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Form

990-PF

Department of the Treasury
Internal Revenue Service

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

OMB No 1545-0052

2012

Open to Public Inspection

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

Name of foundation ROBERT & TONI BADER CHARITABLE FOUNDATION INC		A Employer identification number 27-4281614	
Number and street (or P O box number if mail is not delivered to street address) 5262 ROLAND DRIVE		B Telephone number (see instructions) (317) 253-9812	
City or town, state, and ZIP code INDIANAPOLIS, IN 46228		C If exemption application is pending, check here ☐	
G Check all that apply ☐ Initial return ☐ Final return ☐ Address change ☐ Initial return of a former public charity ☐ Amended return ☐ Name change		D 1. Foreign organizations, check here ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ☐	
H Check type of organization ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here ☐	
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 5,201,305	J Accounting method ☒ Cash ☐ Accrual ☐ Other (specify) _____ (Part I, column (d) must be on cash basis.)	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐	

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)	1,400,500			
	2 Check ☐ if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities.	98,924	100,242		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	74,404			
	b Gross sales price for all assets on line 6a _____ 513,788				
	7 Capital gain net income (from Part IV , line 2)		76,106		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
Operating and Administrative Expenses	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)		-47		
	12 Total. Add lines 1 through 11	1,573,828	176,301		
	13 Compensation of officers, directors, trustees, etc	21,500	2,150		19,350
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)	6,975	3,487		3,488
	c Other professional fees (attach schedule)	23,611	23,611		0
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	5,530	5,530		0
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings	12,043	6,021		6,022
	22 Printing and publications				
	23 Other expenses (attach schedule)	4,158	2,079		2,079
	24 Total operating and administrative expenses. Add lines 13 through 23	73,817	42,878		30,939
	25 Contributions, gifts, grants paid	129,600			129,600
	26 Total expenses and disbursements. Add lines 24 and 25	203,417	42,878		160,539
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	1,370,411			
	b Net investment income (if negative, enter -0-)		133,423		
	c Adjusted net income (if negative, enter -0-)				

Part II

Balance Sheets

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

		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing		
	2	Savings and temporary cash investments	345,234	818,209
	3	Accounts receivable ▶ _____ Less allowance for doubtful accounts ▶ _____		
	4	Pledges receivable ▶ _____ Less allowance for doubtful accounts ▶ _____		
	5	Grants receivable		
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see page 15 of the instructions)		
	7	Other notes and loans receivable (attach schedule) ▶ _____ Less allowance for doubtful accounts ▶ _____		
	8	Inventories for sale or use		
	9	Prepaid expenses and deferred charges		
	10a	Investments—U S and state government obligations (attach schedule)		
	b	Investments—corporate stock (attach schedule)	2,040,296	2,488,768
	c	Investments—corporate bonds (attach schedule).	375,593	577,430
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____		
	12	Investments—mortgage loans		
	13	Investments—other (attach schedule)	824,303	1,316,898
	14	Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____		
Liabilities	15	Other assets (describe ▶ _____)		
	16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	3,585,426	5,201,305
	17	Accounts payable and accrued expenses		
	18	Grants payable		
	19	Deferred revenue		
	20	Loans from officers, directors, trustees, and other disqualified persons		
	21	Mortgages and other notes payable (attach schedule)		
	22	Other liabilities (describe ▶ _____)		
	23	Total liabilities (add lines 17 through 22)	0	0
Net Assets or Fund Balances		Foundations that follow SFAS 117, check here ▶ ☒ and complete lines 24 through 26 and lines 30 and 31.		
	24	Unrestricted	3,585,426	5,201,305
	25	Temporarily restricted		
	26	Permanently restricted		
		Foundations that do not follow SFAS 117, check here ▶ ☐ and complete lines 27 through 31.		
	27	Capital stock, trust principal, or current funds		
	28	Paid-in or capital surplus, or land, bldg , and equipment fund		
	29	Retained earnings, accumulated income, endowment, or other funds		
	30	Total net assets or fund balances (see page 17 of the instructions)	3,585,426	5,201,305
	31	Total liabilities and net assets/fund balances (see page 17 of the instructions)	3,585,426	5,201,305

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	3,585,426
2	Enter amount from Part I, line 27a	2	1,370,411
3	Other increases not included in line 2 (itemize) ▶ _____	3	245,468
4	Add lines 1, 2, and 3	4	5,201,305
5	Decreases not included in line 2 (itemize) ▶ _____	5	0
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	5,201,305

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)		(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
1a	See Additional Data Table			
b				
c				
d				
e				

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a See Additional Data Table			
b			
c			
d			
e			

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

2	Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	76,106
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8		3	

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	148,056	2,550,736	0 058044
2010	0	1,951,709	0 000000
2009			
2008			
2007			

2	Total of line 1, column (d).	2	0 058044
3	Average distribution ratio for the 5-year base period—divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	0 029022
4	Enter the net value of noncharitable-use assets for 2012 from Part X, line 5.	4	3,955,482
5	Multiply line 4 by line 3.	5	114,796
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	1,334
7	Add lines 5 and 6.	7	116,130
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	160,539

Part VIExcise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the instructions)

1a		Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1			
		Date of ruling or determination letter _____ (attach copy of letter if necessary—see instructions)			
b		Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☒ and enter 1% of Part I, line 27b		1	1,334
c		All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)			
2		Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		2	0
3		Add lines 1 and 2.		3	1,334
4		Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		4	0
5		Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0-		5	1,334
6		Credits/Payments			
a		2012 estimated tax payments and 2011 overpayment credited to 2012	6a	3,280	
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	3,280
8		Enter any penalty for underpayment of estimated tax Check here ☐ 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	1,946
11		Enter the amount of line 10 to be Credited to 2013 estimated tax ☒ 1,946	Refunded ☐	11	0

Part VII-AStatements Regarding Activities

1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		Yes	No
		1a		No
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)?			No
	If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.			
c	Did the foundation file Form 1120-POL for this year?.	1c		No
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation ☒ \$ 0 (2) On foundation managers ☒ \$ 0			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ☒ \$ 0			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.	2		No
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	3		No
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?.	4a		No
b	If "Yes," has it filed a tax return on Form 990-T for this year?.	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.	5		No
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?	6	Yes	
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	7	Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) ☒ 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 .	8b	Yes	
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	9		No
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10		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 ▶N/A				
14	The books are in care of ▶THOMAS J SPONSEL CPAABV CVA CF Telephone no ▶(317) 608-6699 Located at ▶251 N ILLINOIS STREET SUITE 450 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		
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.			Yes	No
1a	During the year did the foundation (either directly or indirectly) (1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☒ No (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?. ☐ Yes ☒ No (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☒ Yes ☐ No (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?. ☐ Yes ☒ No (6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days). ☐ Yes ☒ No			
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)?. . . Organizations relying on a current notice regarding disaster assistance check here. ▶ ☐	1b		No
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? (<i>Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2012.</i>).	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 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))?

YesNo

(2)

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

YesNo

(3)

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

YesNo

(4)

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

YesNo

(5)

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

YesNo

5b

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)?

YesNo

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

YesNo

6a

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

YesNo

6b

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

YesNo

If "Yes" to 6b, file Form 8870.

7a

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

YesNo

7b

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

YesNo

Part VIII

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

1

List all officers, directors, trustees, foundation managers and their compensation (see instructions).

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

2

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

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

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

0

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Part VIII

Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)

3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE".		
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
Total number of others receiving over \$50,000 for professional services.		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	
2	
3	
4	

Part IX-B

Summary of Program-Related Investments (see instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1	
2	
All other program-related investments. See page 24 of the instructions.	
3	
Total. Add lines 1 through 3.	0

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	3,597,769
b	Average of monthly cash balances.	1b	417,949
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	4,015,718
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	4,015,718
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	60,236
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	3,955,482
6	Minimum investment return. Enter 5% of line 5.	6	197,774

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	197,774
2a	Tax on investment income for 2012 from Part VI, line 5.	2a	1,334
b	Income tax for 2012 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	1,334
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	196,440
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	196,440
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	196,440

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	160,539
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	160,539
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see instructions).	5	1,334
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	159,205
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				196,440
2 Undistributed income, if any, as of the end of 2012				
a Enter amount for 2011 only.			0	
b Total for prior years 20____, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2012				
a From 2007.				
b From 2008.				
c From 2009.				
d From 2010.				
e From 2011.				16,899
f Total of lines 3a through e.	16,899			
4 Qualifying distributions for 2012 from Part XII, line 4 ▶ \$ 160,539				
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.				160,539
e Remaining amount distributed out of corpus	0			
5 Excess distributions carryover applied to 2012 (If an amount appears in column (d), the same amount must be shown in column (a).)	16,899			16,899
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	0			
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 instructions			0	
f Undistributed income for 2012 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2013.				19,002
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions).	0			
8 Excess distributions carryover from 2007 not applied on line 5 or line 7 (see instructions). . . .	0			
9 Excess distributions carryover to 2013. Subtract lines 7 and 8 from line 6a.	0			
10 Analysis of line 9				
a Excess from 2008. . . .				
b Excess from 2009. . . .				
c Excess from 2010. . . .				
d Excess from 2011. . . .				
e Excess from 2012. . . .				

Part XIV

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

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)

☐ 4942(j)(3) or ☐ 4942(j)(5)

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

Part XV

Supplementary Information (Complete this part only if the 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))

See Additional Data Table

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 ☐ 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

FOUNDATION GRANT COMMITTEE CO JOSHU
5262 ROLAND DRIVE
INDIANAPOLIS,IN 46228
(317) 608-6699

b

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

THE FOUNDATION DOES NOT REQUIRE A SPECIFIC FORM OR APPLICATION

c

Any submission deadlines

REQUESTS WILL BE EVALUATED AS RECEIVED, THERE IS NO SUBMISSION DEADLINE

d

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

THE FOUNDATION, AS STATED IN ITS BYLAWS, WILL MAKE CONTRIBUTIONS TO QUALIFIED EXEMPT ORGANIZATIONS UNDER SECTION 501(C)(3) OF THE INTERNAL REVENUE CODE FOR, BUT NOT LIMITED TO, THE FOLLOWING PURPOSES LITERACY, JEWISH EDUCATION, NATIONWIDE RECYCLING PROGRAMS, ALTERNATIVE ENERGY, CLASSICAL MUSICAL EDUCATION, PUBLIC RADIO AND TELEVISION, MUSEUMS, WILDLIFE CONSERVATION, THEATRE, MUSIC EDUCATION, AIDS/HIV RESEARCH, HEMOPHILIA RESEARCH, AND FOOD FOR THE HUNGRY

Form 990-PF (2012)

Part XV

Supplementary Information (continued)

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 Paid during the year See Additional Data Table				
Total			3a	129,600
b Approved for future payment				
Total			3b	0

Enter gross amounts unless otherwise indicated		Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions)
		(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1	Program service revenue					
a	_____					
b	_____					
c	_____					
d	_____					
e	_____					
f	_____					
g	Fees and contracts from government agencies					
2	Membership dues and assessments. . . .					
3	Interest on savings and temporary cash investments					
4	Dividends and interest from securities. . . .			14	98,924	
5	Net rental income or (loss) from real estate					
a	Debt-financed property.					
b	Not debt-financed property.					
6	Net rental income or (loss) from personal property					
7	Other investment income.					
8	Gain or (loss) from sales of assets other than inventory			14	74,404	
9	Net income or (loss) from special events					
10	Gross profit or (loss) from sales of inventory. .					
11	Other revenue a _____					
b	_____					
c	_____					
d	_____					
e	_____					
12	Subtotal Add columns (b), (d), and (e). .		0		173,328	0
13	Total. Add line 12, columns (b), (d), and (e).			13	173,328	

[illegible]

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?		Yes	No
a Transfers from the reporting foundation to a noncharitable exempt organization of			
(1) Cash.			No
(2) Other assets.			No
b Other transactions			
(1) Sales of assets to a noncharitable exempt organization.			No
(2) Purchases of assets from a noncharitable exempt organization.			No
(3) Rental of facilities, equipment, or other assets.			No
(4) Reimbursement arrangements.			No
(5) Loans or loan guarantees.			No
(6) Performance of services or membership or fundraising solicitations.			No
c Sharing of facilities, equipment, mailing lists, other assets, or paid employees.			No
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

**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 or fiduciary) is based on all information of which preparer has any knowledge.

*****	2013-04-26	*****
Signature of officer or trustee	Date	Title

May the IRS discuss this return with the preparer shown below (see instr.)? ☒ Yes ☐ No

May the IRS discuss this return with the preparer shown below (see instr. 7)? ☒ **Yes** ☐ **No**

**Paid
Preparer
Use
Only**

Print/Type preparer's name	Preparer's Signature	Date	Check if self-employed ☐	PTIN P00983298
NICHOLAS C HOPKINS CPA	NICHOLAS C HOPKINS CPA			
Firm's name ☐	SPONSEL CPA GROUP LLC		Firm's EIN ☐ 27-0851983	
	251 N ILLINOIS ST STE 450			
Firm's address ☐	INDIANAPOLIS, IN 46204		Phone no (317) 608-6699	

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(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)
CATERPILLAR INC		2011-11-01	2012-09-20
CHESAPEAKE ENERGY CORP		2012-03-20	2012-05-17
KEELEY SMALL CAP VALUE FUND		2011-10-04	2012-05-08
OCCIDENTAL PETE CORP		2011-11-01	2012-09-20
SPDR GOLD TR		2011-07-13	2012-05-11
APACHE CORP		2008-12-24	2012-05-17
APPLE INC		2011-03-08	2012-03-28
CATERPILLAR INC		2008-12-22	2012-09-20
DUKE ENERTY CORP		2011-03-16	2012-07-13
GREENHAVEN CONTINUOUS		2009-03-23	2012-05-07
HERSHEY COMPANY		2010-09-30	2012-01-25
OCCIDENTAL PETE CORP		2008-12-30	2002-09-20
PETROLEO BRASILEIRO SA PETROBR		2011-01-07	2012-03-20
SPDR GOLD TR		2009-09-23	2012-05-11
UNITED TECHNOLOGIES		2008-12-30	2012-05-16
SPDR GOLD TR		2011-04-09	2012-04-10
CAPITAL GAINS DIVIDENDS			
CAPITAL GAINS DIVIDENDS	P		

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
41,496		41,026	470
27,108		51,253	-24,145
98,665		80,030	18,635
21,739		22,369	-630
11,576		11,581	-5
14,377		12,275	2,102
30,897		17,830	13,067
50,718		32,532	18,186
22		18	4
12,841		9,301	3,540
46,059		35,693	10,366
65,216		43,058	22,158
40,682		55,115	-14,433
19,293		12,425	6,868
19,005		13,134	5,871
42		42	0
900			900
13,152			13,152

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

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	
			470
			-24,145
			18,635
			-630
			-5
			2,102
			13,067
			18,186
			4
			3,540
			10,366
			22,158
			-14,433
			6,868
			5,871
			0
			900
			13,152

Form 990PF Part VIII Line 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
ROBERT N BADER	CHAIRMAN/PRESIDENT 5 00	3,250	0	0
5262 ROLAND DRIVE INDIANAPOLIS,IN 46228				
TONI R BADER	SECRETARY/TREASURER 5 00	3,000	0	0
5262 ROLAND DRIVE INDIANAPOLIS,IN 46228				
SARA MEYER	DIRECTOR 1 00	3,000	0	0
43-16 204TH STREET BAYSIDE,NY 11361				
JAIME CARMODY	DIRECTOR 1 00	3,250	0	0
11640 THISTLEHILL DRIVE LOVELAND,OH 45140				
JOSHUA BADER	DIRECTOR 1 00	2,750	0	0
923 W FLETCHER 1 CHICAGO,IL 60657				
DANIELLE BADER	DIRECTOR 1 00	3,250	0	0
1122 E 57TH STREET INDIANAPOLIS,IN 46220				
THOMAS J SPONSEL	DIRECTOR 1 00	3,000	0	0
251 N ILLINOIS STREET SUITE 450 INDIANAPOLIS,IN 46204				

Form 990PF Part XV Line 1a - 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).

ROBERT N BADER
TONI R BADER

Form 990PF Part XV Line 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 Paid during the year				
BBYO INC 2020 K STREET NW 7TH FLOOR WASHINGTON,DC 20006	NO RELATIONSHIP	501(C)(3)	GENERAL SUPPORT TOWARDS MISSION	2,000
CROHN'S AND COLITIS FOUNDATION-INDIANA CHAPTER 931 E 86TH STREET STE 210 INDIANAPOLIS,IN 46240	NO RELATIONSHIP	501(C)(3)	GENERAL SUPPORT TOWARDS MISSION	1,000
DOROT INC 171 W 85TH ST NEW YORK,NY 10024	NO RELATIONSHIP	501(C)(3)	GENERAL SUPPORT TOWARDS MISSION	1,000
KEEP INDIANAPOLIS BEAUTIFUL INC 1029 FLETCHER AVENUE STE 100 INDIANAPOLIS,IN 46203	NO RELATIONSHIP	501(C)(3)	GENERAL SUPPORT TOWARDS MISSION	5,000
LEGACY HOUSE 2505 NORTH ARLINGTON AVENUE INDIANAPOLIS,IN 46218	NO RELATIONSHIP	501(C)(3)	GENERAL SUPPORT TOWARDS MISSION	1,500
OCEAN CONSERVANCY 1300 19TH ST NW 8TH FLOOR WASHINGTON,DC 20036	NO RELATIONSHIP	501(C)(3)	TRASH FREE SEAS ALLIANCE PROJECT	10,000
OCEAN VOYAGES INSTITUTEPROJECT KAISEI 2320 MARINSHIP WAY SAUSALITO,CA 94965	NO RELATIONSHIP	501(C)(3)	GENERAL SUPPORT TOWARDS MISSION	5,000
QUEENS COUNTY FARM MUSEUM 73-50 LITTLE NECK PARKWAY FLORAL PARK,NY 11004	NO RELATIONSHIP	501(C)(3)	GENERAL SUPPORT TOWARDS MISSION	2,000
QUEENS LIBRARY FOUNDATION 89-11 MERRICK BLV JAMAICA,NY 11432	NO RELATIONSHIP	501(C)(3)	GENERAL SUPPORT TOWARDS MISSION	4,000
READING PARTNERS 106 LINDEN ST 202 OAKLAND,CA 94607	NO RELATIONSHIP	501(C)(3)	GENERAL SUPPORT TOWARDS MISSION	1,000
SIMON YOUTH FOUNDATION INC 225 WEST WASHINGTON STREET INDIANAPOLIS,IN 46204	NO RELATIONSHIP	501(C)(3)	GENERAL SUPPORT TOWARDS MISSION	1,000
SOUTHERN SUSTAINABLE RESOURCES 1420 WESTWOOD DR CHARLESTON,SC 29412	NO RELATIONSHIP	501(C)(3)	GENERAL SUPPORT TOWARDS MISSION	4,000
SPERTUS INSTITUTE OF JEWISH STUDIES 610 S MICHIGAN AVENUE CHICAGO,IL 60605	NO RELATIONSHIP	501(C)(3)	GENERAL SUPPORT TOWARDS MISSION	1,000
THE NEA FOUNDATION 1201 16TH STREET NW WASHINGTON,DC 20036	NO RELATIONSHIP	501(C)(3)	EDUCATOR GRANTS	5,000
UBUNTU EDUCATION FUND 32 BROADWAY SUITE 414 NEW YORK,NY 10004	NO RELATIONSHIP	501(C)(3)	GENERAL SUPPORT TOWARDS MISSION	5,000

Form 990PF Part XV Line 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 Paid during the year				
THE UNIVERSITY OF CINCINNATI FOUNDATION 51 GOODMAN DRIVE UNIVERSITY HALL SUITE 100 CINCINNATI,OH 45221	NO RELATIONSHIP	501(C)(3)	GENERAL SUPPORT TOWARDS MISSION	5,000
VH1 SAVE THE MUSIC FOUNDATION 1515 BROADWAY 20TH FLOOR NEW YORK,NY 10036	NO RELATIONSHIP	501(C)(3)	GENERAL SUPPORT TOWARDS MISSION	5,000
JCC INDIANAPOLIS 6701 HOOVER RD INDIANAPOLIS,IN 46260	NO RELATIONSHIP	501(C)(3)	EARTH DAY CELEBRATION	3,600
BOARD OF JEWISH EDUCATION OF GREATER NEW YORK 520 EIGHTH AVENUE 15TH FLR NEW YORK,NY 10018	NO RELATIONSHIP	501(C)(3)	THE JEWISH EDUCATION PROJECT	3,000
HAROLD GRINSPOON FOUNDATION 380 UNION ST WEST SPRINGFIELD,MA 01089	NO RELATIONSHIP	501(C)(3)	PJ LIBRARY	5,000
RONALD MCDONALD HOUSE OF LONG ISLAND 267-07 76TH AVENUE NEW HYDE PARK,NY 11040	NO RELATIONSHIP	501(C)(3)	GENERAL SUPPORT TOWARDS MISSION	3,000
BIG BROTHERS BIG SISTERS OF CENTRAL INDIANA 2960 NORTH MERIDIAN STREET SUITE 150 INDIANAPOLIS,IN 46208	NO RELATIONSHIP	501(C)(3)	GENERAL SUPPORT TOWARDS MISSION	1,000
INDIANA HISTORICAL SOCIETY 450 WEST OHIO STREET INDIANAPOLIS,IN 46202	NO RELATIONSHIP	501(C)(3)	GENERAL SUPPORT TOWARDS MISSION	1,000
JEWISH FEDERATION OF GREATER INDIANAPOLIS 6705 HOOVER RD INDIANAPOLIS,IN 46260	NO RELATIONSHIP	501(C)(3)	GENERAL SUPPORT TOWARDS MISSION	1,000
CHICAGO JEWISH DAY SCHOOL 5959 NORTH SHERIDAN ROAD CHICAGO,IL 60660	NO RELATIONSHIP	501(C)(3)	GENERAL SUPPORT TOWARDS MISSION	5,000
INDIANAPOLIS INTERFAITH HOSPITALITY NETWORK INC PO BOX 1153 CARMEL,IN 46082	NO RELATIONSHIP	501(C)(3)	GENERAL SUPPORT TOWARDS MISSION	1,000
PATTY BRISBEN FOUNDATION FOR WOMEN'S SEXUAL HEALTH 161 COMMERCE BLVD LOVELAND,OH 45140	NO RELATIONSHIP	501(C)(3)	GENERAL SUPPORT TOWARDS MISSION	1,000
4 PAWS FOR ABILITY 253 DAYTON AVE XENIA,OH 45385	NO RELATIONSHIP	501(C)(3)	GENERAL SUPPORT TOWARDS MISSION	2,000
COFFEE KIDS 1751 OLD PECOS TRAIL SUITE K SANTA FE,NM 87505	NO RELATIONSHIP	501(C)(3)	GENERAL SUPPORT TOWARDS MISSION	2,000
826 NATIONAL 44 GOUGH ST STE 206 SAN FRANSISCO,CA 94103	NO RELATIONSHIP	501(C)(3)	TEACHER TUTORING	2,000

Form 990PF Part XV Line 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 Paid during the year				
BROOKLYN & QUEENS LANDTRUST 677 LAFAYETTE AVENUE BROOKLYN,IL 11216	NO RELATIONSHIP	501(C)(3)	GENERAL SUPPORT TOWARDS MISSION	3,000
IRAQ & AFGHANISTAN VETERANS OF AMERICA 292 MADISON AVE 10TH FLOOR NEWYORK,NY 10017	NO RELATIONSHIP	501(C)(3)	COMBAT TO CAREER INITIATIVE AND JOB SUPPORT	2,500
TERRA FOUNDATION 217 WESTMONT SAN LUIS OBISPO,CA 93405	NO RELATIONSHIP	501(C)(3)	OPEN SOURCE TECHNOLOGY ASSISTANCE GRANT	10,000
THE ARK 6450 N CALIFORNIA AVE CHICAGO,IL 60645	NO RELATIONSHIP	501(C)(3)	JEWISH SOCIAL SERVICES	5,000
WOUNDED WARRIORS PROJECT 370 7TH AVENUE SUITE 1802 NEWYORK,NY 10001	NO RELATIONSHIP	501(C)(3)	EMPOWERMENT PROGRAM	1,500
ALBERT & SARA REUBEN SENIOR AND COMMUNITY RESOURCE CENTER 6905 HOOVER ROAD INDIANAPOLIS,IN 46260	NO RELATIONSHIP	501(C)(3)	GENERAL SUPPORT TOWARDS MISSION	4,000
AMERICAN ALLIANCE OF MUSEUMS 1575 EYE ST NW STE 400 WASHINGTON,DC 20005	NO RELATIONSHIP	501(C)(3)	CENTER FOR FUTURE OF MUSEUMS GRANT	10,000
INDIANAPOLIS B'NAI B'RITH YOUTH ORGANIZATION 1839 BOX ELDER COURT INDIANAPOLIS,IN 46260	NO RELATIONSHIP	501(C)(3)	LEADERSHIP TRAINING	2,500
UNION FOR REFORM JUDIASM 633 THIRD AVENUE NEWYORK,NY 10017	NO RELATIONSHIP	501(C)(3)	HURRICANE SANDY RELIEF	2,000
Total  3a				129,600

Schedule B

(Form 990, 990-EZ, or 990-PF)

Department of the Treasury
Internal Revenue Service

Schedule of Contributors

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

OMB No 1545-0047

2012

Name of the organization ROBERT & TONI BADER CHARITABLE FOUNDATION INC	Employer identification number 27-4281614
--	---

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 33¹/₃% 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)

Name of organization ROBERT & TONI BADER CHARITABLE FOUNDATION INC	Employer identification number 27-4281614
--	---

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
<u>1</u>	ROBERT N BADER 5262 ROLAND DRIVE INDIANAPOLIS, IN 46228	\$ 700,250	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
<u>2</u>	TONI R BADER 5262 ROLAND DRIVE INDIANAPOLIS, IN 46228	\$ 700,250	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
 	 	\$ 	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
 	 	\$ 	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
 	 	\$ 	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
 	 	\$ 	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
 	 	\$ 	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)

Name of organization ROBERT & TONI BADER CHARITABLE FOUNDATION INC	Employer identification number 27-4281614
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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
_____	_____ _____ _____ _____	\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	_____ _____ _____ _____	\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	_____ _____ _____ _____	\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	_____ _____ _____ _____	\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	_____ _____ _____ _____	\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	_____ _____ _____ _____	\$ _____	_____

Name of organization ROBERT & TONI BADER CHARITABLE FOUNDATION INC	Employer identification number 27-4281614
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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 <i>exclusively</i> religious, charitable, etc , contributions of \$1,000 or less for the year (Enter this information once See instructions) ▶ \$ Use duplicate copies of Part III if additional space is needed
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(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	

(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	

(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	

(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	

TY 2012 Accounting Fees Schedule**Name:** ROBERT & TONI BADER CHARITABLE FOUNDATION INC**EIN:** 27-4281614

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING	6,975	3,487		3,488

**TY 2012 Investments Corporate
Bonds Schedule****Name:** ROBERT & TONI BADER CHARITABLE FOUNDATION INC**EIN:** 27-4281614

Name of Bond	End of Year Book Value	End of Year Fair Market Value
ALCOA INC.	28,561	28,561
BANK OF AMERICA CORPORATION	29,932	29,932
CITIGROUP INC.	27,713	27,713
COMCAST CORPORATION	28,723	28,723
DUKE CAPITAL CORPORATION	30,967	30,967
EASTMAN CHEMICAL COMPANY	29,933	29,933
GENERAL ELECTRIC CAPITAL CORPORATION	25,122	25,122
GOLDMAN SACHS GROUP, INC.	26,263	26,263
HEWLETT-PACKARD COMPANY	26,060	26,060
KOHLS CORPORATION	48,548	48,548
MARRIOTT INTERNATIONAL, INC.	27,811	27,811
MORGAN STANLEY	52,038	52,038
NORFOLK SOUTHERN CORPORATION	30,701	30,701
PRUDENTIAL FINANCIAL, INC.	50,997	50,997
SYMANTEC CORPORATION	26,264	26,264
TIME WARNER, INC.	29,201	29,201
VERIZON COMMUNICATIONS DTD 03 27 09 6 350 04 01 20	31,594	31,594
WELLPOINT INC.	27,002	27,002

TY 2012 Investments Corporate
Stock Schedule

Name: ROBERT & TONI BADER CHARITABLE FOUNDATION INC
EIN: 27-4281614

Name of Stock	End of Year Book Value	End of Year Fair Market Value
ABBOTT LABS COM	98,250	98,250
APACHE CORP COM	0	0
APPLE INC COM	79,826	79,826
BLACKROCK INC COM	51,678	51,678
CATERPILLAR INC DEL COM	0	0
CHEVRON CORPORATION	108,140	108,140
CISCO SYS INC COM	88,421	88,421
DIAGEO P L C SPON ADR NEW (UNITED KINGDOM)	58,290	58,290
DOMINION RES INC VA NEW COM	77,700	77,700
DU PONT E I DE NEMOURS & CO COM	78,712	78,712
DUKE ENERGY CORP NEW COM	69,095	69,095
E M C CORP MASS COM	50,600	50,600
ENCANA CORPORATION (CANADA)	98,800	98,800
FORD MTR CO DEL COM PAR \$0.01	51,800	51,800
HEINZ H J CO COM	86,520	86,520
HERSHEY CO COM	54,165	54,165
HERTZ GLOBAL HOLDINGS INC COM	56,945	56,945
HONEYWELL INTERNATIONAL INCORPORATED	111,073	111,073
JOHNSON & JOHNSON COM	87,625	87,625
JPMORGAN CHASE & CO COM	109,923	109,923
MCDONALDS CORP COM	66,157	66,157
MICROSOFT CORP COM	100,159	100,159
OCCIDENTAL PETE CORP DEL COM	0	0
PEPSICO INC COM	85,537	85,537
PETROLEO BRASILEIRO SA PETRO SPONSORED ADR	0	0
PROCTER & GAMBLE CO COM	84,862	84,862
QUALCOMM INCORPORATED	92,788	92,788
RAYONIER INC COM	103,660	103,660
SIMON PPTY GROUP INC NEW COM	82,365	82,365
UNION PAC CORP COM	125,720	125,720

Name of Stock	End of Year Book Value	End of Year Fair Market Value
UNITED TECHNOLOGIES CORP COM	0	0
VERIZON COMMUNICATIONS INC COM	97,357	97,357
VODAFONE GROUP PLC NEW SPONS ADR NEW	50,380	50,380
WELLS FARGO & COMPANY NEW	102,540	102,540
YUM BRANDS INC COM	79,680	79,680

TY 2012 Investments - Other Schedule**Name:** ROBERT & TONI BADER CHARITABLE FOUNDATION INC**EIN:** 27-4281614

Category / Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
DISCOVER BANK GREENWOOD, DE	FMV	50,812	50,812
EURO PAC GROWTH FD CL F-1	FMV	224,825	224,825
GREENHAVEN CONT CMDTY INDEX UNIT BEN INT	FMV	0	0
HARTFORD WORLD BOND FUND	FMV	100,729	100,729
HENDERSON INTERNATIONAL OPPORTUNITIES FUND CLASS W N/L	FMV	167,889	167,889
KEELEY FDS INC SMCAP VALUE I	FMV	164,344	164,344
OPPENHEIMER DEVELOPING MKTS CL A	FMV	213,812	213,812
PIONEER SER TR I PNROAK SCGW Y	FMV	141,396	141,396
ROYCE FD PENN MUT INV	FMV	156,189	156,189
SPDR GOLD TRUST GOLD SHS	FMV	0	0
THORNBURG DEVELOPING WORLD FUND	FMV	96,902	96,902

TY 2012 Other Expenses Schedule

Name: ROBERT & TONI BADER CHARITABLE FOUNDATION INC

EIN: 27-4281614

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
DUES	1,000	500		500
TELEPHONE AND INTERNET EXPENSE	3,158	1,579		1,579

TY 2012 Other Increases Schedule

Name: ROBERT & TONI BADER CHARITABLE FOUNDATION INC

EIN: 27-4281614

Description	Amount
UNREALIZED GAINS ON INVESTMENTS	245,468

TY 2012 Other Professional Fees Schedule

Name: ROBERT & TONI BADER CHARITABLE FOUNDATION INC

EIN: 27-4281614

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT FEES	23,611	23,611		0

TY 2012 Taxes Schedule**Name:** ROBERT & TONI BADER CHARITABLE FOUNDATION INC**EIN:** 27-4281614

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOREIGN TAXES	1,433	1,433		0
INCOME TAXES	4,097	4,097		0