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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>PETER V. WESTHAYSEN MEDICAL EDUCATION TRUST</b>   |   | A Employer identification number<br><b>31-6290396</b>  |
| Number and street (or P.O. box number if mail is not delivered to street address)<br><b>10322 INDIANAPOLIS BLVD</b>  | Room/suite<br><b>1</b>  | B Telephone number<br><b>219 853-3532</b>  |
| City or town, state, and ZIP code<br><b>HIGHLAND, IN 46322</b>   |   | C If exemption application is pending, check here <input type="checkbox"/>   |
| G Check all that apply<br><input type="checkbox"/> Initial return<br><input type="checkbox"/> Final return<br><input type="checkbox"/> Address change<br><input type="checkbox"/> Initial return of a former public charity<br><input type="checkbox"/> Amended return<br><input type="checkbox"/> Name change |   | D 1. Foreign organizations, check here <input type="checkbox"/><br>2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/> |
| H Check type of organization<br><input type="checkbox"/> Section 501(c)(3) exempt private foundation<br><input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust<br><input checked="" 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<br>(from Part II, col. (c), line 16)<br><b>\$ 1208368</b>   | J Accounting method<br><input checked="" type="checkbox"/> Cash<br><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   |  |                                    |                           | N/A                     |   |
| 2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch. B   |  |                                    |                           |                         |   |
| 3 Interest on savings and temporary cash investments   |  | 14929.                             | 14929.                    |                         | Statement 1   |
| 4 Dividends and interest from securities   |  | 21008.                             | 21008.                    |                         | Statement 2   |
| 5a Gross rents   |  |                                    |                           |                         |   |
| b Net rental income or (loss)  |  |                                    |                           |                         |   |
| 6a Net gain or (loss) from sale of assets not on line 10   |  | 59496.                             |                           |                         |   |
| b Gross sales price for all assets on line 6a <b>113510.</b>   |  |                                    |                           |                         |   |
| 7 Capital gain net income (from Part IV, line 2)   |  |                                    | 59496.                    |                         |   |
| 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   |  | 95433.                             | 95433.                    |                         |   |
| 13 Compensation of officers, directors, trustees, etc  |  | 13880.                             | 13880.                    |                         | 0.  |
| 14 Other employee salaries and wages   |  |                                    |                           |                         |   |
| 15 Pension plans, employee benefits  |  |                                    |                           |                         |   |
| 16a Legal fees Stmt 3  |  | 675.                               | 675.                      |                         | 0.  |
| b Accounting fees Stmt 4   |  | 725.                               | 725.                      |                         | 0.  |
| c Other professional fees  |  |                                    |                           |                         |   |
| 17 Interest  |  |                                    |                           |                         |   |
| 18 Taxes   |  |                                    |                           |                         |   |
| 19 Depreciation and depletion  |  |                                    |                           |                         |   |
| 20 Occupancy   |  |                                    |                           |                         |   |
| 21 Travel, conferences, and meetings   |  |                                    |                           |                         |   |
| 22 Printing and publications   |  |                                    |                           |                         |   |
| 23 Other expenses  |  |                                    |                           |                         |   |
| 24 Total operating and administrative expenses. Add lines 13 through 23  |  | 15280.                             | 15280.                    |                         | 0.  |
| 25 Contributions, gifts, grants paid   |  | 58050.                             |                           |                         | 58050.  |
| 26 Total expenses and disbursements. Add lines 24 and 25   |  | 73330.                             | 15280.                    |                         | 58050.  |
| 27 Subtract line 26 from line 12   |  | 22103.                             |                           |                         |   |
| a Excess of revenue over expenses and disbursements  |  |                                    | 80153.                    |                         |   |
| b Net investment income (if negative, enter -0-)   |  |                                    |                           |                         |   |
| c Adjusted net income (if negative, enter -0-)   |  |                                    |                           | N/A                     |   |

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**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  |                   |                |                       |
|   | 3 Accounts receivable ▶   |                   |                |                       |
|   | Less allowance for doubtful accounts ▶  |                   |                |                       |
|   | 4 Pledges receivable ▶  |                   |                |                       |
|   | Less allowance for doubtful accounts ▶  |                   |                |                       |
|   | 5 Grants receivable   |                   |                |                       |
|   | 6 Receivables due from officers, directors, trustees, and other disqualified persons  |                   |                |                       |
|   | 7 Other notes and loans receivable ▶  |                   |                |                       |
|   | Less allowance for doubtful accounts ▶  |                   |                |                       |
|   | 8 Inventories for sale or use   |                   |                |                       |
|   | 9 Prepaid expenses and deferred charges   |                   |                |                       |
|   | 10a Investments - U S and state government obligations Stmt 6   | 36184.            | 29997.         | 29997.                |
|   | b Investments - corporate stock Stmt 7  | 931202.           | 953090.        | 1178371.              |
|   | c Investments - corporate bonds   |                   |                |                       |
| 11 Investments - land, buildings, and equipment basis ▶ |   |                   |                |                       |
| Less accumulated depreciation ▶                         |   |                   |                |                       |
| 12 Investments - mortgage loans                         |   |                   |                |                       |
| 13 Investments - other                                  |   |                   |                |                       |
| 14 Land, buildings, and equipment basis ▶               |   |                   |                |                       |
| Less accumulated depreciation ▶                         |   |                   |                |                       |
| 15 Other assets (describe ▶)                            |   |                   |                |                       |
| 16 <b>Total assets</b> (to be completed by all filers)  | 967386.   | 983087.           | 1208368.       |                       |
| <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 <b>Total liabilities</b> (add lines 17 through 22)   | 0.                | 0.             |                       |
| <b>Net Assets or Fund Balances</b>                      | Foundations that follow SFAS 117, check here <input type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31. |                   |                |                       |
|   | 24 Unrestricted   |                   |                |                       |
|   | 25 Temporarily restricted   |                   |                |                       |
|   | 26 Permanently restricted   |                   |                |                       |
|   | Foundations that do not follow SFAS 117, check here <input checked="" type="checkbox"/> and complete lines 27 through 31    |                   |                |                       |
|   | 27 Capital stock, trust principal, or current funds   | 907849.           | 907849.        |                       |
|   | 28 Paid-in or capital surplus, or land, bldg, and equipment fund  | 0.                | 0.             |                       |
|   | 29 Retained earnings, accumulated income, endowment, or other funds   | 59537.            | 75238.         |                       |
|   | 30 <b>Total net assets or fund balances</b>   | 967386.           | 983087.        |                       |
|   | 31 <b>Total liabilities and net assets/fund balances</b>  | 967386.           | 983087.        |                       |

**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 | 967386. |
| 2 Enter amount from Part I, line 27a  | 2 | 22103.  |
| 3 Other increases not included in line 2 (itemize) ▶  | 3 | 0.      |
| 4 Add lines 1, 2, and 3   | 4 | 989489. |
| 5 Decreases not included in line 2 (itemize) ▶ See Statement 5  | 5 | 6402.   |
| 6 <b>Total net assets or fund balances at end of year</b> (line 4 minus line 5) - Part II, column (b), line 30  | 6 | 983087. |

**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  |                        |  |                                      |                                  |
| b   | See Attached Statement |  |                                      |                                  |
| c   |                        |  |                                      |                                  |
| d   |                        |  |                                      |                                  |
| 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                     |  |   |  |
| b                     |  |   |  |
| c                     |  |   |  |
| d                     |  |   |  |
| e                     | 113510.                                    | 93941.  | 59496.                                       |

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

| (i) FMV as of 12/31/69 | (j) Adjusted basis<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                      |                                      |   |  |
| b                      |                                      |   |  |
| c                      |                                      |   |  |
| d                      |                                      |   |  |
| e                      |                                      |   | 59496.   |

|   |   |   |        |
|---|---|---|--------|
| 2 Capital gain net income or (net capital loss)   | { If gain, also enter in Part I, line 7<br>If (loss), enter -0- in Part I, line 7 | 2 | 59496. |
| 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  |                                       |   |  |
| 2010  |                                       |   |  |
| 2009  |                                       |   |  |
| 2008  |                                       |   |  |
| 2007  |                                       |   |  |

|   |   |
|---|---|
| 2 Total of line 1, column (d)   | 2 |
| 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 |
| 4 Enter the net value of noncharitable-use assets for 2012 from Part X, line 5  | 4 |
| 5 Multiply line 4 by line 3   | 5 |
| 6 Enter 1% of net investment income (1% of Part I, line 27b)  | 6 |
| 7 Add lines 5 and 6   | 7 |
| 8 Enter qualifying distributions from Part XII, line 4<br>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<br>See the Part VI instructions | 8 |

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**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     | 1603. |
| 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     | 1603. |
| 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     | 1603. |
| 6 Credits/Payments   |    |       |       |
| a 2012 estimated tax payments and 2011 overpayment credited to 2012  | 6a | 1960. |       |
| 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  | 1960. |       |
| 8 Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached  | 8  |       |       |
| 9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed  | 9  |       |       |
| 10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid   | 10 | 357.  |       |
| 11 Enter the amount of line 10 to be Credited to 2013 estimated tax <input type="checkbox"/> 357. Refunded <input type="checkbox"/>  | 11 | 0.    |       |

**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 <input type="checkbox"/> \$ 0. (2) On foundation managers <input type="checkbox"/> \$ 0.  |     |    |
| e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input type="checkbox"/> \$ 0.   |     |    |
| 2 Has the foundation engaged in any activities that have not previously been reported to the IRS?<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) <input type="checkbox"/> IN   |     |    |
| b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation   | X   |    |
| 9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2012 or the taxable year beginning in 2012 (see instructions for Part XIV)? If "Yes," complete Part XIV  |     | X  |
| 10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses   |     | X  |

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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 ► N/A   | 13 | X   |         |
| 14 | The books are in care of ► FIRST MIDWEST BANK Telephone no ► 219-853-3734<br>Located at ► 2801 WEST JEFFERSON STREET, JOLIET, IL ZIP+4 ► 60435-5352  |    |     |         |
| 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>► 15 N/A  |    |     |         |
| 16 | At any time during calendar year 2012, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?<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)? Organizations relying on a current notice regarding disaster assistance check here<br>N/A<br>► <input type="checkbox"/>  | 1b  |    |
| c   | Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2012?   | 1c  | X  |
| 2   | Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))   |     |    |
| a   | At the end of tax year 2012, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2012? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No<br>If "Yes," list the years ►   |     |    |
| b   | Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.) 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  | X  |
| b   | Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2012?   | 4b  | X  |

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

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

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

N/A

Organizations relying on a current notice regarding disaster assistance check here

☒

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

N/A

☐ Yes ☐ No

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

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

☐ Yes ☒ No

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

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

6b

X

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

☐ Yes ☒ No

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

N/A

7b

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

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

| (a) Name and address                          | (b) Title, and average hours per week devoted to position | (c) Compensation (If not paid, enter -0-) | (d) Contributions to employee benefit plans and deferred compensation | (e) Expense account, other allowances |
|---|---|---|---|---------------------------------------|
| FIRST MIDWEST BANK<br>10322 INDIANAPOLIS BLVD | TRUSTEE   | 0.00                                      | 0.  | 0.                                    |
|   |   |   |   |                                       |
|   |   |   |   |                                       |
|   |   |   |   |                                       |
|   |   |   |   |                                       |
|   |   |   |   |                                       |
|   |   |   |   |                                       |
|   |   |   |   |                                       |

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

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

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

0

Form 990-PF (2012)

C

4

**2**

**3**

0.



PETER V. WESTHAYSEN MEDICAL EDUCATION  
TRUST

Form 990-PF (2012)

31-6290396 Page 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 | 1202994. |
| b | Average of monthly cash balances   | 1b |          |
| c | Fair market value of all other assets  | 1c |          |
| d | Total (add lines 1a, b, and c)   | 1d | 1202994. |
| 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  | 1202994. |
| 4 | Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)  | 4  | 18045.   |
| 5 | Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4       | 5  | 1184949. |
| 6 | Minimum investment return. Enter 5% of line 5  | 6  | 59247.   |

**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  | 59247. |
| 2a | Tax on investment income for 2012 from Part VI, line 5   | 2a | 1603.  |
| b  | Income tax for 2012 (This does not include the tax from Part VI)                                   | 2b |        |
| c  | Add lines 2a and 2b  | 2c | 1603.  |
| 3  | Distributable amount before adjustments. Subtract line 2c from line 1                              | 3  | 57644. |
| 4  | Recoveries of amounts treated as qualifying distributions  | 4  | 0.     |
| 5  | Add lines 3 and 4  | 5  | 57644. |
| 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  | 57644. |

**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 | 58050. |
| 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  | 58050. |
| 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  | 58050. |

**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.

Form 990-PF (2012)

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

|  | (a)<br>Corpus | (b)<br>Years prior to 2011 | (c)<br>2011 | (d)<br>2012 |
|--|---------------|----------------------------|-------------|-------------|
| 1 Distributable amount for 2012 from Part XI, line 7   |               |                            |             | 57644.      |
| 2 Undistributed income, if any, as of the end of 2012  |               |                            |             |             |
| a Enter amount for 2011 only   |               | *                          | 0.          |             |
| b Total for prior years  |               | 0.                         |             |             |
| 3 Excess distributions carryover, if any, to 2012  |               |                            |             |             |
| a From 2007  |               |                            |             |             |
| b From 2008  | 2425.         |                            |             |             |
| c From 2009  |               |                            |             |             |
| d From 2010  | 1241.         |                            |             |             |
| e From 2011  |               |                            |             |             |
| f Total of lines 3a through e  | 3666.         |                            |             |             |
| 4 Qualifying distributions for 2012 from Part XII, line 4. ► \$ 58050.   |               |                            |             |             |
| a Applied to 2011, but not more than line 2a   |               |                            | 0.          |             |
| b Applied to undistributed income of prior years (Election required - see instructions)  |               | 0.                         |             |             |
| c Treated as distributions out of corpus (Election required - see instructions)  | 0.            |                            |             |             |
| d Applied to 2012 distributable amount   |               |                            |             | 57644.      |
| e Remaining amount distributed out of corpus   | 406.          |                            |             |             |
| 5 Excess distributions carryover applied to 2012 (If an amount appears in column (d), the same amount must be shown in column (a).)  | 0.            |                            |             | 0.          |
| 6 Enter the net total of each column as indicated below.   |               |                            |             |             |
| a Corpus Add lines 3f, 4c, and 4e Subtract line 5  | 4072.         |                            |             |             |
| b Prior years' undistributed income Subtract line 4b from line 2b  |               | 0.                         |             |             |
| c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed |               | 0.                         |             |             |
| d Subtract line 6c from line 6b Taxable amount - see instructions  |               | 0.                         |             |             |
| e Undistributed income for 2011 Subtract line 4a from line 2a Taxable amount - see instr   |               |                            | 0.          |             |
| f Undistributed income for 2012 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2013  |               |                            |             | 0.          |
| 7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)   | 0.            |                            |             |             |
| 8 Excess distributions carryover from 2007 not applied on line 5 or line 7   | 0.            |                            |             |             |
| 9 Excess distributions carryover to 2013. Subtract lines 7 and 8 from line 6a  | 4072.         |                            |             |             |
| 10 Analysis of line 9  |               |                            |             |             |
| a Excess from 2008   | 2425.         |                            |             |             |
| b Excess from 2009   |               |                            |             |             |
| c Excess from 2010   | 1241.         |                            |             |             |
| d Excess from 2011   |               |                            |             |             |
| e Excess from 2012   | 406.          |                            |             |             |

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

N/A

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

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

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

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

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

None

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

None

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

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

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

FIRST MIDWEST BANK TRUSTEE , 10322 INDIANAPOLIS BLVD, HIGHLAND, IN 46322

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

SEE ATTACHED APPLICATION FORM

**c** Any submission deadlines

SEE ATTACHED APPLICATION FORM

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

SCHOLARSHIPS FOR MEDICAL AND/OR NURSING EDUCATION PROGRAMS AT ACCREDITED COLLEGES AND UNIVERSITIES







Form **990-W**

**Estimated Tax on Unrelated Business Taxable  
Income for Tax-Exempt Organizations**

OMB No 1545-0976

(Worksheet)

(and on Investment Income for Private Foundations)

Form 990-PF

**2013**

Department of the Treasury  
Internal Revenue Service

(Keep for your records. Do not send to the Internal Revenue Service)

|     |   |             |       |
|-----|---|-------------|-------|
| 1   | Unrelated business taxable income expected in the tax year  | 1           |       |
| 2   | Tax on the amount on line 1. See instructions for tax computation   | 2           |       |
| 3   | Alternative minimum tax (see instructions)  | 3           |       |
| 4   | Total Add lines 2 and 3   | 4           |       |
| 5   | Estimated tax credits (see instructions)  | 5           |       |
| 6   | Subtract line 5 from line 4   | 6           |       |
| 7   | Other taxes (see instructions)  | 7           |       |
| 8   | Total Add lines 6 and 7   | 8           |       |
| 9   | Credit for federal tax paid on fuels (see instructions)   | 9           |       |
| 10a | Subtract line 9 from line 8 <b>Note.</b> If less than \$500, the organization is not required to make estimated tax payments Private foundations, see instructions                            | 10a         |       |
| b   | Enter the tax shown on the 2012 return (see instructions). <b>Caution.</b> If zero or the tax year was for less than 12 months, skip this line and enter the amount from line 10a on line 10c | 10b         | 1603. |
| c   | <b>2013 Estimated Tax.</b> Enter the smaller of line 10a or line 10b If the organization is required to skip line 10b, enter the amount from line 10a on line 10c                             | Adjusted To | 1640. |
|     |   | 10c         | 1640. |

|    |   | (a) | (b)      | (c)      | (d)      |          |
|----|---|-----|----------|----------|----------|----------|
| 11 | Installment due dates (see instructions)  | 11  | 05/15/13 | 06/17/13 | 09/16/13 | 12/16/13 |
| 12 | Required installments Enter 25% of line 10c in columns (a) through (d) unless the organization uses the annualized income installment method, the adjusted seasonal installment method, or is a "large organization" (see instructions) | 12  | 410.     | 410.     | 410.     | 410.     |
| 13 | 2012 Overpayment (see instructions)   | 13  | 357.     |          |          |          |
| 14 | Payment due. (Subtract line 13 from line 12 )   | 14  | 53.      | 410.     | 410.     | 410.     |

LHA For Paperwork Reduction Act Notice, see instructions.

Form 990-W (2013)

Estimated Tax 1640.  
Overpayment Applied 357.  
Amount Due 1283.

# 2012 WESTHAYSEN MEDICAL SCHOLARSHIP APPLICANTS

Revised 7/18/12

|    | MEDICAL STUDENTS   | SCHOOL   | YR OF GRAD | PRIOR RECP   | Proposed   | COMMENTS/GPA/COSTS  |
|----|--|--|------------|--|------------|---|
|    |  |  |            |  | 2012 AWARD |   |
| 1. | Aleksandar Alavanja<br>942 Cooke Court<br>Crown Point, IN 46307<br>SSN: [REDACTED]                   | Indiana University<br>School of Medicine<br>635 Barnhill Drive, MS164<br>Indianapolis, IN 46202-5120 | 2016       | No   | \$2,000    | 1 <sup>st</sup> year student-Medical<br>Costs-\$42,135 GPA 3.95<br>Earned B.A in Chemistry- IU<br>Bloomington 2012  |
| 2. | Siddharth S. Bangar<br>7819 Linden Street<br>Dyer, IN 46311<br>SSN: [REDACTED]                       | Indiana University<br>School of Medicine<br>635 Barnhill Drive, MS164<br>Indianapolis, IN 46202-5120 | 2016       | No   | \$2,000    | 1 <sup>st</sup> year student- Medical<br>Earned B S in Biology -IUN<br>2011 Costs-\$42,135 GPA 3.74   |
| 3. | Haaris Ahmed Beg<br>1355 Covington Court<br>Crown Point, IN 46307<br>SSN: [REDACTED]                 | Geisel School of Medicine at<br>Dartmouth<br>7021 Remsen #305A<br>Hanover, NH 03755                  | 2016       | No   | \$2,000    | 1 <sup>st</sup> yr. student. Earned B.A<br>from Harvard-2012<br>Costs-\$53,921 GPA 3.45<br>Tremendous need/great<br>student   |
| 4. | Oluwabusola A. Binutu<br>7953 W. 92 <sup>nd</sup> Avenue<br>Crown Point, IN 46307<br>SSN: [REDACTED] | Indiana University<br>School of Medicine<br>635 Barnhill Drive, MS164<br>Indianapolis, IN 46202-5120 | 2014       | 2010-\$1,600<br>2011-<br>\$2,200.00                | \$2,400    | Graduate- Cornell Univ 2009<br>GPA 3.054<br>IUSOM 2009-10 GPA 3.667<br>Costs \$31,274   |
| 5. | Lucas T. Buchler<br>9040 Robinson Road<br>Dyer, IN 46311<br>SSN: [REDACTED]                          | Indiana University<br>School of Medicine<br>635 Barnhill Drive, MS164<br>Indianapolis, IN 46202-5120 | 2013       | 2009 \$1,250<br>2010 \$2,100<br>2011<br>\$2,800.00 | \$3,000    | Undergrad CUM GPA. 3.62<br>2009-earned B.A. from<br>Depauw<br>Costs-\$31,574  |
| 6. | Katie Nichole Byrd<br>941 Stone Bridge Drive<br>Schererville, IN 46375<br>SSN: [REDACTED]            | Indiana University<br>School of Medicine<br>635 Barnhill Drive, MS164<br>Indianapolis, IN 46202-5120 | 2016       | No   | \$2,000    | 1 <sup>st</sup> year student<br>Earned B.A.in Biology from<br>IU-2012. GPA 3.95<br>Costs-\$42,135. Confirmed-<br>Receiving \$15,000.00 from<br>LaPorte Hospital Award |



|    | MEDICAL STUDENTS (   | SCHOOL  | YR OF GRAD | PRIOR RECP          | 2012 AWARD | COMMENTS/GPA/COSTS   |
|----|--|---|------------|---------------------|------------|--|
| 7. | Anthony R. Ferrantella<br>427 E. Joliet, PO Box 322<br>Schererville, IN 46375<br>SSN: [REDACTED] | Indiana University<br>School of Medicine<br>635 Barnhill Drive, MS164<br>Indianapolis, IN 46202-5120    | 2015       | 2011-<br>\$2,000.00 | \$2,200    | 2011-GPA 3.73<br>Costs-\$41,835<br>2010-Earned B.A. in Biology-IU & 2011-M.S. in Biology-Purdue  |
| 8. | Nataha Felea<br>3195 Tremont Lane<br>Crown Point, IN 46307<br>SSN: [REDACTED]                    | Indiana University<br>School of Medicine<br>635 Barnhill Drive, MS164<br>Indianapolis, IN 46202-5120    | 2016       | No                  | \$2,000    | 1 <sup>st</sup> year student<br>Earned B S in Biology from IUN in 2012<br>Costs \$42,135 GPA 3.96  |
| 9  | Megan Christine Feustel<br>109 Mulberry Lane<br>Schererville, IN 46375<br>SSN: [REDACTED]        | Indiana University<br>School of Medicine<br>635 Barnhill Drive, MS164<br>Indianapolis, IN 46202-5120    | 2016       | No                  | \$2,000    | 1 <sup>st</sup> year student Medical<br>Earned B.A. in Spanish and Biology from IUPUI 2012<br>Costs-\$42,135 GPA 4.0                           |
| 10 | Jeffrey Byron Florek<br>8706 Madison Avenue<br>Munster, IN 46321<br>SSN: [REDACTED]              | Indiana University<br>School of Medicine<br>635 Barnhill Drive, MS164<br>Indianapolis, IN 46202-5120    | 2016       | No                  | \$2,000    | 1 <sup>st</sup> year student Medical<br>Earned B.S in Biology from IU 2012<br>Costs \$42,135 GPA 3.94  |
| 11 | Ayla Charbel Garcia<br>1125 Rockview Road<br>Dyer, IN 46311<br>[REDACTED]                        | Purdue University Calumet<br>Financial Aid Office<br>2200 169 <sup>th</sup> Street<br>Hammond, IN 46323 | 2015       | No                  | N/A        | 1 <sup>st</sup> year student-Medical<br>Suspended before due to academic performance, see app pg. 3, #14<br>Pursuing Pre-med Bachelor's degree |
| 12 | Nhila Jagadeesan<br>6916 W. 73 <sup>rd</sup> Avenue<br>Schererville, IN 46375<br>SSN: [REDACTED] | Washington University SOM<br>660 S. Euclid Ave.<br>St. Louis, MO 63110-1093                             | 2015       | 2011 \$2,000        | \$2,200    | IUPUI GPA 3.834<br>Honors College Scholar<br>BS Biology 2011<br>BA Chemistry 2011 Costs \$52,768   |
| 13 | Rania Kaoukis<br>1220 White Hawk Drive<br>Crown Point, IN 46307<br>[REDACTED]                    | Indiana University<br>School of Medicine<br>635 Barnhill Drive, MS164<br>Indianapolis, IN 46202-5120    | 2014       | 2011<br>\$2,000     | \$2,200    | Purdue GPA 4.0 earned B.S. in Biology 2010<br>Dean's List & Honors<br>Costs \$31,274   |

|    | MEDICAL STUDENTS   | SCHOOL   | YR OF GRAD | PRIOR RECP                                   | 2012 AWARD | COMMENTS/GPA/COSTS   |
|----|--|--|------------|--|------------|--|
| 14 | Ryan Joseph Longfellow<br>10525 W. 124 <sup>th</sup> Avenue<br>Cedar Lake, IN 46303<br>SSN: [REDACTED] | Indiana University<br>School of Medicine<br>635 Barnhill Drive, MS119<br>Indianapolis, IN 46202-5120 | 2014       | 2010 \$1,600<br>2011 \$2,200                 | \$2,400    | Graduate: Columbia College<br>Chicago -- Dean's List<br>GPA 3.896 Earned B.A.<br>Major: Film & Video<br>Costs \$31,274   |
| 15 | Michael Alan Masteller<br>9976 Belmont Court<br>Saint John, IN 46373<br>SSN: [REDACTED]                | Indiana University<br>School of Medicine<br>635 Barnhill Drive, MS164<br>Indianapolis, IN 46202-5120 | 2013       | 2009 \$1,250<br>2010 \$2,100<br>2011 \$2,800 | \$3,000    | Final year. Earned BS Notre<br>Dame 2009<br>Honors Cum Laude no income<br>in 2011<br>Costs \$31,574  |
| 16 | Cicely L. Moreno<br>2378 Jennings Street<br>Gary, IN 46404<br>SSN: [REDACTED]                          | Indiana University<br>School of Medicine<br>635 Barnhill Drive, MS158<br>Indianapolis, IN 46202-5120 | 2015       | 2011-\$2,000                                 | \$2,200    | IUN BA-Spanish/Min-2011<br>Chemistry GPA 3.701<br>Costs \$42,146   |
| 17 | Julie Anne Nelson<br>1040 Azalca Drive<br>Munster, IN 46321<br>SSN: [REDACTED]                         | Indiana University<br>School of Medicine<br>635 Barnhill Drive, MS158<br>Indianapolis, IN 46202-5120 | 2016       | No   | \$2,000    | 1 <sup>st</sup> year student<br>Earned B.A. in Speech &<br>Hearing, Spanish &<br>Psychology from IU 2009<br>Costs \$42,135 GPA 3.88, 4.0<br>John Hopkins --Spring 2011 |
| 18 | Lyndsay A. Oancea (Langbehn)<br>9828 Pasturegate Lane<br>Munster, IN 46321<br>SSN: [REDACTED]          | Indiana University<br>School of Medicine<br>635 Barnhill Drive, MS158<br>Indianapolis, IN 46202-5120 | 2013       | 2009 \$1,250<br>2010 \$2,100<br>2011 \$2,800 | \$3,000    | Formerly Lyndsay Langbehn<br>Earned B.S. from Purdue in<br>2009 Pre-Med with Highest<br>Distinction Costs \$31,574   |
| 19 | James Thomas Paliga<br>10028 Redbud<br>Munster, IN 46321<br>SSN: [REDACTED]                            | Duke University<br>School of Medicine<br>Financial Aid Office<br>P.O. Box 3067<br>Durham, N.C. 27710 | 2014       | 2010 \$1,600                                 | \$1,800    | Earned B.A. 2010 from<br>Claremont McKenna College<br>Costs \$53,940<br>Receiving some aid.  |

|    | MEDICAL STUDENTS   | SCHOOL   | YR OF GRAD | PRIOR RECP                   | 2012 AWARD | COMMENTS/GPA/COSTS   |
|----|--|--|------------|------------------------------|------------|--|
| 20 | Kevin Amrish Parikh<br>2636 Harvest Court<br>Crown Point, IN 46307<br>SSN: [REDACTED]    | Indiana University<br>School of Medicine<br>635 Barnhill Drive,<br>Indianapolis, IN 46202-5120                 | 2016       | No                           | \$2,000    | 1 <sup>st</sup> year student-Medical<br>Earned Entrepreneurship &<br>Corporate Innovation Degree<br>from IU in 2012<br>Costs \$42,135 GPA 3.87 |
| 21 | Joseph Patrick Raycroft<br>8025 Linden Avenue<br>Munster, IN 46321<br>SSN: [REDACTED]    | Indiana University<br>School of Medicine<br>635 Barnhill Drive, MS158<br>Indianapolis, IN 46202-5120           | 2015       | No                           | \$2,000    | 1 <sup>st</sup> year student.<br>Earned B.S in Chemical<br>Engineering 2011<br>Costs \$41,835 GPA 3.40   |
| 22 | Akash Rusia<br>9905 Sequoia Court<br>Munster, IN 46321<br>SSN: [REDACTED]                | Indiana University<br>School of Medicine<br>635 Barnhill Drive, MS158<br>Indianapolis, IN 46202-5120           | 2015       | 2011 \$2,000                 | \$2,200    | Brother Deepam Rusia rec'd<br>4 years Med Scholarships<br><br>IU GPA 3.712 Costs \$41,835<br>Earned BS Neuroscience 2011                       |
| 23 | Christina Marie Rybicki<br>9179 Franklin Drive<br>St. John, IN 46373<br>[REDACTED]       | Purdue University<br>Bursars Office - Outside Awards<br>610 Purdue Mall - Room 200<br>West Lafayette, IN 47907 | 2018       | No                           | N/A        | Student used last year's<br>application. Pre-Pharmacy<br>student.<br>High school GPA 4.04<br>Costs \$11,530                                    |
| 24 | Faiheen S. Sultana<br>624-A Newcastle Drive<br>Schererville, IN 46375<br>SSN: [REDACTED] | Indiana University<br>School of Medicine<br>635 Barnhill Drive, MS158<br>Indianapolis, IN 46202-5120           | 2014       | 2010 \$1,600<br>2011 \$2,200 | \$2,400    | IUN BS-Psychology 2010<br>GPA 3.89 Highest Distinction<br>Costs \$31,274   |
|    | Total Medical Applicants: 24<br>Total Awards: \$49,000                                   |  |            |                              | \$49,000   |  |

|    | NURSING STUDENTS   | SCHOOL   | YR OF GRAD   | PRIOR RECP  | 2012 AWARD | COMMENTS/GPA/COSTS   |
|----|--|--|--------------|---|------------|--|
| 1. | La'Shay Marie Brinson<br>506 Exchange Avenue<br>Calumet City, IL [REDACTED]<br>[REDACTED]                    | Purdue University Calumet<br>Financial Aid Office<br>[REDACTED]<br>Hammond, IN 46323                           | 2015         | No  | N/A        | 1 <sup>st</sup> year student<br>*Resides in Illinois*<br>Receiving some aid.<br>Costs \$19,557 GPA 3.50  |
| 2. | Cierra D. Griggs-Bradley<br>3985 W. 73 <sup>rd</sup> Ave. Apt D<br>Merrillville, IN 46410<br>SSN: [REDACTED] | University of Indianapolis<br>1400 East Hanna Ave.<br>Indianapolis, IN 46227                                   | 2014         | 2011<br>\$1 [REDACTED]                            | \$1,500    | GPA 3.24 Costs \$25,764<br>Receiving small amount of<br>state aid-\$3,480  |
| 3. | Ashley A. Hahn<br>14208 W. 135 <sup>th</sup> Avenue<br>Cedar Lake, IN 46303<br>SSN: [REDACTED]               | Purdue University<br>Bursars Office - Outside Awards<br>610 Purdue Mall - Room 200<br>West Lafayette, IN 47907 | 2013         | [REDACTED] \$1,100<br>2011<br>\$1,371             | \$1,500    | Last year.<br>GPA 3.36 Costs \$11,530<br>Receiving some aid.   |
| 4. | Kristin K. Malek<br>1045 Madison Avenue<br>Dyer, IN 46311<br>SSN: [REDACTED]                                 | Purdue University<br>Bursars Office - Outside Awards<br>610 Purdue Mall - Room 200<br>West Lafayette, IN 47907 | 2013         | 2010 \$1,300<br>2011 \$1,571                      | \$1,700    | GPA 3.33 Costs \$11,530<br>has not yet been awarded<br>financial aid.  |
| 5. | Emily Rose Sasaki<br>129 Stone Ridge Drive<br>Dyer, IN 46311<br>SSN: [REDACTED]                              | Purdue University Calumet<br>Financial Aid Office<br>2200 - 169 <sup>th</sup> Street<br>Hammond, IN 46323      | Dec.<br>2012 |   | \$1,450    | Last year. Earned BSIE 2008<br>Purdue West Lafayette<br>Costs \$11,840 GPA 3.30  |
| 6. | Michelle Lynn Schaap<br>1350 Ludington Lane<br>Dyer, IN 46311<br>SSN: [REDACTED]                             | Purdue University Calumet<br>Financial Aid Office<br>2200 169 <sup>th</sup> Street<br>Hammond, IN 46323        | 2013         |   | \$1,450    | Earned B.A in English &<br>Religion from Calvin College<br>in 2002<br>Costs \$11,840 GPA 3.72  |
| 7. | Stephanie Jean Sknerski<br>8015 Duluth Street<br>Highland, IN 46322<br>SSN: [REDACTED]                       | Valparaiso University<br>1700 Chapel Drive<br>Valparaiso, IN 46383   | 2015         |   | \$1,450    | Costs \$34,250 GPA 3.60<br>1 <sup>st</sup> year student  |
| 8. | Meredith Allyn White<br>1505 W. 4 <sup>th</sup> Place<br>Hobart, IN 46342<br>[REDACTED]                      | Purdue University<br>Bursars Office - Outside Awards<br>610 Purdue Mall - Room 200<br>West Lafayette, IN 47907 | 2013         | 2009 \$1,000<br>2011<br>disqualified-<br>no FAFSA | N/A        | Family has 2 full-time<br>students. Plans on continuing<br>to achieve a Doctorate Nurse<br>Practitioner degree. Part B of<br>app. incomplete no costs, |

|  |  |  |  |  |         |   |
|--|--|--|--|--|---------|---|
|  |  |  |  |  |         | not signed. It was not completed by Purdue. GPA: 3.61 |
|  | Total Nursing Applicants: 8<br>Total Awards: \$9,050 |  |  |  | \$9,050 |   |

| TOTAL STUDENTS 2012       |    | TOTAL SCHOLARSHIP AWARDS |          | MEDICAL SCHOOLS           |    | NURSING SCHOOLS            |   |
|---------------------------|----|--------------------------|----------|---------------------------|----|----------------------------|---|
| MEDICAL STUDENTS          | 24 | 22                       | \$49,000 | IUSOM - Indianapolis      | 19 | Purdue Calumet             | 2 |
| NURSING STUDENTS          | 8  | 6                        | \$9,050  | Duke                      | 1  | Purdue West Lafayette      | 2 |
| Non Med./Nursing Students | 2  |                          |          | Washington University SOM | 1  | University of Indianapolis | 1 |
| Incomplete Apps.          | 1  |                          |          | Geisel School of Medicine | 1  | Valparaiso                 | 1 |
| Non Lake Co. Resident     | 1  |                          |          |                           |    |                            |   |
| GRAND TOTAL AWARDS:       |    | \$58,050                 |          |                           |    |                            |   |
| Maximum Distribution:     |    | \$58,000                 |          |                           |    |                            |   |

## Comparison to 2011

| TOTAL STUDENTS 2011        |    | TOTAL SCHOLARSHIP AWARDS |          |
|----------------------------|----|--------------------------|----------|
| MEDICAL STUDENTS           | 20 | 19                       | \$46,200 |
| NURSING STUDENTS           | 8  | 7                        | \$9,800  |
| Non Med Students -- 1      |    |                          |          |
| Incomplete Applications -- |    |                          |          |
| GRAND TOTAL AWARDS:        |    | \$56,000                 |          |
| Maximum Distribution:      |    | \$56,000                 |          |

## Comparison to 2010

| TOTAL STUDENTS 2010          |    | TOTAL SCHOLARSHIP AWARDS |
|------------------------------|----|--------------------------|
| MEDICAL STUDENTS             | 27 | 23 - \$47,000            |
| NURSING STUDENTS             | 11 | 9 - \$11,000             |
| Non Lake Co. Resident -- 2   |    |                          |
| Non Med Students -- 2        |    |                          |
| Incomplete Applications - 4  |    |                          |
| <b>GRAND TOTAL AWARDS:</b>   |    | <b>\$58,000</b>          |
| <b>Maximum Distribution:</b> |    | <b>\$58,000</b>          |

## Comparison to 2009

| TOTAL STUDENTS 2009           |    | TOTAL SCHOLARSHIP AWARDS |
|-------------------------------|----|--------------------------|
| MEDICAL STUDENTS              | 23 | \$39,300                 |
| NURSING STUDENTS              | 13 | \$13,200                 |
| <b>GRAND TOTAL AWARDS: 36</b> |    | <b>\$52,500</b>          |
| <b>Minimum Distribution:</b>  |    | <b>\$47,000</b>          |

**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,<br>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 COMMON TRUST FUNDS  |  |  |                                      |                                  |
| b COMMON TRUST FUNDS   |  |  |                                      |                                  |
| c 446.275 SH DODGE & COX FDS   |  | P  | 03/07/08                             | 01/09/12                         |
| d 90.932 SH DODGE & COX FDS  |  | P  | 11/07/08                             | 04/13/12                         |
| e 250 SH JOHNSON & JOHNSON   |  | P  | 01/09/96                             | 04/16/12                         |
| f 1017.916 SH FIRST MIDWEST LARGE CAP  |  | P  | 02/01/03                             | 07/31/12                         |
| g 150 SH NEXTERA ENERGY  |  | P  | 02/11/93                             | 07/20/12                         |
| h 1120 SH PIMCO REAL RETURN  |  | P  | 09/22/10                             | 07/20/12                         |
| i 1788.909 SH PIMCO FDS  |  | P  | 04/25/11                             | 04/13/12                         |
| j 150 SH SOUTHERN CO   |  | P  | 06/09/88                             | 07/20/12                         |
| k  |  |  |                                      |                                  |
| l  |  |  |                                      |                                  |
| m  |  |  |                                      |                                  |
| n  |  |  |                                      |                                  |
| o  |  |  |                                      |                                  |

| (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                     |  |   | 75.  |
| b                     |  |   | 39852.                                       |
| c 13000.              |  | 15360.  | -2360.                                       |
| d 2831.               |  | 2250.   | 581.   |
| e 16012.              |  | 5632.   | 10380.                                       |
| f 30000.              |  | 33803.  | -3803.                                       |
| g 10560.              |  | 2868.   | 7692.  |
| h 14000.              |  | 12949.  | 1051.  |
| i 19946.              |  | 20000.  | -54.   |
| j 7161.               |  | 1079.   | 6082.  |
| k                     |  |   |  |
| l                     |  |   |  |
| m                     |  |   |  |
| n                     |  |   |  |
| o                     |  |   |  |

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

| (i) FMV as of 12/31/69 | (j) Adjusted basis<br>as of 12/31/69 | (k) Excess of col (i)<br>over col (j), if any | (l) Losses (from col (h))<br>Gains (excess of col (h) gain over col (k),<br>but not less than "-0-") |
|------------------------|--------------------------------------|---|--|
| a                      |                                      |   | 75.  |
| b                      |                                      |   | 39852.   |
| c                      |                                      |   | -2360.   |
| d                      |                                      |   | 581.   |
| e                      |                                      |   | 10380.   |
| f                      |                                      |   | -3803.   |
| g                      |                                      |   | 7692.  |
| h                      |                                      |   | 1051.  |
| i                      |                                      |   | -54.   |
| j                      |                                      |   | 6082.  |
| k                      |                                      |   |  |
| l                      |                                      |   |  |
| m                      |                                      |   |  |
| n                      |                                      |   |  |
| o                      |                                      |   |  |

|   |   |        |
|---|---|--------|
| 2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7<br>If (loss), enter "-0-" in Part I, line 7 }   | 2 | 59496. |
| 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    |

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Form 990-PF Interest on Savings and Temporary Cash Investments Statement 1

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| Source   | Amount |
|--|--------|
| COMMON TRUST FUND                              | 14929. |
| Total to Form 990-PF, Part I, line 3, Column A | 14929. |

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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 |
|----------------------------------|--------------|----------------------------|----------------------|
| CAPITAL GAIN DIVIDENDS           | 479.         | 0.                         | 479.                 |
| DOMESTIC CORPORATIONS            | 18982.       | 0.                         | 18982.               |
| FOREIGN CORPORATIONS             | 1547.        | 0.                         | 1547.                |
| Total to Fm 990-PF, Part I, ln 4 | 21008.       | 0.                         | 21008.               |

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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                 | 675.                         | 675.                              |                               | 0.                            |
| To Fm 990-PF, Pg 1, ln 16a | 675.                         | 675.                              |                               | 0.                            |

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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              | 725.                         | 725.                              |                               | 0.                            |
| To Form 990-PF, Pg 1, ln 16b | 725.                         | 725.                              |                               | 0.                            |

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| Form 990-PF  | Other Decreases in Net Assets or Fund Balances | Statement | 5 |
|--|--|-----------|---|
| Description  |  | Amount    |   |
| ADJUSTMENT FOR 2011 ACTIVITY INCLUDED IN 2012 ACTIVITY |  | 3950.     |   |
| ESTIMATED TAX PAYMENTS                                 |  | 2452.     |   |
| Total to Form 990-PF, Part III, line 5                 |  | 6402.     |   |

| Form 990-PF                                      | U.S. and State/City Government Obligations |                | Statement  | 6                    |
|--|--|----------------|------------|----------------------|
| Description                                      | U.S.<br>Gov't                              | Other<br>Gov't | Book Value | Fair Market<br>Value |
| GOVERNMENT OBLIGATIONS TAX MANAGED<br>FD         | X  |                | 29997.     | 29997.               |
| Total U.S. Government Obligations                |  |                | 29997.     | 29997.               |
| Total State and Municipal Government Obligations |  |                |            |                      |
| Total to Form 990-PF, Part II, line 10a          |  |                | 29997.     | 29997.               |

| Form 990-PF                                | Corporate Stock | Statement         | 7 |
|--|-----------------|-------------------|---|
| Description                                | Book Value      | Fair Market Value |   |
| 690 SH EXXON MOBIL                         | 4517.           | 59720.            |   |
| 550 SH SOUTHERN CORP                       | 3957.           | 23546.            |   |
| 2300 INTEL CORP                            | 16268.          | 47426.            |   |
| 530 JOHNSON & JOHNSON                      | 11940.          | 37153.            |   |
| 435 PEPSICO INC                            | 11197.          | 29767.            |   |
| 884 SH AT&T INC                            | 12508.          | 29800.            |   |
| 7660.744 SH FM LARGE CAP EQUITY            | 215087.         | 231303.           |   |
| 40044.673 SH FIRST MIDWEST FIXED INCOME FD | 441276.         | 444476.           |   |
| 537.207 SH DODGE & COX FDS                 | 0.              | 0.                |   |
| 4711.828 SH FM SMALL CAP EQUITY            | 71265.          | 82726.            |   |
| 4480.275 SH FM GEMS FUND                   | 56568.          | 62057.            |   |
| 2274.883 SH FM MID CAP EQUITY              | 39056.          | 45421.            |   |
| 587.021 SH SCOUT INTERNATIONAL             | 14165.          | 19577.            |   |
| 165 SH NEXTERA ENERGY                      | 3155.           | 11416.            |   |
| 1495.418 SH FIDELITY ADVISOR SER           | 14435.          | 14835.            |   |
| 884.339 SH PIMCO REAL RETURN               | 10196.          | 10851.            |   |
| 1788.909 SH PIMCO FDS                      | 0.              | 0.                |   |
| 1918.649 SH TEMPLETON INCOME               | 25000.          | 25595.            |   |

PETER V. WESTHAYSEN MEDICAL EDUCATION TR

31-6290396

95.932 SH MFS INTL VALUE

2500.

2702.

Total to Form 990-PF, Part II, line 10b

953090.

1178371.