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Form 990-PF

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

2012

Open to Public Inspection

Department of the Treasury Internal Revenue Service

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

For calendar year 2012, or tax year beginning 01-01-2012, and ending 12-31-2012

Name of foundation LUMOS, A Employer identification number 20-8203226, B Telephone number (615) 783-0101, G Check all that apply, H Check type of organization, I Fair market value of all assets at end of year \$ 3,171,605, J Accounting method Accrual

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))

Table with 5 columns: (a) Revenue and expenses per books, (b) Net investment income, (c) Adjusted net income, (d) Disbursements for charitable purposes. Rows include Revenue (1-12) and Operating and Administrative Expenses (13-26), ending with Excess of revenue over expenses and disbursements (-114,735) and Adjusted net income (78,044).

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

<b>Part II Balance Sheets</b>		Beginning of year			End of year		
		(a) Book Value	(b) Book Value	(c) Fair Market Value	(a) Book Value	(b) Book Value	(c) Fair Market Value
<b>Assets</b>	<b>1</b> Cash—non-interest-bearing . . . . .						
	<b>2</b> Savings and temporary cash investments . . . . .	112,545	347,803	347,803			
	<b>3</b> Accounts receivable ▶ _____ Less allowance for doubtful accounts ▶ _____						
	<b>4</b> Pledges receivable ▶ _____ Less allowance for doubtful accounts ▶ _____						
	<b>5</b> Grants receivable . . . . .						
	<b>6</b> Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see page 15 of the instructions) . . . . .						
	<b>7</b> Other notes and loans receivable (attach schedule) ▶ _____ Less allowance for doubtful accounts ▶ _____						
	<b>8</b> Inventories for sale or use . . . . .						
	<b>9</b> Prepaid expenses and deferred charges . . . . .						
	<b>10a</b> Investments—U S and state government obligations (attach schedule)						
	<b>b</b> Investments—corporate stock (attach schedule) . . . . .	2,058,478 <input type="checkbox"/>	2,007,944	2,007,944			
	<b>c</b> Investments—corporate bonds (attach schedule) . . . . .	722,486 <input type="checkbox"/>	715,465	715,465			
	<b>11</b> Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____						
	<b>12</b> Investments—mortgage loans . . . . .						
	<b>13</b> Investments—other (attach schedule) . . . . .	57,460 <input type="checkbox"/>	99,100	99,100			
	<b>14</b> Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____						
<b>15</b> Other assets (describe ▶ _____)	<input type="checkbox"/> 2,073 <input type="checkbox"/>	<input type="checkbox"/> 1,293 <input type="checkbox"/>	<input type="checkbox"/> 1,293				
<b>16 Total assets</b> (to be completed by all filers—see the instructions Also, see page 1, item I)	2,953,042	3,171,605	3,171,605				
<b>Liabilities</b>	<b>17</b> Accounts payable and accrued expenses . . . . .	3,750	3,750				
	<b>18</b> Grants payable . . . . .						
	<b>19</b> Deferred revenue . . . . .						
	<b>20</b> Loans from officers, directors, trustees, and other disqualified persons						
	<b>21</b> Mortgages and other notes payable (attach schedule) . . . . .						
<b>22</b> Other liabilities (describe ▶ _____)	<input type="checkbox"/> 0 <input type="checkbox"/>	<input type="checkbox"/> 431					
<b>23 Total liabilities</b> (add lines 17 through 22) . . . . .	3,750	4,181					
<b>Net Assets or Fund Balances</b>	<b>Foundations that follow SFAS 117, check here</b> <input checked="" type="checkbox"/> <b>and complete lines 24 through 26 and lines 30 and 31.</b>						
	<b>24</b> Unrestricted . . . . .	2,949,292	3,167,424				
	<b>25</b> Temporarily restricted . . . . .						
	<b>26</b> Permanently restricted . . . . .						
	<b>Foundations that do not follow SFAS 117, check here</b> <input type="checkbox"/> <b>and complete lines 27 through 31.</b>						
	<b>27</b> Capital stock, trust principal, or current funds . . . . .						
	<b>28</b> Paid-in or capital surplus, or land, bldg, and equipment fund						
<b>29</b> Retained earnings, accumulated income, endowment, or other funds							
<b>30 Total net assets or fund balances</b> (see page 17 of the instructions) . . . . .	2,949,292	3,167,424					
<b>31 Total liabilities and net assets/fund balances</b> (see page 17 of the instructions) . . . . .	2,953,042	3,171,605					

**Part III Analysis of Changes in Net Assets or Fund Balances**

<b>1</b>	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) . . . . .	<b>1</b>	2,949,292
<b>2</b>	Enter amount from Part I, line 27a . . . . .	<b>2</b>	-114,735
<b>3</b>	Other increases not included in line 2 (itemize) ▶ _____ <input type="checkbox"/>	<b>3</b>	332,867
<b>4</b>	Add lines 1, 2, and 3 . . . . .	<b>4</b>	3,167,424
<b>5</b>	Decreases not included in line 2 (itemize) ▶ _____	<b>5</b>	0
<b>6</b>	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30 . . . . .	<b>6</b>	3,167,424

**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)
<b>1 a</b>	PUBLICLY-TRADED SECURITIES	P		
<b>b</b>				
<b>c</b>				
<b>d</b>				
<b>e</b>				
(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)	
<b>a</b> 1,234,475		1,272,271	-37,796	
<b>b</b>				
<b>c</b>				
<b>d</b>				
<b>e</b>				
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) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any		
<b>a</b>			-37,796	
<b>b</b>				
<b>c</b>				
<b>d</b>				
<b>e</b>				
<b>2</b>	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 }		<b>2</b> -37,796
<b>3</b>	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 }		<b>3</b>

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?  Yes  No  
 If "Yes," the foundation does not qualify under section 4940(e) Do not complete this part

**1** Enter the appropriate amount in each column for each year, see page 18 of the instructions before making any entries

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2011	143,821	3,089,623	0.046550
2010	108,044	2,947,944	0.036651
2009	146,780	2,377,977	0.061725
2008	107,604	2,885,565	0.037290
2007	57,508	1,858,612	0.030941
<b>2</b>	<b>Total</b> of line 1, column (d).		<b>2</b> 0.213157
<b>3</b>	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		<b>3</b> 0.042631
<b>4</b>	Enter the net value of noncharitable-use assets for 2012 from Part X, line 5.		<b>4</b> 3,124,307
<b>5</b>	Multiply line 4 by line 3.		<b>5</b> 133,192
<b>6</b>	Enter 1% of net investment income (1% of Part I, line 27b).		<b>6</b> 780
<b>7</b>	Add lines 5 and 6.		<b>7</b> 133,972
<b>8</b>	Enter qualifying distributions from Part XII, line 4.		<b>8</b> 154,203

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 page 18 of the instructions)**

<b>1a</b>	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>b</b>	Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b . . . . .	<b>1</b>	780
<b>c</b>	All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)		
<b>2</b>	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	<b>2</b>	0
<b>3</b>	Add lines 1 and 2. . . . .	<b>3</b>	780
<b>4</b>	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	<b>4</b>	0
<b>5</b>	<b>Tax based on investment income.</b> Subtract line 4 from line 3 If zero or less, enter -0- . . . . .	<b>5</b>	780
<b>6</b>	Credits/Payments		
<b>a</b>	2012 estimated tax payments and 2011 overpayment credited to 2012	<b>6a</b>	2,073
<b>b</b>	Exempt foreign organizations—tax withheld at source . . . . .	<b>6b</b>	
<b>c</b>	Tax paid with application for extension of time to file (Form 8868)	<b>6c</b>	
<b>d</b>	Backup withholding erroneously withheld . . . . .	<b>6d</b>	
<b>7</b>	Total credits and payments Add lines 6a through 6d. . . . .	<b>7</b>	2,073
<b>8</b>	Enter any <b>penalty</b> for underpayment of estimated tax Check here <input type="checkbox"/> if Form 2220 is attached	<b>8</b>	
<b>9</b>	<b>Tax due.</b> If the total of lines 5 and 8 is more than line 7, enter <b>amount owed</b> . . . . .	<b>9</b>	
<b>10</b>	<b>Overpayment.</b> If line 7 is more than the total of lines 5 and 8, enter the <b>amount overpaid</b> . . . . .	<b>10</b>	1,293
<b>11</b>	Enter the amount of line 10 to be <b>Credited to 2013 estimated tax</b> ▶ 1,293 <b>Refunded</b> ▶	<b>11</b>	0

**Part VII-A Statements Regarding Activities**

	Yes	No
<b>1a</b> 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? . . . . .		No
<b>b</b> Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)? . . . . . <i>If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.</i>		No
<b>c</b> Did the foundation file <b>Form 1120-POL</b> for this year? . . . . .		No
<b>d</b> Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year <b>(1)</b> On the foundation ▶ \$ <u>0</u> <b>(2)</b> On foundation managers ▶ \$ <u>0</u>		
<b>e</b> Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ▶ \$ <u>0</u>		
<b>2</b> Has the foundation engaged in any activities that have not previously been reported to the IRS? . . . . . <i>If "Yes," attach a detailed description of the activities.</i>		No
<b>3</b> Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? <i>If "Yes," attach a conformed copy of the changes</i> . . . . .		No
<b>4a</b> Did the foundation have unrelated business gross income of \$1,000 or more during the year? . . . . .		No
<b>b</b> If "Yes," has it filed a tax return on <b>Form 990-T</b> for this year? . . . . .		
<b>5</b> Was there a liquidation, termination, dissolution, or substantial contraction during the year? . . . . . <i>If "Yes," attach the statement required by General Instruction T.</i>		No
<b>6</b> 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? . . . . .	Yes	
<b>7</b> Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col (c), and Part XV</i>	Yes	
<b>8a</b> Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ TN _____		
<b>b</b> If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? <i>If "No," attach explanation .</i>	Yes	
<b>9</b> 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)? <i>If "Yes," complete Part XIV</i> . . . . .		No
<b>10</b> Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses</i>		No

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 No
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 No
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? 13 Yes
Website address HTTP //BLOGS BELMONT EDU/LUMOS/
14 The books are in care of CYNTHIA LEU Telephone no (615) 783-0101
Located at 3502 SCARDSALE RD NASHVILLE TN ZIP+4 37215
15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 -Check here . . . . . 15
and enter the amount of tax-exempt interest received or accrued during the year . . . . .
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 No
See instructions for exceptions and filing requirements for Form TD F 90-22.1 If "Yes", enter the name of the foreign country

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

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.
1a During the year did the foundation (either directly or indirectly)
(1) Engage in the sale or exchange, or leasing of property with a disqualified person? Yes 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 page 20 of the instructions)? 1b No
Organizations relying on a current notice regarding disaster assistance check here.
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2012? 1c No
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? Yes No
If "Yes," list the years 20\_\_, 20\_\_, 20\_\_, 20\_\_
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement-see instructions). 2b
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here 20\_\_, 20\_\_, 20\_\_, 20\_\_
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? Yes 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 No
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 No



**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. . . . . **0**

**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
<b>1</b> _____	
<b>2</b> _____	
<b>3</b> _____	
<b>4</b> _____	

**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
<b>1</b> _____	
<b>2</b> _____	
<b>3</b> All other program-related investments See page 24 of the instructions _____	

**Total.** Add lines 1 through 3. . . . . **0**

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

<b>1</b>	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes		
<b>a</b>	Average monthly fair market value of securities. . . . .	<b>1a</b>	2,918,808
<b>b</b>	Average of monthly cash balances. . . . .	<b>1b</b>	253,077
<b>c</b>	Fair market value of all other assets (see instructions). . . . .	<b>1c</b>	0
<b>d</b>	<b>Total</b> (add lines 1a, b, and c). . . . .	<b>1d</b>	3,171,885
<b>e</b>	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation). . . . .	<b>1e</b>	0
<b>2</b>	Acquisition indebtedness applicable to line 1 assets. . . . .	<b>2</b>	0
<b>3</b>	Subtract line 2 from line 1d. . . . .	<b>3</b>	3,171,885
<b>4</b>	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions). . . . .	<b>4</b>	47,578
<b>5</b>	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3 Enter here and on Part V, line 4	<b>5</b>	3,124,307
<b>6</b>	<b>Minimum investment return.</b> Enter 5% of line 5. . . . .	<b>6</b>	156,215

**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.)

<b>1</b>	Minimum investment return from Part X, line 6. . . . .	<b>1</b>	156,215
<b>2a</b>	Tax on investment income for 2012 from Part VI, line 5. . . . .	<b>2a</b>	780
<b>b</b>	Income tax for 2012 (This does not include the tax from Part VI ). . . . .	<b>2b</b>	
<b>c</b>	Add lines 2a and 2b. . . . .	<b>2c</b>	780
<b>3</b>	Distributable amount before adjustments Subtract line 2c from line 1. . . . .	<b>3</b>	155,435
<b>4</b>	Recoveries of amounts treated as qualifying distributions. . . . .	<b>4</b>	0
<b>5</b>	Add lines 3 and 4. . . . .	<b>5</b>	155,435
<b>6</b>	Deduction from distributable amount (see instructions). . . . .	<b>6</b>	0
<b>7</b>	<b>Distributable amount</b> as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1. . . . .	<b>7</b>	155,435

**Part XII Qualifying Distributions** (see instructions)

<b>1</b>	Amounts paid (including administrative expenses) to accomplish charitable, etc , purposes		
<b>a</b>	Expenses, contributions, gifts, etc —total from Part I, column (d), line 26. . . . .	<b>1a</b>	154,203
<b>b</b>	Program-related investments—total from Part IX-B. . . . .	<b>1b</b>	0
<b>2</b>	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes. . . . .	<b>2</b>	
<b>3</b>	Amounts set aside for specific charitable projects that satisfy the		
<b>a</b>	Suitability test (prior IRS approval required). . . . .	<b>3a</b>	
<b>b</b>	Cash distribution test (attach the required schedule). . . . .	<b>3b</b>	
<b>4</b>	<b>Qualifying distributions.</b> Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	<b>4</b>	154,203
<b>5</b>	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). . . . .	<b>5</b>	780
<b>6</b>	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4. . . . .	<b>6</b>	153,423

**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
<b>1</b> Distributable amount for 2012 from Part XI, line 7				155,435
<b>2</b> Undistributed income, if any, as of the end of 2012				
<b>a</b> Enter amount for 2011 only. . . . .			79,936	
<b>b</b> Total for prior years 20__ , 20__ , 20__		0		
<b>3</b> Excess distributions carryover, if any, to 2012				
<b>a</b> From 2007. . . . .				
<b>b</b> From 2008. . . . .				
<b>c</b> From 2009. . . . .				
<b>d</b> From 2010. . . . .				
<b>e</b> From 2011. . . . .				
<b>f</b> <b>Total</b> of lines 3a through e. . . . .	0			
<b>4</b> Qualifying distributions for 2012 from Part XII, line 4 ▶ \$ <u>154,203</u>				
<b>a</b> Applied to 2011, but not more than line 2a			79,936	
<b>b</b> Applied to undistributed income of prior years (Election required—see instructions). . . . .		0		
<b>c</b> Treated as distributions out of corpus (Election required—see instructions). . . . .	0			
<b>d</b> Applied to 2012 distributable amount. . . . .				74,267
<b>e</b> Remaining amount distributed out of corpus	0			
<b>5</b> Excess distributions carryover applied to 2012 <i>(If an amount appears in column (d), the same amount must be shown in column (a).)</i>	0			0
<b>6</b> <b>Enter the net total of each column as indicated below:</b>				
<b>a</b> Corpus Add lines 3f, 4c, and 4e Subtract line 5	0			
<b>b</b> Prior years' undistributed income Subtract line 4b from line 2b. . . . .		0		
<b>c</b> 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		
<b>d</b> Subtract line 6c from line 6b Taxable amount—see instructions . . . . .		0		
<b>e</b> Undistributed income for 2011 Subtract line 4a from line 2a Taxable amount—see instructions . . . . .			0	
<b>f</b> Undistributed income for 2012 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2013 . . . . .				81,168
<b>7</b> Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions). . . . .	0			
<b>8</b> Excess distributions carryover from 2007 not applied on line 5 or line 7 (see instructions). . . . .	0			
<b>9</b> <b>Excess distributions carryover to 2013.</b> Subtract lines 7 and 8 from line 6a . . . . .	0			
<b>10</b> Analysis of line 9				
<b>a</b> Excess from 2008. . . . .				
<b>b</b> Excess from 2009. . . . .				
<b>c</b> Excess from 2010. . . . .				
<b>d</b> Excess from 2011. . . . .				
<b>e</b> Excess from 2012. . . . .				

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

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

b Check box to indicate whether the organization is a private operating foundation described in section 4942(j)(3) or 4942(j)(5)

Table with 5 columns: (a) 2012, (b) 2011, (c) 2010, (d) 2009, (e) Total. Rows include 2a (Adjusted net income), 2b (85% of line 2a), 2c (Qualifying distributions from Part XII), 2d (Amounts included in line 2c not used directly), 2e (Qualifying distributions made directly), 3 (Alternative tests: Assets, Endowment, Support).

Part XV Supplementary Information (Complete this part only if the organization 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) )
b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest

2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:
Check here [X] 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 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**

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
<b>a</b> <i>Paid during the year</i> BELMONT UNIVERSITY 1900 BELMONT BLVD NASHVILLE, TN 37212	N/A	501(C)(3)	ENDOWMENT FOR LUMOS TRAVEL SCHOLARSHIPS	79,936
<b>Total</b> . . . . . <b>▶ 3a</b>				79,936
<b>b</b> <i>Approved for future payment</i>				
<b>Total</b> . . . . . <b>▶ 3b</b>				0





## TY 2012 Accounting Fees Schedule

**Name:** LUMOS

**EIN:** 20-8203226

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING FEES	3,917	0		3,917

**TY 2012 Investments Corporate  
Bonds Schedule****Name:** LUMOS**EIN:** 20-8203226

<b>Name of Bond</b>	<b>End of Year Book Value</b>	<b>End of Year Fair Market Value</b>
ALLY FINANCIAL INC, 3000 SHARES	74,970	74,970
BANK OF AMERICA CORP, 3350 SHARES	83,482	83,482
BANK OF AMERICA, 1000 SHARES	25,560	25,560
FORD MOTOR CO, 4000 SHARES	103,600	103,600
LEHMAN BROS HLDG CP TR V, 4000 SHARES	240	240
MERRILL LYNCH PFD CAP TR, 2000 SHARES	49,980	49,980
NATIONAL RURAL UTIL CORP, 4000 SHARES	102,103	102,103
PARTNER RE LTD, 5000 SHARES	126,050	126,050
PPLUS TR CERT CLASS A, 4000 SHARES	99,000	99,000
PREFERRED PLUS TR SRS, 2000 SHARES	50,480	50,480

**TY 2012 Investments Corporate  
Stock Schedule****Name:** LUMOS**EIN:** 20-8203226

<b>Name of Stock</b>	<b>End of Year Book Value</b>	<b>End of Year Fair Market Value</b>
ABBOTT LABS, 50 SHARES	3,275	3,275
AGILENT TECHNOLOGIES INC, 79 SHARES	3,234	3,234
AIR PRODUCTS&CHEM, 30 SHARES	2,521	2,521
ALLEGHANY CORP DEL COM, 7 SHARES	2,348	2,348
ALTRIA GROUP INC, 500 SHARES	15,720	15,720
AMER EXPRESS COMPANY, 195 SHARES	11,209	11,209
AMERIPRISE FINL INC, 40 SHARES	2,505	2,505
AMETEK INC NEW, 96 SHARES	3,607	3,607
APPLE INC, 24 SHARES	12,772	12,772
APPLE INC, 99 SHARES	52,685	52,685
BANK NEW YORK MELLON, 356 SHARES	9,149	9,149
BASKET CLIRN ISSUER BAC, 10500 SHARES	110,954	110,954
BED BATH & BEYOND INC, 97 SHARES	5,423	5,423
BERKSHIRE HATHAWAYINC, 118 SHARES	10,585	10,585
BIOGEN IDEC INC, 18 SHARES	2,635	2,635
BLACKROCK GLOBAL, 5728 SHARES	105,287	105,287
BOEING COMPANY, 45 SHARES	3,391	3,391
BORG WARNER INC COM, 50 SHARES	3,581	3,581
BROADCOM CORP CALIF CL A, 97 SHARES	3,221	3,221
CANADIAN NATURAL RES LTD, 159 SHARES	4,590	4,590
CF INDS HLDGS INC, 15 SHARES	3,047	3,047
CITIGROUP INC COM NEW, 1461 SHARES	57,797	57,797
COCA COLA COM, 134 SHARES	4,857	4,857
COCA COLA COM, 400 SHARES	14,500	14,500
COCA COLA COM, 78 SHARES	2,828	2,828
COHEN & STEERS GLOBAL, 9275 SHARES	95,720	95,720
COMCAST CORP NEW CL A, 125 SHARES	4,670	4,670
CONSOLIDATED EDISON INC, 325 SHARES	18,050	18,050
COSTCO WHOLESALE CRP DEL, 130 SHARES	12,835	12,835
COVIDIEN PLC SHS NEW, 60 SHARES	3,464	3,464

<b>Name of Stock</b>	<b>End of Year Book Value</b>	<b>End of Year Fair Market Value</b>
CVS CAREMARK CORP, 221 SHARES	10,685	10,685
DAVIS NY VENTURE, 380 SHARES	12,739	12,739
DEERE CO, 49 SHARES	4,235	4,235
DELTA AIR LINES INC, 6792 SHARES	80,621	80,621
DEVON ENERGY CORP NEW, 84 SHARES	4,371	4,371
DIAGEO PLC SPSD ADR NEW, 50 SHARES	5,829	5,829
DISNEY (WALT) CO COM STK, 101 SHARES	5,029	5,029
DISNEY (WALT) CO COM STK, 89 SHARES	4,431	4,431
DU PONT E I DE NEMOURS, 400 SHARES	17,991	17,991
E M C CORPORATION MASS, 166 SHARES	4,200	4,200
EATON CORP PLC, 500 SHARES	27,090	27,090
EATON VANCE LARGE CAP, 6508 SHARES	126,974	126,974
EBAY INC COM, 98 SHARES	4,998	4,998
ENSCO PLC SHS CL A, 67 SHARES	3,972	3,972
EOG RESOURCES INC, 91 SHARES	10,992	10,992
EXPRESS SCRIPTS HLDG CO, 65 SHARES	3,510	3,510
GILEAD SCIENCES INC COM, 43 SHARES	3,158	3,158
GOOGLE INC CL A, 8 SHARES	5,659	5,659
GOOGLE INC CL A, 8 SHARES	5,659	5,659
HARLEY DAVIDSON INC WIS, 123 SHARES	6,006	6,006
HEALTH CARE SELECT SPDR, 163 SHARES	6,501	6,501
HEWLETT PACKARD CO DEL, 60 SHARES	855	855
HOME DEPOT INC, 79 SHARES	4,886	4,886
HONEYWELL INTL INC DEL, 67 SHARES	4,252	4,252
INTL BUSINESS MACHINES, 25 SHARES	4,789	4,789
IRON MOUNTAIN INC NEW, 143 SHARES	4,440	4,440
ISHARES DOW JONES US, 790 SHARES	51,089	51,089
J M SMUCKER CO, 38 SHARES	3,277	3,277
JPMORGAN CHASE & CO, 78 SHARES	3,430	3,430
KELLOGG CO, 500 SHARES	27,925	27,925

<b>Name of Stock</b>	<b>End of Year Book Value</b>	<b>End of Year Fair Market Value</b>
KINDER MORGAN ENERGY, 300 SHARES	23,937	23,937
KINDER MORGAN ENERGY, 300 SHARES	23,937	23,937
LOEWS CORP, 189 SHARES	7,702	7,702
MARATHON OIL CORP, 500 SHARES	15,330	15,330
MARKET VECTORS HARD, 350 SHARES	12,547	12,547
MATERIALS SELECT SECTOR, 93 SHARES	3,491	3,491
MCDONALDS CORP COM, 580 SHARES	51,162	51,162
MICROSOFT CORP, 188 SHARES	5,021	5,021
MICROSOFT CORP, 88 SHARES	2,350	2,350
MONDELEZ INTERNATIONAL, 187 SHARES	4,760	4,760
MONSANTO CO NEW DEL COM, 35 SHARES	3,313	3,313
NATL HEALTH INVS INC, 3620 SHARES	204,639	204,639
NUVEEN ENERGY MLP TOTAL, 1827 SHARES	32,342	32,342
OCCIDENTAL PETE CORP CAL, 111 SHARES	8,504	8,504
ORACLE CORP \$0.01 DEL, 148 SHARES	4,931	4,931
ORACLE CORP \$0.01 DEL, 49 SHARES	1,633	1,633
PFIZER INC, 98 SHARES	2,458	2,458
PHILIP MORRIS INTL INC, 37 SHARES	3,095	3,095
PIONEER HIGH YIELD, 9576 SHARES	100,736	100,736
POTASH CORP SASKATCHEWAN, 43 SHARES	1,750	1,750
POWERSHARES FIN PFD, 350 SHARES	6,398	6,398
POWERSHARES FIN PFD, 3650 SHARES	66,722	66,722
PROGRESSIVE CRP OHIO, 249 SHARES	5,254	5,254
SCHLUMBERGER LTD, 57 SHARES	3,950	3,950
SECTOR SPDR CONSMRS STPL, 92 SHARES	3,211	3,211
SECTOR SPDR FINANCIAL, 421 SHARES	6,900	6,900
SECTOR SPDR INDUSTRIAL, 89 SHARES	3,373	3,373
SP500 CLIRN ISSUER HSBC, 11500 SHARES	114,885	114,885
SP500 STEPUP ISSUER BAC, 8000 SHARES	83,760	83,760
STARBUCKS CORP, 93 SHARES	4,988	4,988

<b>Name of Stock</b>	<b>End of Year Book Value</b>	<b>End of Year Fair Market Value</b>
SUNOCO LOGISTICS PRTS LP, 1125 SHARES	55,946	55,946
TEXAS INSTRUMENTS, 106 SHARES	3,274	3,274
TJX COS INC NEW, 118 SHARES	5,009	5,009
TRANSOCEAN LTD, 20 SHARES	893	893
UNITED CONTL HLDGS INC, 1252 SHARES	29,272	29,272
VERIZON COMMUNICATNS COM, 900 SHARES	38,943	38,943
WELLS FARGO & CO NEW DEL, 354 SHARES	12,100	12,100
WYNN RESORTS LTD, 30 SHARES	3,375	3,375

**TY 2012 Investments - Other Schedule**

**Name:** LUMOS

**EIN:** 20-8203226

Category / Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
RICI ARN ISSUER SEK, 10000 SHARES	FMV	99,100	99,100

**TY 2012 Other Assets Schedule**

**Name:** LUMOS

**EIN:** 20-8203226

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
FEDERAL EXCISE TAX RECOVERABLE	2,073	1,293	1,293

## TY 2012 Other Expenses Schedule

**Name:** LUMOS

**EIN:** 20-8203226

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT - BANK SERVICE CHARGE	300	300		0
OTHER MISCELLANEOUS EXPENSES	997	0		997

**TY 2012 Other Increases Schedule**

**Name:** LUMOS

**ETIN:** 20-8203226

Description	Amount
CHANGE IN UNREALIZED GAIN/LOSS	332,867

## TY 2012 Other Liabilities Schedule

**Name:** LUMOS

**EIN:** 20-8203226

Description	Beginning of Year - Book Value	End of Year - Book Value
UNSETTLED INVESTMENT TRANSACTIONS	0	431

## TY 2012 Other Professional Fees Schedule

**Name:** LUMOS

**EIN:** 20-8203226

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT MANAGER FEES	13,167	13,167		0

# TY 2012 Taxes Schedule

**Name:** LUMOS

**EIN:** 20-8203226

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
EXCISE TAXES	780	0		0