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

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

For calendar year 2012 or tax year beginning , 2012, and ending , 20

Name of foundation EVERGREEN FOUNDATION, INC.		A Employer identification number 06-1482180
Number and street (or P O box number if mail is not delivered to street address) C/O GEORGE S. BROWNELL 3139 WESTFIELD RIDGE		B Telephone number (see instructions) (920) 751-3912
City or town, state, and ZIP code NEENAH, WI 54956		C If exemption application is pending, check here <input type="checkbox"/>
G Check all that apply	Initial return <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Final return <input type="checkbox"/> Amended return <input type="checkbox"/> Address change <input type="checkbox"/> Name change <input type="checkbox"/>	D 1 Foreign organizations, check here <input type="checkbox"/> 2 Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
H Check type of organization <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col (c), line 16) \$ 2,020,774.		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>
J Accounting method <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ (Part I, column (d) must be on cash basis)		

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1	Contributions, gifts, grants, etc., received (attach schedule) if the foundation is not required to attach Sch B <input type="checkbox"/>	530,160.			
2	Check <input type="checkbox"/>				
3	Interest on savings and temporary cash investments				
4	Dividends and interest from securities	35,312.	35,312.		ATCH 1
5a	Gross rents				
b	Net rental income or (loss)				
6a	Net gain or (loss) from sale of assets not on line 10	576,399.			
b	Gross sales price for all assets on line 6a 925,177.		576,399.		
7	Capital gain net income (from Part IV, line 2)				
8	Net short-term capital gain				
9	Income modifications				
10a	Gross sales less returns and allowances				
b	Less Cost of goods sold				
c	Gross profit or (loss) (attach schedule)				
11	Other income (attach schedule)				
12	Total. Add lines 1 through 11	1,141,871.	611,718.		
13	Compensation of officers, directors, trustees, etc.	0			
14	Other employee salaries and wages				
15	Pension plans, employee benefits				
16a	Legal fees (attach schedule)				
b	Accounting fees (attach schedule) ATCH 2	3,675.			
c	Other professional fees (attach schedule) *	6,859.	6,859.		
17	Interest				
18	Taxes (attach schedule) (see instructions) ATCH 4	985.	985.		
19	Depreciation (attach schedule) and depletion				
20	Occupancy				
21	Travel, conferences, and meetings				
22	Printing and publications				
23	Other expenses (attach schedule) ATCH 5	8.			
24	Total operating and administrative expenses. Add lines 13 through 23	11,527.	7,844.		
25	Contributions, gifts, grants paid	50,501.			50,501.
26	Total expenses and disbursements. Add lines 24 and 25	62,028.	7,844.	0	50,501.
27	Subtract line 26 from line 12	1,079,843.			
a	Excess of revenue over expenses and disbursements		603,867.		
b	Net investment income (if negative, enter -0-)				
c	Adjusted net income (if negative, enter -0-)				

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Revenue
Operating and Administrative Expenses

Part II Balance Sheets

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

		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing	2,415.	2,405.	2,405.
	2 Savings and temporary cash investments	49,165.	180,400.	180,400.
	3 Accounts receivable ▶ Less allowance for doubtful accounts ▶			
	4 Pledges receivable ▶ Less allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7 Other notes and loans receivable (attach schedule) ▶ Less allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10 a Investments - U S and state government obligations (attach schedule) .			
	b Investments - corporate stock (attach schedule) ATCH 6	704,400.	1,349,664.	1,646,704.
	c Investments - corporate bonds (attach schedule) ATCH 7	185,499.	146,604.	160,025.
	11 Investments - land, buildings, and equipment basis Less accumulated depreciation (attach schedule) ▶			
	12 Investments - mortgage loans ATCH 8	133,335.	16,201.	31,240.
	13 Investments - other (attach schedule) ATCH 8			
	14 Land, buildings, and equipment basis Less accumulated depreciation (attach schedule) ▶			
15 Other assets (describe ▶)				
16 Total assets (to be completed by all filers - see the instructions Also, see page 1, item I)	1,074,814.	1,695,274.	2,020,774.	
Liabilities	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons .			
	21 Mortgages and other notes payable (attach schedule)			
	22 Other liabilities (describe ▶)			
	23 Total liabilities (add lines 17 through 22)	0	0	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. ▶ <input checked="" type="checkbox"/>			
	27 Capital stock, trust principal, or current funds	1,074,814.	1,695,274.	
	28 Paid-in or capital surplus, or land, bldg, and equipment fund			
	29 Retained earnings, accumulated income, endowment, or other funds . .			
	30 Total net assets or fund balances (see instructions)	1,074,814.	1,695,274.	
	31 Total liabilities and net assets/fund balances (see instructions)	1,074,814.	1,695,274.	

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	1,074,814.
2 Enter amount from Part I, line 27a	2	1,079,843.
3 Other increases not included in line 2 (itemize) ▶	3	
4 Add lines 1, 2, and 3	4	2,154,657.
5 Decreases not included in line 2 (itemize) ▶ ATCH 9	5	459,383.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	1,695,274.

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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 SEE PART IV SCHEDULE					
b					
c					
d					
e					
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)		
a					
b					
c					
d					
e					
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))		
(i) 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					
b					
c					
d					
e					
2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }			2	576,399.	
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8			3	0	

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 the instructions before making any entries

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2011	48,880.	1,039,011.	0.047045
2010	46,100.	1,029,361.	0.044785
2009	53,354.	927,678.	0.057513
2008	68,916.	1,122,711.	0.061384
2007	54,065.	1,287,759.	0.041984
2 Total of line 1, column (d)			2 0.252711
3 Average distribution ratio for the 5-year base period - divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years			3 0.050542
4 Enter the net value of noncharitable-use assets for 2012 from Part X, line 5			4 1,446,349.
5 Multiply line 4 by line 3			5 73,101.
6 Enter 1% of net investment income (1% of Part I, line 27b)			6 6,039.
7 Add lines 5 and 6			7 79,140.
8 Enter qualifying distributions from Part XII, line 4 If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions			8 50,501.

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

1 a	Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1 Date of ruling or determination letter _____ (attach copy of letter if necessary - see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b	1	12,077.
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col (b)		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	2	
3	Add lines 1 and 2	3	12,077.
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	0
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5	12,077.
6	Credits/Payments		
a	2012 estimated tax payments and 2011 overpayment credited to 2012	6a	2,898.
b	Exempt foreign organizations - tax withheld at source	6b	
c	Tax paid with application for extension of time to file (Form 8868)	6c	14,000.
d	Backup withholding erroneously withheld	6d	
7	Total credits and payments. Add lines 6a through 6d	7	16,898.
8	Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8	
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	4,821.
11	Enter the amount of line 10 to be Credited to 2013 estimated tax <input type="checkbox"/> 4,821. Refunded <input type="checkbox"/>	11	

Part VII-A Statements Regarding Activities

	Yes	No
1 a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for the definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation \$ _____ (2) On foundation managers \$ _____		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers \$ _____		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4 a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), and Part XV	X	
8 a Enter the states to which the foundation reports or with which it is registered (see instructions) <input type="checkbox"/> CT,		
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 2012 or the taxable year beginning in 2012 (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	

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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?	13	X	
Website address N/A				
14	The books are in care of GEORGE S. BROWNELL Telephone no 920-751-3912			
Located at 3139 WESTFIELD RIDGE NEENAH, WI ZIP+4 54956				
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here	<input type="checkbox"/>		
and enter the amount of tax-exempt interest received or accrued during the year		15		
16	At any time during calendar year 2012, 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?	16	Yes	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 ▶				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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)?	1b	
Organizations relying on a current notice regarding disaster assistance check here <input type="checkbox"/>		
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2012?	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 2012, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2012? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
If "Yes," list the years ▶		
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions)	2b	X
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ▶		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b If "Yes," did it have excess business holdings in 2012 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 2012)	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 2012?	4b	X

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

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

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☒ No(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☒ No(3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☒ No(4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see instructions) ☐ Yes ☒ No(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☒ Nob 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)? ☐ Yes ☒ NoOrganizations relying on a current notice regarding disaster assistance check here ☐c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? ☐ Yes ☒ No

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

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

If "Yes" to 6b, file Form 8870

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☒ Nob If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction? ☐ Yes ☒ No**Part VIII** Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors**1** List all officers, directors, trustees, foundation managers and their compensation (see instructions).

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

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

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

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

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

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		

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

Part IX-A Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1 N/A	
2	
3	
4	

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

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1 NONE	
2	
All other program-related investments. See instructions.	
3 NONE	
Total. Add lines 1 through 3 ▶	

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Part X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see 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	1,351,182.
b	Average of monthly cash balances	1b	117,193.
c	Fair market value of all other assets (see instructions)	1c	
d	Total (add lines 1a, b, and c)	1d	1,468,375.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	
2	Acquisition indebtedness applicable to line 1 assets	2	
3	Subtract line 2 from line 1d	3	1,468,375.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	22,026.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	1,446,349.
6	Minimum investment return. Enter 5% of line 5	6	72,317.

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	72,317.
2a	Tax on investment income for 2012 from Part VI, line 5	2a	12,077.
b	Income tax for 2012 (This does not include the tax from Part VI)	2b	
c	Add lines 2a and 2b	2c	12,077.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	60,240.
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	60,240.
6	Deduction from distributable amount (see instructions)	6	
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	60,240.

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	50,501.
b	Program-related investments - total from Part IX-B	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	50,501.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b (see instructions).	5	0
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	50,501.

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

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2011	(c) 2011	(d) 2012
1 Distributable amount for 2012 from Part XI, line 7				60,240.
2 Undistributed income, if any, as of the end of 2012				
a Enter amount for 2011 only			50,398.	
b Total for prior years 20 <u>10</u> 20 <u>09</u> 20 <u>08</u>				
3 Excess distributions carryover, if any, to 2012				
a From 2007				
b From 2008				
c From 2009				
d From 2010				
e From 2011				
f Total of lines 3a through e				
4 Qualifying distributions for 2012 from Part XII, line 4 ► \$ <u>50,501.</u>				
a Applied to 2011, but not more than line 2a			50,398.	
b Applied to undistributed income of prior years (Election required - see instructions).				
c Treated as distributions out of corpus (Election required - see instructions)				
d Applied to 2012 distributable amount				103.
e Remaining amount distributed out of corpus				
5 Excess distributions carryover applied to 2012 . (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:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5				
b Prior years' undistributed income Subtract line 4b from line 2b				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed				
d Subtract line 6c from line 6b Taxable amount - see instructions				
e Undistributed income for 2011 Subtract line 4a from line 2a Taxable amount - see instructions				
f Undistributed income for 2012 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2013				60,137.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions)				
8 Excess distributions carryover from 2007 not applied on line 5 or line 7 (see instructions)				
9 Excess distributions carryover to 2013. Subtract lines 7 and 8 from line 6a	0			
10 Analysis of line 9				
a Excess from 2008				
b Excess from 2009				
c Excess from 2010				
d Excess from 2011				
e Excess from 2012				

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

NOT APPLICABLE

1 a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2012, enter the date of the ruling

b Check box to indicate whether the foundation is a private operating foundation described in section

4942(j)(3) or

4942(j)(5)

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

Tax year	Prior 3 years				(e) Total
	(a) 2012	(b) 2011	(c) 2010	(d) 2009	
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon					
a "Assets" alternative test - enter					
(1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test - enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed					
c "Support" alternative test - enter					
(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

Part XV Supplementary Information (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year - see instructions.)**1 Information Regarding Foundation Managers:**

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

MEAD M. BROWNELL, K. HYDE BROWNELL

b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest

N/A

2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:

Check here ☒ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. (see instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d

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

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

c Any submission deadlines

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

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

<div>Recipient</div> <div>Name and address (home or business)</div>	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount			
a Paid during the year ATCH 12							
Total	3a	50,501.	b Approved for future payment				
Total	3b						

Form 990-PF (2012)

Enter gross amounts unless otherwise indicated

(See worksheet in line 13 instructions to verify calculations)

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

[illegible]

Schedule B

(Form 990, 990-EZ,
or 990-PF)
Department of the Treasury
Internal Revenue Service

Schedule of Contributors

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

OMB No 1545-0047

2012

Name of the organization

EVERGREEN FOUNDATION, INC.

Employer identification number

06-1482180

Organization type (check one)

Filers of:

Section:

Form 990 or 990-EZ

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

Form 990-PF

☒ 501(c)(3) exempt private foundation☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation☐ 501(c)(3) taxable private foundationCheck if your organization is covered by the **General Rule** or a **Special Rule**.**Note.** Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

General Rule

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

Special Rules

- ☐
- For a section 501(c)(3) organization filing Form 990 or 990-EZ that met the 33 1/3 % support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi) and received from any one contributor, during the year, a contribution of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.

- ☐
- For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 for use
- exclusively*
- for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals. Complete Parts I, II, and III.

- ☐
- For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions for use
- exclusively*
- for religious, charitable, etc., purposes, but these contributions did not total to more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an
- exclusively*
- religious, charitable, etc., purpose. Do not complete any of the parts unless the
- General Rule**
- applies to this organization because it received nonexclusively religious, charitable, etc., contributions of \$5,000 or more during the year. ▶ \$ _____

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

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

Schedule B (Form 990, 990-EZ, or 990-PF) (2012)

JSA

2E1251 1 000

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PAGE 16

Name of organization EVERGREEN FOUNDATION, INC.

Employer identification number
06-1482180**Part I Contributors** (see instructions) Use duplicate copies of Part I if additional space is needed

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	MEAD M. BROWNELL 516 WAKE ROBIN DRIVE SHELBURNE, VT 05482	\$ 526,485.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II if there is a noncash contribution)
2	MEAD M. BROWNELL 516 WAKE ROBIN DRIVE SHELBURNE, VT 05485	\$ 3,675.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)

Employer identification number	06-1482180
--------------------------------	------------

Part II

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
1	2,965 SHS ABBOTT LABORATORIES 9,075 SHS HEWLETT PACKARD 3,000 SHS YUM BRANDS	\$ 526,485.	11/27/2012
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
- - - -	- - - - - - - - - - - - - - - -	\$ - - - -	- - - -
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
- - - -	- - - - - - - - - - - - - - - -	\$ - - - -	- - - -
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
- - - -	- - - - - - - - - - - - - - - -	\$ - - - -	- - - -
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
- - - -	- - - - - - - - - - - - - - - -	\$ - - - -	- - - -
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
- - - -	- - - - - - - - - - - - - - - -	\$ - - - -	- - - -
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
- - - -	- - - - - - - - - - - - - - - -	\$ - - - -	- - - -

Name of organization EVERGREEN FOUNDATION, INC.

Employer identification number

06-1482180

Part III Exclusively religious, charitable, etc., individual contributions to section 501(c)(7), (8), or (10) organizations that total more than \$1,000 for the year. Complete columns (a) through (e) and the following line entryFor organizations completing Part III, enter the total of *exclusively* religious, charitable, etc., contributions of \$1,000 or less for the year (Enter this information once See instructions) ► \$ _____

Use duplicate copies of Part III if additional space is needed.

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
---	----- ----- -----	----- ----- -----	----- ----- -----
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	----- ----- -----	----- ----- -----	
---	----- ----- -----	----- ----- -----	----- ----- -----
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	----- ----- -----	----- ----- -----	
---	----- ----- -----	----- ----- -----	----- ----- -----
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	----- ----- -----	----- ----- -----	
---	----- ----- -----	----- ----- -----	----- ----- -----
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	----- ----- -----	----- ----- -----	
---	----- ----- -----	----- ----- -----	----- ----- -----
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	----- ----- -----	----- ----- -----	

ATTACHMENT 1FORM 990PF, PART I - DIVIDENDS AND INTEREST FROM SECURITIES

<u>DESCRIPTION</u>	<u>REVENUE AND EXPENSES PER BOOKS</u>	<u>NET INVESTMENT INCOME</u>
DIVIDEND INCOME	28,940.	28,940.
INTEREST INCOME	10,230.	10,230.
AMORTIZATION OF BOND PREMIUM	-3,858.	-3,858.
TOTAL	<u>35,312.</u>	<u>35,312.</u>

ATTACHMENT 2

FORM 990PF, PART I - ACCOUNTING FEES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME	ADJUSTED NET INCOME	CHARITABLE PURPOSES
TAX PREPARATION FEE	3,675.			
TOTALS	3,675.			

ATTACHMENT 3

FORM 990PF, PART I - OTHER PROFESSIONAL FEES

<u>DESCRIPTION</u>	<u>REVENUE AND EXPENSES PER BOOKS</u>	<u>NET INVESTMENT INCOME</u>
INVESTMENT MANAGEMENT FEES	6,749.	6,749.
INVESTMENT EXPENSES	110.	110.
TOTALS	<u>6,859.</u>	<u>6,859.</u>

ATTACHMENT 4

FORM 990PF, PART I - TAXES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
FOREIGN TAX PAID	985.	985.
TOTALS	985.	985.

ATTACHMENT 5FORM 990PF, PART I - OTHER EXPENSES

<u>DESCRIPTION</u>	<u>REVENUE AND EXPENSES PER BOOKS</u>
BANK SERVICE CHARGES	8.
TOTALS	<u>8.</u>

ATTACHMENT 6

FORM 990PF, PART II - CORPORATE STOCK

DESCRIPTION

ENDING
BOOK VALUE

ENDING
FMV

GLENMEDE - SEE ATTACHED

1,349,664.



1,646,704.

TOTALS

1,349,664.

1,646,704.

HOLDINGS LIST

Security Name	Quantity	Symbol	Bond Rating	Unit Cost	Total Cost	Market Price	Market Value	Unrealized Gain/Loss	Estimated Annual Income	Current Yield
 Cash										
CASH	-			1 00	1 03	1 00	1 03	-	-	0 0%
GLENMEDE FUND INC-GOVT CASH PORTFOLIO DTD 1/1/1988	105,056 00	GTGXX		1 00	105,056 00	1.00	105,056 00	-	0 07	0 0%
Cash Total					105,057.03		105,057.03		0 07	0 0%
 Equity										
Large Cap										
Consumer Discretionary										
ADVANCE AUTO PARTS	300 00	AAP		67 94	20,382 00	72 35	21,705 00	1,323 00	72 00	0 3%
TARGET CORP	600 00	TGT		57 35	34,409 18	59 17	35,502 00	1,092 82	864 00	2 4% +
VIACOM INC-CLASS B	1,000 00	VIAB		28 09	28,085 52	52 74	52,740 00	24,654 48	1,100 00	2 1% +
YUM BRANDS INC	1,000 00	YUM		13 29	13,292 50	66 40	66,400 00	53,107 50	1,340 00	2 0%
Consumer Staples										
H J HEINZ CO	700 00	HNZ		54 39	38,074 95	57 68	40,376 00	2,301 05	1,442 00	3 6%
NESTLE SA ADR	300 00	NSRGY		58 00	17,399 17	65 11	19,533 60	2,134 43	531 60	2 7%
PEPSICO INC	600 00	PEP		63 87	38,321 37	68 43	41,058 00	2,736 63	1,290 00	3 1% +
PROCTER & GAMBLE CO.	700 00	PG		63 63	44,538 42	67 89	47,523 00	2,984 58	1,573 60	3 3% +
WALGREEN CO	1,500 00	WAG		38 53	57,791 68	37 01	55,515 00	(2,276 68)	1,650 00	3 0% +
Energy										
CHEVRON CORP	400 00	CVX		0 43	173 20	108 14	43,256 00	43,082 80	1,440 00	3 3%
CONOCOPHILLIPS	300 00	COP		35 05	10,516 41	57 99	17,397 00	6,880 59	792 00	4 6%
DEVON ENERGY CORP	260 00	DVN		66 69	17,338 41	52 04	13,530 40	(3,808 01)	208 00	1 5%
OCCIDENTAL PETROLEUM CORP	600 00	OXY		80 79	48,473 24	76 61	45,966 00	(2,507 24)	1,296 00	2 8% +

12/01/2012 - 12/31/2012

Security Name	Quantity	Symbol	Bond Rating	Unit Cost	Total Cost	Market Price	Market Value	Unrealized Gain/Loss	Estimated Annual Income	Current Yield
SCHLUMBERGER LTD	700.00	SLB		64.33	45,027.69	69.30	48,509.02	3,481.33	770.00	1.6% +
Financials										
ACE LTD	600.00	ACE		78.32	46,989.00	79.80	47,880.00	891.00	1,176.00	2.5% +
AMERICAN EXPRESS CO	800.00	AXP		57.41	45,927.89	57.48	45,984.00	56.11	640.00	1.4% +
BLACKROCK INC	100.00	BLK		195.49	19,548.60	206.71	20,671.00	1,122.40	600.00	2.9%
PNC FINANCIAL SERVICES GROUP	800.00	PNC		59.47	47,576.00	58.31	46,648.00	(928.00)	1,280.00	2.7% +
Health Care										
ABBOTT LABORATORIES	800.00	ABT		5.24	4,190.08	65.50	52,400.00	48,209.92	448.00	0.9% +
C R BARD INC	500.00	BCR		91.32	45,662.27	97.74	48,870.00	3,207.73	400.00	0.8% +
MEDTRONIC INC	1,000.00	MDT		46.28	46,279.44	41.02	41,020.00	(5,259.44)	1,040.00	2.5% +
WATERS CORP	500.00	WAT		64.90	32,452.25	87.12	43,560.00	11,107.75	-	0.0% +
Industrials										
3M CO	500.00	MMM		87.28	43,638.86	92.85	46,425.00	2,786.14	1,180.00	2.5% +
DANAHER CORP	530.00	DHR		32.00	16,961.56	55.90	29,627.00	12,665.44	53.00	0.2%
EMERSON ELECTRIC CO	860.00	EMR		41.05	35,305.41	52.96	45,545.60	10,240.19	1,410.40	3.1% +
UNITED PARCEL SERVICE - CL B	370.00	UPS		73.48	27,187.70	73.73	27,280.10	92.40	843.60	3.1% +
W W GRAINGER INC	100.00	GWV		194.46	19,445.97	202.37	20,237.00	791.03	320.00	1.6% +
Information Technology										
APPLE INC.	50.00	AAPL		522.18	26,109.00	532.17	26,608.65	499.65	530.00	2.0% +
CISCO SYSTEMS	1,500.00	CSCO		18.99	28,485.28	19.65	29,474.10	988.82	840.00	2.8% +
COGNIZANT TECH SOLUTIONS CRP	500.00	CTSH		68.64	34,321.00	73.88	36,941.15	2,620.15	-	0.0% +
INTERNATIONAL BUSINESS MACHINES CORP	200.00	IBM		189.25	37,849.00	191.55	38,310.00	461.00	680.00	1.8%
MICROSOFT CORP	1,500.00	MSFT		25.84	38,761.50	26.71	40,064.55	1,303.05	1,380.00	3.4% +
ORACLE CORP	1,000.00	ORCL		31.89	31,890.00	33.32	33,320.00	1,430.00	240.00	0.7% +

12/01/2012 - 12/31/2012

Security Name	Quantity	Symbol	Bond Rating	Unit Cost	Total Cost	Market Price	Market Value	Unrealized Gain/Loss	Estimated Annual Income	Current Yield
QUALCOMM CORP	700.00	QCOM		59.62	41,732.37	61.86	43,301.72	1,569.35	700.00	1.6% +
TEXAS INSTRUMENTS INC	750.00	TXN		28.29	21,217.40	30.89	23,167.50	1,950.10	630.00	2.7%
Materials										
CF INDUSTRIES HOLDINGS INC	200.00	CF		46.48	9,296.00	203.16	40,632.00	31,336.00	320.00	0.8%
PRAXAIR INC	220.00	PX		47.92	10,543.24	109.45	24,079.00	13,535.76	484.00	2.0% +
Other										
KINDER MORGAN MANAGEMENT CORP LLC COM	322.00	KMR		47.08	15,159.30	75.46	24,298.12	9,138.82	-	0.0%
Mutual Fund										
ISHARES S & P SMALLCAP 600	700.00	IJR		68.77	48,139.39	78.10	54,670.00	6,530.61	905.10	1.7% +
Large Cap Total					1,188,492.25		1,480,025.51	291,533.26	30,469.30	2.1%
International										
Mutual Fund										
DUPONT CAPITAL EMG MKTS -I	2,793.82	DCMEX		9.06	25,312.00	9.72	27,155.92	1,843.92	240.27	0.9%
TWEEDY BROWNE GLOBAL VALUE FUND	2,188.32	TBGVX		25.35	55,475.89	23.24	50,856.53	(4,619.36)	-	0.0% +
VANGUARD EMERGING MARKET ETF	1,200.00	VWO		41.46	49,756.33	44.53	53,436.00	3,679.67	1,170.00	2.2% +
VANGUARD EUROPE PACIFIC ETF	1,000.00	VEA		30.63	30,627.15	35.23	35,230.00	4,602.85	1,380.00	3.9%
International Total					161,171.37		166,678.45	5,507.08	2,790.27	1.7%
Equity Total					1,349,663.62		1,646,703.96	297,040.34	33,259.57	2.0%
Total For 8035-11-4/1					1,454,720.65		1,751,760.99	297,040.34	33,259.64	1.9%
Accrued Income							450.50			
Grand Total							\$1,752,211.49			

+ Multiple lots

FORM 990PF, PART II - CORPORATE BONDS

ATTACHMENT 7

<u>DESCRIPTION</u>	<u>ENDING BOOK VALUE</u>	<u>ENDING FMV</u>
RAYMOND JAMES - SEE ATTACHED	146,604.	160,025.
TOTALS	<u>146,604.</u>	<u>160,025.</u>

FORM 990PF, PART II - OTHER INVESTMENTS

ATTACHMENT 8

<u>DESCRIPTION</u>	<u>ENDING BOOK VALUE</u>	<u>ENDING FMV</u>
RJ MUTUAL FDS - SEE ATTACHED	16,201.	31,240.
TOTALS	<u>16,201.</u>	<u>31,240.</u>

Your Portfolio

visit

	Quantity	Price	Value	Cost
Cash & Cash Alternatives				
Eagle Class-JPMorgan U.S. Government Money Market Fund (JJGXX) 0.02%	75,343.050	\$1.000	\$75,343.05	75,343.05
Cash & Cash Alternatives Total			\$75,343.05	75,343.05
Mutual Funds				
ISHARES TR CORE S&P SCP ETF (IJR)	400.000	\$78.100	\$31,240.00	16,201.00
Mutual Funds Total			\$31,240.00	16,201.00
Fixed Income				
DUKE POWER COMPANY, LLC NTS ISIN US264399EQ56 6.3000% DUE 02/01/2014 (264399EQ5)	\$40,000.00	\$105.945	\$42,378.00	40,756.83
Debt Classification: Senior Unsecured				
Ratings Information: Moody's Long Term Rating: Baa2 S&P Long Term Rating: BBB, Long T				
THE GOLDMAN SACHS GROUP, INC. NTS ISIN US38143UAW18 5.0000% DUE 10/01/2014 (38143UAW1)	\$25,000.00	\$106.519	\$26,629.75	25,025.63
Debt Classification: Senior Unsecured				
Ratings Information: Moody's Long Term Rating: A3 S&P Long Term Rating: A-				
PSEG POWER LLC NTS ISIN US69362BAN29 5.5000% DUE 12/01/2015 (69362BAN2)	\$40,000.00	\$111.651	\$44,660.40	40,313.04
Debt Classification: Senior Unsecured				
Ratings Information: Moody's Long Term Rating: Baa1 S&P Long Term Rating: BBB, Long T				
DOMINION RESOURCES, INC. NTS ISIN US25746UBB44 5.6000% DUE 11/15/2016 (25746UBB4)	\$40,000.00	\$115.892	\$46,356.80	40,508.51
Debt Classification: Senior Unsecured				
Ratings Information: Moody's Long Term Rating: Baa2 S&P Long Term Rating: A-				
Fixed Income Total			\$160,024.95	146,604.01
Portfolio Total			\$266,608.00	238,148.06

^A Adjusted cost basis was used to calculate the gain or (loss) figure

^o Please see Cost Basis on the Understanding Your Statement page

ATTACHMENT 9FORM 990PF, PART III - OTHER DECREASES IN NET WORTH OR FUND BALANCESDESCRIPTIONAMOUNT

DIFFERENCE IN BOOK VS. TAX BASIS
OF EQUITIES CONTRIBUTED

459,383.

TOTAL

459,383.

FORM 990PF, PART VII-A, LINE 10 - NEW SUBSTANTIAL CONTRIBUTORS

ATTACHMENT 10

NAME AND ADDRESS	DATE	DIRECT PUBLIC SUPPORT
MEAD M. BROWNELL 516 WAKE ROBIN DRIVE SHELBURNE, VT 05482	11/27/2012	526,485.
MEAD M. BROWNELL 516 WAKE ROBIN DRIVE SHELBURNE, VT 05485	6/26/2012	3,675.
TOTAL CONTRIBUTION AMOUNTS		530,160.

FORM 990PF, PART VIII - LIST OF OFFICERS, DIRECTORS, AND TRUSTEESATTACHMENT 11

TITLE AND AVERAGE HOURS PER
WEEK DEVOTED TO POSITION

NAME AND ADDRESS

MEAD M. BROWNELL
516 WAKE ROBIN DRIVE
SHELBURNE, VT 05482

PRESIDENT

0 0 0

K. HYDE BROWNELL
516 WAKE ROBIN DRIVE
SHELBURNE, VT 05482

VICE PRESIDENT

0 0 0

THOMAS H. BROWNELL
44 OVERLAKE PARK
BURLINGTON, VT 05401

V.P./ASSISTANT TREASURER

0 0 0

GEORGE S. BROWNELL
3139 WESTFIELD RIDGE
NEENAH, WI 54956

SECRETARY

0 0 0

KENNETH C. BROWNELL
P.O. BOX 414
LEVERETT, MA 01054

VICE PRESIDENT

0 0 0

GRAND TOTALS

FORM 990FF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

ATTACHMENT 12

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
SEE ATTACHED STATEMENT	NO RELATIONSHIP EXEMPT	GENERAL PURPOSES	50,501.
TOTAL CONTRIBUTIONS PAID			50,501

Evergreen Foundation, Inc.
06-1482180

Rider to 2012 990-PF Return of Private Foundation

Part XV, Section 3a, Grants and Contributions Paid

Recipient Name & Address	Relationship	Foundation Status of Recipient	Purpose of Grant or Contribution	Amount
Union Theological Seminary 3041 Broadway New York, NY 10027	No Relationship	Public Charity	General Purposes	\$500.00
Trust for Public Land 116 new Montgomery Street Fourth Floor San Francisco, CA 94105	No Relationship	Public Charity	General Purposes	\$1,500.00
Neenah Public Library 240 E. Wisconsin Ave Neenah, WI 54957-0569	No Relationship	Public Charity	General Purposes	\$201.00
Junior Achievement of Wisconsin, Inc. 300 North Appleton Street Appleton, WI 54911	No Relationship	Public Charity	General Purposes	\$1,000.00
University of Michigan 3003 S. State Street Suite 8000 Ann Arbor, MI 48109-1288	No Relationship	Public Charity	General Purposes	\$1,500.00
Twin City Catholic Education System St. Margaret Mary School 610 Division Street Neenah, WI 54956	No Relationship	Public Charity	General Purposes	\$1,000.00
Christine Ann Domestic Abuse Services PO Box 99 Neenah, WI 54957-0099	No Relationship	Public Charity	General Purposes	\$2,000.00

September 16, 2013

Evergreen Foundation, Inc.
06-1482180

Rider to 2012 990-PF Return of Private Foundation

Recipient Name & Address	Relationship	Foundation Status of Recipient	Purpose of Grant or Contribution	Amount
St. Luke's Health Care Foundation Child Protection Center of Cedar Rapids, Iowa 855 A. Avenue NE, Suite 105 Cedar Rapids, IA 52402	No Relationship	Public Charity	General Purposes	\$500.00
Holderness School Plymouth, NH 03264-1879	No Relationship	Public Charity	General Purposes	\$500.00
Wisconsin Public Radio 821 University Avenue Madison, WI 53706	No Relationship	Public Charity	General Purposes	\$250.00
The Nature Conservancy - Adirondack Land Trust 8 Nature Way P.O Box 65 Keene Valley, NY 12943	No Relationship	Public Charity	General Purposes	\$12,500.00
The Nature Conservancy - Adirondack 4245 North Fairfax Drive, Suite 100 Arlington, VA 22203-1606	No Relationship	Public Charity	General Purposes	\$1,000.00
Charlotte Congregation Church 403 Church Hill Rd Charlotte, VT 05445	No Relationship	Public Charity	General Purposes	\$500.00
Fletcher Allen Health Care Medical Center Campus 111 Colchester Avenue Burlington, VT 05401	No Relationship	Public Charity	General Purposes	\$1,000.00

September 16, 2013

Evergreen Foundation, Inc.
06-1482180

Rider to 2012 990-PF Return of Private Foundation

Recipient Name & Address	Relationship	Foundation Status of Recipient	Purpose of Grant or Contribution	Amount
The Nature Conservancy - Wisconsin 633 West Main Street Madison, WI 53703	No Relationship	Public Charity	General Purposes	\$200.00
Bowdoin College 4100 College Station Brunswick, ME 04011-8432	No Relationship	Public Charity	General Purposes	\$500.00
Brunswick School 100 Maher Avenue Greenwich, CT 06830	No Relationship	Public Charity	General Purposes	\$500.00
Paine Memorial Free Library 2 Gilliland Lane Willsboro, NY 12996	No Relationship	Public Charity	General Purposes	\$250.00
Lund Family Center P.O. Box 4009 Burlington, VT 05406	No Relationship	Public Charity	General Purposes	\$1,000.00
Franklin Land Trust P.O. Box 450 Shelburne Falls, MA 01370	No Relationship	Public Charity	General Purposes	\$1,000.00
The Central High School Foundation P.O. Box 31610 Omaha, NE 68131-0610	No Relationship	Public Charity	General Purposes	\$750.00
The Smile Train 41 Madison Avenue 28 th Floor New York, NY 10010	No Relationship	Public Charity	General Purposes	\$500.00
Babson College The Fund for Babson	No Relationship	Public Charity	General Purposes	\$250.00

September 16, 2013

Evergreen Foundation, Inc.
06-1482180

Rider to 2012 990-PF Return of Private Foundation

Recipient Name & Address	Relationship	Foundation Status of Recipient	Purpose of Grant or Contribution	Amount
Alumni Hall Babson Park, MA 02457				
Vermont Land Trust 8 Bailey Avenue Montpelier, VT 0502	No Relationship	Public Charity	General Purposes	\$1,000.00
The Fisher Home, Hospice 1165 N Pleasant St Amherst, MA 01002	No Relationship	Public Charity	General Purposes	\$1,250.00
Vermont Symphony Orchestra 2 Church Street, Suite 3B Burlington, Vermont 05401	No Relationship	Public Charity	General Purposes	\$500.00
Amherst Cinema Arts Center Inc. 28 Amity Street Amherst, MA	No Relationship	Public Charity	General Purposes	\$500.00
Vermont Public Radio 365 Troy Avenue Colchester, VT 05446	No Relationship	Public Charity	General Purposes	\$250.00
Friends of Leverett Library 75 Montague Rd. P.O. Box 250 Leverett, MA 01054	No Relationship	Public Charity	General Purposes	\$1,000.00

September 16, 2013

Evergreen Foundation, Inc.
06-1482180

Rider to 2012 990-PF Return of Private Foundation

Recipient Name & Address	Relationship	Foundation Status of Recipient	Purpose of Grant or Contribution	Amount
The Hitchcock Center for the Environment 525 South Pleasant Street Amherst, MA 01002	No Relationship	Public Charity	General Purposes	\$1,000.00
Adirondack Council 103 Hand Ave # 3 Elizabethtown, NY 12932	No Relationship	Public Charity	General Purposes	\$1,500.00
Connecticut River Watershed Council 15 Bank Row Greenfield, MA 01301	No Relationship	Public Charity	General Purposes	\$1,000.00
Amherst Survival Center PO Box 9629 North Amherst MA 01059-9629	No Relationship	Public Charity	General Purposes	\$1,250.00
Appleton Boy Choir 111 West College Avenue, 4th Floor Appleton, WI 54911	No Relationship	Public Charity	General Purposes	\$500.00
YMCA of the Fox Cities Strong Kids Campaign 110 W.N. Water Street Neenah, WI 54956	No Relationship	Public Charity	General Purposes	\$500.00
Conservacion Patagonica Building 1062 Fort Cronkite Sausalito, CA 94965	No Relationship	Public Charity	General Purposes	\$750.00
Maine Maritime Museum 243 Washington St. Bath, ME 04530	No Relationship	Public Charity	General Purposes	\$1,250.00

September 16, 2013

Evergreen Foundation, Inc.
06-1482180

Rider to 2012 990-PF Return of Private Foundation

Recipient Name & Address	Relationship	Foundation Status of Recipient	Purpose of Grant or Contribution	Amount
Rocky Mountain Elk Foundation 5705 Grant Creek Road Missoula, MT 59808-8249	No Relationship	Public Charity	General Purposes	\$500.00
Fox Valley Symphony Orchestra Association, Inc. 111 W. College Avenue, Suite 500 Appleton, WI 54911-5781	No Relationship	Public Charity	General Purposes	\$500.00
Lake Champlain Committee 106 Main Street, Suite 200 Burlington, VT 05401	No Relationship	Public Charity	General Purposes	\$1,000.00
Spectrum Health & Services, Inc. Progress Haddington Plaza 5619-25 Vine Street, Philadelphia, PA 19139	No Relationship	Public Charity	General Purposes	\$3,000.00
Addison County Humane Society 236 Farm Rd Middlebury, VT 05753	No Relationship	Public Charity	General Purposes	\$1,600.00
Colorado College 902 N Cascade Ave Colorado Springs, CO 80903	No Relationship	Public Charity	General Purposes	\$1,000.00
The American Chestnut Foundation 160 Zillico Street, Suite D Asheville, NC 28801-1082	No Relationship	Public Charity	General Purposes	\$500.00

September 16, 2013

Evergreen Foundation, Inc.
06-1482180

Rider to 2012 990-PF Return of Private Foundation

The Wild Center / Natural History Museum of the Adirondacks Rt. 28N & 30 Blue Mountain Lake, NY 12812	No Relationship	Public Charity	General Purposes	\$750.00
Catamount Outdoor Center 592 Governor Chittenden Rd Williston, VT 05495	No Relationship	Public Charity	General Purposes	\$500.00
			Total Giving	\$50,501.00

September 16, 2013

**SCHEDULE D
(Form 1041)**

Department of the Treasury
Internal Revenue Service

Capital Gains and Losses

► Attach to Form 1041, Form 5227, or Form 990-T.
► Information about Schedule D (Form 1041) and its separate instructions is at
www.irs.gov/form1041.

OMB No 1545-0092

2012

Name of estate or trust

EVERGREEN FOUNDATION, INC.

Employer identification number

06-1482180

Note: Form 5227 filers need to complete *only* Parts I and II

Part I Short-Term Capital Gains and Losses - Assets Held One Year or Less

(a) Description of property (Example 100 shares 7% preferred of "Z" Co)	(b) Date acquired (mo., day, yr.)	(c) Date sold (mo., day, yr.)	(d) Sales price	(e) Cost or other basis (see instructions)	(f) Gain or (loss) for the entire year Subtract (e) from (d)
1a					
b Enter the short-term gain or (loss), if any, from Schedule D-1, line 1b					1b 619.
2 Short-term capital gain or (loss) from Forms 4684, 6252, 6781, and 8824					2
3 Net short-term gain or (loss) from partnerships, S corporations, and other estates or trusts					3
4 Short-term capital loss carryover Enter the amount, if any, from line 9 of the 2011 Capital Loss Carryover Worksheet					4 ()
5 Net short-term gain or (loss). Combine lines 1a through 4 in column (f) Enter here and on line 13, column (3) on the back					5 619.

Part II Long-Term Capital Gains and Losses - Assets Held More Than One Year

(a) Description of property (Example 100 shares 7% preferred of "Z" Co)	(b) Date acquired (mo., day, yr.)	(c) Date sold (mo., day, yr.)	(d) Sales price	(e) Cost or other basis (see instructions)	(f) Gain or (loss) for the entire year Subtract (e) from (d)
6a					
b Enter the long-term gain or (loss), if any, from Schedule D-1, line 6b					6b 571,368.
7 Long-term capital gain or (loss) from Forms 2439, 4684, 6252, 6781, and 8824					7
8 Net long-term gain or (loss) from partnerships, S corporations, and other estates or trusts					8
9 Capital gain distributions					9 4,412.
10 Gain from Form 4797, Part I					10
11 Long-term capital loss carryover Enter the amount, if any, from line 14 of the 2011 Capital Loss Carryover Worksheet					11 ()
12 Net long-term gain or (loss). Combine lines 6a through 11 in column (f) Enter here and on line 14a, column (3) on the back					12 575,780.

For Paperwork Reduction Act Notice, see the Instructions for Form 1041.

Schedule D (Form 1041) 2012

Part III Summary of Parts I and II**Caution:** Read the instructions before completing this part

		(1) Beneficiaries' (see instr)	(2) Estate's or trust's	(3) Total
13 Net short-term gain or (loss)	13			619.
14 Net long-term gain or (loss):				
a Total for year	14a			575,780.
b Unrecaptured section 1250 gain (see line 18 of the wrksh)	14b			
c 28% rate gain	14c			
15 Total net gain or (loss). Combine lines 13 and 14	15			576,399.

Note: If line 15, column (3), is a net gain, enter the gain on Form 1041, line 4 (or Form 990-T, Part I, line 4a). If lines 14a and 15, column (2), are net gains, go to Part V, and do not complete Part IV. If line 15, column (3), is a net loss, complete Part IV and the **Capital Loss Carryover Worksheet**, as necessary.

Part IV Capital Loss Limitation

16 Enter here and enter as a (loss) on Form 1041, line 4 (or Form 990-T, Part I, line 4c, if a trust), the smaller of
 a The loss on line 15, column (3) or b \$3,000 **16** ()

Note: If the loss on line 15, column (3), is more than \$3,000, or if Form 1041, page 1, line 22 (or Form 990-T, line 34), is a loss, complete the **Capital Loss Carryover Worksheet** in the instructions to figure your capital loss carryover.

Part V Tax Computation Using Maximum Capital Gains Rates

Form 1041 filers. Complete this part **only** if both lines 14a and 15 in column (2) are gains, or an amount is entered in Part I or Part II and there is an entry on Form 1041, line 2b(2), and Form 1041, line 22, is more than zero.

Caution: Skip this part and complete the **Schedule D Tax Worksheet** in the instructions if

- Either line 14b, col (2) or line 14c, col (2) is more than zero, or
- Both Form 1041, line 2b(1), and Form 4952, line 4g are more than zero

Form 990-T trusts. Complete this part **only** if both lines 14a and 15 are gains, or qualified dividends are included in income in Part I of Form 990-T, and Form 990-T, line 34, is more than zero. Skip this part and complete the **Schedule D Tax Worksheet** in the instructions if either line 14b, col (2) or line 14c, col (2) is more than zero.

17 Enter taxable income from Form 1041, line 22 (or Form 990-T, line 34)	17		
18 Enter the smaller of line 14a or 15 in column (2) but not less than zero	18		
19 Enter the estate's or trust's qualified dividends from Form 1041, line 2b(2) (or enter the qualified dividends included in income in Part I of Form 990-T)	19		
20 Add lines 18 and 19	20		
21 If the estate or trust is filing Form 4952, enter the amount from line 4g, otherwise, enter -0-	21		
22 Subtract line 21 from line 20. If zero or less, enter -0-	22		
23 Subtract line 22 from line 17. If zero or less, enter -0-	23		
24 Enter the smaller of the amount on line 17 or \$2,400	24		
25 Is the amount on line 23 equal to or more than the amount on line 24? <input type="checkbox"/> Yes. Skip lines 25 and 26, go to line 27 and check the "No" box <input type="checkbox"/> No. Enter the amount from line 23	25		
26 Subtract line 25 from line 24	26		
27 Are the amounts on lines 22 and 26 the same? <input type="checkbox"/> Yes. Skip lines 27 thru 30, go to line 31 <input type="checkbox"/> No. Enter the smaller of line 17 or line 22	27		
28 Enter the amount from line 26 (if line 26 is blank, enter -0-)	28		
29 Subtract line 28 from line 27	29		
30 Multiply line 29 by 15% (15)			30
31 Figure the tax on the amount on line 23. Use the 2012 Tax Rate Schedule for Estates and Trusts (see the Schedule G instructions in the instructions for Form 1041)			31
32 Add lines 30 and 31			32
33 Figure the tax on the amount on line 17. Use the 2012 Tax Rate Schedule for Estates and Trusts (see the Schedule G instructions in the instructions for Form 1041)			33
34 Tax on all taxable income. Enter the smaller of line 32 or line 33 here and on Form 1041, Schedule G, line 1a (or Form 990-T, line 36)			34

Schedule D (Form 1041) 2012

▶ Attach to Schedule D to list additional transactions for lines 1a and 6a

2012

Name of estate or trust

Employer identification number

Part I Short-Term Capital Gains and Losses - Assets Held One Year or Less

1b Total. Combine the amounts in column (f). Enter here and on Schedule D, line 1b	619.
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Schedule D-1 (Form 1041) 2012

JSA

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10024-400

PAGE 34

Employer identification number

[illegible]

6b Total. Combine the amounts in column (f) Enter here and on Schedule D, line 6b	571,368.
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Schedule D-1 (Form 1041) 2012

2012 Tax Information Statement

Page 6 of 18

Payer's Name and Address
THE GLENMEDE TRUST COMPANY, N A
1650 MARKET STREET, SUITE 1200
PHILADELPHIA, PA 19103-7391

Account Number 8035-11-4/1
Recipient's Tax ID Number: 06-1482180
Payer's Federal ID Number: 32-0274136
Payer's State ID Number
State: CT
Questions? (215)419-6099
☐ Corrected ☐ 2nd TIN notice

Recipient's Name and Address
EVERGREEN FOUNDATION INC
C/O GEORGE S BROWNELL
3139 WESTFIELD RIDGE
NEENAH, WI 54956

2012 Form 1099-B: Proceeds from Broker and Barter Exchange Transactions

OMB No 1545-0715

Reported to the IRS is Sales Price of stocks, bonds etc , less commissions and option premiums
Covered (Box 6a is not checked)

Cusip	Description (Box 8)		Stock or Other Symbol (Box 1d)						
Quantity Sold (Box 1e)	Date of Sale or Exchange (Box 1a)	Date of Acquisition (Box 1b)	Stocks Bonds, etc (Box 2a)	Cost or Other Basis (Box 3)	Wash Sale Loss Disallowed (Box 5)	Net Gain or Loss (Box 4)	Federal Income Tax Withheld (Box 4)	State Tax Withheld (Box 15)	
Short Term Sales Reported on 1099-B									
192446102	COGNIZANT TECH SOLUTIONS CRP		CTSH						
200 0000	12/20/2012	10/01/2012	14,627 67	14,212 00	0 00	415 67	0 00	0 00	
68389X105	ORACLE CORP		ORCL						
100 0000	12/20/2012	11/29/2012	3,397 92	3,195 00	0 00	202 92	0 00	0 00	
Total Short Term Sales Reported on 1099-B			18,025 59	17,407 00	0 00	618 59	0 00	0 00	
Report on Form 8949 Part I, with Box A checked									
Long Term Sales Reported on 1099-B									
91912E105	VALE S A COMMON		VALE						
460 0000	11/29/2012	01/19/2011	8,086 61	16,752 49	0 00	8 665 88	0 00	0 00	
000375204	ABB LTD SPON ADR		ABB						
850 0000	12/03/2012	04/15/2011	16,574 62	20,750 14	0 00	-4,175 52	0 00	0 00	
Total Long Term 15% Sales Reported on 1099-B			24,661 23	37,502.63	0 00	-12,841 40	0 00	0 00	
Report on Form 8949, Part II, with Box A checked									

This is important tax information and is being furnished to the Internal Revenue Service (except as indicated) If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported The taxpayer is ultimately responsible for the accuracy of their own tax return

2012 Tax Information Statement

Page 7 of 18

Payer's Name and Address:
THE GLENMEDE TRUST COMPANY, N A
1650 MARKET STREET, SUITE 1200
PHILADELPHIA, PA 19103-7391

Account Number: 8035-11-4/1
Recipient's Tax ID Number: 06-1482180
Payer's Federal ID Number: 32-0274136
Payer's State ID Number: CT
State: (215)419-6099
Questions?
☐ Corrected ☐ 2nd TIN notice

Recipient's Name and Address:
EVERGREEN FOUNDATION INC
C/O GEORGE S BROWNELL
3139 WESTFIELD RIDGE
NEENAH, WI 54956

2012 Form 1099-B: Proceeds from Broker and Barter Exchange Transactions

OMB No 1545-0715

Reported to the IRS is Sales Price of stocks, bonds, etc , less commissions and option premiums

For noncovered securities (Box 6a is checked) shown on this statement, cost basis information including wash sale disallowed loss is not being reported to the IRS

Cusip	Description (Box 8)		Stock or Other Symbol (Box 1d)						
Quantity Sold (Box 1e)	Date of Sale or Exchange (Box 1a)	Date of Acquisition	Stocks Bonds, etc (Box 2a)	Cost or Other Basis	Wash Sale Loss Disallowed	Net Gain or Loss	Federal Income Tax Withheld (Box 4)	State Tax Withheld (Box 15)	
Long Term 15% Sales Reported on 1099-B									
988498101	YUM BRANDS INC		YUM						
500 0000	09/13/2012	05/23/2003	33,225 00	6,646 25	0 00	26,578 75	0 00	0 00	
02076X102	ALPHA NATURAL RESOURCES INC		US02076X1028						
1435 0000	10/01/2012	02/18/2009	9,528 61	18,525 00	0 00	-8,996 39	0 00	0 00	
125269100	CF INDUSTRIES HOLDINGS INC		CF						
150 0000	10/01/2012	01/23/2009	33,859 24	6,972 00	0 00	26,887 24	0 00	0 00	
166764100	CHEVRON CORP		CVX						
100 0000	10/01/2012	06/11/1937	11,782 73	43 30	0 00	11,739 43	0 00	0 00	
654902204	NOKIA CORP		NOK						
7102 0000	10/01/2012	01/24/1996	19,106 78	16,714 12	0 00	2,392 66	0 00	0 00	
718546104	PHILLIPS 66		PSX						
150 0000	10/01/2012	Various	7,012 34	3,125 31	0 00	3,887 03	0 00	0 00	
904784709	UNILEVER NV -NY SHARES		UN						
560 0000	10/01/2012	12/18/2009	19,997 15	17,788 08	0 00	2,209 07	0 00	0 00	

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2012 Tax Information Statement

Page 8 of 18

Payer's Name and Address:
THE GLENMEDE TRUST COMPANY, N A
1650 MARKET STREET, SUITE 1200
PHILADELPHIA, PA 19103-7391

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EVERGREEN FOUNDATION INC
C/O GEORGE S BROWNELL
3139 WESTFIELD RIDGE
NEENAH, WI 54956

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Cusip	Description (Box 8)		Stock or Other Symbol (Box 1d)						
Quantity Sold	Date of Sale or Exchange	Date of Acquisition	Stocks Bonds, etc	Cost or Other Basis	Wash Sale Loss Disallowed	Net Gain or Loss	Federal Income Tax Withheld	State Tax Withheld	
(Box 1e)	(Box 1a)		(Box 2a)				(Box 4)	(Box 15)	
92553P201	VIACOM INC-CLASS B		VIAB						
900 0000	10/01/2012	Various	48,382 91	36 627 37	0 00	11,755 54	0 00	0 00	
49455U100	KINDER MORGAN MANAGEMENT LLC		KMR						
1550	11/14/2012	02/17/2010	11 58	7 30	0 00	4 28	0 00	0 00	
002824100	ABBOTT LABORATORIES		ABT						
1965 0000	11/29/2012	Various	127 746 09	10,297 91	0 00	117,448 18	0 00	0 00	
15135U109	CENOVUS ENERGY INC		CVE						
320 0000	11/29/2012	Various	10,639 76	8,568 93	0 00	2,070 83	0 00	0 00	
428236103	HEWLETT PACKARD CORP		HPQ						
9075 0000	11/29/2012	Various	116,124 72	7,696 75	0 00	108,427 97	0 00	0 00	
988498101	YUM BRANDS INC		YUM						
3500 0000	11/29/2012	Various	259 967 88	50,514 81	0 00	209,453 07	0 00	0 00	
002824100	ABBOTT LABORATORIES		ABT						
200 0000	12/03/2012	10/15/1986	12,901 71	1,047 52	0 00	11,854 19	0 00	0 00	
088606108	BHP LIMITED - SPONS ADR		BHP						
250 0000	12/03/2012	05/15/2007	18 002 09	12,971 51	0 00	5,030 58	0 00	0 00	
249030107	DENTSPLY INTL		XRAY						
600 0000	12/03/2012	Various	23,764 44	15,125 12	0 00	8,639 32	0 00	0 00	
337738108	FISERV INC		FISV						
385 0000	12/03/2012	07/24/2007	29,671 28	21,582 46	0 00	8,088 82	0 00	0 00	

This is important tax information and is being furnished to the Internal Revenue Service (except as indicated). If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported. For noncovered securities shown on this statement, cost basis information including wash sale disallowed loss is not being reported to the Internal Revenue Service. The taxpayer is ultimately responsible for the accuracy of their own tax return.

2012 Tax Information Statement

Page 9 of 18

Payer's Name and Address

THE GLENMEDE TRUST COMPANY, N A
1650 MARKET STREET, SUITE 1200
PHILADELPHIA, PA 19103-7391

Account Number: 8035-11-4/1
Recipient's Tax ID Number: 06-1482180
Payer's Federal ID Number: 32-0274136
Payer's State ID Number: CT
State: CT
Questions? (215)419-6099

☐ Corrected

☐ 2nd TIN notice

Recipient's Name and Address:
EVERGREEN FOUNDATION INC
C/O GEORGE S BROWNELL
3139 WESTFIELD RIDGE
NEENAH, WI 54956

For noncovered securities (Box 6a is checked) shown on this statement, cost basis information including wash sale disallowed loss is not being reported to the IRS

Cusip	Description (Box 8)		Stock or Other Symbol (Box 1d)						
Quantity Sold	Date of Sale or Exchange	Date of Acquisition	Stocks Bonds, etc	Cost or Other Basis	Wash Sale Loss Disallowed	Net Gain or Loss	Federal Income Tax Withheld	State Tax Withheld	
(Box 1e)	(Box 1a)		(Box 2a)				(Box 4)	(Box 15)	
670100205	NOVO-NORDISK A/S		NVO						
190 0000	12/03/2012 02/04/2009		30,581 62	10,343 99	0 00	20,237 63	0 00	0 00	
125269100	CF INDUSTRIES HOLDINGS INC		CF						
100 0000	12/20/2012 01/23/2009		20,156 54	4,648 00	0 00	15,508 54	0 00	0 00	
68389X105	ORACLE CORP		ORCL						
300 0000	12/20/2012 12/23/2010		10,193 77	9,470 83	0 00	722 94	0 00	0 00	
Total Long Term 15% Sales Reported on 1099-B			842,656 24	258 716 56	0 00	583,939 68	0 00	0 00	
Report on Form 8949, Part II, with Box B checked									

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FORM 990-PF - PART IV
CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME

Kind of Property		Description				P or D	Date acquired	Date sold
Gross sale price less expenses of sale	Depreciation allowed/ allowable	Cost or other basis	FMV as of 12/31/69	Adj basis as of 12/31/69	Excess of FMV over adj basis		Gain or (loss)	
		TOTAL CAPITAL GAIN DISTRIBUTIONS					4,412.	
35,249.		35000 VERIZON COMMUNICATIONS 35,037.					05/29/2009 212.	12/12/2012
18,026.		SEE ATTACHED STATEMENT 17,407.					VARIOUS 619.	VARIOUS
24,661.		SEE ATTACHED STATEMENT 37,503.					VARIOUS -12,842.	VARIOUS
842,656.		SEE ATTACHED STATEMENT 258,717.					VARIOUS 583,939.	VARIOUS
173.		2.35 SHS KINDERMORGAN 114.					VARIOUS 59.	VARIOUS
TOTAL GAIN (LOSS)							<u>576,399.</u>	

**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

Enter filer's identifying number, see instructions

**Type or
print**File by the
due date for
filing your
return. See
instructions

Name of exempt organization or other filer, see instructions

Employer identification number (EIN) or

EVERGREEN FOUNDATION, INC.

06-1482180

Number, street, and room or suite no. If a P.O. box, see instructions

Social security number (SSN)

C/O GEORGE S. BROWNELL, 3139 WESTFIELD RIDGE

City, town or post office, state, and ZIP code. For a foreign address, see instructions

NEENAH, WI 54956

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 or Form 990-EZ	01	Form 990-T (corporation)	07
Form 990-BL	02	Form 1041-A	08
Form 4720- (individual)	03	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

- The books are in the care of ▶ GEORGE S. BROWNELL

Telephone No ▶ 920 751-3912

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 08/15, 20 13, to file the exempt organization return for the organization named above. The extension is for the organization's return for
- ▶ ☒ calendar year 2012 or
- ▶ ☐ tax year beginning _____, 20____, and ending _____, 20____

- 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 \$ <u>16,898</u>
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 \$ <u>2,898</u>
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 \$ <u>14,000</u>

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

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

Form **8868** (Rev. 1-2013)

- If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only **Part II** and check this box ☒ **X**
- Note.** Only complete Part II if you have already been granted an automatic 3-month extension on a previously filed Form 8868
- If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** (on page 1).

Part II Additional (Not Automatic) 3-Month Extension of Time. Only file the original (no copies needed).

Type or print File by the due date for filing your return See instructions	Name of exempt organization or other filer, see instructions	Enter filer's identifying number, see instructions Employer identification number (EIN) or
	EVERGREEN FOUNDATION, INC.	06-1482180
	Number, street, and room or suite no. If a P.O. box, see instructions. C/O GEORGE S. BROWNELL, 3139 WESTFIELD RIDGE	Social security number (SSN)
	City, town or post office, state, and ZIP code. For a foreign address, see instructions NEENAH, WI 54956	

Enter the Return code for the return that this application is for (file a separate application for each return) 0 4

Application Is For	Return Code	Application Is For	Return Code
Form 990 or Form 990-EZ	01		
Form 990-BL	02	Form 1041-A	08
Form 4720 (individual)	03	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 an automatic 3-month extension on a previously filed Form 8868.

- The books are in the care of **GEORGE S. BROWNELL**
Telephone No. **920 751-3912** 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.

- 4 I request an additional 3-month extension of time until **11/15, 2013**.
- 5 For calendar year **2012**, or other tax year beginning , 20 , and ending , 20
- 6 If the tax year entered in line 5 is for less than 12 months, check reason: ☐ Initial return ☐ Final return
☐ Change in accounting period
- 7 State in detail why you need the extension
ADDITIONAL TIME IS NEEDED TO GATHER THE INFORMATION NECESSARY TO FILE A COMPLETE AND ACCURATE RETURN.

- 8a 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. 8a \$ **NONE**
- 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 and any amount paid previously with Form 8868. 8b \$ **NONE**
- c **Balance Due.** Subtract line 8b from line 8a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions. 8c \$ **NONE**

Signature and Verification must be completed for Part II only.

Under penalties of perjury, I declare that I have examined this form, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete, and that I am authorized to prepare this form

Signature **George S. Brownell** Title **Agent** Date **7/23/13**

Form 8868 (Rev 1-2013)

DANAHER ATTIG & PLANTE PLC
PO BOX 2166
SOUTH BURLINGTON, VT 05407