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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

2012

Open to public inspection

For calendar year 2012 or tax year beginning

, and ending

Name of foundation WEST FOUNDATION, INC.		A Employer identification number 23-7416727
Number and street (or P.O. box number if mail is not delivered to street address) 111 MONUMENT CIRCLE	Room/suite 220	B Telephone number 317-972-0204
City or town, state, and ZIP code INDIANAPOLIS, IN 46204		C If exemption application is pending, check here <input type="checkbox"/>
G Check all that apply <input type="checkbox"/> Initial return <input type="checkbox"/> Final return <input type="checkbox"/> Address change <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Amended return <input type="checkbox"/> Name change		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) ► \$ 5,468,967. (Part I, column (d) must be on cash basis.)	J Accounting method <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a).)		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received		225,000.		N/A	
2 Check <input type="checkbox"/> if the foundation is not required to attach Sch. B					
3 Interest on savings and temporary cash investments		23.	23.		STATEMENT 1
4 Dividends and interest from securities		116,897.	116,897.		STATEMENT 2
5a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10		-569,021.			
b Gross sales price for all assets on line 6a 3,456,684.					
7 Capital gain net income (from Part IV, line 2)			0.		
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)					
11 Other income		551.	551.		STATEMENT 3
12 Total. Add lines 1 through 11		-226,550.	117,471.		
13 Compensation of officers, directors, trustees, etc		225,000.	0.		225,000.
14 Other employee salaries and wages					
15 Pension plans, employee benefits					
16a Legal fees					
b Accounting fees STMT 4		1,425.	0.		1,425.
c Other professional fees					
17 Interest					
18 Taxes					
19 Depreciation and depletion					
20 Occupancy		37,779.	0.		37,779.
21 Travel, conferences, and meetings					
22 Printing and publications					
23 Other expenses STMT 5		52,765.	36,193.		16,572.
24 Total operating and administrative expenses. Add lines 13 through 23		316,969.	36,193.		280,776.
25 Contributions, gifts, grants paid		386,900.			386,900.
26 Total expenses and disbursements. Add lines 24 and 25		703,869.	36,193.		667,676.
27 Subtract line 26 from line 12		-930,419.			
a Excess of revenue over expenses and disbursements			81,278.		
b Net investment income (if negative, enter -0-)					
c Adjusted net income (if negative, enter -0-)				N/A	

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value		
Assets	1	Cash - non-interest-bearing		273,159.	325,652.	325,652.
	2	Savings and temporary cash investments				
	3	Accounts receivable ▶				
		Less allowance for doubtful accounts ▶				
	4	Pledges receivable ▶				
		Less allowance for doubtful accounts ▶				
	5	Grants receivable				
	6	Receivables due from officers, directors, trustees, and other disqualified persons				
	7	Other notes and loans receivable ▶				
		Less allowance for doubtful accounts ▶				
	8	Inventories for sale or use				
	9	Prepaid expenses and deferred charges				
	10a	Investments - U S and state government obligations STMT 8	537,674.	531,126.	544,351.	
	b	Investments - corporate stock STMT 9	5,549,142.	4,504,588.	4,477,546.	
	c	Investments - corporate bonds STMT 10	58,506.	76,960.	79,595.	
11	Investments - land, buildings, and equipment basis ▶					
	Less accumulated depreciation ▶					
12	Investments - mortgage loans					
13	Investments - other STMT 11	27,368.	40,355.	41,823.		
14	Land, buildings, and equipment basis ▶ 71,108.					
	Less accumulated depreciation STMT 12 ▶ 71,108.					
15	Other assets (describe ▶)					
16	Total assets (to be completed by all filers)	6,445,849.	5,478,681.	5,468,967.		
Liabilities	17	Accounts payable and accrued expenses				
	18	Grants payable				
	19	Deferred revenue				
	20	Loans from officers, directors, trustees, and other disqualified persons				
	21	Mortgages and other notes payable				
	22	Other liabilities (describe ▶)				
	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 ▶ <input checked="" type="checkbox"/>					
	and complete lines 27 through 31.					
	27	Capital stock, trust principal, or current funds	400,000.	400,000.		
28	Paid-in or capital surplus, or land, bldg., and equipment fund	3,470,985.	3,470,985.			
29	Retained earnings, accumulated income, endowment, or other funds	2,574,864.	1,607,696.			
30	Total net assets or fund balances	6,445,849.	5,478,681.			
31	Total liabilities and net assets/fund balances	6,445,849.	5,478,681.			

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	6,445,849.
2	Enter amount from Part I, line 27a	2	-930,419.
3	Other increases not included in line 2 (itemize) ▶ SEE STATEMENT 6	3	13,329.
4	Add lines 1, 2, and 3	4	5,528,759.
5	Decreases not included in line 2 (itemize) ▶ SEE STATEMENT 7	5	50,078.
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	5,478,681.

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				
b SEE ATTACHED STATEMENTS				
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 3,456,684.		4,025,705.	-569,021.

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

(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	(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
a			
b			
c			
d			
e			-569,021.

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	-569,021.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) If (loss), enter -0- in Part I, line 8		3	N/A

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

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

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

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

☐ Yes ☒ No

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

1 Enter the appropriate amount in each column for each year, see 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	549,436.	5,640,148.	.097415
2010	473,297.	5,527,924.	.085619
2009	431,075.	4,937,533.	.087306
2008	1,118,452.	8,356,929.	.133835
2007	1,189,562.	11,095,140.	.107215

2 Total of line 1, column (d)	2	.511390
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	.102278
4 Enter the net value of noncharitable-use assets for 2012 from Part X, line 5	4	5,551,630.
5 Multiply line 4 by line 3	5	567,810.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	813.
7 Add lines 5 and 6	7	568,623.
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	667,676.

WEST FOUNDATION, INC.

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	WELLS FARGO 1702	P	VARIOUS	07/27/12
b	WELLS FARGO 1702	P	VARIOUS	07/27/12
c	WELLS FARGO 1702	P	VARIOUS	07/01/12
d	WELLS FARGO 1702	P	VARIOUS	07/01/12
e	WELLS FARGO 6873	P	VARIOUS	07/01/12
f	WELLS FARGO 6873	P	VARIOUS	07/01/12
g	WELLS FARGO 6613	P	VARIOUS	07/01/12
h	WELLS FARGO 6613	P	VARIOUS	07/01/12
i	WELLS FARGO 5584	P	VARIOUS	07/01/12
j	WELLS FARGO 5584	P	VARIOUS	07/01/12
k	WELLS FARGO 5584	P	VARIOUS	07/01/12
l	WELLS FARGO 6343	P	VARIOUS	07/01/12
m	WELLS FARGO 6343	P	VARIOUS	07/01/12
n	WELLS FARGO 6343	P	VARIOUS	07/01/12
o	WELLS FARGO 1934	P	VARIOUS	07/01/12

(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	1,810.	1,707.	103.
b	23,225.	24,185.	-960.
c	1,934,519.	1,801,661.	132,858.
d	27,568.	5,511.	22,057.
e	90,225.	91,333.	-1,108.
f	52,602.	53,897.	-1,295.
g	81,147.	79,752.	1,395.
h	85,629.	86,084.	-455.
i	33,662.	33,202.	460.
j	35,141.	29,979.	5,162.
k	28,853.	26,702.	2,151.
l	365,160.	394,029.	-28,869.
m	320,738.	291,167.	29,571.
n	70,608.	45,756.	24,852.
o	236,866.	271,315.	-34,449.

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

(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	(l) Losses (from col (h)) Gains (excess of col (h) gain over col (k), but not less than "-0-")
a			103.
b			-960.
c			132,858.
d			22,057.
e			-1,108.
f			-1,295.
g			1,395.
h			-455.
i			460.
j			5,162.
k			2,151.
l			-28,869.
m			29,571.
n			24,852.
o			-34,449.

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 }

3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6)

If gain, also enter in Part I, line 8, column (c)

If (loss), enter "-0-" in Part I, line 8

2

3

WEST FOUNDATION, INC.

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	WELLS FARGO 1934	P	VARIOUS	07/01/12
b	WHMT 6613	P	VARIOUS	07/01/12
c	WELLS FARGO 1702	P	VARIOUS	07/01/12
d				
e				
f				
g				
h				
i				
j				
k				
l				
m				
n				
o				

(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 32,005.		752,499.	-720,494.
b 32,963.		32,963.	0.
c 3,963.		3,963.	0.
d			
e			
f			
g			
h			
i			
j			
k			
l			
m			
n			
o			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

(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	(l) Losses (from col (h)) Gains (excess of col (h) gain over col (k), but not less than "-0-")
a			-720,494.
b			0.
c			0.
d			
e			
f			
g			
h			
i			
j			
k			
l			
m			
n			
o			

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	-569,021.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) If (loss), enter "-0-" in Part I, line 8 }	3	N/A

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

1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1 Date of ruling or determination letter _____ (attach copy of letter if necessary-see instructions)		1	813.
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			
c All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)		2	0.
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		3	813.
3 Add lines 1 and 2		4	0.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		5	813.
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-			
6 Credits/Payments			
a 2012 estimated tax payments and 2011 overpayment credited to 2012	6a	3,080.	
b Exempt foreign organizations - tax withheld at source	6b		
c Tax paid with application for extension of time to file (Form 8868)	6c		
d Backup withholding erroneously withheld	6d		
7 Total credits and payments. Add lines 6a through 6d	7	3,080.	
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	2,267.	
11 Enter the amount of line 10 to be Credited to 2013 estimated tax	11	840.	Refunded

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.		X
1c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation <input type="checkbox"/> \$ 0. (2) On foundation managers <input type="checkbox"/> \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input type="checkbox"/> \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV.	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) <input type="checkbox"/> IN		
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

N/A

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► N/A	13	X	
14	The books are in care of ► JOANNA DAY Telephone no ► 317-972-0204 Located at ► 111 MONUMENT CIRCLE, STE. 220, INDIANAPOLIS, IN ZIP+4 ► 46204			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year ► 15 N/A			
16	At any time during calendar year 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? See the instructions for exceptions and filing requirements for Form TD F 90-22.1 If "Yes," enter the name of the foreign country ►	16	Yes	No X

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

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

	Yes	No
1a During the year did the foundation (either directly or indirectly)		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	<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)? Organizations relying on a current notice regarding disaster assistance check here	N/A	1b
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 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? If "Yes," list the years ►	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions)	N/A	2b
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ►		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	<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)	N/A	3b
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		4a X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 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)?

☐ Yes ☒ No

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

☐ Yes ☒ No

b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?

N/A

5b

Organizations relying on a current notice regarding disaster assistance check here

☒

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

N/A

☐ Yes ☐ No

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

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?

☐ Yes ☒ No

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

6b

If "Yes" to 6b, file Form 8870

X

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?

☐ Yes ☒ No

b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?

N/A

7b

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors

1 List all officers, directors, trustees, foundation managers and their compensation.

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
PHYLLIS WEST 4120 N. ILLINOIS STREET INDIANAPOLIS, IN 46208	VICE PRESIDENT 2.00	0.	0.	0.
EMILY WEST 332 N. EAST STREET INDIANAPOLIS, IN 46208	DIRECTOR 30.00	0.	0.	0.

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

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

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

0

Form 990-PF (2012)

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

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
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
1 SEE ATTACHMENT #1	
	0.
2	
3	
4	

Part IX-B**Summary of Program-Related Investments**

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2

	Amount
1 N/A	
2	
All other program-related investments See instructions	
3	
Total. Add lines 1 through 3	0.

Form 990-PF (2012)

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	5,126,185.
b	Average of monthly cash balances	1b	509,988.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	5,636,173.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	5,636,173.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	84,543.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	5,551,630.
6	Minimum investment return. Enter 5% of line 5	6	277,582.

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	277,582.
2a	Tax on investment income for 2012 from Part VI, line 5	2a	813.
b	Income tax for 2012 (This does not include the tax from Part VI)	2b	
c	Add lines 2a and 2b	2c	813.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	276,769.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	276,769.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	276,769.

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	667,676.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	667,676.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	813.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	666,863.

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				276,769.
2 Undistributed income, if any, as of the end of 2012				
a Enter amount for 2011 only			0.	
b Total for prior years		0.		
3 Excess distributions carryover, if any, to 2012				
a From 2007	652,955.			
b From 2008	720,189.			
c From 2009	187,783.			
d From 2010	211,333.			
e From 2011	270,473.			
f Total of lines 3a through e	2,042,733.			
4 Qualifying distributions for 2012 from Part XII, line 4 ▶ \$ 667,676.				
a Applied to 2011, but not more than line 2a			0.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2012 distributable amount				276,769.
e Remaining amount distributed out of corpus	390,907.			
5 Excess distributions carryover applied to 2012 (If an amount appears in column (d), the same amount must be shown in column (a))	0.			0.
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	2,433,640.			
b Prior years' undistributed income Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b Taxable amount - see instructions		0.		
e Undistributed income for 2011 Subtract line 4a from line 2a Taxable amount - see instr			0.	
f Undistributed income for 2012 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2013				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)	0.			
8 Excess distributions carryover from 2007 not applied on line 5 or line 7	652,955.			
9 Excess distributions carryover to 2013 Subtract lines 7 and 8 from line 6a	1,780,685.			
10 Analysis of line 9				
a Excess from 2008	720,189.			
b Excess from 2009	187,783.			
c Excess from 2010	211,333.			
d Excess from 2011	270,473.			
e Excess from 2012	390,907.			

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

N/A

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)

	Tax year	Prior 3 years			(e) Total
	(a) 2012	(b) 2011	(c) 2010	(d) 2009	
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					
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					
3 Subtract line 2d from line 2c					
a 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))

NONE

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

NONE

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

EMILY WEST, 317-283-5525

4120 NORTH ILLINOIS STREET,, INDIANAPOLIS, IN 46208

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

NO SPECIAL FORMAT IS REQUIRED

c Any submission deadlines

NONE

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

NO RESTRICTIONS. EMPHASIS IS ON INTERNATIONAL COMMUNITY DEVELOPMENT, AND GRANTS TO PROBLEM-YOUTH AGENCIES AND ALCOHOL AND DRUG ABUSE PROGRAMS

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
SEE ATTACHMENT #1				386,900.
Total			► 3a	386,900.
b <i>Approved for future payment</i>				
NONE				
Total			► 3b	0.

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

- | | | Yes | No |
|----------|--|-----|----|
| 1 | Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations? | | |
| a | Transfers from the reporting foundation to a noncharitable exempt organization of | | |
| | (1) Cash | | X |
| | (2) Other assets | | X |
| b | Other transactions | | |
| | (1) Sales of assets to a noncharitable exempt organization | | X |
| | (2) Purchases of assets from a noncharitable exempt organization | | X |
| | (3) Rental of facilities, equipment, or other assets | | X |
| | (4) Reimbursement arrangements | | X |
| | (5) Loans or loan guarantees | | X |
| | (6) Performance of services or membership or fundraising solicitations | | X |
| c | Sharing of facilities, equipment, mailing lists, other assets, or paid employees | | X |
| d | If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received. | | |

[illegible]

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

- b** If "Yes," complete the following schedule

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

**Sign
Here**

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

Signature of officer or trustee

5-6-13
Date

Executive Dir

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

☒ Yes ☐ No

**Paid
Preparer
Use Only**

Print/Type preparer's name
SUSIE M. KEATON,
CPA

Preparer's signature

SUSIE M. KEATON,

Date _____

05/02/13

Check ☐ if self-employed

PTIN

P00765420

Firm's name ► **SOMERSET CPAS, P.C.**

Firm's EIN ► 20-1717681

Firm's address ► 3925 RIVER CROSSING PKWY
INDIANAPOLIS, IN 46240

Phone no 317-472-2200

Form 990-PF (2012)

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

Employer identification number

WEST FOUNDATION, INC.

23-7416727

Organization type (check one):

Filers of:

Section:

Form 990 or 990-EZ

☐ 501(c)() (enter number) organization

☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation

☐ 527 political organization

Form 990-PF

☒ 501(c)(3) exempt private foundation

☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation

☐ 501(c)(3) taxable private foundation

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

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

General Rule

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

Special Rules

- ☐ For a section 501(c)(3) organization filing Form 990 or 990-EZ that met the 33 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).

LHA 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)

Name of organization

Employer identification number

WEST FOUNDATION, INC.

23-7416727

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	PHYLLIS WEST 4120 NORTH ILLINOIS STREET INDIANAPOLIS, IN 46208	\$ 225,000.	Person <input checked="checked" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
			Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
			Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
			Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
			Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
			Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
			Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)

Name of organization

Employer identification number

WEST FOUNDATION, INC.

23-7416727

Part II Noncash Property (see instructions) Use duplicate copies of Part II if additional space is needed.

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	

Name of organization

Employer identification number

WEST FOUNDATION, INC.

23-7416727

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 entry. For 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) ▶ \$

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

2012 DEPRECIATION AND AMORTIZATION REPORT

FORM 990-PF PAGE 1

990-PF

Asset No	Description	Date Acquired	Method	Life	Line No	Unadjusted Cost Or Basis	Bus % Excl	* Reduction In Basis	Basis For Depreciation	Accumulated Depreciation	Current Sec 179	Current Year Deduction
1	FURNITURE - LOBBY	0611196200	DB	7.00	17	6,220.			6,220.	6,220.		0.
2	FURNITURE - CONFERENCE	0415962000	DB	7.00	17	8,908.			8,908.	8,908.		0.
3	FURNITURE - WORK A	0320962000	DB	7.00	17	1,944.			1,944.	1,944.		0.
4	FURNITURE - PMW	0525962000	DB	7.00	17	3,637.			3,637.	3,637.		0.
5	FURNITURE - SRW	0610962000	DB	7.00	17	11,716.			11,716.	11,716.		0.
6	FURNITURE - EAW	0430962000	DB	7.00	17	11,045.			11,045.	11,045.		0.
7	TELEPHONES	0301962000	DB	5.00	17	2,100.			2,100.	2,100.		0.
8	FURNITURE - OTHER	0915962000	DB	7.00	17	2,002.			2,002.	2,002.		0.
9	NCS	1010962000	DB	5.00	17	1,245.			1,245.	1,245.		0.
10	TABLETOPS	0509972000	DB	7.00	17	859.			859.	859.		0.
11	ARMOIRE	0522972000	DB	7.00	17	1,574.			1,574.	1,574.		0.
12	BUSINESS MACHINES COMPUTER AND	0603972000	DB	5.00	17	6,705.			6,705.	6,705.		0.
13	INSTALLATION	010105SL		5.00	17	13,153.			13,153.	13,153.		0.
	* TOTAL 990-PF PG 1					71,108.		0.	71,108.	71,108.	0.	0.
	DEPR											

228102
05-01-12

(D) - Asset disposed

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

FORM 990-PF INTEREST ON SAVINGS AND TEMPORARY CASH INVESTMENTS STATEMENT 1

<u>SOURCE</u>	<u>AMOUNT</u>
FIFTH THIRD BANK	23.
TOTAL TO FORM 990-PF, PART I, LINE 3, COLUMN A	23.

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

<u>SOURCE</u>	<u>GROSS AMOUNT</u>	<u>CAPITAL GAINS DIVIDENDS</u>	<u>COLUMN (A) AMOUNT</u>
WACHOVIA SECURITIES	116,897.	0.	116,897.
TOTAL TO FM 990-PF, PART I, LN 4	116,897.	0.	116,897.

FORM 990-PF OTHER INCOME STATEMENT 3

<u>DESCRIPTION</u>	<u>(A) REVENUE PER BOOKS</u>	<u>(B) NET INVEST- MENT INCOME</u>	<u>(C) ADJUSTED NET INCOME</u>
MISCELLANEOUS INVESTMENT INCOME	502.	502.	
UNRECAPTURED SEC 1250 GAIN	49.	49.	
TOTAL TO FORM 990-PF, PART I, LINE 11	551.	551.	

FORM 990-PF ACCOUNTING FEES STATEMENT 4

<u>DESCRIPTION</u>	<u>(A) EXPENSES PER BOOKS</u>	<u>(B) NET INVEST- MENT INCOME</u>	<u>(C) ADJUSTED NET INCOME</u>	<u>(D) CHARITABLE PURPOSES</u>
SOMERSET, TAX PREPARATION	1,425.	0.		1,425.
TO FORM 990-PF, PG 1, LN 16B	1,425.	0.		1,425.

FORM 990-PF

OTHER EXPENSES

STATEMENT 5

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
COMPUTER & TRAINING EXPENSE	2,247.	0.		2,247.
BROKER FEES	36,193.	36,193.		0.
TELEPHONE & INTERNET	2,354.	0.		2,354.
LIABILITY INSURANCE	1,360.	0.		1,360.
MAINTENANCE SERVICE CONTRACT	1,897.	0.		1,897.
OFFICE SUPPLIES	416.	0.		416.
PARKING	6,120.	0.		6,120.
INTERNET SERVICE	1,083.	0.		1,083.
INVESTMENT EXP - WHMT	417.	0.		417.
OTHER EXPENSE - 1702	469.	0.		469.
MARGIN DEBT INTEREST	30.	0.		30.
REPAIRS	179.	0.		179.
TO FORM 990-PF, PG 1, LN 23	52,765.	36,193.		16,572.

FORM 990-PF

OTHER INCREASES IN NET ASSETS OR FUND BALANCES

STATEMENT 6

DESCRIPTION	AMOUNT
NONDIVIDEND DISTRIBUTION	4,434.
INCOME TAX REFUND	8,895.
TOTAL TO FORM 990-PF, PART III, LINE 3	13,329.

FORM 990-PF

OTHER DECREASES IN NET ASSETS OR FUND BALANCES

STATEMENT 7

DESCRIPTION	AMOUNT
ADJUSTMENT FOR DIFFERENCE IN COST BASIS	50,078.
TOTAL TO FORM 990-PF, PART III, LINE 5	50,078.

FORM 990-PF	U.S. AND STATE/CITY GOVERNMENT OBLIGATIONS	STATEMENT	8
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DESCRIPTION	U.S. GOV'T	OTHER GOV'T	BOOK VALUE	FAIR MARKET VALUE
INVESTMENTS - WELLS FARGO (SEE ATTACHMENT #3)	X		200,630.	200,800.
INVESTMENTS - WELLS FARGO (SEE ATTACHMENT #4)	X		330,496.	343,551.
TOTAL U.S. GOVERNMENT OBLIGATIONS			531,126.	544,351.
TOTAL STATE AND MUNICIPAL GOVERNMENT OBLIGATIONS				
TOTAL TO FORM 990-PF, PART II, LINE 10A			531,126.	544,351.

FORM 990-PF	CORPORATE STOCK	STATEMENT	9
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
INVESTMENTS - WELLS FARGO (SEE ATTACHMENT #2)	2,676,854.	2,429,548.
INVESTMENTS - WELLS FARGO (SEE ATTACHMENT #5)	600,731.	667,912.
INVESTMENTS - WELLS FARGO (SEE ATTACHMENT #6)	733,551.	870,425.
INVESTMENTS - WELLS FARGO (SEE ATTACHMENT #7)	493,452.	509,661.
TOTAL TO FORM 990-PF, PART II, LINE 10B	4,504,588.	4,477,546.

FORM 990-PF	CORPORATE BONDS	STATEMENT	10
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
INVESTMENTS - WELLS FARGO (SEE ATTACHMENT #3)	76,960.	79,595.
TOTAL TO FORM 990-PF, PART II, LINE 10C	76,960.	79,595.

FORM 990-PF	OTHER INVESTMENTS	STATEMENT	11
DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
INVESTMENTS - WELLS FARGO (SEE ATTACHMENT #3)	FMV	40,355.	41,823.
TOTAL TO FORM 990-PF, PART II, LINE 13		40,355.	41,823.

FORM 990-PF	DEPRECIATION OF ASSETS NOT HELD FOR INVESTMENT	STATEMENT	12
DESCRIPTION	COST OR OTHER BASIS	ACCUMULATED DEPRECIATION	BOOK VALUE
FURNITURE - LOBBY	6,220.	6,220.	0.
FURNITURE - CONFERENCE	8,908.	8,908.	0.
FURNITURE - WORK A	1,944.	1,944.	0.
FURNITURE - PMW OFFICE	3,637.	3,637.	0.
FURNITURE - SRW OFFICE	11,716.	11,716.	0.
FURNITURE - EAW OFFICE	11,045.	11,045.	0.
TELEPHONES	2,100.	2,100.	0.
FURNITURE - OTHER	2,002.	2,002.	0.
NCES	1,245.	1,245.	0.
TABLETOPS	859.	859.	0.
ARMOIRE	1,574.	1,574.	0.
BUSINESS MACHINES	6,705.	6,705.	0.
COMPUTER AND INSTALLATION	13,153.	13,153.	0.
TOTAL TO FM 990-PF, PART II, LN 14	71,108.	71,108.	0.

WEST FOUNDATION	CHARITABLE GIFTS	2012	PROJECT	2012 GRANT DATE	2012 GRANT AMOUNT
ORGANIZATION					
African Wildlife Foundation	1400 16th St., N.W., Ste 120	Washington, DC 20036	Easements for Education Program	6/29/12	\$20,000
Aqua Clara International	88 Sun Ridge Dr c/o M Buck	Holland, MI 49424	Clean Water Initiative, Kenya	12/28/12	\$14,000
blueEnergy	972 Mission St., Ste 500	San Francisco, CA 94103	Latrine Feasibility Study	12/5/12	\$14,400
Blue Planet Network	P O Box 3059	Redwood City, CA 94060	Cambodia with East Meets West	12/5/12	\$12,000
Boys Hope Girls Hope	12120 Bridgeton Square Drive	Bridgeton, MO 63044-2607	Guatemalan and Brazilian Home Programs	6/29/12	\$15,000
Children International	2000 E Red Bridge Rd	Kansas City, MO 64131	Training Prog Quito, Ecuador	12/5/12	\$15,000
Cooperative of Education	2300 Montana Ave., Ste 301	Cincinnati, OH 45211	Teacher Training Program	6/29/12	\$20,000
CURE International	701 Bosler Ave	Lemoynne, PA 17043	Hydrocephalus Prog In Mozambique	12/28/12	\$10,000
Goodweave USA	2001 S St NW, Ste 510	Washington, DC 20009	Program Grant	6/29/12	\$15,000
Hesperian Foundation	1919 Addison Street, #304	Berkeley, CA 94704	Book Projects & Production, Matching Grant	5/31/12	\$30,000
			Environmental Health		
H2O for Life	1310 Highway 96 East, #235	White Bear Lake, MN 55110	Clean Water to Communities in Global South	12/5/12	\$10,000
INDEX	333 Valencia Street, Ste 250	San Francisco, CA 94103	Econ Dev in rural Nepal	5/31/12	\$15,000
KickStart-International	2435 Polk Street, Suite 20	San Francisco, CA 94109	Field Agents in Tanzania	5/31/12	\$18,500
Moynihan Institute of Global Affairs	346 Eggers Hall	Syracuse, NY 13244-1090	Transnational NGO Leadership Institute	12/28/12	\$10,000
One World Children's Fund	1016 Lincoln Boulevard	San Francisco, CA 94129	Tuneweza Program in Tanzania	12/5/12	\$10,000
Plant With Purpose	4903 Morena Blvd., Ste 1215	San Diego, CA 92117	Grant Prog In Thailand	12/28/12	\$15,000
Project MedSend	999 Oronoque Lane	Stratford, CT 06614-1379	Part/time Devl Staff Member in CA	12/28/12	\$16,000
Prosthetics Outreach Foundation	400 E Pine St., Ste 325	Seattle, WA 98122-2300	Work in Sierra Leone	12/5/12	\$12,000
VisionSpring (Formerly Scojo Fdn)	322 8th Avenue, Suite 201	New York, NY 10001	re-branding Campaign	5/31/12	\$20,000
Shared Interest	121 W 27th St., Ste 805	New York, NY 10001	Work in South Africa	12/5/12	\$20,000
Tanari International, Inc	319 E Union Avenue	Wheaton, IL 60187	Executive Director Salary	12/28/12	\$5,000
The Aspen Institute	1 Dupont Circle, NW, Ste 700	Washington, DC 20036	For Arts Partners at Aspen (1 of 3 pls)	12/28/12	\$25,000
Upaya Social Ventures	2111 Third Avenue	Seattle, WA 98121	To Assist the Ultrapoor	12/28/12	\$15,000
Village Enterprise Fund	751 Laurel Street, PMB 222	San Carlos, CA 94070	Business In A Box program	6/29/12	\$20,000
World Community Service Foundation	P O Box 457	Brownsburg, IN 46112	For Rotary Fdn's Afghanistan Village Prog	11/2/12	\$10,000
TOTAL					\$ 386,900

WEST FOUNDATION INC. - 2012
8681-1702 WELLS FARGO

23-7416727

DESCRIPTION	2012 BEGINNING BOOK VALUE	2012 ENDING BOOK VALUE	2012 ENDING FMV
APPLE INC	339,875 -	290,284	266,086
AT & T	186,593-	186,593	168,550
CENTURYLINK INC	481,992-	39,675 **	56,294
CHURCH & DWIGHT INC		291,384	267,850
ECOLAB		134,507	143,800
FIRST MERCHANTS CORP	163,584-	163,584	155,909
HH GREGG	103,765-	103,765	28,080
INTUITIVE SURGICAL INC		248,841	245,185
ISHARES BARCLAYS TIPSET	205,346✓	205,346	224,609
MARATHON OIL CORP	302✓	302	1,104
MARATHON OIL CORP	204✓	204	1,134
MEDTRONIC INCL	486,711✓	106,853	90,244
RUBICON TECHNOLOGIES	107,705✓	107,705	26,884
SPDR GOLD TRUST	105,527✓	58,327	81,010
SURMODICS INC	206,376✓	206,376	116,272
TIME WARNER INC CABLE	1,100✓	1,100	1,944
TIME WARNER INC NEW	158,801✓	158,802	194,477
WINDSTREAM CORP	125,010✓	125,010	73,228
XILINX INC	248,196 ✓	248,196	286,888
		2,676,854	\$ 2,429,548
CALLS	(18,603)		
TOTAL	2,902,484		

WEST FOUNDATION, INCORPORATED - 2012
 #1 PACIFIC INCOME ADVISERS
 1579-6873 WELLS FARGO

23-7416727

<u>DESCRIPTION</u>	<u>2012 BEGINNING BOOK VALUE</u>	<u>2012 ENDING BOOK VALUE</u>	<u>2012 ENDING FMV</u>
CORPORATE BONDS			
VERIZON NOTES 2.00%		9,994.80	10,363.00
WACHOVIA CORP 6.150%		9,318.72	9,615.36
CONOCOPHILLIPS NOTE 4.60%	9,858.93	9,858.93	9,758.16
JPMORGAN CHASE NOTES 4.750%	9,566.79	9,566.79	9,718.38
GENERAL ELECTRIC NOTES 5.40%	9,757.65	9,757.65	10,363.68
GOLDMAN SACHS GROUP NOTES 6.150%		9,719.91	10,598.40
AT&T NOTES 5.60%	9,089.50	9,089.50	9,641.68
UNITED TECHNOLOGIES 3.100%		9,653.22	9,536.04
		<u>76,959.52</u>	<u>79,594.70</u>
GOVERNMENT BONDS			
US TREASURY NOTES	22,370.61	13,419.50	13,216.84
FED HOME LN MTG NOTES	25,742.59	26,353.60	26,299.26
FED HOME LN MTG NOTES	22,848.30	23,223.64	23,189.76
US TREASURY NOTES	23,210.80	19,830.57	19,673.17
FED NATL MTG ASSN NOTES	25,335.52	26,368.85	26,089.25
US TREASURY NOTES	25,438.00	25,438.00	25,341.40
US TREASURY NOTES	25,714.84	25,714.84	26,839.85
US TREASURY NOTES	29,007.36	30,167.60	30,078.88
US TREASURY NOTES		10,113.71	10,072.70
		<u>200,670</u>	<u>280,395.81</u>
TOTAL - BONDS			280,395.81
MUTUAL FUNDS			
ADVISORS SERV TR BOND FUND	27,369.03	40,354.66	41,823.32
TOTAL	265,309.92	317,944.49	322,219.13

WEST FOUNDATION, INCORPORATED - 2012

23-7416727

#2 PIMCO

2683-6613 WELLS FARGO

DESCRIPTION	2012 BEGINNING BOOK VALUE	2012 ENDING BOOK VALUE	2012 ENDING FMV
GOVERNMENT BONDS			
US TREASURY NOTES .75%	7,916.32-	42,169.09	42,118.00
US TREASURY NOTES 1.375%	2,976.33-	10,948.44	11,262.00
US TREASURY NOTES 0.125%		29,639.88	29,455.00
US TREASURY NOTES 2.5%		9,273.20	9,199.00
GOVERNMENT ASSET BACKED/ CMO SECURITIES			
FNMA PASS THRU 4.50%	4,628.55-	3,395.49	3,699.00
FNMA PASS THRU 4.50%	7,236.64-	5,166.72	5,420.00
FNMA PASS THRU 4.50%	7,379.75-	7,970.69	8,032.00
FNMA PASS THRU 5.00%	7,008.59-	3,582.88	3,760.00
FNMA PASS THRU 4.00%		12,191.10	12,165.00
FNMA PASS THRU 3.50%		8,659.27	8,911.00
FNMA PASS THRU 6.00%		5,017.89	4,831.00
FNMA PASS THRU 4.00%		12,582.15	12,321.00
FNMA PASS THRU 3.50%		9,541.19	9,655.00
FNMA PASS THRU 3.50%		16,599.93	16,506.00
FNMA PASS THRU 3.00%		10,517.73	10,464.00
			187,798.00
ALLIANZ GLOBAL INV MAN	73,823.33-	73,823.33	78,111.00
ALLIANZ GLOBAL SERVICE	69,416.55-	69,416.55	77,642.00
TOTAL	180,386.06	330,495.53	343,551.00

WEST FOUNDATION, INCORPORATED - 2012
 #3 ESTABROOK
 4062-5584 WELLS FARGO

DESCRIPTION	2012 BEGINNING BOOK VALUE	2012 ENDING BOOK VALUE	2011 ENDING FMV
ALLSTATE	9,839.17-	9839.17	12,733.89
AMERICAN EXPRESS	13,169.24 -	13169.24	17,186.52
BB & T CORP		9184.17	7,830.59
BORG WARNER	12,225.56-	12225.56	17,690.14
CISCO SYSTEMS	23,709.53 -	23709.53	23,127.34
COSTCO WHSL	6,287.43 -	6287.43	9,083.16
DUPONT	18,910.29-	18910.29	18,216.29
EMC CORP	11,468.78-	11468.78	12,801.80
EATON CORP	18,100.19-	18,100.19	22,863.96
EMERSON ELECTRIC	18,674.61-	18,674.61	17,847.52
EOG RESOURCES	19,571.75 -	19,571.75	23,916.42
EQT CORP	14,563.55 -	14,563.55	18,165.84
FORD MOTOR CO		12,854.20	16,407.65
HUMANA	8,772.61-	8,772.61	10,569.02
INGERSOLL-RAND	9,155.42-	9,155.42	10,647.12
INTEL C ORP	13,983.57-	13,983.57	13,155.56
IBM	12,218.80 -	12,218.80	15,898.65
JPMORGAN	27,025.46 -	33,272.12	33,548.42
MACY'S INC	9,924.72-	9,924.72	16,778.60
MICROSOFT	17,237.68-	21,277.29	20,326.08
NORFOLK	20,153.13-	20,153.13	20,469.04
POTASH CORP		8,763.69	8,992.49
PROCTOR & GAMBLE	13,714.80 -	13,714.80	14,460.57
QEP RESOURCES	8,376.70-	8,376.70	8,929.65
QUALCOMM INC		16,586.46	17,691.84
QUESTAR CORP	15,506.51-	15,506.51	15,472.08
SANOFI-AVENTIS	21,041.60-	21,041.60	28,048.96
SCHLUMBERGER LTD	13,856.20-	19,089.41	16,562.36
SONOCO PRODUCTS	12,766.15-	12,766.15	11,208.21
SPECTRA ENERGY	12,797.91-	12,797.91	14,484.02
TARGET CORP		10,402.67	9,703.88
TIFFANY & CO		9,951.74	9,633.12
TRAVELERS COS	13,118.81-	13,118.81	16,734.06
UNION PACIFIC CORP	13,096.40 -	13,096.40	16,217.88
UNITED HEALTH GROUP	18,750.37-	18,750.37	26,469.12
US BANCORP	26,499.38-	23,901.00	28,043.32
VERIZON COMM	18,559.29-	13,309.44	16,399.33
WASTE MGMT	13,132.46-	16,435.23	15,317.96
WELLS FARGO CO	23,023.54 -	23,023.54	24,712.14
WESTERN UNION	12,782.74-	12,782.74	9,567.83
TOTAL	522,014.35	600,731.30	667,912.43

WEST FOUNDATION, INCORPORATED - 2012
 #4 DORSEY WRIGHT
 5153-6343 WELLS FARGO

DESCRIPTION	2012 BEGINNING BOOK VALUE	202 ENDING BOOK VALUE	2012 ENDING FMV
AOL INC		23,395 85	22,888.53
ALASKA AIR GROUP	33,737.61		
APPLE INC	32,267.92	32,267.92	55,878 15
CBS		35,098.58	37,783 65
CARBO CERAMICS INC	33,385.71		
CHIPOTLE MEXICAN GRILL	34,125.13		
CHURCH & DWIGHT INC	25,707.66		
CROWN CASTLE INTL CORP		35,542 83	40,986 88
CUMMINS INC	36,027.88		
DAVITA INC		36,036 44	36,695 96
DECKERS OUTDOOR CORP	40,793.06		
DISCOVER FINANCIAL	34,216.46	34,216.46	52,852 05
EBAY INC		36,235 04	38,044 28
EQUITY RESIDENTIAL	35,410 58		
FMC CORP NEW		34,881 74	40,261.76
FOSSIL INC	25,798.56		
GARDNER DENVER INC	33,864.70		
HOLLYFRONTIER		35,441.55	41,755 35
INTUITIVE SURGICAL INC	32,088 04		
LANCASTER COLONY CORP	33,873.22		
LAUDER ESTEE COS	34,936.06		
MENTOR GRAPHICS CORP		26,254.71	29,529.70
NEWMARKET CORP	35,627.87		
NISOURCE INC	26,390 31		
NRG ENERGY INC		35,854 12	35,910.38
OGE ENERGY CORP	33,370 27		
ONEOK INC NEW	36,037.01	36,037.01	45,742.50
PERRIGO CO	27,722.82	27,722.82	47,229 62
RESMED		27,572 47	27,145 21
SERVICE CORP INTERNATIONAL		36,263 13	36,596 50
SHERMAN WILLIAMS CO		39,029.98	54,913 74
TAUBMAN CENTERS INC REIT		36,371.10	39,438.72
TRIUMPH GROOUP INC NEW		38,467 70	40,877 80
VF CORPORATION		32,976.62	37,289.59
VALSPAR CORPORATION		36,017 41	44,990 40
WATSON PHARMACEUTICALS		26,704 78	25,886 00
WELLCARE HEALTH PLANS	36,333 61		
WILLIAMS COMPANIES	26,496.75	26,496.75	32,772.74
WPX ENERGY		4,665.52	4,955 04
TOTAL	688,211.23	733,550.53	870,424.55

WEST FOUNDATION, INCORPORATED - 2012

23-7416727

7744-1934 WELLS FARGO

<u>DESCRIPTION</u>	<u>2012 BEGINNING BOOK VALUE</u>	<u>2012 ENDING BOOK VALUE</u>	<u>2012 ENDING FMV</u>
ALEXION PHARMACEUTICALS INC		7,813.29	8,342.86
ALLIANCE DATE SYSTEMS CORP		14,138.38	15,634.08
ALTISOURCE ASSET MANAGEMENT CORP		381.35	410.00
ALTISOURCE PORTFOLIO		4,484.05	4,679.37
ALTISOURCE RESIDENTIAL CORP-CL B		248.75	285.12
AMAZON COM INC		17,109.75	18,815.25
APPLE INC		24,045.00	22,351.26
CABOT OIL & GAS		14,523.64	15,170.70
CATAMARAN CORP		20,329.03	20,724.00
CHIPOTLE MEXICAN GRILL		15,903.42	11,600.94
CONTINENTAL RESOURCES INC		20,034.25	19,401.36
COVIDIEN PLC		5,028.88	5,485.30
DISCOVERY COMMUNICATIONS INC A		5,128.54	5,332.32
EBAY INC		16,114.47	17,747.19
EDWARDS LIFESCIENCE C ORP		13,823.98	11,992.61
EVERBANK FINANCIAL CORP		3,789.79	3,846.78
FACEBOOK INC CLASS A		5,082.97	5,616.75
FASTENAL CO		13,668.61	14,414.85
FLEETCOR TECHNOLOGIES		8,550.26	11,963.95
FRESH MARKET INC		13,316.39	11,493.51
GARTNER INC NEW		10,923.18	11,643.06
GILEAD SCIENCES INC		6,975.39	6,830.85
INDEX LABORATORIES INC		7,933.17	8,352.00
INTUITIVE SURGICAL INC		21,713.63	19,124.43
KANSAS CITY SOUTHERN INDS INC		15,244.19	16,946.44
LINKEDIN CORP CLASS A		5,891.22	5,970.64
MASTERCARD INC CL A		17,834.45	20,633.76
MONSANTO CO NEW		14,048.77	15,427.95
QUALCOMM INC		5,698.83	5,629.22
SALESFORCE.COM		18,066.88	21,348.70
SBA COMMUNICATIONS CORP		12,113.74	15,615.60
SOLARWINDS INC		12,425.38	13,584.55
STARBUCKS CORP		9,124.29	8,848.95
STERICYCLE INC		15,086.07	16,883.68
T ROWE PRICE GROUP INC		10,067.88	10,939.67
TERADATA CORP		4,333.00	4,022.85
TRACTOR SUPPLY COMPANY		21,334.21	19,704.28
TRANSDIGM GROUP INC		10,159.04	10,908.80
TRIMBLE NAVIGATIONS LTD		15,694.06	16,857.96
ULTRA SALON COSMETICS & FRAGRANCE		10,891.02	11,299.90
UNDER ARMOUR INC CLASS A		5,658.00	5,823.60
VMWARE INC CLASS A		11,327.76	10,543.68
WORKDAY INC CLASS A		7,393.03	7,412.00
TOTAL		493,451.99	509,660.77

Form **4562**Department of the Treasury
Internal Revenue Service (99)**Depreciation and Amortization 990-PF**
(Including Information on Listed Property)

▶ See separate instructions.

▶ Attach to your tax return.

OMB No 1545-0172

2012Attachment
Sequence No **179**

Name(s) shown on return

Business or activity to which this form relates

Identifying number

WEST FOUNDATION, INC.

FORM 990-PF PAGE 1

23-7416727

Part I Election To Expense Certain Property Under Section 179 Note: If you have any listed property, complete Part V before you complete Part I.

1	Maximum amount (see instructions)	1	500,000.
2	Total cost of section 179 property placed in service (see instructions)	2	
3	Threshold cost of section 179 property before reduction in limitation	3	2,000,000.
4	Reduction in limitation. Subtract line 3 from line 2. If zero or less, enter -0-	4	
5	Dollar limitation for tax year. Subtract line 4 from line 1. If zero or less, enter -0-. If married filing separately, see instructions	5	
6	(a) Description of property	(b) Cost (business use only)	(c) Elected cost
7	Listed property. Enter the amount from line 29	7	
8	Total elected cost of section 179 property. Add amounts in column (c), lines 6 and 7	8	
9	Tentative deduction. Enter the smaller of line 5 or line 8	9	
10	Carryover of disallowed deduction from line 13 of your 2011 Form 4562	10	
11	Business income limitation. Enter the smaller of business income (not less than zero) or line 5	11	
12	Section 179 expense deduction. Add lines 9 and 10, but do not enter more than line 11	12	
13	Carryover of disallowed deduction to 2013. Add lines 9 and 10, less line 12	13	

Note: Do not use Part II or Part III below for listed property. Instead, use Part V.

Part II Special Depreciation Allowance and Other Depreciation (Do not include listed property)

14	Special depreciation allowance for qualified property (other than listed property) placed in service during the tax year	14	
15	Property subject to section 168(f)(1) election	15	
16	Other depreciation (including ACRS)	16	

Part III MACRS Depreciation (Do not include listed property.) (See instructions.)**Section A**

17	MACRS deductions for assets placed in service in tax years beginning before 2012	17	
18	If you are electing to group any assets placed in service during the tax year into one or more general asset accounts, check here		

Section B - Assets Placed in Service During 2012 Tax Year Using the General Depreciation System

(a) Classification of property	(b) Month and year placed in service	(c) Basis for depreciation (business/investment use only - see instructions)	(d) Recovery period	(e) Convention	(f) Method	(g) Depreciation deduction
19a 3-year property						
b 5-year property						
c 7-year property						
d 10-year property						
e 15-year property						
f 20-year property						
g 25-year property			25 yrs.		S/L	
h Residential rental property	/		27.5 yrs.	MM	S/L	
	/		27.5 yrs.	MM	S/L	
i Nonresidential real property	/		39 yrs.	MM	S/L	
	/			MM	S/L	

Section C - Assets Placed in Service During 2012 Tax Year Using the Alternative Depreciation System

20a Class life					S/L	
b 12-year			12 yrs.		S/L	
c 40-year	/		40 yrs.	MM	S/L	

Part IV Summary (See instructions.)

21	Listed property. Enter amount from line 28	21	
22	Total. Add amounts from line 12, lines 14 through 17, lines 19 and 20 in column (g), and line 21. Enter here and on the appropriate lines of your return. Partnerships and S corporations - see instr.	22	0.
23	For assets shown above and placed in service during the current year, enter the portion of the basis attributable to section 263A costs	23	

Part V Listed Property (Include automobiles, certain other vehicles, certain computers, and property used for entertainment, recreation, or amusement.)
Note: For any vehicle for which you are using the standard mileage rate or deducting lease expense, complete only 24a, 24b, columns (a) through (c) of Section A, all of Section B, and Section C if applicable.

Section A - Depreciation and Other Information (Caution: See the instructions for limits for passenger automobiles.)

24a Do you have evidence to support the business/investment use claimed? ☐ Yes ☐ No **24b** If "Yes," is the evidence written? ☐ Yes ☐ No

(a) Type of property (list vehicles first)	(b) Date placed in service	(c) Business/ investment use percentage	(d) Cost or other basis	(e) Basis for depreciation (business/investment use only)	(f) Recovery period	(g) Method/ Convention	(h) Depreciation deduction	(i) Elected section 179 cost
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25 Special depreciation allowance for qualified listed property placed in service during the tax year and used more than 50% in a qualified business use

25

26 Property used more than 50% in a qualified business use:

		%						
		%						
		%						

27 Property used 50% or less in a qualified business use:

		%			S/L		
		%			S/L		
		%			S/L		

28 Add amounts in column (h), lines 25 through 27. Enter here and on line 21, page 1

28

29 Add amounts in column (i), line 26. Enter here and on line 7, page 1

29

Section B - Information on Use of Vehicles

Complete this section for vehicles used by a sole proprietor, partner, or other "more than 5% owner," or related person.

If you provided vehicles to your employees, first answer the questions in Section C to see if you meet an exception to completing this section for those vehicles.

	(a) Vehicle	(b) Vehicle	(c) Vehicle	(d) Vehicle	(e) Vehicle	(f) Vehicle
30 Total business/investment miles driven during the year (do not include commuting miles)						
31 Total commuting miles driven during the year						
32 Total other personal (noncommuting) miles driven						
33 Total miles driven during the year. Add lines 30 through 32						
34 Was the vehicle available for personal use during off-duty hours?	Yes	No	Yes	No	Yes	No
35 Was the vehicle used primarily by a more than 5% owner or related person?						
36 Is another vehicle available for personal use?						

Section C - Questions for Employers Who Provide Vehicles for Use by Their Employees

Answer these questions to determine if you meet an exception to completing Section B for vehicles used by employees who are not more than 5% owners or related persons.

	Yes	No
37 Do you maintain a written policy statement that prohibits all personal use of vehicles, including commuting, by your employees?		
38 Do you maintain a written policy statement that prohibits personal use of vehicles, except commuting, by your employees? See the instructions for vehicles used by corporate officers, directors, or 1% or more owners		
39 Do you treat all use of vehicles by employees as personal use?		
40 Do you provide more than five vehicles to your employees, obtain information from your employees about the use of the vehicles, and retain the information received?		
41 Do you meet the requirements concerning qualified automobile demonstration use?		

Note: If your answer to 37, 38, 39, 40, or 41 is "Yes," do not complete Section B for the covered vehicles.

Part VI Amortization

(a) Description of costs	(b) Date amortization begins	(c) Amortizable amount	(d) Code section	(e) Amortization period or percentage	(f) Amortization for this year
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42 Amortization of costs that begins during your 2012 tax year:

43 Amortization of costs that began before your 2012 tax year

43

44 Total. Add amounts in column (f). See the instructions for where to report

44