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

2011

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

SEP 1, 2011

, and ending

AUG 31, 2012

Name of foundation

A Employer identification number

NEW HORIZON FOUNDATION

36-3406294

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

Room/suite

1625 HINMAN AVENUE

B Telephone number

(847) 570-8202

City or town, state, and ZIP code

EVANSTON, IL 60201

C If exemption application is pending, check here ☐

G Check all that apply:

☐ Initial return☐ Initial return of a former public charity☐ Final return☐ Amended return☐ Address change☐ Name changeD 1. Foreign organizations, check here ☐2. Foreign organizations meeting the 85% test, check here and attach computation ☐

H Check type of organization:

☒ Section 501(c)(3) exempt private foundation☐ Section 4947(a)(1) nonexempt charitable trust☐ Other taxable private foundationE If private foundation status was terminated under section 507(b)(1)(A), check here ☐

I Fair market value of all assets at end of year

J Accounting method: ☒ Cash ☐ Accrual

(from Part II, col. (c), line 16)

☐ Other (specify)F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

\$ 816,708. (Part I, column (d) must be on cash basis.)

Part I Analysis of Revenue and Expenses

(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a).)

(a) Revenue and expenses per books

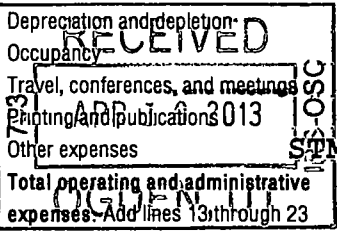
(b) Net investment income

(c) Adjusted net income

(d) Disbursements for charitable purposes (cash basis only)

Revenue	1	Contributions, gifts, grants, etc., received			N/A	
	2	Check ☒ If the foundation is not required to attach Sch. B				
	3	Interest on savings and temporary cash investments				
	4	Dividends and interest from securities	17,644.	17,644.		STATEMENT 1
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10	48,920.			
	b	Gross sales price for all assets on line 6a	663,779.			
	7	Capital gain net income (from Part IV, line 2)		48,920.		
	8	Net short-term capital gain				
	9	Income modifications				
	10a	Gross sales less returns and allowances				
Operating and Administrative Expenses	b	Less: Cost of goods sold				
	c	Gross profit or (loss)				
	11	Other income	550.	550.		STATEMENT 2
	12	Total. Add lines 1 through 11	67,114.	67,114.		
	13	Compensation of officers, directors, trustees, etc	10,000.	5,000.		5,000.
	14	Other employee salaries and wages				
	15	Pension plans, employee benefits				
	16a	Legal fees STMT 3	275.	0.		275.
	b	Accounting fees STMT 4	2,600.	1,300.		1,300.
	c	Other professional fees STMT 5	2,225.	2,225.		0.
	17	Interest				
	18	Taxes STMT 6	2,220.	1,838.		382.
	19	Depreciation and depletion				
	20	Occupancy				
	21	Travel, conferences, and meetings				
	22	Printing and publications				
	23	Other expenses STMT 7	510.	5.		505.
	24	Total operating and administrative expenses. Add lines 13 through 23	17,830.	10,368.		7,462.
	25	Contributions, gifts, grants paid	295,200.			295,200.
	26	Total expenses and disbursements. Add lines 24 and 25	313,030.	10,368.		302,662.
	27	Subtract line 26 from line 12:				
	a	Excess of revenue over expenses and disbursements	<245,916.>			
	b	Net investment income (if negative, enter -0-)		56,746.		
	c	Adjusted net income (if negative, enter -0-)			N/A	

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Part II Balance Sheets

Attached schedules and amounts in the description column should be for end-of-year amounts only

		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing	26,747.	46,082.	46,082.
	2 Savings and temporary cash investments	38,337.	81,896.	81,896.
	3 Accounts receivable ▶			
	Less: allowance for doubtful accounts ▶			
	4 Pledges receivable ▶			
	Less: allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons			
	7 Other notes and loans receivable ▶			
	Less: allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments - U.S. and state government obligations			
	b Investments - corporate stock STMT 8	983,381.	847,670.	616,746.
	c Investments - corporate bonds STMT 9	239,015.	63,259.	71,984.
11 Investments - land, buildings, and equipment basis ▶				
Less accumulated depreciation ▶				
12 Investments - mortgage loans				
13 Investments - other				
14 Land, buildings, and equipment basis ▶				
Less accumulated depreciation ▶				
15 Other assets (describe ▶)				
16 Total assets (to be completed by all filers)	1,287,480.	1,038,907.	816,708.	
Liabilities	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
22 Other liabilities (describe ▶ STATEMENT 10)	395.	395.		
23 Total liabilities (add lines 17 through 22)	395.	395.		
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ ☐ and complete lines 24 through 26 and lines 30 and 31.			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ ☒ and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds	0.	0.	
	28 Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
	29 Retained earnings, accumulated income, endowment, or other funds	1,287,085.	1,038,512.	
30 Total net assets or fund balances	1,287,085.	1,038,512.		
31 Total liabilities and net assets/fund balances	1,287,480.	1,038,907.		

Part III Analysis of Changes in Net Assets or Fund Balances

1 Total net assets or fund balances at beginning of year - Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	1,287,085.
2 Enter amount from Part I, line 27a	2	<245,916.>
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	1,041,169.
5 Decreases not included in line 2 (itemize) ▶ BOOK ADJUSTMENT	5	2,657.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	1,038,512.

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Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a US TRUST #0556	P	09/01/11	08/31/12
b CAPITAL GAINS DIVIDENDS			
c			
d			
e			

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 660,649.		614,859.	45,790.
b 3,130.			3,130.
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a			45,790.
b			3,130.
c			
d			
e			

2 Capital gain net income or (net capital loss)	2	48,920.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8	3	N/A

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?

☐ Yes ☒ No

If "Yes," the foundation does not qualify under section 4940(e). Do not complete this part.

1 Enter the appropriate amount in each column for each year; see instructions before making any entries.

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2010	392,083.	1,284,174.	.305319
2009	379,023.	1,443,080.	.262649
2008	382,958.	1,996,943.	.191772
2007	439,130.	1,665,664.	.263637
2006	358,818.	1,836,713.	.195359

2 Total of line 1, column (d)	2	1.218736
3 Average distribution ratio for the 5-year base period - divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	.243747
4 Enter the net value of noncharitable-use assets for 2011 from Part X, line 5	4	877,368.
5 Multiply line 4 by line 3	5	213,856.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	567.
7 Add lines 5 and 6	7	214,423.
8 Enter qualifying distributions from Part XII, line 4	8	302,662.

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate.
See the Part VI instructions.

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

1a Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)			
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☒ and enter 1% of Part I, line 27b		1	567.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b).		2	0.
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		3	567.
3 Add lines 1 and 2		4	0.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		5	567.
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-			
6 Credits/Payments:			
a 2011 estimated tax payments and 2010 overpayment credited to 2011	6a	960.	
b Exempt foreign organizations - tax withheld at source	6b		
c Tax paid with application for extension of time to file (Form 8868)	6c		
d Backup withholding erroneously withheld	6d		
7 Total credits and payments. Add lines 6a through 6d	7	960.	
8 Enter any penalty for underpayment of estimated tax. Check here ☒ if Form 2220 is attached	8	1.	
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9		
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	392.	
11 Enter the amount of line 10 to be: Credited to 2012 estimated tax ☒ 392. Refunded ☒ 0.	11	0.	

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
1b 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.		X
1c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. ☒ \$ 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.		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV.	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ☒ IL		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2011 or the taxable year beginning in 2011 (see instructions for Part XIV)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

N/A

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Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► <u>WWW.NEWHORIZONFOUNDATION.ORG</u>	13	X	
14	The books are in care of ► <u>ETHELYN BOND</u> Telephone no. ► <u>847 570-8202</u> Located at ► <u>1625 HINMAN AVENUE, EVANSTON, IL</u> ZIP+4 ► <u>60201</u>			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year ► 15 N/A			
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 filing requirements for Form TD F 90-22.1. If "Yes," enter the name of the foreign country ►	16	Yes	No X

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

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

		Yes	No
1a	During the year did the foundation (either directly or indirectly):		
(1)	Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☒ No		
(2)	Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No		
(3)	Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No		
(4)	Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☒ 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 ☒ 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 ☒ No		
b	If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here N/A	1b	
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?	1c	X
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):		
a	At the end of tax year 2011, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2011? ☐ Yes ☒ No If "Yes," list the years ►		
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.) N/A	2b	
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ►		
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☒ No		
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.) N/A	3b	
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	X
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2011?	4b	X

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Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required (continued)**5a** During the year did the foundation pay or incur any amount to:

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?

☐ Yes ☒ No

(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?

☐ Yes ☒ No

(3) Provide a grant to an individual for travel, study, or other similar purposes?

☐ Yes ☒ No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)?

☐ Yes ☒ No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?

☐ Yes ☒ No**b** If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?

N/A

5b

Organizations relying on a current notice regarding disaster assistance check here-

☒**c** If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?

N/A

☐ Yes ☐ No

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

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

6b

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

N/A

7b

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors**1** List all officers, directors, trustees, foundation managers and their compensation.

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
SEE STATEMENT 11		10,000.	0.	0.

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

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

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

0

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	828,301.
b	Average of monthly cash balances	1b	62,428.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	890,729.
e	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	890,729.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	13,361.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	877,368.
6	Minimum investment return. Enter 5% of line 5	6	43,868.

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

1	Minimum investment return from Part X, line 6	1	43,868.
2a	Tax on investment income for 2011 from Part VI, line 5	2a	567.
b	Income tax for 2011. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	567.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	43,301.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	43,301.
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	43,301.

Part XII Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
a	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	1a	302,662.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	302,662.
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	567.
6	Adjusted qualifying distributions Subtract line 5 from line 4	6	302,095.

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

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Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2010	(c) 2010	(d) 2011
1 Distributable amount for 2011 from Part XI, line 7				43,301.
2 Undistributed income, if any, as of the end of 2011				
a Enter amount for 2010 only			0.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2011:				
a From 2006	360,199.			
b From 2007	439,696.			
c From 2008	393,130.			
d From 2009	379,023.			
e From 2010	329,760.			
f Total of lines 3a through e	1,901,808.			
4 Qualifying distributions for 2011 from Part XII, line 4: ► \$	302,662.			
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				43,301.
e Remaining amount distributed out of corpus	259,361.			
5 Excess distributions carryover applied to 2011 (If an amount appears in column (d), the same amount must be shown in column (a))	0.			0.
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	2,161,169.			
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount - see 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	360,199.			
9 Excess distributions carryover to 2012. Subtract lines 7 and 8 from line 6a	1,800,970.			
10 Analysis of line 9:				
a Excess from 2007	439,696.			
b Excess from 2008	393,130.			
c Excess from 2009	379,023.			
d Excess from 2010	329,760.			
e Excess from 2011	259,361.			

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year				
ACLU FOUNDATION NEW YORK, NY			PUBLIC AFFAIRS	1,000.
AMERICAN JEWISH WORLD SERVICE NEW YORK, NY			HUMAN SERVICES/INTERNATIONAL	500.
AFRICAN MEDICAL & RESEARCH FOUNDATION-USA NEW YORK, NY			HEALTH	500.
AMERICAN FIELD SERVICE-USA NEW YORK, NY			EDUCATION	5,000.
AMERICAN FRIENDS SERVICE COMMITTEE PHILADELPHIA, PA			HUMAN SERVICES/INTERNATIONAL	750.
Total	SEE CONTINUATION SHEET(S)			295,200.
b Approved for future payment				
NONE				
Total				0.

Form 990-PF (2011)

Part XVI-A

Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.

Enter gross amounts unless otherwise indicated.		Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income
	(a) Business code	(b) Amount	(c) Exclu- sion code	(d) Amount		
1 Program service revenue:						
a _____						
b _____						
c _____						
d _____						
e _____						
f _____						
g Fees and contracts from government agencies						
2 Membership dues and assessments						
3 Interest on savings and temporary cash investments						
4 Dividends and interest from securities			14	17,644.		
5 Net rental income or (loss) from real estate:						
a Debt-financed property						
b Not debt-financed property						
6 Net rental income or (loss) from personal property						
7 Other investment income			01	550.		
8 Gain or (loss) from sales of assets other than inventory			18	48,920.		
9 Net income or (loss) from special events						
10 Gross profit or (loss) from sales of inventory						
11 Other revenue:						
a _____						
b _____						
c _____						
d _____						
e _____						
12 Subtotal. Add columns (b), (d), and (e)		0.		67,114.		0.
13 Total. Add line 12, columns (b), (d), and (e)					13	67,114.

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

Part XVI-B

Relationship of Activities to the Accomplishment of Exempt Purposes

[illegible]

Part XVII Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

- | | |
|--|---------------------|
| <p>1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?</p> <p>a Transfers from the reporting foundation to a noncharitable exempt organization of:</p> <p>(1) Cash</p> <p>(2) Other assets</p> <p>b Other transactions:</p> <p>(1) Sales of assets to a noncharitable exempt organization</p> <p>(2) Purchases of assets from a noncharitable exempt organization</p> <p>(3) Rental of facilities, equipment, or other assets</p> <p>(4) Reimbursement arrangements</p> <p>(5) Loans or loan guarantees</p> <p>(6) Performance of services or membership or fundraising solicitations</p> <p>c Sharing of facilities, equipment, mailing lists, other assets, or paid employees</p> <p>d If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received.</p> | <p>Yes</p> |
| | <p>1a(1)</p> |
| | <p>1a(2)</p> |
| | <p>1b(1)</p> |
| | <p>1b(2)</p> |
| | <p>1b(3)</p> |
| | <p>1b(4)</p> |
| | <p>1b(5)</p> |
| | <p>1b(6)</p> |
| | <p>1c</p> |

	Yes	No
1a(1)		X
1a(2)		X
1b(1)		X
1b(2)		X
1b(3)		X
1b(4)		X
1b(5)		X
1b(6)		X
1c		X

[illegible]

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

(a) Name of organization	(b) Type of organization	(c) Description of relationship
N/A		

**Sign
Here**

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

Signature of officer or trustee

Date _____

Title

May the IRS discuss this return with the preparer shown below (see instr.)?

☒ Yes ☐ No

**Paid
Preparer
Use Only**

Print/Type preparer's name

Preparer's signature

Date

Check ☐
self-employed

PTIN

DAVID LOWENTHAL

DAVID LOWENTHAL

01/17/13

P00378651

Firm's name ► **PLANTE & MORAN, PLLC**

Firm's EIN ▶ 38-1357951

Firm's address ► 10 S. RIVERSIDE PLAZA, 9TH FLOOR
CHICAGO, IL 60606

Phone no. (312) 207-1040

Form **990-PF** (2011)

Part XV Supplementary Information**3 Grants and Contributions Paid During the Year (Continuation)**

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
AMNESTY INTERNATIONAL WASHINGTON, DC			PUBLIC AFFAIRS	750.
ART INSTITUTE OF CHICAGO CHICAGO, IL			ARTS AND CULTURE	2,500.
BALLET THEATER FOUNDATION NEW YORK, NY			ARTS AND CULTURE	700.
BLACK PINE CIRCLE SCHOOL BERKELEY, CA			EDUCATION	58,500.
BORNEO PROJECT BERKELEY, CA			ENVIRONMENT	2,500.
BOYS AND GIRLS CLUB OF METRO DENVER DENVER, CO			HUMAN SERVICES/USA	3,250.
CARE ATLANTA, GA			HUMAN SERVICES/INTERNATIONAL	1,000.
BROWN UNIVERSITY PROVIDENCE, RI			EDUCATION	5,000.
CAMBRIDGE IN AMERICA NEW YORK, NY			EDUCATION	500.
CENTER FOR ARMS CONTROL AND NON-PROLIFERATION CAMBRIDGE, MA			PUBLIC AFFAIRS	3,000.
Total from continuation sheets				287,450.

Part XV Supplementary Information**3 Grants and Contributions Paid During the Year (Continuation)**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
CHICAGO FOUNDATION FOR WOMEN CHICAGO, IL			HUMAN SERVICES/USA	3,000.
CHICAGO PUBLIC RADIO -WBEZ CHICAGO, IL			ARTS AND CULTURE	1,000.
COMMONWEALTH SCHOOL BOSTON, MA			EDUCATION	30,000.
ENVIRONMENTAL DEFENSE FUND NEW YORK, NY			ENVIRONMENT	2,500.
ENVIRONMENTAL LAW & POLICY CENTER OF THE MIDWEST CHICAGO, IL			ENVIRONMENT	2,000.
EVANSTON COMMUNITY FOUNDATION EVANSTON, IL			HUMAN SERVICES/USA	10,000.
FREEDOM FROM HUNGER DAVIS, CA			HUMAN SERVICES/INTERNATIONAL	1,000.
FUND FOR PEACE WASHINGTON, DC			PUBLIC AFFAIRS	1,000.
GREATER CHICAGO FOOD DEPOSITORY CHICAGO, IL			HUMAN SERVICES/USA	2,500.
HARLEM SCHOOL OF THE ARTS NEW YORK, NY			ARTS & CULTURE	3,000.
Total from continuation sheets				

Part XV Supplementary Information**3 Grants and Contributions Paid During the Year (Continuation)**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
HABITAT FOR HUMANITY AMERICUS, GA			HUMAN SERVICES/INTERNATIONAL	1,000.
HARVARD UNIVERSITY CAMBRIDGE, MA			EDUCATION	1,000.
HARVARD SCHOOL OF PUBLIC HEALTH BOSTON, MA			EDUCATION	60,000.
HOUSING OPTIONS FOR THE MENTALLY ILL EVANSTON, IL			HUMAN SERVICES/USA	1,000.
HUBBARD STREET DANCE CHICAGO CHICAGO, IL			ARTS AND CULTURE	5,000.
INTERNATIONAL RESCUE COMMITTEE NEW YORK, NY			HUMAN SERVICES/INTERNATIONAL	3,500.
LEGAL ASSISTANCE FOUNDATION OF METROPOLITAN CHICAGO CHICAGO, IL			HUMAN SERVICES/USA	1,250.
LYRIC OPERA OF CHICAGO CHICAGO, IL			ARTS AND CULTURE	1,000.
MCGAW YMCA EVANSTON, IL			HUMAN SERVICES/USA	1,000.
NAACP LEGAL DEFENSE AND EDUCATION FUND UNIONDALE, NY			PUBLIC AFFAIRS	1,000.
Total from continuation sheets				

Part XV Supplementary Information**3 Grants and Contributions Paid During the Year (Continuation)**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
NATIONAL CATHEDRAL SCHOOL WASHINGTON, DC			EDUCATION	1,000.
NATURAL RESOURCES DEFENSE COUNCIL WASHINGTON, DC			ENVIRONMENT	2,500.
MARIN COMMUNITY CLINICS SAN RAFAEL, CA			HEALTH	500.
NEXT THEATER COMPANY EVANSTON, IL			ARTS AND CULTURE	1,000.
OXFAM AMERICA BOSTON, MA			HUMAN SERVICES/USA	1,500.
PLANNED PARENTHOOD FEDERATION OF AMERICA NEW YORK, NY			PUBLIC AFFAIRS	2,000.
PLOUGHSHARES FUND SAN FRANCISCO, CA			PUBLIC AFFAIRS	5,000.
POPULATION INSTITUTE WASHINGTON, DC			PUBLIC AFFAIRS	1,000.
PROJECT BREAD/WALK FOR HUNGER BOSTON, MA			HUMAN SERVICES/USA	1,000.
RAINFOREST ALLIANCE NEW YORK, NY			ENVIRONMENT	1,000.
Total from continuation sheets				

Part XV Supplementary Information**3 Grants and Contributions Paid During the Year (Continuation)**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
ROGER BALDWIN FOUNDATION CHICAGO, IL			PUBLIC AFFAIRS	2,500.
SAVE THE CHILDREN HARTFORD, CT			HUMAN SERVICES/INTERNATIONAL	3,000.
PARK SCHOOL BOSTON, MA			EDUCATION	4,000.
STEPPENWOLF THEATER COMPANY CHICAGO, IL			ARTS AND CULTURE	2,000.
PHYSICIANS FOR REPRODUCTIVE CHOICE AND HEALTH NEW YORK, NY			HEALTH	500.
THE FRESH AIR FUND NEW YORK, NY			HUMAN SERVICES/USA	2,500.
POMONA COLLEGE CLAREMONT, CA			EDUCATION	2,000.
RITTER CENTER SAN RAFAEL, CA			HUMAN SERVICE/USA	500.
THIRTEEN/WNET NEW YORK BOSTON, MA			ARTS AND CULTURE	1,000.
SCRIPPS COLLEGE CLAREMONT, CA			EDUCATION	21,000.
Total from continuation sheets				

Part XV Supplementary Information**3 Grants and Contributions Paid During the Year (Continuation)**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
THE CARTER CENTER ATLANTA, GA			HUMAN SERVICES/INTERNATIONAL	1,000.
US FUND FOR UNICEF NEW YORK, NY			HUMAN SERVICES/INTERNATIONAL	5,000.
WELLESLEY COLLEGE BOSTON, MA			EDUCATION	5,000.
WFMT CHICAGO, IL			ARTS AND CULTURE	500.
WNYC RADIO NEW YORK, NY			ARTS AND CULTURE	2,000.
WORLDWATCH INSTITUTE ALEXANDRIA, VA			PUBLIC AFFAIRS	1,500.
THE NATURE CONSERVANCY ALEXANDRIA, VA			ENVIRONMENT	500.
UCSF FOUNDATION SAN FRANCISCO, CA			EDUCATION	6,000.
WBEZ CHICAGO, IL			ARTS & CULTURE	1,000.
Total from continuation sheets				



U.S. TRUST

Bank of America Corporation

S U M M A R Y O F A C C O U N T A S S E T S

AS OF 08/31/12

ACCOUNT

NEW HORIZON FOUNDATION - COMB

PAGE 1

	FEDERAL TAX COST	MARKET VALUE	% OF ACCOUNT	ESTIMATED ANNUAL INCOME	CURRENT YIELD	UNREALIZED GAIN/LOSS
CASH AND CASH EQUIVALENTS						
INCOME CASH	153.27	153.27	0.020			
PRINCIPAL CASH	86,281.45	86,281.45	11.131			
TOTAL CASH AND CASH EQUIVALENTS	<u>86,434.72</u>	<u>86,434.72</u>	<u>11.150</u>	0.00	0.000	0.00
FIXED INCOME						
MUTUAL FUNDS-FIXED	28,259.15	35,307.32	4.555	1,243.40	3.522	7,048.17
EQUITIES						
CONSUMER DISCRETIONARY	26,870.94	33,134.72	4.275	554.32	1.673	6,263.78
CONSUMER STAPLES	23,623.81	28,520.55	3.679	808.21	2.834	4,896.74
ENERGY	12,759.00	14,421.10	1.860	263.80	1.829	1,662.10
FINANCIALS	23,559.71	23,493.26	3.031	587.71	2.502	-66.45
HEALTH CARE	28,886.74	34,496.55	4.450	612.92	1.777	5,609.81
INDUSTRIALS	33,056.21	35,429.43	4.571	863.50	2.437	2,373.22
INFORMATION TECHNOLOGY	34,893.48	52,830.50	6.815	551.01	1.043	17,937.02
MATERIALS	6,973.53	8,139.21	1.050	171.94	2.112	1,165.68
TELECOMMUNICATION SERVICES	4,872.19	5,501.80	0.710	268.19	4.875	629.61
MUTUAL FUNDS-EQUITY	117,084.49	121,955.34	15.733	738.54	0.606	4,870.85
TOTAL EQUITIES	<u>312,580.10</u>	<u>357,922.46</u>	<u>46.174</u>	<u>5,420.14</u>	<u>1.514</u>	<u>45,342.36</u>
BALANCED FUNDS						
MUTUAL FUNDS-BALANCED	35,000.00	36,676.46	4.731	2,352.94	6.415	1,676.46
ALTERNATIVE INVESTMENTS						
REAL ESTATE	535,090.02	258,823.78	33.390	77.76	0.030	-276,266.24
ACCOUNT TOTAL	<u>997,363.99</u>	<u>775,164.74</u>	<u>100.000</u>	<u>9,094.24</u>	<u>1.173</u>	<u>-222,199.25</u>

FORM 990-PF	DIVIDENDS AND INTEREST FROM SECURITIES	STATEMENT	1
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SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
BANK OF AMERICA	20,774.	3,130.	17,644.
TOTAL TO FM 990-PF, PART I, LN 4	20,774.	3,130.	17,644.

FORM 990-PF	OTHER INCOME	STATEMENT	2
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DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
OTHER INCOME	550.	550.	
TOTAL TO FORM 990-PF, PART I, LINE 11	550.	550.	

FORM 990-PF	LEGAL FEES	STATEMENT	3
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
LEGAL	275.	0.		275.
TO FM 990-PF, PG 1, LN 16A	275.	0.		275.

FORM 990-PF	ACCOUNTING FEES	STATEMENT	4
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING	2,600.	1,300.		1,300.
TO FORM 990-PF, PG 1, LN 16B	2,600.	1,300.		1,300.

FORM 990-PF OTHER PROFESSIONAL FEES STATEMENT 5

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
MANAGEMENT/CONSULTING	2,225.	2,225.		0.
TO FORM 990-PF, PG 1, LN 16C	2,225.	2,225.		0.

FORM 990-PF TAXES STATEMENT 6

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FOREIGN TAXES	41.	41.		0.
PAYROLL TAXES	765.	383.		382.
IL CHARITY BUREAU	15.	15.		0.
FEDERAL TAXES PAID	960.	960.		0.
OTHER TAXES	439.	439.		0.
TO FORM 990-PF, PG 1, LN 18	2,220.	1,838.		382.

FORM 990-PF OTHER EXPENSES STATEMENT 7

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
MISCELLANEOUS	10.	5.		5.
DUES & SUBSCRIPTIONS	500.	0.		500.
TO FORM 990-PF, PG 1, LN 23	510.	5.		505.

FORM 990-PF	CORPORATE STOCK	STATEMENT	8
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
CORPORATE STOCK	847,670.	616,746.
TOTAL TO FORM 990-PF, PART II, LINE 10B	847,670.	616,746.

FORM 990-PF	CORPORATE BONDS	STATEMENT	9
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
CORPORATE BONDS	63,259.	71,984.
TOTAL TO FORM 990-PF, PART II, LINE 10C	63,259.	71,984.

FORM 990-PF	OTHER LIABILITIES	STATEMENT	10
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DESCRIPTION	BOY AMOUNT	EOY AMOUNT
PAYROLL TAXES PAYABLE: FEDERAL	15.	15.
PAYROLL TAXES PAYABLE: FICA	35.	35.
PAYROLL TAXES PAYABLE: MEDICARE	12.	12.
PAYROLL TAXES PAYABLE: STATE TAXES	333.	333.
TOTAL TO FORM 990-PF, PART II, LINE 22	395.	395.

FORM 990-PF

PART VIII - LIST OF OFFICERS, DIRECTORS
TRUSTEES AND FOUNDATION MANAGERS

STATEMENT 11

NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN CONTRIB	EXPENSE ACCOUNT
WILLIAM REVELLE 1625 HINMAN AVENUE, #202 EVANSTON, IL 60201	PRESIDENT 0.13	0.	0.	0.
CAROLYN REVELLE 1625 HINMAN AVENUE, #202 EVANSTON, IL 60201	VICE PRESIDENT 0.13	0.	0.	0.
MARY PACI 1625 HINMAN AVENUE, #202 EVANSTON, IL 60201	VICE PRESIDENT 0.13	0.	0.	0.
ETHELYN C. BOND 1625 HINMAN AVENUE, #202 EVANSTON, IL 60201	SECRETARY/TREASURER 6.00	10,000.	0.	0.
ELEANOR REVELLE 1625 HINMAN AVENUE, #202 EVANSTON, IL 60201	DIRECTOR 0.13	0.	0.	0.
TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII		10,000.	0.	0.

Application for Extension of Time To File an Exempt Organization Return

OMB No. 1545-1709

► File a separate application for each return.

- If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** and check this box ☒ **X**
 - If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only **Part II** (on page 2 of this form).
- Do not complete Part II unless you have already been granted an automatic 3-month extension on a previously filed Form 8868.

Electronic filing (e-file). You can electronically file Form 8868 if you need a 3-month automatic extension of time to file (6 months for a corporation required to file Form 990-T), or an additional (not automatic) 3-month extension of time. You can electronically file Form 8868 to request an extension of time to file any of the forms listed in Part I or Part II with the exception of Form 8870, Information Return for Transfers Associated With Certain Personal Benefit Contracts, which must be sent to the IRS in paper format (see instructions). For more details on the electronic filing of this form, visit www.irs.gov/efile and click on e-file for Charities & Nonprofits.

Part I Automatic 3-Month Extension of Time. Only submit original (no copies needed).

A corporation required to file Form 990-T and requesting an automatic 6-month extension - check this box and complete

Part I only ☐

All other corporations (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns.

Type or print	Name of exempt organization or other filer, see instructions. NEW HORIZON FOUNDATION	Employer identification number (EIN) or ☒ 36-3406294
File by the due date for filing your return. See instructions.	Number, street, and room or suite no. If a P.O. box, see instructions. 1625 HINMAN AVENUE	Social security number (SSN) ☐
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. EVANSTON, IL 60201	

Enter the Return code for the return that this application is for (file a separate application for each return)

Application Is For	Return Code	Application Is For	Return Code
Form 990	01	Form 990-T (corporation)	07
Form 990-BL	02	Form 1041-A	08
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

ETHELYN BOND

- The books are in the care of ► **1625 HINMAN AVENUE - EVANSTON, IL 60201**

Telephone No. ► **847 570-8202**

FAX No. ► ☐

- If the organization does not have an office or place of business in the United States, check this box ☐
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) . If this is for the whole group, check this box ☐. If it is for part of the group, check this box ☐ and attach a list with the names and EINs of all members the extension is for.

1 I request an automatic 3-month (6 months for a corporation required to file Form 990-T) extension of time until **APRIL 15, 2013**, to file the exempt organization return for the organization named above. The extension is for the organization's return for:

► ☐ calendar year or

► ☒ tax year beginning **SEP 1, 2011**, and ending **AUG 31, 2012**

2 If the tax year entered in line 1 is for less than 12 months, check reason ☐ Initial return ☐ Final return
☐ Change in accounting period

3a If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	3a	\$	567.
b If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit.	3b	\$	960.
c Balance due. Subtract line 3b from line 3a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	3c	\$	0.

Caution. If you are going to make an electronic fund withdrawal with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions.

LHA For Privacy Act and Paperwork Reduction Act Notice, see Instructions.

Form 8868 (Rev. 1-2012)