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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<br><b>ROBERT AND HELEN HADDAD FOUNDATION, INC</b>                                                                                                                                                                                                                                                                                                                                                            |                                                                                                                                                  | A Employer identification number<br><b>30-0127786</b>                                                                                                                            |
| Number and street (or P O box number if mail is not delivered to street address)<br><b>3460 COMMERCE DRIVE</b>                                                                                                                                                                                                                                                                                                                  | Room/suite                                                                                                                                       | B Telephone number<br><b>812-376-9301</b>                                                                                                                                        |
| City or town, state, and ZIP code<br><b>COLUMBUS, IN 47201</b>                                                                                                                                                                                                                                                                                                                                                                  |                                                                                                                                                  | C If exemption application is pending, check here <input type="checkbox"/>                                                                                                       |
| G Check all that apply: <div style="display: flex; justify-content: space-between;"> <div> <input type="checkbox"/> Initial return<br/> <input type="checkbox"/> Final return<br/> <input type="checkbox"/> Address change         </div> <div> <input type="checkbox"/> Initial return of a former public charity<br/> <input type="checkbox"/> Amended return<br/> <input type="checkbox"/> Name change         </div> </div> |                                                                                                                                                  | D 1. Foreign organizations, check here <input type="checkbox"/><br><br>2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/> |
| H Check type of organization: <input type="checkbox"/> Section 501(c)(3) exempt private foundation<br><input checked="" 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)<br>\$ <b>4,429,111.</b>                                                                                                                                                                                                                                                                                                                       | J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual<br><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<br>(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                                                                                                     | 461,574.                           |                           | 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                                                                                               |                                    |                           |                         |                                                             |
| 4 Dividends and interest from securities                                                                                                           | 110,617.                           | 110,617.                  |                         | STATEMENT 2                                                 |
| 5a Gross rents                                                                                                                                     |                                    |                           |                         |                                                             |
| b Net rental income or (loss)                                                                                                                      |                                    |                           |                         |                                                             |
| 6a Net gain or (loss) from sale of assets not on line 10                                                                                           | 82,464.                            |                           |                         |                                                             |
| b Gross sales price for all assets on line 6a <b>578,858.</b>                                                                                      |                                    |                           |                         |                                                             |
| 7 Capital gain net income (from Part IV, line 2)                                                                                                   |                                    | 82,464.                   |                         |                                                             |
| 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                                                                                                                                    |                                    |                           |                         |                                                             |
| 12 Total Add lines 1 through 11                                                                                                                    | 654,655.                           | 193,081.                  |                         |                                                             |
| 13 Compensation of officers, directors, trustees, etc                                                                                              | 0.                                 | 0.                        |                         | 0.                                                          |
| 14 Other employee salaries and wages                                                                                                               |                                    |                           |                         |                                                             |
| 15 Pension plans, employee benefits                                                                                                                |                                    |                           |                         |                                                             |
| 16a Legal fees STMT 3                                                                                                                              | 16,909.                            | 0.                        |                         | 16,909.                                                     |
| b Accounting fees STMT 4                                                                                                                           | 2,500.                             | 2,500.                    |                         | 0.                                                          |
| c Other professional fees STMT 5                                                                                                                   | 16,792.                            | 13,532.                   |                         | 3,260.                                                      |
| 17 Interest                                                                                                                                        |                                    |                           |                         |                                                             |
| 18 Taxes STMT 6                                                                                                                                    | 4,348.                             | 4,348.                    |                         | 0.                                                          |
| 19 Depreciation and depletion                                                                                                                      |                                    |                           |                         |                                                             |
| 20 Occupancy                                                                                                                                       |                                    |                           |                         |                                                             |
| 21 Travel, conferences, and meetings                                                                                                               |                                    |                           |                         |                                                             |
| 22 Printing and publications                                                                                                                       |                                    |                           |                         |                                                             |
| 23 Other expenses STMT 7                                                                                                                           | 5,092.                             | 0.                        |                         | 5,092.                                                      |
| 24 Total operating and administrative expenses. Add lines 13 through 23                                                                            | 45,641.                            | 20,380.                   |                         | 25,261.                                                     |
| 25 Contributions, gifts, grants paid                                                                                                               | 141,450.                           |                           |                         | 141,450.                                                    |
| 26 Total expenses and disbursements Add lines 24 and 25                                                                                            | 187,091.                           | 20,380.                   |                         | 166,711.                                                    |
| 27 Subtract line 26 from line 12:                                                                                                                  |                                    |                           |                         |                                                             |
| a Excess of revenue over expenses and disbursements                                                                                                | 467,564.                           |                           |                         |                                                             |
| b Net investment income (if negative, enter -0-)                                                                                                   |                                    | 172,701.                  |                         |                                                             |
| 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 |
| <b>Assets</b>                                           | 1 Cash - non-interest-bearing                                                                                                |                   |                |                       |
|                                                         | 2 Savings and temporary cash investments                                                                                     | 639,638.          | 668,140.       | 668,140.              |
|                                                         | 3 Accounts receivable ▶                                                                                                      |                   |                |                       |
|                                                         | Less: allowance for doubtful accounts ▶                                                                                      |                   |                |                       |
|                                                         | 4 Pledges receivable ▶                                                                                                       |                   |                |                       |
|                                                         | Less: allowance for doubtful accounts ▶                                                                                      |                   |                |                       |
|                                                         | 5 Grants receivable                                                                                                          |                   |                |                       |
|                                                         | 6 Receivables due from officers, directors, trustees, and other disqualified persons                                         |                   |                |                       |
|                                                         | 7 Other notes and loans receivable ▶                                                                                         |                   |                |                       |
|                                                         | Less: allowance for doubtful accounts ▶                                                                                      |                   |                |                       |
|                                                         | 8 Inventories for sale or use                                                                                                |                   |                |                       |
|                                                         | 9 Prepaid expenses and deferred charges                                                                                      |                   |                |                       |
|                                                         | 10a Investments - U.S. and state government obligations                                                                      |                   |                |                       |
|                                                         | b Investments - corporate stock                                                                                              |                   |                |                       |
|                                                         | c Investments - corporate bonds STMT 9                                                                                       | 58,270.           | 52,450.        | 62,472.               |
| 11 Investments - land, buildings, and equipment basis ▶ |                                                                                                                              |                   |                |                       |
| Less: accumulated depreciation ▶                        |                                                                                                                              |                   |                |                       |
| 12 Investments - mortgage loans                         |                                                                                                                              |                   |                |                       |
| 13 Investments - other STMT 10                          | 2,832,405.                                                                                                                   | 3,277,287.        | 3,698,499.     |                       |
| 14 Land, buildings, and equipment: basis ▶              |                                                                                                                              |                   |                |                       |
| Less: accumulated depreciation ▶                        |                                                                                                                              |                   |                |                       |
| 15 Other assets (describe ▶)                            |                                                                                                                              |                   |                |                       |
| 16 Total assets (to be completed by all filers)         | 3,530,313.                                                                                                                   | 3,997,877.        | 4,429,111.     |                       |
| <b>Liabilities</b>                                      | 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.                |                |                       |
| <b>Net Assets or Fund Balances</b>                      | Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31 ▶ <input type="checkbox"/> |                   |                |                       |
|                                                         | 24 Unrestricted                                                                                                              |                   |                |                       |
|                                                         | 25 Temporarily restricted                                                                                                    |                   |                |                       |
|                                                         | 26 Permanently restricted                                                                                                    |                   |                |                       |
|                                                         | Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. ▶ <input checked="" type="checkbox"/>  |                   |                |                       |
|                                                         | 27 Capital stock, trust principal, or current funds                                                                          | 0.                | 0.             |                       |
|                                                         | 28 Paid-in or capital surplus, or land, bldg., and equipment fund                                                            | 0.                | 0.             |                       |
|                                                         | 29 Retained earnings, accumulated income, endowment, or other funds                                                          | 3,530,313.        | 3,997,877.     |                       |
| 30 Total net assets or fund balances                    | 3,530,313.                                                                                                                   | 3,997,877.        |                |                       |
| 31 Total liabilities and net assets/fund balances       | 3,530,313.                                                                                                                   | 3,997,877.        |                |                       |

**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<br>(must agree with end-of-year figure reported on prior year's return) | 1 | 3,530,313. |
| 2 Enter amount from Part I, line 27a                                                                                                                            | 2 | 467,564.   |
| 3 Other increases not included in line 2 (itemize) ▶                                                                                                            | 3 | 0.         |
| 4 Add lines 1, 2, and 3                                                                                                                                         | 4 | 3,997,877. |
| 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 | 3,997,877. |

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**Part IV Capital Gains and Losses for Tax on Investment Income**

| (a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.) | (b) How acquired<br>P - Purchase<br>D - Donation | (c) Date acquired<br>(mo., day, yr.) | (d) Date sold<br>(mo., day, yr.) |
|------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------|--------------------------------------|----------------------------------|
| 1a SEE ATTACHED SCHEDULE                                                                                                           | P                                                |                                      |                                  |
| b SEE ATTACHED SCHEDULE                                                                                                            | P                                                |                                      |                                  |
| c CAPITAL GAIN DIVIDEND                                                                                                            | P                                                |                                      |                                  |
| d FACTIONAL SHARE                                                                                                                  | P                                                |                                      |                                  |
| e                                                                                                                                  |                                                  |                                      |                                  |

| (e) Gross sales price | (f) Depreciation allowed<br>(or allowable) | (g) Cost or other basis<br>plus expense of sale | (h) Gain or (loss)<br>(e) plus (f) minus (g) |
|-----------------------|--------------------------------------------|-------------------------------------------------|----------------------------------------------|
| a 523,709.            |                                            | 446,212.                                        | 77,497.                                      |
| b 52,754.             |                                            | 50,182.                                         | 2,572.                                       |
| c 2,373.              |                                            |                                                 | 2,373.                                       |
| d 22.                 |                                            |                                                 | 22.                                          |
| e                     |                                            |                                                 |                                              |

| (i) F.M.V. as of 12/31/69 | (j) Adjusted basis<br>as of 12/31/69 | (k) Excess of col. (i)<br>over col. (j), if any | (l) Gains (Col. (h) gain minus<br>col. (k), but not less than -0-) or<br>Losses (from col. (h)) |
|---------------------------|--------------------------------------|-------------------------------------------------|-------------------------------------------------------------------------------------------------|
| a                         |                                      |                                                 | 77,497.                                                                                         |
| b                         |                                      |                                                 | 2,572.                                                                                          |
| c                         |                                      |                                                 | 2,373.                                                                                          |
| d                         |                                      |                                                 | 22.                                                                                             |
| e                         |                                      |                                                 |                                                                                                 |

|                                                                                                                                                                                 |   |         |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---|---------|
| 2 Capital gain net income or (net capital loss)                                                                                                                                 | 2 | 82,464. |
| 3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6):<br>If gain, also enter in Part I, line 8, column (c).<br>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<br>Calendar year (or tax year beginning in) | (b) Adjusted qualifying distributions | (c) Net value of noncharitable-use assets | (d) Distribution ratio<br>(col. (b) divided by col. (c)) |
|-------------------------------------------------------------------|---------------------------------------|-------------------------------------------|----------------------------------------------------------|
| 2011                                                              | 581,570.                              | 3,414,475.                                | .170325                                                  |
| 2010                                                              | 156,827.                              | 3,116,789.                                | .050317                                                  |
| 2009                                                              | 147,341.                              | 2,494,773.                                | .059060                                                  |
| 2008                                                              | 152,545.                              | 2,469,633.                                | .061768                                                  |
| 2007                                                              | 91,757.                               | 2,343,320.                                | .039157                                                  |

|                                                                                                                                                                                |   |            |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---|------------|
| 2 Total of line 1, column (d)                                                                                                                                                  | 2 | .380627    |
| 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 | .076125    |
| 4 Enter the net value of noncharitable-use assets for 2012 from Part X, line 5                                                                                                 | 4 | 3,840,302. |
| 5 Multiply line 4 by line 3                                                                                                                                                    | 5 | 292,343.   |
| 6 Enter 1% of net investment income (1% of Part I, line 27b)                                                                                                                   | 6 | 1,727.     |
| 7 Add lines 5 and 6                                                                                                                                                            | 7 | 294,070.   |
| 8 Enter qualifying distributions from Part XII, line 4                                                                                                                         | 8 | 166,711.   |

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

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

|                                                                                                                                                                                                                                        |    |        |        |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----|--------|--------|
| 1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1.<br>Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions) |    |        |        |
| b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b                                                                                      |    | 1      | 3,454. |
| 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      | 3,454. |
| 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      | 3,454. |
| 6 Credits/Payments:                                                                                                                                                                                                                    |    |        |        |
| a 2012 estimated tax payments and 2011 overpayment credited to 2012                                                                                                                                                                    | 6a | 840.   |        |
| 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  | 840.   |        |
| 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  | 2,614. |        |
| 10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid                                                                                                                                           | 10 |        |        |
| 11 Enter the amount of line 10 to be: Credited to 2013 estimated tax <input type="checkbox"/> Refunded <input type="checkbox"/>                                                                                                        | 11 |        |        |

**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  |
| b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)?<br>If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities. |     | X  |
| c Did the foundation file Form 1120-POL for this year?                                                                                                                                                                                                                                                                                    |     | X  |
| d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year:<br>(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?<br>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?<br>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:<br>• By language in the governing instrument, or<br>• 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?<br>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) <u>IN</u>                                                                                                                                                                                                                           |     |    |
| 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

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**Part VII-A Statements Regarding Activities** (continued)

|    |                                                                                                                                                                                                                                                                                                                                   |    |     |         |
|----|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----|-----|---------|
| 11 | At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)                                                                                                                                           | 11 |     | X       |
| 12 | Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)                                                                                                                                          | 12 |     | X       |
| 13 | Did the foundation comply with the public inspection requirements for its annual returns and exemption application?<br>Website address ► <b>WWW.THEHADDADFOUNDATION.ORG</b>                                                                                                                                                       | 13 | X   |         |
| 14 | The books are in care of ► <b>STEPHEN DONALD</b> Telephone no. ► <b>812-376-9301</b><br>Located at ► <b>3460 COMMERCE DRIVE, COLUMBUS, IN</b> ZIP+4 ► <b>47201</b>                                                                                                                                                                |    |     |         |
| 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<br>► <b>15</b> 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?<br>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<br>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)?<br>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 |
| 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?<br>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.<br>►                                                                                                                                                                                                                                                                                                                                                                           |                                                                     |    |
| 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 |
| 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 |

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

- x

- 7b

## Part VIII

[illegible][illegible]

|   |   |
|---|---|
| ▶ | 0 |
|---|---|

8



**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 | 3,615,260. |
| b Average of monthly cash balances                                                                            | 1b | 283,524.   |
| c Fair market value of all other assets                                                                       | 1c |            |
| d Total (add lines 1a, b, and c)                                                                              | 1d | 3,898,784. |
| 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  | 3,898,784. |
| 4 Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)   | 4  | 58,482.    |
| 5 Net value of noncharitable-use assets Subtract line 4 from line 3. Enter here and on Part V, line 4         | 5  | 3,840,302. |
| 6 Minimum investment return Enter 5% of line 5                                                                | 6  | 192,015.   |

**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  | 192,015. |
| 2a Tax on investment income for 2012 from Part VI, line 5                                            | 2a | 3,454.   |
| b Income tax for 2012. (This does not include the tax from Part VI.)                                 | 2b |          |
| c Add lines 2a and 2b                                                                                | 2c | 3,454.   |
| 3 Distributable amount before adjustments. Subtract line 2c from line 1                              | 3  | 188,561. |
| 4 Recoveries of amounts treated as qualifying distributions                                          | 4  | 0.       |
| 5 Add lines 3 and 4                                                                                  | 5  | 188,561. |
| 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  | 188,561. |

**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 | 166,711. |
| 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  | 166,711. |
| 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  | 0.       |
| 6 Adjusted qualifying distributions Subtract line 5 from line 4                                                                     | 6  | 166,711. |

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

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**Part XIII** Undistributed Income (see instructions)

|                                                                                                                                                                                   | (a)<br>Corpus | (b)<br>Years prior to 2011 | (c)<br>2011 | (d)<br>2012 |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------|----------------------------|-------------|-------------|
| <b>1</b> Distributable amount for 2012 from Part XI, line 7                                                                                                                       |               |                            |             | 188,561.    |
| <b>2</b> Undistributed income, if any, as of the end of 2012                                                                                                                      |               |                            |             |             |
| <b>a</b> Enter amount for 2011 only                                                                                                                                               |               |                            | 0.          |             |
| <b>b</b> Total for prior years:                                                                                                                                                   |               | 0.                         |             |             |
| <b>3</b> Excess distributions carryover, if any, to 2012:                                                                                                                         |               |                            |             |             |
| <b>a</b> From 2007                                                                                                                                                                |               |                            |             |             |
| <b>b</b> From 2008                                                                                                                                                                |               |                            |             | 5,808.      |
| <b>c</b> From 2009                                                                                                                                                                |               |                            |             | 23,504.     |
| <b>d</b> From 2010                                                                                                                                                                |               |                            |             | 1,162.      |
| <b>e</b> From 2011                                                                                                                                                                |               |                            |             | 412,516.    |
| <b>f</b> Total of lines 3a through e                                                                                                                                              | 442,990.      |                            |             |             |
| <b>4</b> Qualifying distributions for 2012 from Part XII, line 4: ► \$ 166,711.                                                                                                   |               |                            |             |             |
| <b>a</b> Applied to 2011, but not more than line 2a                                                                                                                               |               |                            | 0.          |             |
| <b>b</b> Applied to undistributed income of prior years (Election required - see instructions)                                                                                    |               | 0.                         |             |             |
| <b>c</b> Treated as distributions out of corpus (Election required - see instructions)                                                                                            | 0.            |                            |             |             |
| <b>d</b> Applied to 2012 distributable amount                                                                                                                                     |               |                            |             | 166,711.    |
| <b>e</b> Remaining amount distributed out of corpus                                                                                                                               | 0.            |                            |             |             |
| <b>5</b> Excess distributions carryover applied to 2012 (If an amount appears in column (d), the same amount must be shown in column (a))                                         | 21,850.       |                            |             | 21,850.     |
| <b>6</b> Enter the net total of each column as indicated below:                                                                                                                   |               |                            |             |             |
| <b>a</b> Corpus. Add lines 3f, 4c, and 4e. Subtract line 5                                                                                                                        | 421,140.      |                            |             |             |
| <b>b</b> Prior years' undistributed income. Subtract line 4b from line 2b                                                                                                         |               | 0.                         |             |             |
| <b>c</b> Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed |               | 0.                         |             |             |
| <b>d</b> Subtract line 6c from line 6b. Taxable amount - see instructions                                                                                                         |               | 0.                         |             |             |
| <b>e</b> Undistributed income for 2011. Subtract line 4a from line 2a. Taxable amount - see instr.                                                                                |               |                            | 0.          |             |
| <b>f</b> Undistributed income for 2012. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2013                                                              |               |                            |             | 0.          |
| <b>7</b> Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)                                                     | 0.            |                            |             |             |
| <b>8</b> Excess distributions carryover from 2007 not applied on line 5 or line 7                                                                                                 | 0.            |                            |             |             |
| <b>9</b> Excess distributions carryover to 2013. Subtract lines 7 and 8 from line 6a                                                                                              | 421,140.      |                            |             |             |
| <b>10</b> Analysis of line 9:                                                                                                                                                     |               |                            |             |             |
| <b>a</b> Excess from 2008                                                                                                                                                         |               |                            |             |             |
| <b>b</b> Excess from 2009                                                                                                                                                         |               |                            |             | 7,462.      |
| <b>c</b> Excess from 2010                                                                                                                                                         |               |                            |             | 1,162.      |
| <b>d</b> Excess from 2011                                                                                                                                                         |               |                            |             | 412,516.    |
| <b>e</b> Excess from 2012                                                                                                                                                         |               |                            |             |             |

N/A

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

☐ 4942(j)(3) or ☐ 4942(j)(5)

- b** 85% of line 2a

- 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.

- a "Assets" alternative test - enter:  
(1) Value of all assets

- (2) Value of assets qualifying under section 4942(p)(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

[illegible]

**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:

SEE STATEMENT 12

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

- c Any submission deadlines:**

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

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

| Recipient                                   | 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)         |                                                                                                           |                                |                                  |          |
| <b>a Paid during the year</b>               |                                                                                                           |                                |                                  |          |
| SEE ATTACHED FOOTNOTE<br>VARIOUS<br>VARIOUS | NONE                                                                                                      | CHARITABLE                     | CHARITABLE PURPOSES              | 141,450. |
|                                             |                                                                                                           |                                |                                  |          |
|                                             |                                                                                                           |                                |                                  |          |
|                                             |                                                                                                           |                                |                                  |          |
|                                             |                                                                                                           |                                |                                  |          |
|                                             |                                                                                                           |                                |                                  |          |
| <b>Total</b>                                |                                                                                                           |                                | <b>3a</b>                        | 141,450. |
| <b>b Approved for future payment</b>        |                                                                                                           |                                |                                  |          |
| NONE                                        |                                                                                                           |                                |                                  |          |
|                                             |                                                                                                           |                                |                                  |          |
|                                             |                                                                                                           |                                |                                  |          |
|                                             |                                                                                                           |                                |                                  |          |
| <b>Total</b>                                |                                                                                                           |                                | <b>3b</b>                        | 0.       |



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

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

and belief, it is true, correct, and complete Declaration of preparer (other than the taxpayer) if the preparer is not the taxpayer: Sammy S Burton  
Signature of officer or trustee

5-10-13  
Date

► TREASURER  
Title

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

☒ Yes ☐ No

**Paid  
Preparer  
Use Only**

Print/Type preparer's name

Preparer's signature

|      |  |
|------|--|
| Date |  |
|------|--|

Check ☐ self-employed

|      |  |
|------|--|
| PTIN |  |
|------|--|

MARY ANN NUNN, CPA

MARY ANN NUNN, CP

05/07/13

P00014296

Firm's name ► LARRY NUNN & ASSOCIATES, CPAS, L.L.C.

Firm's EIN ► 35-1521239

Firm's address ► 2545 FOXPOINTE DRIVE, SUITE A  
COLUMBUS, IN 47203-3299

Phone no. 812-376-3061

**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

**ROBERT AND HELEN HADDAD FOUNDATION, INC****30-0127786**

Organization type (check one)

Filers of:

Section:

Form 990 or 990-EZ

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

Form 990-PF

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

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

**Special Rules**

- ☐ For a section 501(c)(3) organization filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi) and received from any one contributor, during the year, a contribution of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 for use *exclusively* for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals. Complete Parts I, II, and III.
- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions for use *exclusively* for religious, charitable, etc., purposes, but these contributions did not total to more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Do not complete any of the parts unless the **General Rule** applies to this organization because it received nonexclusively religious, charitable, etc., contributions of \$5,000 or more during the year. ▶ \$ \_\_\_\_\_

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

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

**ROBERT AND HELEN HADDAD FOUNDATION, INC****30-0127786****Part I Contributors** (see instructions) Use duplicate copies of Part I if additional space is needed

| (a)<br>No. | (b)<br>Name, address, and ZIP + 4                                                                                                                 | (c)<br>Total contributions | (d)<br>Type of contribution                                                                                                                                                 |
|------------|---------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>1</b>   | <b>ROBERT W. HADDAD &amp; HELEN HADDAD</b><br><b>IRREVOCABLE CHARITABLE LEAD</b><br><br><b>3460 COMMERCE DR.</b><br><br><b>COLUMBUS, IN 47201</b> | \$ <b>461,574.</b>         | Person <input checked="" type="checkbox"/><br>Payroll <input type="checkbox"/><br>Noncash <input type="checkbox"/><br>(Complete Part II if there is a noncash contribution) |
|            |                                                                                                                                                   | \$                         | Person <input type="checkbox"/><br>Payroll <input type="checkbox"/><br>Noncash <input type="checkbox"/><br>(Complete Part II if there is a noncash contribution)            |
|            |                                                                                                                                                   | \$                         | Person <input type="checkbox"/><br>Payroll <input type="checkbox"/><br>Noncash <input type="checkbox"/><br>(Complete Part II if there is a noncash contribution)            |
|            |                                                                                                                                                   | \$                         | Person <input type="checkbox"/><br>Payroll <input type="checkbox"/><br>Noncash <input type="checkbox"/><br>(Complete Part II if there is a noncash contribution)            |
|            |                                                                                                                                                   | \$                         | Person <input type="checkbox"/><br>Payroll <input type="checkbox"/><br>Noncash <input type="checkbox"/><br>(Complete Part II if there is a noncash contribution)            |
|            |                                                                                                                                                   | \$                         | Person <input type="checkbox"/><br>Payroll <input type="checkbox"/><br>Noncash <input type="checkbox"/><br>(Complete Part II if there is a noncash contribution)            |
|            |                                                                                                                                                   | \$                         | Person <input type="checkbox"/><br>Payroll <input type="checkbox"/><br>Noncash <input type="checkbox"/><br>(Complete Part II if there is a noncash contribution)            |



Name of organization

Employer identification number

ROBERT AND HELEN HADDAD FOUNDATION, INC

30-0127786

**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.<br>from<br>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 |
|                           |                                         |                 |                                          |
|                           |                                         |                 |                                          |
|                           |                                         |                 |                                          |

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|             |                                        |           |   |
|-------------|----------------------------------------|-----------|---|
| FORM 990-PF | DIVIDENDS AND INTEREST FROM SECURITIES | STATEMENT | 2 |
|-------------|----------------------------------------|-----------|---|

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| SOURCE                           | GROSS AMOUNT | CAPITAL GAINS<br>DIVIDENDS | COLUMN (A)<br>AMOUNT |
|----------------------------------|--------------|----------------------------|----------------------|
| VARIOUS                          | 110,617.     | 0.                         | 110,617.             |
| TOTAL TO FM 990-PF, PART I, LN 4 | 110,617.     | 0.                         | 110,617.             |

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|             |            |           |   |
|-------------|------------|-----------|---|
| FORM 990-PF | LEGAL FEES | STATEMENT | 3 |
|-------------|------------|-----------|---|

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| DESCRIPTION                | (A)<br>EXPENSES<br>PER BOOKS | (B)<br>NET INVEST-<br>MENT INCOME | (C)<br>ADJUSTED<br>NET INCOME | (D)<br>CHARITABLE<br>PURPOSES |
|----------------------------|------------------------------|-----------------------------------|-------------------------------|-------------------------------|
| LEGAL FEES                 | 16,909.                      | 0.                                |                               | 16,909.                       |
| TO FM 990-PF, PG 1, LN 16A | 16,909.                      | 0.                                |                               | 16,909.                       |

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|             |                 |           |   |
|-------------|-----------------|-----------|---|
| FORM 990-PF | ACCOUNTING FEES | STATEMENT | 4 |
|-------------|-----------------|-----------|---|

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| DESCRIPTION                  | (A)<br>EXPENSES<br>PER BOOKS | (B)<br>NET INVEST-<br>MENT INCOME | (C)<br>ADJUSTED<br>NET INCOME | (D)<br>CHARITABLE<br>PURPOSES |
|------------------------------|------------------------------|-----------------------------------|-------------------------------|-------------------------------|
| ACCOUNTING FEES              | 2,500.                       | 2,500.                            |                               | 0.                            |
| TO FORM 990-PF, PG 1, LN 16B | 2,500.                       | 2,500.                            |                               | 0.                            |

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|             |                         |           |   |
|-------------|-------------------------|-----------|---|
| FORM 990-PF | OTHER PROFESSIONAL FEES | STATEMENT | 5 |
|-------------|-------------------------|-----------|---|

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| DESCRIPTION                  | (A)<br>EXPENSES<br>PER BOOKS | (B)<br>NET INVEST-<br>MENT INCOME | (C)<br>ADJUSTED<br>NET INCOME | (D)<br>CHARITABLE<br>PURPOSES |
|------------------------------|------------------------------|-----------------------------------|-------------------------------|-------------------------------|
| INVESTMENT ADVISORY FEES     | 13,532.                      | 13,532.                           |                               | 0.                            |
| CONSULTING FEES              | 3,260.                       | 0.                                |                               | 3,260.                        |
| TO FORM 990-PF, PG 1, LN 16C | 16,792.                      | 13,532.                           |                               | 3,260.                        |

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## FORM 990-PF

## TAXES

## STATEMENT

6

| DESCRIPTION                 | (A)<br>EXPENSES<br>PER BOOKS | (B)<br>NET INVEST-<br>MENT INCOME | (C)<br>ADJUSTED<br>NET INCOME | (D)<br>CHARITABLE<br>PURPOSES |
|-----------------------------|------------------------------|-----------------------------------|-------------------------------|-------------------------------|
| EXCISE TAXES                | 1,475.                       | 1,475.                            |                               | 0.                            |
| FOREIGN TAXES ON DIVIDENDS  | 2,873.                       | 2,873.                            |                               | 0.                            |
| TO FORM 990-PF, PG 1, LN 18 | 4,348.                       | 4,348.                            |                               | 0.                            |

## FORM 990-PF

## OTHER EXPENSES

## STATEMENT

7

| DESCRIPTION                 | (A)<br>EXPENSES<br>PER BOOKS | (B)<br>NET INVEST-<br>MENT INCOME | (C)<br>ADJUSTED<br>NET INCOME | (D)<br>CHARITABLE<br>PURPOSES |
|-----------------------------|------------------------------|-----------------------------------|-------------------------------|-------------------------------|
| WEBSITE MAINTENANCE         | 4,951.                       | 0.                                |                               | 4,951.                        |
| SUPPLIES                    | 141.                         | 0.                                |                               | 141.                          |
| TO FORM 990-PF, PG 1, LN 23 | 5,092.                       | 0.                                |                               | 5,092.                        |

## FOOTNOTES

## STATEMENT

8

## GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR:

|                                           |         |
|-------------------------------------------|---------|
| PROVIDENCE CRISTO REY HIGH SCHOOL         | 8,500.  |
| ROCK STEADY BOXING FOUNDATION, INC.       | 6,000.  |
| SHEPARD COMMUNITY INC.                    | 2,500.  |
| FLOOD RESCUE                              | 7,000.  |
| LITTLE RED DOOR CANCER AGENCY             | 5,000.  |
| DISASTER RELIEF                           | 17,000. |
| HAPPY HOLLOW CHILDREN'S CAMP              | 5,000.  |
| NOBLE INC.                                | 3,000.  |
| OUTREACH, INC.                            | 10,000. |
| ST. MARY'S CHILD CENTER                   | 5,000.  |
| ST. THOMAS AQUINAS/ST. VINCENT DE PAUL    | 5,000.  |
| CHARLES A TINDLEY ACCELERATED SCHOOL      | 15,000. |
| CHILD/FAMILY/SCHOOL ENRICHMENT, INC       | 10,000. |
| PHILANTHROPIC ORCHESTRA OF INDIANAPOLIS   | 8,000.  |
| SHELTERING WINGS                          | 7,500.  |
| NATIONAL MUSEUM OF EDUCATION              | 1,950.  |
| TRUTH @ WORK                              | 5,000.  |
| UNIVERSITY OF SOUTHERN INDIANA FOUNDATION | 10,000. |
| INDIANA UNIVERSITY CANCER FOUNDATION      | 10,000. |

ROBERT AND HELEN HADDAD FOUNDATION, INC

30-0127786

TOTAL

141,450.

|             |                 |           |   |
|-------------|-----------------|-----------|---|
| FORM 990-PF | CORPORATE BONDS | STATEMENT | 9 |
|-------------|-----------------|-----------|---|

| DESCRIPTION                             | BOOK VALUE | FAIR MARKET VALUE |
|-----------------------------------------|------------|-------------------|
| VARIOUS CORPORATE BONDS                 | 52,450.    | 62,472.           |
| TOTAL TO FORM 990-PF, PART II, LINE 10C | 52,450.    | 62,472.           |

|             |                   |           |    |
|-------------|-------------------|-----------|----|
| FORM 990-PF | OTHER INVESTMENTS | STATEMENT | 10 |
|-------------|-------------------|-----------|----|

| DESCRIPTION                            | VALUATION METHOD | BOOK VALUE | FAIR MARKET VALUE |
|----------------------------------------|------------------|------------|-------------------|
| VARIOUS OTHER INVESTMENTS              | COST             | 3,277,287. | 3,698,499.        |
| TOTAL TO FORM 990-PF, PART II, LINE 13 |                  | 3,277,287. | 3,698,499.        |

|             |                                                                             |           |    |
|-------------|-----------------------------------------------------------------------------|-----------|----|
| FORM 990-PF | PART VIII - LIST OF OFFICERS, DIRECTORS<br>TRUSTEES AND FOUNDATION MANAGERS | STATEMENT | 11 |
|-------------|-----------------------------------------------------------------------------|-----------|----|

| NAME AND ADDRESS                                                            | TITLE AND<br>AVRG HRS/WK | COMPEN-<br>SATION | EMPLOYEE<br>BEN PLAN CONTRIB | EXPENSE<br>ACCOUNT |
|-----------------------------------------------------------------------------|--------------------------|-------------------|------------------------------|--------------------|
| ROBERT W. HADDAD, JR.<br>14415 CHERRY TREE ROAD<br>CARMEL, IN 46033         | PRESIDENT<br>2.00        | 0.                | 0.                           | 0.                 |
| TAMARA L BURTON<br>1016 HUMMINGBIRD LANE<br>COLUMBUS, IN 47203              | TREASURER<br>2.00        | 0.                | 0.                           | 0.                 |
| ROGER FROMER<br>6080 SHERIDAN DRIVE<br>COLUMBUS, IN 47203                   | EX-OFFICER<br>2.00       | 0.                | 0.                           | 0.                 |
| HAYDEN L. H. BISHOP<br>510 WEST 63RD STREET<br>INDIANAPOLIS, IN 46260       | SECRETARY<br>2.00        | 0.                | 0.                           | 0.                 |
| KEVIN ALERDING<br>ONE AMERICAN SQUARE, SUITE 3100<br>INDIANAPOLIS, IN 46282 | DIRECTOR<br>2.00         | 0.                | 0.                           | 0.                 |

ROBERT AND HELEN HADDAD FOUNDATION, INC

30-0127786

TRACY L. HADDAD  
14415 CHERRY TREE ROAD  
CARMEL, IN 46033

DIRECTOR  
2.00

0. 0. 0.

TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII

0. 0. 0.

FORM 990-PF

GRANT APPLICATION SUBMISSION INFORMATION  
PART XV, LINES 2A THROUGH 2D

STATEMENT 12

## NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

STEPHEN DONALD  
3460 COMMERCE DRIVE  
COLUMBUS, IN 47201

## TELEPHONE NUMBER

812-376-9301

## FORM AND CONTENT OF APPLICATIONS

GRANT APPLICATIONS CAN BE SUBMITTED IN WRITING OR VIA THE FOUNDATION'S WEBSITE. THE WRITTEN APPLICATIONS ARE TO BE SUBMITTED TO STEPHEN DONALD, AT 3460 COMMERCE DRIVE, COLUMBUS, IN 47201. A COPY OF EACH APPLICANT'S FEDERAL DETERMENATION LETTER WHICH STATES THAT THE ORIGANIZATION IS A CODE SECTION 501(C)(3) ORGANIZATION, SHOULD BE SUBMITTED, ALSO.

## ANY SUBMISSION DEADLINES

PRIOR TO QUARTERLY MEETINGS.

## RESTRICTIONS AND LIMITATIONS ON AWARDS

NO RESTRICTIONS OTHER THAN GENERAL PURPOSE OUTLINED AS FOLLOWS. THE FOUNDATION IS OPERATED SOLELY TO PROVIDE FUNDING FOR CHARITABLE, RELIGIOUS, SCIENTIFIC, LITERARY, AND EDUCATIONAL PURPOSES. ALSO TESTING FOR PUBLIC SAFETY AS DESCRIBED IN CODE SECTION 501 (C) (3). THE FOUNDATION WILL ACCOMPLISH SUCH PURPOSE BY MAKING GRANTS AND CONTRIBUTIONS TO QUALIFIED CHARITABLE ORGANIZATIONS TO SUPPORT SUCH ACTIVITIES. THE FOUNDATION'S GRANT-MAKING ACTIVITIES WILL BE CONDUCTED ON AN ONGOING BASIS BY MAKING GRANTS TO ORGANIZATIONS THE FOUNDATION'S BOARD OF DIRECTORS FEEL ARE IN NEED OF FUNDS.

ROBERT AND HELEN HADDAD FOUNDATION

EIN. 30-0127786

YEAR ENDED 12/31/2012

SCHEDULE D ACTIVITY

|                                     | <u>TERM</u> | <u>DATE</u>     |             | <u>PROCEEDS</u> | <u>COST<br/>BASIS</u> | <u>GAIN/LOSS</u> |
|-------------------------------------|-------------|-----------------|-------------|-----------------|-----------------------|------------------|
|                                     |             | <u>ACQUIRED</u> | <u>SOLD</u> |                 |                       |                  |
| ARTISAN INT'L INVESTOR CLASS, ARTIX | SHORT       | 8/8/2011        | 3/16/2012   | 23,500.00       | 20,418.37             | 3,081.63         |
| DOUBLELINE TOTAL RETURN BOND        | SHORT       | 3/16/2012       | 6/15/2012   | 23,970.00       | 23,943.02             | 26.98            |
| RETAIL PPTYS AMERICA INC. CL A      | SHORT       | 4/27/2012       | 5/2/2012    | 5,283.57        | 5,820.22              | (536.65)         |
| AMERICAN EUROPACIFIC GROWTH         | LONG        | 8/4/2010        | 12/14/2012  | 15,000.00       | 13,747.57             | 1,252.43         |
| ISHARES TR MSCI EMERGING MKTS       | LONG        | 10/5/2011       | 12/14/2012  | 36,971.28       | 30,211.83             | 6,759.45         |
| ISHARES TR RUSSELL 2000 INDEX       | LONG        | 8/4/2010        | 3/16/2012   | 32,679.05       | 26,066.90             | 6,612.15         |
| LOOMIS SAYLES                       | LONG        | 8/4/2010        | 6/15/2012   | 36,970.00       | 35,930.39             | 1,039.61         |
| PIMCO EMERGING                      | LONG        | 8/4/2010        | 6/15/2012   | 23,970.00       | 24,701.66             | (731.66)         |
| PIMCO TOTAL RETURN                  | LONG        | 8/4/2010        | 6/15/2012   | 14,970.00       | 15,301.32             | (331.32)         |
| PIMCO UNCONSTRAINED                 | LONG        | 8/4/2010        | 6/15/2012   | 14,970.00       | 14,691.41             | 278.59           |
| SPDR S&P 500 ETF TRUST              | LONG        | 8/4/2010        | 3/16/2012   | 147,663.89      | 118,739.24            | 28,924.65        |
| SPDR S&P 500 ETF TRUST              | LONG        | 8/4/2010        | 6/15/2012   | 160,643.09      | 135,782.61            | 24,860.48        |
| SPDR S&P 500 ETF TRUST              | LONG        | 8/4/2010        | 10/9/2012   | 39,871.68       | 31,039.25             | 8,832.43         |

FIDELITY SCHEDULE D ACTIVITY

|            |            |           |
|------------|------------|-----------|
| 576,462.56 | 496,393.79 | 80,068.77 |
|------------|------------|-----------|