	
Washington, DC 20036	509(a)(2)	service providers and consumers.	\$196,500
	000(a)(2)	One-year grant for an advocacy	ψ1 30 ,300
National People's Action		campaign to end predatory payday	
810 North Milwaukee Avenue		lending practices targeting senior	
Chicago, Illinois 60642	509(a)(2)	citizens.	\$45,000
	303(a)(2)	Eighteen-month grant to study the	Ψ+3,000
Northwestern University		impact of mindfulness training on well-	
Office of Sponsored Research		being of persons with early-stage	
633 Clark St.		Alzheimer's disease and their	
Evanston, Illinois 60208	509(a)(1)	caregivers.	\$54,491
Norwegian Lutheran Bethesda Home	309(a)(1)	Caregivers.	φο 4,49 1
2833 North Nordica Avenue		One-year grant to develop and	
Chicago, Illinois 60634-9968	500(a)(1)		640.400
Cincago, minois 60634-9966	509(a)(1)	implement planned giving. Three-year special initiative to advance	\$12,400
	1	end-of-life care by catalyzing the	
Orogan Haakh & Caianaa Hairanik	1	spread of POLST (Physician Orders	
Oregon Health & Science University		for Life sustaining Treatment) across	
Foundation		the United States through small grants,	
1121 SW Salmon Street, Suite 100	500(=)/4)	technical assistance and national	0405-05-
Portland, Oregon 97205	509(a)(1)	program office support.	\$185,835
		Three-year special initiative to advance	
		end-of-life care by catalyzing the	
0		spread of POLST (Physician Orders	
Oregon Health & Science University		for Life sustaining Treatment) across	
Foundation		the United States through small grants,	1
1121 SW Salmon Street, Suite 100		technical assistance and national	
Portland, Oregon 97205	509(a)(1)	program office support.	\$185,835

	т	Three-year special initiative to advance	
1		end-of-life care by catalyzing the	
Construction of Construction of		spread of POLST (Physician Orders	
Oregon Health & Science University	i	for Life sustaining Treatment) across	
Foundation		the United States through small grants,	
1121 SW Salmon Street, Suite 100		technical assistance and national	
Portland, Oregon 97205	509(a)(1)	program office support.	\$116,095
Personal Assistance Telephone Help,	İ		
Inc.		Two-year grant to create self-neglect	
201 E. Grove Street, Suite 200		response system for older adults in	
Bloomington, Illinois 61701	509(a)(1)	McLean County, Illinois	\$29,746
Personal Assistance Telephone Help,	1		
Inc.		Two-year grant to create self-neglect	
201 E. Grove Street, Suite 200	1	response system for older adults in	
Bloomington, Illinois 61701	509(a)(1)	McLean County, Illinois.	\$20,852
Jisanington, ministration	000(4)(1)	One-year grant to replicate PEARLS, a	Ψ20,002
Pillars	1	model program designed to reduce	
333 North LaGrange Road, Suite One		depressive symptoms among older	
LaGrange Park, Illinois 60526	E00(a)(3)	1 ' ' '	607 500
LaGrange Park, Illinois 60526	509(a)(2)	adults.	\$27,500
Diamaga Naturada in Outura Obarra		Eighteen-month grant to promote the	
Pioneer Network in Culture Change		use of MDS3 resident preference data	
35 E. Wacker Drive, Suite 850		for enabling long-term care culture	
Chicago, Illinois 60601	509(a)(2)	change.	\$89,375
		Eighteen-month grant to promote the	
Pioneer Network in Culture Change		use of MDS3 resident preference data	
35 E. Wacker Drive, Suite 850		for enabling long-term care culture	j
Chicago, Illinois 60601	509(a)(2)	change.	\$89,375
		One-year grant supporting an	
Provena Mercy Medical Center		Advanced Practice Nurse providing	
1325 N. Highland Avenue		program care coordination to persons	
Aurora, Illinois 60119	509(a)(1)	with dementia and their caregivers.	\$34,962
	<u> </u>	Three-year grant to build capacity of	
		four nursing homes for persons with	
Rainbow Hospice and Palliative Care		advanced dementia, and develop a self-	
1550 Bishop Court		sustaining, specialized dementia care	
Park Ridge, Illinois 60056	509(a)(1)	program.	\$60,740
- and thage, minioto cooce	000(4)(1)	Three-year grant to build capacity of	Ψου, / πο
		four nursing homes for persons with	
Rainbow Hospice and Palliative Care		advanced dementia, and develop a self-	
1550 Bishop Court		1	1
·	E00/5\/4\	sustaining, specialized dementia care	860 740
Park Ridge, Illinois 60056	509(a)(1)	program.	\$60,740
		Three-year grant to build capacity of	
		four nursing homes for persons with	
Rainbow Hospice and Palliative Care		advanced dementia, and develop a self-	
1550 Bishop Court		sustaining, specialized dementia care	1
Park Ridge, Illinois 60056	509(a)(1)	program.	\$51,955
		Three-year grant to build capacity of	
		four nursing homes for persons with	
Rainbow Hospice and Palliative Care		advanced dementia, and develop a self-	l
1550 Bishop Court		sustaining, specialized dementia care	ŀ
Park Ridge, Illinois 60056	509(a)(1)	program.	\$51,955
	<u> </u>		

Rehabilitation Institute of Chicago	<u> </u>	Three-year grant for on-line database	
345 East Superior Street		to assist rehabilitation clinicians	
Chicago, Illinois 60611	509(a)(1)	1	\$49,273
Rehabilitation Institute of Chicago		Three-year grant for on-line database	
345 East Superior Street		to assist rehabilitation clinicians	
Chicago, Illinois 60611	509(a)(1)	working with older adult patients.	\$47,865
		Two-year grant to address older adult	
Rush University Medical Center		substance abuse and medication	
1653 West Congress Parkway		misuse with an intervention and	
Chicago, Illinois 60612-3833	509(a)(1)	education protocol.	\$45,774
		One-year grant to develop and deliver a	
Saint Louis University		training curriculum on mobility	
221 N Grand Boulevard		counseling for providers of aging	
St. Louis, Missouri 63103	509(a)(1)	services	(\$515)
Skokie Valley Agudath Jacob			
Synagogue			
8825 N. East Prairie Road		Eighteen-month grant to renovate two	
Skokie, Illinois 60076	509(a)(1)	restrooms for accessibility.	(\$2,176)
Skokie Valley Agudath Jacob			
Synagogue			
8825 N. East Prairie Road		Eighteen-month grant to renovate two	
Skokie, Illinois 60076	509(a)(1)	restrooms for accessibility.	(\$4,942)
		One-grant to expand and enhance	
Terra Nova Films, Inc.		videos on English and Spanish	
9848 South Winchester Avenue		websites for family caregivers of older	
Chicago, Illinois 60643	509(a)(1)	adults.	\$28,200
Treasure Coast Hospice		One-year continuation grant to expand	
1201 S.E. Indian Street		a palliative care program in area	
Stuart, Florida 34997	509(a)(1)	nursing homes.	\$106,000
		Two-year grant to coordinate health	
United Community Center, Inc.	ĺ	and social services at a new medical	
1028 South 9th Street		center serving low-income elderly	
Milwaukee, Wisconsin 53204	509(a)(1)	Latinos.	\$25,000
University of Illinois at Chicago			
Office of the Chancellor		Two-year grant for research to test	
2833 University Hall		replication strategies for Fit and Strong,	
601 South Morgan		an evidence-based exercise program	
Chicago, Illinois 60607-7128	509(a)(1)	for older adults with osteoarthritis.	\$33,000
University of Illinois at Chicago			
Office of the Chancellor		Two-year grant for research to test	
2833 University Hall		replication strategies for Fit and Strong,	1
601 South Morgan		an evidence-based exercise program	
Chicago, Illinois 60607-7128	509(a)(1)	for older adults with osteoarthritis.	\$66,000
University of Illinois at Chicago			
Office of the Chancellor		Two-year grant for research to test	
2833 University Hall		replication strategies for Fit and Strong,	
601 South Morgan		an evidence-based exercise program	
Chicago, Illinois 60607-7128	509(a)(1)	for older adults with osteoarthritis.	\$33,000

		Total Grants Approved for Future Payment	\$4,387,262
		Total Add Back Returned Grants included above	\$4,376,831 \$10,431
Western Illinois Area Agency on Aging 729 34th Avenue Rock Island, Illinois 61201	509(a)(1)	One-year grant to expand the Matter of Balance falls prevention program across 13 mostly rural, west-central Illinois counties.	\$35,900
Wayne State University Office of Research and Sponsored Programs 656 West Kirby Detroit, Michigan 48202	509(a)(1)	Two-year grant for a randomized controlled trial of a project to bring continuing education on mental health and aging to occupational therapists.	\$31,000
University of South Florida Division of Sponsored Research 3650 Spectrum Boulevard, Suite 160 Tampa, Florida 33612	509(a)(1)	Eighteen-month grant to test feasibility of a model, faith-based collaborative addressing depression in low-income African -American elders.	\$50,000
University of Maryland, Baltimore 620 West Lexington Street Baltimore, Maryland 21201 University of South Florida Division of Sponsored Research 3650 Spectrum Boulevard, Suite 160 Tampa, Florida 33612	509(a)(1) 509(a)(1)	Eighteen-month grant to test feasibility of a model, faith-based collaborative addressing depression in low-income African -American elders.	\$108,775 \$37,650
		Eighteen-month grant for the first national, longitudinal study of health	

RETIREMENT RESEARCH FOUNDATION CHICAGO, ILLINOIS FORM 990 PF DECEMBER 31, 2011 36-2429540

CAPITAL GAINS AND LOSSES
Part IV
Details

Form **6781**

Department of the Treasury Internal Revenue Service Gains and Losses From Section 1256 Contracts and Straddles

► Attach to your tax return.

OMB No 1545-0644

2011

Attachment Sequence No 82

	s) shown on tax return	10M						"	dentifying number	
	REMENT RESEARCH FOUNDAT all applicable boxes (see instruct		A ☐ Mixed	straddle electio	n		☐ Mixed stra	ddle ad	36-3994838	
000.				dle-by-straddle i			= ' ' ' ' '		contracts loss elec	tion
Par	Section 1256 Contr									
	(a)	Identifica	tion of acc	ount			(b) (Loss	s)	(c) Gain	
1 F	rom Global Endowment Fund II	Form K-1	(26-174130	77)					714,058	
								-		
	Add the amounts on line 1 in co	lumns (b) a	and (c)			2	(+-	714,058	
3	Net gain or (loss). Combine line						`	1 3	714,058	:
4	Form 1099-B adjustments. See	•	., .,					4	1	
5	Combine lines 3 and 4							5	714,058	
	Note: If line 5 shows a net gair instructions.	n, skip line	6 and enter	the gain on line	e 7. Partnersi	hips and S co	orporations, see			
6	If you have a net section 1256			checked box D	above, ente	er the amoun	t of loss to be			
	carried back. Enter the loss as a	a positive n	umber .					6		
7	Combine lines 5 and 6							7		
8	Short-term capital gain or (los	ss). Multip	 Iv line 7 bv :		here and inc	clude on the	appropriate line			
	of Schedule D (see instructions)	-	-					8	285,623	
9	Long-term capital gain or (los	s). Multipl	y line 7 by t	60% (.60). Enter	here and inc	clude on the	appropriate line	\vdash	200,020	
	of Schedule D (see instructions)							9	428,435	
Part			addles. /	Attach a separa	ate schedul	le listing ead	ch straddle and	d its c	omponents.	
Sect	ion A-Losses From Strac	ddles				T				
	(a) Description of property	(b) Date entered into or acquired	(c) Date closed out or sold	(d) Gross sales price	(e) Cost or other basis plus expense of sale	(f) Loss. If column (e) is more than (d), enter difference. Otherwise, enter -0-	(e) (g) tan Unrecognize tr gain on e. offsetting e, positions		(h) Recognized I If column (f) is m than (g), enter difference Otherwise, enter	r r
10										
			" 40	L	<u> </u>	<u> </u>	1	_		!
	Enter the short-term portion of Schedule D (see instructions)							11a	()
ь	Enter the long-term portion of Schedule D (see instructions)					e on the app	propriate line of		1,	١,
Secti	on B—Gains From Strade		· · · · · · · · · · · · · · · · · · ·	· · · · · · ·	· · · ·	· · · · · ·	· · ·	11b		:
	(a) Description of property	(b) Date entered into or acquired	(c) Date closed out or sold	(d) G sales		b	Cost or other lasis plus ense of sale		(f) Gain. If column (d) is more than (e), enter difference Otherwise, enter -0-	
12										
13a	Enter the short-term portion of Schedule D (see instructions)	gains froi	m line 12, (column (f), here	and include	on the app	ropriate line of	13a	1	
ь	Enter the long-term portion of Schedule D (see instructions)		· • • •	· · · · · ·		<u> </u>	<u> </u>	13b		
Part	III Unrecognized Gains	s From F	ositions	Held on Las	t Day of T	Tax Year.	Memo Entry (Only (s		
	(a) Description of property		(b) Da acquin		market value o	,	f) Cost or other ba as adjusted	ISIS	(e) Unrecognized of If column (c) is mo than (d), enter different Otherwise, enter	ore ence
14										
								<u> </u>		•

Form **8868**

(Rev. January 2012)

Department of the Treasury Internal Revenue Service

Application for Extension of Time To File an Exempt Organization Return

File a separate application for each return.

OMB No. 1545-1709

• If yo	u are filing for an Automatic 3-Month Extension, comple	te only Pa	art I and check this box			■ X
• If yo	u are filing for an Additional (Not Automatic) 3-Month Ex	ctension, c	complete only Part II (on page 2 of	this form)	•	
Do no	t complete Part II unless you have already been granted	an automa	atic 3-month extension on a previous	ly filed Fo	rm 8868.	
Electr	onic filing (e-file). You can electronically file Form 8868 if	you need a	a 3-month automatic extension of tin	ne to file (6 months for a cor	poration
require	ed to file Form 990-T), or an additional (not automatic) 3-mo	nth extens	sion of time. You can electronically fi	le Form 8	868 to request an	extension
of time	to file any of the forms listed in Part I or Part II with the ex	ception of	Form 8870, Information Return for	Fransfers .	Associated With C	ertaın
Persor	nal Benefit Contracts, which must be sent to the IRS in pag	per format	(see instructions). For more details of	on the elec	ctronic filing of this	form,
visit w	ww.irs.gov/efile and click on e-file for Charities & Nonprofits Automatic 3-Month Extension of Time		cubmit original (no conies no	odod)		
	· · · · · · · · · · · · · · · · · · ·					
•	oration required to file Form 990-T and requesting an autor	mauc o-me	onth extension - check this box and	complete		
	only		rusts must use Form 7004 to reques	t an exter	. Insion of time	
Туре	Name of exempt organization or other filer, see instru	ctions.		Employe	r identification nun	nber (EfN) or
print						
File by th	Retirement Research Founda		<u></u>	X	<u> 36-24295</u>	40
due date	for Number, street, and room or suite no. If a P.O. box, s		tions.	Social se	ecunty number (SS	N)
filing you return Se	* O'03 West niggins Road, No					
instructio		oreign add	lress, see instructions.			
	Chicago, IL 60631-4170					
Enter t	he Return code for the return that this application is for (file	ə a separa	te application for each return)			0 4
Annlia	otion	Return	Application			Return
Applic Is For	auon	Code	Application Is For			Code
	Form 990 01 Form 990-T (corporation)					
Form 9	· · · · · · · · · · · · · · · · · · ·	02	Form 1041-A	•		07
Form 9		01	Form 4720		•••	09
Form 9		04	Form 5227		,	10
	90-T (sec. 401(a) or 408(a) trust)	05	Form 6069			11
	90-T (trust other than above)	06	Form 8870			12
1011113	Irene Frye		101110070		· ··- · · · · · · · · · · · · · · · · ·	
• The	books are in the care of ► 8765_W. Higgins	g Road	d Suite 430 - Chi	cago	TT. 60631	
	phone No. ► 773-714-8080	<u> </u>	FAX No. ►	<u>cago,</u>	11 00031	
	e organization does not have an office or place of business	s in the Un	ited States, shook this boy			•
	is is for a Group Return, enter the organization's four digit		•		r the whole group,	check this
box 🕨					• • • •	
	request an automatic 3-month (6 months for a corporation					
			tion return for the organization name		The extension	
ıs	for the organization's return for:		-			
•	X calendar year 2011 or					
•	tax year beginning	, an	d ending		<u> </u>	
2 If	the tax year entered in line 1 is for less than 12 months, c	heck reaso	on: Initial return 🔲 I	Final retur	'n	
l	Change in accounting period					
					,	
	this application is for Form 990-BL, 990-PF, 990-T, 4720, o	or 6069, ei	nter the tentative tax, less any		_	
_	onrefundable credits. See instructions.			3a	\$ 5	2,000.
	this application is for Form 990-PF, 990-T, 4720, or 6069,				_	
_	stimated tax payments made. Include any prior year overp			3b	<u>\$ 5</u>	<u>2,000.</u>
	alance due. Subtract line 3b from line 3a. Include your pa	-	•			_
	y using EFTPS (Electronic Federal Tax Payment System).			3c	50.4	0.
	n. If you are going to make an electronic fund withdrawal v			rm 8879-		
LHA	For Privacy Act and Paperwork Reduction Act Notice,	see instri	JCTIONS.		Form 8868 (F	1ev. 1·2012)

Farry 2000 (F) 4 0045						_
Form 8868 (Rev. 1-2012)						Page 2
If you are filing for an Additional (Not Automatic) 3-Month E. Not a complete Part II if you have already because the complete part II if you have already because the complete part II if you have already because the complete part II if you have a least the complete part II if						لتما
Note. Only complete Part II if you have already been granted an			iea Form	8868.		
If you are filing for an Automatic 3-Month Extension, complete Part II Additional (Not Automatic) 3-Month E			al Ino	conies n	eeded)	
Tart II Additional (Not Automatic) 0-Month E	Aterisic	Enter filer's				
Type or Name of exempt organization or other filer, see instru	rotions	Enter mer s			ation numbe	
Type or Name of exempt organization or other filer, see instru	LCHOIIS		Linploye	i identinice	ation numbe	ii (Liiv) Oi
File by the Retirement Research Foundat	ion		X	36-2	429540)
due date for Number, street, and room or suite no. If a P.O. box, s		tions			nber (SSN)	
return See 8765 West Higgins Road, No.		itions.		Journy Hair		
instructions City, town or post office, state, and ZIP code For a fe		tress see instructions		·		
Chicago, IL 60631-4170	oroign acc	2,000,000				
Enter the Return code for the return that this application is for (file	e a separa	ite application for each return)				0 4
	,					
Application	Return	Application				Return
ls For	Code	Is For				Code
Form 990	01		··			
Form 990-BL	02	Form 1041-A				80
Form 990-EZ	01	Form 4720				09
Form 990-PF	04	Form 5227				10
Form 990-T (sec 401(a) or 408(a) trust) 05 Form 6069						11
Form 990-T (trust other than above)	06	Form 8870				12
STOP! Do not complete Part II if you were not already granted	l an auton	natic 3-month extension on a previ	ously file	ed Form 8	868	
Irene Frye		a grite 120 ghia		TT 6	0621	
• The books are in the care of \triangleright 8765 W. Higgins	s Road		ago,	717 0	0031	
Telephone No. ► <u>773-714-8080</u>		FAX No 🕨			· . [
If the organization does not have an office or place of business						
If this is for a Group Return, enter the organization's four digit (
box ► If it is for part of the group, check this box ►		ch a list with the names and EINs of	all memb	ers the ex	tension is to	<u>or.</u>
	<u>vovem</u>	per 15, 2012.				
5 For calendar year 2011, or other tax year beginning		, and ending	Final r			·
6 If the tax year entered in line 5 is for less than 12 months, ch	neck reaso	on: Initial return	_ rmai i	etum		
Change in accounting period State in detail why you need the extension						
7 State in detail why you need the extension Due to delayed responses from	outai	de gourges additio	nal	time	ig nee	hah
to gather all the data necessary						<u>ueu</u>
return.	iry cc	Tire a comprete a	na a	ccara		
	r 6060 or	ator the tentative tay less any	\neg			
8a If this application is for Form 990-BL, 990-PF, 990-T, 4720, of nonrefundable credits. See instructions.) 0005, ei	iter the teritative tax, iess any	8a	\$	52	000.
b If this application is for Form 990-PF, 990-T, 4720, or 6069, 6	onter any	refundable credits and estimated	1 50		- 227	0000
tax payments made. Include any prior year overpayment allo	-		j			
previously with Form 8868.	Jweu as a	creat and any amount paid	8b	\$	52.	000.
c Balance due. Subtract line 8b from line 8a. Include your pay	ument with	this form if required by using		—		
EFTPS (Electronic Federal Tax Payment System). See instru		, this form, it requires, by coming	8c	\$		0.
		t be completed for Part II or		_ *		<u>-</u> _
Inder penalties of perjury, I declare that I have examined this form, includir is true, correct, and complete, and that I am authorized to prepare this for	ng accompa	•	-	f my knowle	edge and belie	ef,
	1714		D-4-			
ignature Title			Date		0000 (D=	1 2010
				rorm	8868 (Rev	1-2012)