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

OMB No 1545-0052

2012

Department of the Treasury  
Internal Revenue Service

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

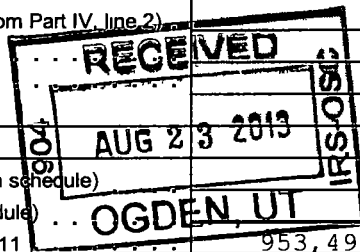
Open to Public Inspection

For calendar year 2012 or tax year beginning , 2012, and ending , 20

Name of foundation <b>Anderson Foundation</b>		A Employer identification number <b>34-6528868</b>
Number and street (or P.O. box number if mail is not delivered to street address) <b>P.O. Box 119</b>		B Telephone number (see instructions) <b>419 893-5050</b>
City or town, state, and ZIP code <b>Maumee, OH 43537</b>		C If exemption application is pending, check here <input type="checkbox"/>
G Check all that apply: <input type="checkbox"/> Initial return <input type="checkbox"/> Final return <input type="checkbox"/> Address change <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Amended return <input type="checkbox"/> Name change		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
H Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) <b>\$ 10,189,437.00</b> (Part I, column (d) must be on cash basis.) J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions).)		(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 (attach schedule) . . . . .	0.00			
2	Check <input type="checkbox"/> if the foundation is not required to attach Sch. B . . . . .				
3	Interest on savings and temporary cash investments . . . . .	126,827.00	126,827.00		
4	Dividends and interest from securities . . . . .	144,161.00	144,161.00		
5a	Gross rents . . . . .				
b	Net rental income or (loss) . . . . .				
6a	Net gain or (loss) from sale of assets not on line 10 . . . . .	682,510.00			
b	Gross sales price for all assets on line 6a . . . . . 5,078,459.98				
7	Capital gain net income (from Part IV, line 2) . . . . .		682,510.00		
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) (attach schedule) . . . . .				
11	Other income (attach schedule) . . . . .				
12	Total. Add lines 1 through 11 . . . . .	953,498.00	953,498.00		
13	Compensation of officers, directors, trustees, etc. . . . .				
14	Other employee salaries and wages . . . . .				
15	Pension plans, employee benefits . . . . .				
16a	Legal fees (attach schedule) . . . . .				
b	Accounting fees (attach schedule) . . . . .				
c	Other professional fees (attach schedule) . . . . .	106,402.00	99,225.00		2,400.00
17	Interest . . . . .				
18	Taxes (attach schedule) (see instructions) . . . . .	20,110.00	20,110.00		
19	Depreciation (attach schedule) and depletion . . . . .				
20	Occupancy . . . . .				
21	Travel, conferences, and meetings . . . . .				
22	Printing and publications . . . . .				
23	Other expenses (attach schedule) . . . . .	200.00	200.00		
24	Total operating and administrative expenses. Add lines 13 through 23 . . . . .	126,712.00	119,535.00		2,400.00
25	Contributions, gifts, grants paid . . . . .	316,567.00			316,567.00
26	Total expenses and disbursements. Add lines 24 and 25 . . . . .	443,279.00	119,535.00		318,967.00
27	Subtract line 26 from line 12: . . . . .				
a	Excess of revenue over expenses and disbursements . . . . .	510,219.00			
b	Net investment income (if negative, enter -0-) . . . . .		833,963.00		
c	Adjusted net income (if negative, enter -0-) . . . . .				

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<b>Part II Balance Sheets</b>		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions.)		Beginning of year	End of year	
				(a) Book Value	(b) Book Value	(c) Fair Market Value
<b>Assets</b>	<b>1</b>	Cash - non-interest-bearing . . . . .		69,931.00	11,503.00	11,503.00
	<b>2</b>	Savings and temporary cash investments . . . . .		112,403.00	112,812.00	112,812.00
	<b>3</b>	Accounts receivable ▶ . . . . .				
		Less: allowance for doubtful accounts ▶ . . . . .				
	<b>4</b>	Pledges receivable ▶ . . . . .				
		Less: allowance for doubtful accounts ▶ . . . . .				
	<b>5</b>	Grants receivable . . . . .				
	<b>6</b>	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions) . . . . .				
	<b>7</b>	Other notes and loans receivable (attach schedule) ▶ . . . . .				
		Less: allowance for doubtful accounts ▶ . . . . .				
	<b>8</b>	Inventories for sale or use . . . . .				
	<b>9</b>	Prepaid expenses and deferred charges . . . . .				
	<b>10 a</b>	Investments - U.S. and state government obligations (attach schedule) . . . . .				
	<b>b</b>	Investments - corporate stock (attach schedule) . . . . .				
	<b>c</b>	Investments - corporate bonds (attach schedule) . . . . .		83,300.00	83,300.00	122,700.00
	<b>11</b>	Investments - land, buildings, and equipment basis ▶ . . . . .				
	Less: accumulated depreciation ▶ (attach schedule) . . . . .					
<b>12</b>	Investments - mortgage loans . . . . .					
<b>13</b>	Investments - other (attach schedule) . . . . .		8,128,165.00	8,696,403.00	9,942,422.00	
<b>14</b>	Land, buildings, and equipment basis ▶ . . . . .					
	Less: accumulated depreciation ▶ (attach schedule) . . . . .					
<b>15</b>	Other assets (describe ▶ . . . . .)					
<b>16</b>	<b>Total assets</b> (to be completed by all filers - see the instructions. Also, see page 1, item I) . . . . .		8,393,799.00	8,904,018.00	10,189,437.00	
<b>Liabilities</b>	<b>17</b>	Accounts payable and accrued expenses . . . . .				
	<b>18</b>	Grants payable . . . . .				
	<b>19</b>	Deferred revenue . . . . .				
	<b>20</b>	Loans from officers, directors, trustees, and other disqualified persons . . . . .				
	<b>21</b>	Mortgages and other notes payable (attach schedule) . . . . .				
	<b>22</b>	Other liabilities (describe ▶ . . . . .)				
<b>23</b>	<b>Total liabilities</b> (add lines 17 through 22) . . . . .					
<b>Net Assets or Fund Balances</b>	<b>Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.</b>					
	<b>24</b>	Unrestricted . . . . .				
	<b>25</b>	Temporarily restricted . . . . .				
	<b>26</b>	Permanently restricted . . . . .				
	<b>Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. ▶ <input type="checkbox"/></b>					
	<b>27</b>	Capital stock, trust principal, or current funds . . . . .				
	<b>28</b>	Paid-in or capital surplus, or land, bldg., and equipment fund . . . . .				
	<b>29</b>	Retained earnings, accumulated income, endowment, or other funds . . . . .		8,393,799.00	8,904,018.00	
	<b>30</b>	<b>Total net assets or fund balances</b> (see instructions) . . . . .		8,393,799.00	8,904,018.00	
	<b>31</b>	<b>Total liabilities and net assets/fund balances</b> (see instructions) . . . . .		8,393,799.00	8,904,018.00	

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

<b>1</b>	Total net assets or fund balances at beginning of year - Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return) . . . . .	<b>1</b>	8,393,799.00
<b>2</b>	Enter amount from Part I, line 27a . . . . .	<b>2</b>	510,219.00
<b>3</b>	Other increases not included in line 2 (itemize) ▶ . . . . .	<b>3</b>	
<b>4</b>	Add lines 1, 2, and 3 . . . . .	<b>4</b>	8,904,018.00
<b>5</b>	Decreases not included in line 2 (itemize) ▶ . . . . .	<b>5</b>	
<b>6</b>	<b>Total net assets or fund balances at end of year</b> (line 4 minus line 5) - Part II, column (b), line 30 . . . . .	<b>6</b>	8,904,018.00

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

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co.)			(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
<b>1a</b> 963					
<b>b</b>					
<b>c</b>					
<b>d</b>					
<b>e</b>					
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)		
<b>a</b> 5,078,459.98		4,395,949.89	682,510.09		
<b>b</b>					
<b>c</b>					
<b>d</b>					
<b>e</b>					
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69					
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col. (j), if any	(l) Gains (Col (h) gain minus col. (k), but not less than -0-) or Losses (from col (h))		
<b>a</b>			682,510.09		
<b>b</b>					
<b>c</b>					
<b>d</b>					
<b>e</b>					
<b>2</b> Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }			<b>2</b>	682,510.09	
<b>3</b> Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8			<b>3</b>		

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

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

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

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

☐ Yes ☒ No

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

**1** Enter the appropriate amount in each column for each year; see the instructions before making any entries

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2011	274,817.00	9,638,558.00	0.0285
2010	413,065.00	9,021,064.00	0.0458
2009	338,220.00	8,184,845.00	0.0413
2008	280,693.00	8,801,099.00	0.0319
2007	957,432.00	9,247,827.00	0.1035
<b>2</b> Total of line 1, column (d)			<b>2</b> 0.2510
<b>3</b> Average distribution ratio for the 5-year base period - divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years			<b>3</b> 0.0502
<b>4</b> Enter the net value of noncharitable-use assets for 2012 from Part X, line 5			<b>4</b> 9,802,457.00
<b>5</b> Multiply line 4 by line 3			<b>5</b> 492,083.34
<b>6</b> Enter 1% of net investment income (1% of Part I, line 27b)			<b>6</b> 8,339.63
<b>7</b> Add lines 5 and 6			<b>7</b> 500,422.97
<b>8</b> Enter qualifying distributions from Part XII, line 4 If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions.			<b>8</b> 318,967.00

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

1 a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1 Date of ruling or determination letter: _____ (attach copy of letter if necessary - see instructions)			
b 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	16,679.00
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	
3 Add lines 1 and 2		3	16,679.00
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		4	
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-		5	16,679.00
6 Credits/Payments			
a 2012 estimated tax payments and 2011 overpayment credited to 2012	6a	17,339.00	
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	17,339.00	
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	660.00	
11 Enter the amount of line 10 to be: Credited to 2013 estimated tax <input type="checkbox"/> 660.00 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 the definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.		X
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 (1) On the foundation <input type="checkbox"/> \$ _____ (2) On foundation managers <input type="checkbox"/> \$ _____		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input type="checkbox"/> \$ _____		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		X
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions)		
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

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) . . . . .

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) . . . . .

13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? . . . . .

14 The books are in care of ▶ Matthew C. Anderson Telephone no ▶ 419 893-5050  
Located at ▶ 480 W. Dussel, Dr, Maumee, OH ZIP+4 ▶ 43537

**15** Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here ☐ and enter the amount of tax-exempt interest received or accrued during the year: 15

**16** At any time during calendar year 2012, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? . . . . .  
See the instructions for exceptions and filing requirements for Form TD F 90-22.1 If "Yes," enter the name of the foreign country ►

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


(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) ☐ Yes ☒ No

**b** If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? . . . . .

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

c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2012?

2. Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))

a At the end of tax year 2012, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2012? ☐ Yes ☒ No  
If "Yes," list the years 

**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.)

**c** If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here

**3a** Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☒ No

**b** If "Yes," did it have excess business holdings in 2012 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2012.)

**4a** Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?

**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?

**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)? (see instructions) ☐ 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)? ☐ **5b**Organizations relying on a current notice regarding disaster assistance check here ☐**c** If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? ☐ 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 **6b****b** If "Yes," did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? ☐ Yes ☒ No **7b**

If "Yes" to 6b, file Form 8870

**7a** At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☒ No**b** If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?**Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors****1** List all officers, directors, trustees, foundation managers and their compensation (see instructions).

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (if not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
Matthew C. Anderson	Chairman 2 hours	0.00		
Richard P. Anderson, Michael J. Anderson	Trustees			
Richard M. Anderson, Lu Stauffer	1 hour	0.00		
Jeffrey W. Anderson, John P. Kraus	Trustees			
All located at: 480 W. Dussel Drive	1 hour	0.00		
Maumee, OH 43537				

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

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances

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

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

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
None		
<b>Total number of others receiving over \$50,000 for professional services</b> . . . . . ►		

**Part IX-A Summary of Direct Charitable Activities**

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
<b>1</b> _____	
<b>2</b> _____	
<b>3</b> _____	
<b>4</b> _____	

**Part IX-B Summary of Program-Related Investments** (see instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
<b>1</b> _____	
<b>2</b> _____	
All other program-related investments. See instructions.	
<b>3</b> _____	
<b>Total.</b> Add lines 1 through 3 . . . . . ►	

Form **990-PF** (2012)



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

<b>1</b>	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
<b>a</b>	Average monthly fair market value of securities	<b>1a</b>	9,273,399.00
<b>b</b>	Average of monthly cash balances	<b>1b</b>	678,334.00
<b>c</b>	Fair market value of all other assets (see instructions)	<b>1c</b>	
<b>d</b>	<b>Total</b> (add lines 1a, b, and c)	<b>1d</b>	9,951,733.00
<b>e</b>	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	<b>1e</b>	
<b>2</b>	Acquisition indebtedness applicable to line 1 assets	<b>2</b>	
<b>3</b>	Subtract line 2 from line 1d	<b>3</b>	9,951,733.00
<b>4</b>	Cash deemed held for charitable activities. Enter 1 1/2 % of line 3 (for greater amount, see instructions)	<b>4</b>	149,276.00
<b>5</b>	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. Enter here and on Part V, line 4	<b>5</b>	9,802,457.00
<b>6</b>	<b>Minimum investment return.</b> Enter 5% of line 5	<b>6</b>	490,122.85

**Part XI Distributable Amount** (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ☐ and do not complete this part.)

<b>1</b>	Minimum investment return from Part X, line 6	<b>1</b>	490,122.85
<b>2a</b>	Tax on investment income for 2012 from Part VI, line 5	<b>2a</b>	16,679.00
<b>b</b>	Income tax for 2012. (This does not include the tax from Part VI.)	<b>2b</b>	
<b>c</b>	Add lines 2a and 2b	<b>2c</b>	16,679.00
<b>3</b>	Distributable amount before adjustments. Subtract line 2c from line 1	<b>3</b>	473,443.85
<b>4</b>	Recoveries of amounts treated as qualifying distributions	<b>4</b>	
<b>5</b>	Add lines 3 and 4	<b>5</b>	473,443.85
<b>6</b>	Deduction from distributable amount (see instructions)	<b>6</b>	
<b>7</b>	<b>Distributable amount as adjusted.</b> Subtract line 6 from line 5. Enter here and on Part XIII, line 1	<b>7</b>	473,443.85

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

<b>1</b>	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
<b>a</b>	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	<b>1a</b>	318,967.00
<b>b</b>	Program-related investments - total from Part IX-B	<b>1b</b>	
<b>2</b>	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	<b>2</b>	
<b>3</b>	Amounts set aside for specific charitable projects that satisfy the:		
<b>a</b>	Suitability test (prior IRS approval required)	<b>3a</b>	
<b>b</b>	Cash distribution test (attach the required schedule)	<b>3b</b>	
<b>4</b>	<b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	<b>4</b>	318,967.00
<b>5</b>	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b (see instructions)	<b>5</b>	
<b>6</b>	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4	<b>6</b>	318,967.00

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

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

	(a) Corpus	(b) Years prior to 2011	(c) 2011	(d) 2012
1 Distributable amount for 2012 from Part XI, line 7 . . . . .				473,443.85
2 Undistributed income, if any, as of the end of 2012				
a Enter amount for 2011 only . . . . .				
b Total for prior years 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2012.				
a From 2007 . . . . . 545,876.00				
b From 2008 . . . . .				
c From 2009 . . . . .				
d From 2010 . . . . .				
e From 2011 . . . . .				
f Total of lines 3a through e . . . . .	545,876.00			
4 Qualifying distributions for 2012 from Part XII, line 4 ▶ \$ 318,967.00				
a Applied to 2011, but not more than line 2a . . . . .				
b Applied to undistributed income of prior years (Election required - see instructions). . . . .				
c Treated as distributions out of corpus (Election required - see instructions) . . . . .				
d Applied to 2012 distributable amount . . . . .				318,967.00
e Remaining amount distributed out of corpus . . . . .				
5 Excess distributions carryover applied to 2012 (If an amount appears in column (d), the same amount must be shown in column (a).)	154,476.85			154,476.85
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5 . . . . .	391,399.15			
b Prior years' undistributed income Subtract line 4b from line 2b . . . . .				
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 . . . . .				
d Subtract line 6c from line 6b Taxable amount - see instructions . . . . .				
e Undistributed income for 2011 Subtract line 4a from line 2a. Taxable amount - see instructions . . . . .				
f Undistributed income for 2012 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2013 . . . . .				
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions) . . . . .				
8 Excess distributions carryover from 2007 not applied on line 5 or line 7 (see instructions) . . . . .	391,399.15			
9 Excess distributions carryover to 2013. Subtract lines 7 and 8 from line 6a . . . . .	0			
10 Analysis of line 9:				
a Excess from 2008 . . . . .				
b Excess from 2009 . . . . .				
c Excess from 2010 . . . . .				
d Excess from 2011 . . . . .				
e Excess from 2012 . . . . .				

**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 . . . . .

4942(j)(3) or	4942(j)(5)
---------------	------------

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

**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.)**

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

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

N/A

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.

see attached statement

see attached statement

**c Any submission deadlines:**

see attached statement

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

see attached statement

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

<div>Recipient</div> <div>Name and address (home or business)</div>	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
<b>a Paid during the year</b> see attached statement				316,566.67
<b>Total</b> .....			▶ <b>3a</b>	316,566.67
<b>b Approved for future payment</b> see attached statement				76,666.66
<b>Total</b> .....			▶ <b>3b</b>	76,666.66

## Enter gross amounts unless otherwise indicated

<b>Part XVI-B</b>	<b>Relationship of Activities to the Accomplishment of Exempt Purposes</b>
-------------------	--

Line No.	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes). (See instructions.)
▼	

[illegible]

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

[illegible]

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

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

(a) Name of organization	(b) Type of organization	(c) Description of relationship

**Sign  
Here**

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

Signature of officer or trustee

Date 8/12/13

► Chairman  
Title

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

**Paid  
Preparer  
Use Only**

Print/Type preparer's name

Preparer's signature

Date \_\_\_\_\_

Check <input type="checkbox"/> if self-employed
---

PTIN

Firm's name ► The Andersons, Inc.

Firm's EIN ► 34-1562374

Firm's address ► 480 W. Dussel Drive  
Maumee, OH 43537

Phone no 419 893-5050

Form 990-PF (2012)

# *Anderson Foundation*

## **Information for Applicants**

### **General Policies**

The Anderson Foundation strives to enhance the quality of life in communities in which the donor company, The Andersons, Inc. has business operations.

The Foundation will consider requests from organizations that have received 501(c)(3) tax-exempt status from the Internal Revenue Service and which are not classified as private foundations under the Internal Revenue Code 509. State and local government requests are also considered.

Grants are made for general operations, specific projects and capital campaigns. As a general rule, the Foundation will not serve as the major or sole funder of a project. Multi-year commitments are normally confined to capital campaigns and are generally restricted to a period of three years or less. The Foundation does not commit to annual support. A specific written request is required each year.

Grants are not made to individuals; to endowment funds; to church building or operating funds; or to the building or operating funds of elementary schools or public high schools.

### **Formal Grant Proposals**

Grant proposals are accepted at any time. Foundation meetings are held four times per year. 2012 deadlines are as follows: February 10, April 20, July 20, and October 19. If the proposal is received in completed form by the deadline it will be presented at the next scheduled meeting. Special circumstances sometimes inhibit this process, however, and a request may need to be held for a subsequent meeting. In either case, the applicant will be notified as to the status of the request.

The Foundation does not use an application form. Please submit a typewritten request that includes the following items:

- A request for a specific amount with an explanation of how the funds will be used, the geographical area and population to be served, a timetable for the drive or project and the total project budget. Please include other donor commitments, and other grant requests pending.
- A description of the organization, including a statement of its purposes and objectives.
- A list of the organization's officers and directors.
- A copy of the last audited financial statements.
- A copy of the current year operating budget.
- A copy of the IRS 501c3 tax-exempt letter.
- The name and phone number of the contact person for the request.

Applications without the basic information listed above may not be considered until all such material is made available to the Foundation.

### **Applications from the Toledo area should be directed to:**

Julie Payeff - The Andersons, Inc. - Community Commitment Manager  
Email applications are preferred - [julie\\_payeff@andersonsinc.com](mailto:julie_payeff@andersonsinc.com)  
Microsoft Word and Excel, and/or Adobe Acrobat pdf files are acceptable.

P.O. Box 119 - 480 W. Dussel Drive Maumee, Ohio 43537  
Direct - 419-891-6353 Fax - 419-891-6695 Telephone inquiries are welcome.

**Applications from outside the Toledo area will require written support from the local manager of the nearest Anderson facility. It is best to contact them prior to submitting the application to the contact listed above.**

ANDERSON FOUNDATION # 34-6528868  
TAX SCHEDULE-- FORM 990-PF  
CALENDAR YEAR 2012

Line 16c-- Other Professional Fees

DESCRIPTION	TOTAL EXPENSE 77171	%	INVESTMENT RELATED AMOUNT	%	EXEMPT PURPOSE AMOUNT
Mill Creek Capital Advisors	81,625	100	81,625		
Midpoint	4,777	100	0 **		
General Accounting	2,000	40%	800	60%	1,200
Finance	16,000	100%	16,000		
Administration	<u>2,000</u>	40%	<u>800</u>	60%	<u>1,200</u>
Total	<u><u>106,402</u></u>		<u><u>99,225</u></u>		<u><u>2,400</u></u>

\*\*limited by investment income



ANDERSON FOUNDATION #34-6528868  
TAX SCHEDULE-- FORM 990-PF  
CALENDAR YEAR 2012

Part I, Line 18 - Taxes

Foreign taxes	4,610
Federal excise taxes	<u>15,500</u>
Total	<u><u>20,110</u></u>

Part I, Line 23 - Other Expenses

Filing fees - Ohio Attorney General	<u>200</u>
Total	<u><u>200</u></u>

ANDERSON FOUNDATION #34-6528868  
TAX SCHEDULE - FORM 990-PF  
CALENDAR YEAR 2012

Part II, line 10b - Investments - corporate stock

<u>Description</u>	<u>(b) Book value</u>	<u>(c) Fair market value</u>
2,000 shares Waterford Bank	50,000	82,000
740 shares Signature Bancorp	33,300	40,700
	<u>83,300</u>	<u>122,700</u>

Part II, line 13 - Investments - other

<u>Description</u>	<u>(b) Book value</u>	<u>(c) Fair market value</u>
Delaware Large Cap Value Fund	564,469	599,421
Agincourt AGIN CFI Fund	2,903,474	2,808,848
Fred Alger Small Growth Fund	180,320	189,957
Alta Large Cap Growth Fund	523,261	605,294
Mill Creek FXD Inc MF/ETF	1,717,540	2,505,914
MFS Large Cap Value Fund	504,512	611,011
Mill Creek Funding Fund	457,440	457,440
AIM Int'l Growth Fund	339,434	433,041
Alliance Bernstein BPH-011177	385,320	445,628
Moody Aldrich Small Cap Value Fund	178,411	184,348
Alger All Cap Growth Fund	534,207	596,632
Midpoint BPD-003663	318,965	322,007
Midpoint Food And Ag Fund, L.P.	89,050	182,881
	<u>8,696,403</u>	<u>9,942,422</u>

\* Mill Creek Capital Advisors LLC manages our portfolio of mutual funds and fixed income securities

**ANDERSON FOUNDATION #34-6528868**  
**TAX SCHEDULE - FORM 990-PF**  
**CALENDAR YEAR 2012**

**Part IV, line 1 - Capital Gains and Losses for Tax on Investment Income**

(a) Description of property sold	(c) Date acquired	# of Shares	(d) Date sold	(e) Gross sales price	(g) Cost or other basis	(h) Gain or (loss)
National Financial Services, LLC						
Alliancebernstein Intl Value Fund	various	various	various	157,391.25	164,686.51	(7,295.26)
Mill Creek Mutual FD ETF	various	various	various	738,913.09	546,909.60	192,003.49
Mill Creek Mutual FD ETF Capital Gain Distributions per 1099	various	various	various	8,181.67	0.00	8,181.67
Agincourt Cap Mgmt - CFI	various	various	various	1,393,186.14	1,182,530.26	210,655.88
Delaware Large Cap Value Fund	various	various	various	99,384.32	97,213.64	2,170.68
Delaware Large Cap Value Fund	various	various	various	276,816.77	256,651.06	20,165.71
Alta Large Cap Growth	various	various	various	870,558.94	756,775.49	113,783.45
Fred Alger Small Cap Growth Fund	various	various	various	326,201.37	299,467.54	26,733.83
MFS Large Cap Value Fund	various	various	various	244,737.78	203,491.40	41,246.38
AIM Int'l Growth Fund	various	various	various	74,031.99	67,746.16	6,285.83
Moody Aldrich Small Cap Value Fund	various	various	various	100,355.99	94,481.12	5,874.87
Fred Alger ALL Cap Growth Fund	various	various	various	785,939.65	725,997.11	59,942.54
Fred Alger ALL Cap Growth Fund Capital Gain Distributions per 1099	various	various	various	138.14	0.00	138.14
MillCreek Fund BPD003663	various	various	various	2,622.88	0.00	2,622.88
<b>GRAND TOTAL</b>				<b>5,078,459.98</b>	<b>4,395,949.89</b>	<b>682,510.09</b>

\* Mill Creek Capital Advisors LLC manages our portfolio of mutual funds and fixed income securities

**THE ANDERSONS FOUNDATION**

January 1, 2012 - December 31, 2012

Tax Year 2012

Tax ID# 34-6528868

Grantee Name	Address	Purpose of Grant	Grant Amount
ASSETS Toledo	2200 Jefferson Ave. - 1st Floor Toledo, OH 43604	Higher Education	5,000.00
Blittersweet Farms	12660 Archbold Whitehouse Rd. Whitehouse, OH 4371	Human Services	2,500.00
Boy Scouts - Erie Shores Council	P.O. Box 8728 Toledo, OH 43623-0728	Other	10,000.00
Boy Scouts - Erie Shores Council	P.O. Box 8728 Toledo, OH 43623-0728	Other	2,500.00
Boys & Girls Club - Toledo	2250 N. Detroit Avenue Toledo, OH 43606	Other	2,500.00
Central City Ministries of Toledo (CCMT)	1933 Spielbusch Ave Toledo, OH 43604	Religion	5,000.00
Foundation For Life	3454 Oak Alley Court, Suite 211 Toledo, OH 43606	Educational	1,500.00
Girl Scouts of America - Western Ohio (Maumee Valley)	450 Shoup Mill Road Dayton, OH 45415	Other	2,500.00
Grace Community Center, Inc.	406 W. Delaware Ave. Toledo, OH 43610	Religion	5,000.00
Heartbeat of Toledo	4041 W. Sylvania Ave., Suite LL4 Toledo, OH 43623	Human Services	500.00
Hospice of Northwest Ohio	3000 East River Road Perrysburg, OH 43551	Human Services	5,000.00
Junior Achievement - Toledo	2239 Cheyenne Blvd. Toledo, OH 43614-1701	Educational	2,500.00
Leukemia & Lymphoma Society - Columbus	2225 Citygate Drive, Suite E Columbus, OH 43219	Human Services	5,000.00
Mountain Mentors	1910 East Broadway Street Northwood, OH 43619	Other	5,000.00
Northwest Ohio SCORE	2200 Jefferson Ave 1st Floor Toledo, OH 43604	Educational	2,500.00
Read for Literacy	25 N. Michigan Toledo, OH 43624	Educational	2,500.00
Saint Louis Center	16195 Old U.S. 12 Chelsea, MI 48118-9646	Educational	2,500.00
Sauder Village	P.O. Box 235 Archbold, OH 43502	Educational	2,500.00
Servant Leadership Center of Toledo	1618 W. Sylvania Avenue Toledo, OH 43612	Human Services	5,000.00
St. John's Jesuit High School	5901 Airport Hwy Toledo, OH 43615-7399	Educational	10,000.00
St. Kateri Catholic Schools - Cardinal Stritch High School	3225 Pickle Road Oregon, OH 43616	Educational	16,666.67
Sunshine Foundation, Inc.	7223 Maumee-Western Rd. Maumee, OH 43537-9656	Human Services	2,500.00
Sunshine Foundation, Inc.	7223 Maumee-Western Rd. Maumee, OH 43537-9656	Human Services	30,000.00
The Pregnancy Center of Greater Toledo	716 N. Westwood Ave. Toledo, OH 43607	Educational	1,000.00

The Sight Center	1002 Garden Lake Parkway Toledo, OH 43624	Human Services	3,000.00
The Sight Center	1002 Garden Lake Parkway Toledo, OH 43624	Human Services	2,000.00
Toledo School for the Arts	333 14th St. Toledo, OH 43604	Educational	5,000.00
Toledo Symphony Orchestra	1838 Parkwood Avenue, Suite 310 Toledo, OH 43624-2502	Culture	15,000.00
United Way - Greater Toledo	424 Jackson St. Toledo, OH 43604	Human Services	75,000.00
United Way - Greater Toledo	424 Jackson St. Toledo, OH 43604	Human Services	68,900.00
United Way of Greater Toledo Loaned Executive Program	424 Jackson St. Toledo, OH 43604	Human Services	7,000.00
YMCA and JCC of Greater Toledo	1550 N. Superior Street, 2nd Floor Toledo, OH 43604	Human Services	1,000.00
YMCA and JCC of Greater Toledo	1550 N. Superior Street, 2nd Floor Toledo, OH 43604	Human Services	10,000.00
		Grand Total	316,566.67

Anderson Foundation  
Tax Year 2012  
Tax ID #34-6528868

Part XV: Grants and Contributions Approved for Future Payment in 2012

Grantee Name	Address	Program Area	Grant Amount Balance
Kateri Catholic School System Cardinal Stritch High	3225 Pickle Road Oregon, OH 43616	Educational	\$16,666.66
St. John's Jesuit High School	5901 Airport Highway Toledo, OH 43614-1701	Educational	\$10,000.00
YMCA and JCC of Greater Toledo	1550 N. Superior Street, 2nd Floor Toledo, OH 43604	Human Services	\$10,000.00
Boy Scouts - Erie Shores Council	P.O. Box 8728 Toledo, OH 43623-0728	Human Services	\$10,000.00
Sunshine Foundation, Inc.	7223 Maumee-Western Rd. Maumee, OH 43537-9656	Human Services	\$30,000.00
<b>Grand Total</b>			<b>\$76,666.66</b>