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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

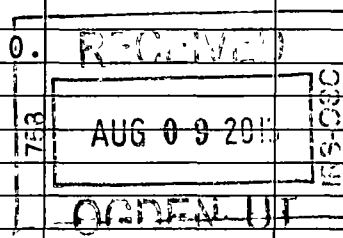
Open to public inspection

For calendar year 2012 or tax year beginning

, and ending

Name of foundation LOWRY BERTELSEN CHARITABLE TRUST		A Employer identification number 35-6020338
Number and street (or P.O. box number if mail is not delivered to street address) OLD NATIONAL BANK, ONE MAIN STREET	Room/suite	B Telephone number 812-464-1200
City or town, state, and ZIP code EVANSVILLE, IN 47708		C If exemption application is pending, check here ☐
G Check all that apply: ☐ Initial return ☐ Initial return of a former public charity ☐ Final return ☐ Amended return ☐ Address change ☐ Name change		D 1. Foreign organizations, check here ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ☐
H Check type of organization: ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here ☐
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 1,530,922.	J Accounting method: ☒ Cash ☐ Accrual ☐ Other (specify) _____	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a).)		(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 ☒ If the foundation is not required to attach Sch. B					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities		38,803.	38,803.		STATEMENT 1
5a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10		27,486.			
b Gross sales price for all assets on line 6a 254,987.					
7 Capital gain net income (from Part IV, line 2)			27,486.		
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		66,289.	66,289.		
13 Compensation of officers, directors, trustees, etc		17,033.	17,033.		0.
14 Other employee salaries and wages					
15 Pension plans, employee benefits					
16a Legal fees					
b Accounting fees STMT 2		730.	0.		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		17,763.	17,033.		0.
25 Contributions, gifts, grants paid		128,249.			128,249.
26 Total expenses and disbursements. Add lines 24 and 25		146,012.	17,033.		128,249.
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements		<79,723.>			
b Net investment income (if negative, enter -0-)			49,256.		
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
Assets	1 Cash - non-interest-bearing	60,311.	78,811.	78,811.
	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			
	b Investments - corporate stock			
	c Investments - corporate bonds			
Liabilities	11 Investments - land, buildings, and equipment basis ▶			
	Less accumulated depreciation ▶			
	12 Investments - mortgage loans			
	13 Investments - other STMT 3	1,255,119.	1,156,896.	1,452,111.
	14 Land, buildings, and equipment basis ▶			
	Less accumulated depreciation ▶			
	15 Other assets (describe ▶)			
	16 Total assets (to be completed by all filers)	1,315,430.	1,235,707.	1,530,922.
	17 Accounts payable and accrued expenses			
	18 Grants payable			
Net Assets or Fund Balances	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe ▶)			
	23 Total liabilities (add lines 17 through 22)	0.	0.	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ ☐			
	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 ▶ ☒			
	and complete lines 27 through 31			
	27 Capital stock, trust principal, or current funds	0.	0.	
28 Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.		
29 Retained earnings, accumulated income, endowment, or other funds	1,315,430.	1,235,707.		
30 Total net assets or fund balances	1,315,430.	1,235,707.		
31 Total liabilities and net assets/fund balances	1,315,430.	1,235,707.		

Part III Analysis of Changes in Net Assets or Fund Balances

1 Total net assets or fund balances at beginning of year - Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	1,315,430.
2 Enter amount from Part I, line 27a	2	<79,723.>
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	1,235,707.
5 Decreases not included in line 2 (itemize) ▶	5	0.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	1,235,707.

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)			(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a PUBLICLY TRADED SECURITIES					
b					
c					
d					
e					
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)		
a 254,987.		227,501.	27,486.		
b					
c					
d					
e					
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))		
a			27,486.		
b					
c					
d					
e					
2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }			2	27,486.	
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8			3	N/A	

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

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

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

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

☐ Yes ☒ No

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2011	78,494.	1,471,999.	.053325
2010	70,657.	1,423,453.	.049638
2009	78,182.	1,339,282.	.058376
2008	73,095.	1,493,692.	.048936
2007	75,277.	1,613,397.	.046657
2 Total of line 1, column (d)			2 .256932
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 .051386
4 Enter the net value of noncharitable-use assets for 2012 from Part X, line 5			4 1,434,531.
5 Multiply line 4 by line 3			5 73,715.
6 Enter 1% of net investment income (1% of Part I, line 27b)			6 493.
7 Add lines 5 and 6			7 74,208.
8 Enter qualifying distributions from Part XII, line 4			8 128,249.

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

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

1a Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)			
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☒ and enter 1% of Part I, line 27b		1	493.
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	493.
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	493.
6 Credits/Payments:			
a 2012 estimated tax payments and 2011 overpayment credited to 2012	6a	621.	
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	621.	
8 Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached	8		
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9		
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	128.	
11 Enter the amount of line 10 to be: Credited to 2013 estimated tax ☒ 128. Refunded ☐	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)? 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. ☒ \$ 0. (2) On foundation managers. ☒ \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ☒ \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?		X
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV.	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ☒ IN		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2012 or the taxable year beginning in 2012 (see instructions for Part XIV)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

N/A

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	

Website address **N/A**

14 The books are in care of **OLD NATIONAL BANK** Telephone no. **812-464-1200**
 Located at **ONE MAIN STREET, EVANSVILLE, IN** ZIP+4 **47708**

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

16 At any time during calendar year 2012, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?
 See the instructions for exceptions and filing requirements for Form TD F 90-22.1. If "Yes," enter the name of the foreign country **16** **Yes** **No**
X

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

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

	Yes	No
1a During the year did the foundation (either directly or indirectly):		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	☐ Yes ☒ No	
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	☐ Yes ☒ No	
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	☐ Yes ☒ No	
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	☐ Yes ☒ No	
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	☐ Yes ☒ No	
(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)	☐ Yes ☒ No	
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here	N/A	1b
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2012?		1c X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):		
a At the end of tax year 2012, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2012? If "Yes," list the years N/A	☐ Yes ☒ No	2b
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.)	N/A	2b
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	☐ 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.)	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)? ☐ Yes ☒ NoOrganizations relying on a current notice regarding disaster assistance check here ☐ ☒

N/A

5b

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

N/A

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? ☐ Yes ☒ No

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? ☐ Yes ☒ No

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
OLD NATIONAL BANK	TRUSTEE			
ONE MAIN STREET				
EVANSVILLE, IN 47708	1.00	17,033.	0.	0.

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

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

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

0

Form 990-PF (2012)

Part 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	1,420,172.
b	Average of monthly cash balances	1b	36,205.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	1,456,377.
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	1,456,377.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	21,846.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	1,434,531.
6	Minimum investment return. Enter 5% of line 5	6	71,727.

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	71,727.
2a	Tax on investment income for 2012 from Part VI, line 5	2a	493.
b	Income tax for 2012. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	493.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	71,234.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	71,234.
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	71,234.

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	128,249.
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	128,249.
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	493.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	127,756.

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				71,234.
2 Undistributed income, if any, as of the end of 2012				
a Enter amount for 2011 only			55,232.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2012:				
a From 2007				
b From 2008				
c From 2009				
d From 2010				
e From 2011				
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2012 from Part XII, line 4: ► \$ 128,249.				
a Applied to 2011, but not more than line 2a			55,232.	
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				71,234.
e Remaining amount distributed out of corpus	1,783.			
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:	1,783.			
a Corpus Add lines 3f, 4c, and 4e Subtract line 5				
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	1,783.			
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	1,783.			

Part XV Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
EVANSVILLE PROTESTANT HOME		PUBLIC CHARITY	CHARITABLE SUPPORT	42,749.
ST JOHN'S UNITED CHURCH OF CHRIST		PUBLIC CHARITY	CHARITABLE SUPPORT	85,500.
Total			3a	128,249.
b Approved for future payment				
NONE				
Total			3b	0.

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

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

[illegible]

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

b If "Yes," complete the following schedule.		
(a) Name of organization	(b) Type of organization	(c) Description of relationship
N/A		

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 and correct. I am a preparer of this return (If preparer's name is on the return, the preparer's signature is based on all information of which preparer has any knowledge)

Sign Here **OLD NATIONAL TRUST CO AS TRUSTEE**

By *[Signature]* 108573 TRUSTEE

Signature of officer or trustee Date Title

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

Paid Preparer Use Only	Print/Type preparer's name KYLE P. WANINGER, CPA	Preparer's signature KYLE P. WANINGER,	Date 07/19/13	Check ☐ if self-employed	PTIN P01066679
	Firm's name ▶ KEMPER CPA GROUP LLP			Firm's EIN ▶ 37-0818432	
	Firm's address ▶ 7200 EAGLE CREST BLVD EVANSVILLE, IN 47715			Phone no. (812) 421-8000	

FORM 990-PF	DIVIDENDS AND INTEREST FROM SECURITIES	STATEMENT	1
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SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
VARIOUS	38,803.	0.	38,803.
TOTAL TO FM 990-PF, PART I, LN 4	38,803.	0.	38,803.

FORM 990-PF	ACCOUNTING FEES	STATEMENT	2
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING FEES	730.	0.		0.
TO FORM 990-PF, PG 1, LN 16B	730.	0.		0.

FORM 990-PF	OTHER INVESTMENTS	STATEMENT	3
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DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
SCHEDULE ATTACHED	COST	1,156,896.	1,452,111.
TOTAL TO FORM 990-PF, PART II, LINE 13		1,156,896.	1,452,111.

AS OF DATE: 12/31/12

CUSIP NUMBER SECURITY DESCRIPTION

CUSIP NUMBER	SECURITY DESCRIPTION	UNITS	CARRYING VALUE	PRICE DATE 12/31/2012	MARKET VALUE 12/31/2012
002824-10-0	ABBOTT LABS	339.000	18,708.31	65.500 12/31/2012	22,204.50
012653-10-1	ALBEMARLE CORP	159.000	7,627.23	62.120 12/31/2012	9,877.08
018490-10-2	ALLERGAN INC COM	151.000	14,070.78	91.730 12/31/2012	13,851.23
037833-10-0	APPLE INC	72.000	26,471.51	532.172 12/31/2012	38,316.45
06738G-40-7	BARCLAYS BK IPATH INDL COMMODITY ETN	437.000	15,287.22	34.870 12/31/2012	15,238.23
071813-AU-3	BAXTER INTL INC SR NT 4.625% DTD 09/15/2003 DUE 03/15/2015 CALLABLE	25,000.000	25,343.50	108.299 12/31/2012	27,074.75
14912L-4E-8	CATERPILLAR FINL SVCS MTNS FR 7.15% DTD 02/12/2009 DUE 02/15/2019 NON-CALLABLE	25,000.000	25,750.00	130.206 12/31/2012	32,551.50
166764-10-0	CHEVRON CORP	131.000	7,095.67	108.140 12/31/2012	14,166.34
16753X-AP-7	CHICAGO ILL HSG AUTH REV BDS TAXABLE 5.86% DTD 02/16/2010 DUE 01/01/2024 CALLABLE	25,000.000	25,257.50	109.677 12/31/2012	27,419.25
171340-10-2	CHURCH & DWIGHT INC	253.000	10,856.38	53.570 12/31/2012	13,553.21
172967-42-4	CITIGROUP INC	292.000	7,116.01	39.560 12/31/2012	11,551.52
191216-AM-2	COCA COLA CO SR NT 4.875% DTD 03/06/2009 DUE 03/15/2019 CALLABLE	25,000.000	25,050.00	119.281 12/31/2012	29,820.25
22160K-10-5	COSTCO WHSL CORP NEW	137.000	11,223.66	98.730 12/31/2012	13,526.01
235851-10-2	DANAHER CORP	427.000	19,385.21	55.900 12/31/2012	23,869.30
244199-10-5	DEERE & CO	195.000	15,957.86	86.420 12/31/2012	16,851.90
25490A-30-9	DIRECTV	469.000	21,279.83	50.160 12/31/2012	23,525.04

63-0129-01-3 LOWRY BERTELSEN CHARITABLE TUV

CUSIP NUMBER SECURITY DESCRIPTION

262028-30-1 DRIEHAUS EMERGING MKTS GROWTH FD #3

268648-10-2 EMC CORP

269858-30-4 EAGLE SMALL CAP GROWTH CL I FD #3933

291011-10-4 EMERSON ELEC CO

30231G-10-2 EXXON MOBIL CORP

314172-26-3 FEDERATED CLOVER SMALL VALUE CL IS FD #659

354613-10-1 FRANKLIN RES INC

377372-AD-9 GLAXOSMITHKLINE CAP INC GTD NT 5.65% DTD 05/13/2008 DUE 05/15/2018 CALLABLE

38141G-10-4 GOLDMAN SACHS

38141W-32-3 GOLDMAN SACHS FINANCIAL SQUARE TREASURY OBLIGATION #468

38141W-39-8 GOLDMAN SACHS MID CAP VALUE INSTL FD #864

38142Y-40-1 GOLDMAN SACHS GROWTH OPPORTUNITIES CL I FD #1132

38144X-50-0 GOLDMAN SACHS GROUP INC PFD

444859-10-2 HUMANA INC

459200-10-1 INTL BUSINESS MACHS CORP

46418#-AA-3 IRWIN BANK AND TRUST CANTERBURY APARTMENTS 5.4% MAT 06/19/2014

46625H-AX-8 JPMORGAN CHASE & CO 5.25% 05/01/2015

UNITS CARRYING VALUE

1,617.722 45,283.86

720.000 15,971.01

458.650 19,212.83

295.000 8,422.32

316.000 13,051.64

905.104 18,645.14

73.000 6,768.55

50,000.000 50,301.00

97.000 8,811.21

78,810.700 78,810.70

2,207.773 72,625.65

2,213.936 50,238.94

1,000.000 25,000.00

145.000 11,894.92

128.000 22,943.72

15,637.700 16,556.91

10,000.000 9,040.20

PRICE DATE

30.610 12/31/2012

25.300 12/31/2012

43.760 12/31/2012

52.960 12/31/2012

86.550 12/31/2012

20.840 12/31/2012

125.700 12/31/2012

121.804 12/31/2012

127.560 12/31/2012

1.000 12/31/2012

39.290 12/31/2012

24.710 12/31/2012

25.150 12/31/2012

68.630 12/31/2012

191.550 12/31/2012

108.783 12/31/2012

MARKET VALUE

49,518.47

18,216.00

20,070.52

15,623.20

27,349.80

18,862.37

9,176.10

60,902.00

12,373.32

78,810.70

86,743.40

54,706.36

25,150.00

9,951.35

24,518.40

16,556.91

10,878.30

63-0129-01-3 LOWRY BERTELSEN CHARITABLE TUV

AS OF DATE: 12/31/12

CUSIP NUMBER SECURITY DESCRIPTION

UNITS CARRYING VALUE

PRICE DATE

MARKET VALUE

46625H-10-0 JPMORGAN CHASE & CO

457.000 13,355.92

43.969
12/31/2012

20,093.88

516228-PN-7 LANSE CREUSE MICH PUB SCHS SCH BLDG
AND SITE BDS 2010B TAXABLE 5.482%
DTD 05/18/2010 DUE 05/01/2021
CALLABLE

25,000.000 25,734.25

115.895
12/31/2012

28,973.75

51971E-BS-5 LAWRENCE CNTY IND ECONOMIC DEV ECON
DEV REV BDS 2003A AMT 4.75% DTD
10/22/2003 DUE 12/23/2020 CALLABLE

25,000.000 25,750.00

102.620
12/31/2012

25,655.00

580135-10-1 MCDONALDS CORP

179.000 6,365.98

88.210
12/31/2012

15,789.59

59156R-10-8 METLIFE INC

464.000 13,299.75

32.940
12/31/2012

15,284.16

617461-20-7 MORGAN STANLEY CAP TR VI CAP SECS
PFD

1,000.000 25,000.00

25.200
12/31/2012

25,200.00

61747M-SC-6 MORGAN STANLEY BK N A UTAH CTF DEP
5.00% DTD 12/05/2008 DUE 12/05/2013
NON-CALLABLE

25,000.000 25,000.00

104.057
12/31/2012

26,014.25

655044-10-5 NOBLE ENERGY INC

113.000 9,874.45

101.740
12/31/2012

11,496.62

68389X-10-5 ORACLE CORP

692.000 20,221.54

33.320
12/31/2012

23,057.44

714290-10-3 PERRIGO CO

84.000 8,656.44

104.030
12/31/2012

8,738.52

74005P-10-4 PRAXAIR INC

169.000 16,061.15

109.450
12/31/2012

18,497.05

747525-10-3 QUALCOMM INC

360.000 19,375.85

61.859
12/31/2012

22,269.46

74762E-10-2 QUANTA SVCS INC

464.000 8,895.62

27.290
12/31/2012

12,662.56

806857-10-8 SCHLUMBERGER LTD

164.000 11,087.80

69.298
12/31/2012

11,364.97

81369Y-30-8 SELECT SECTOR SPDR CONSUMER
STAPLES

266.000 8,980.16

34.900
12/31/2012

9,283.40

81369Y-40-7 SELECT SECTOR SPDR CONSUMER
DISCRETIONARY

178.000 6,559.21

47.439
12/31/2012

8,444.16

63-0129-01-3 LOWRY BERTELSEN CHARITABLE TUV

AS OF DATE: 12/31/12

CUSIP NUMBER SECURITY DESCRIPTION

UNITS CARRYING VALUE

PRICE DATE

PRICE DATE

MARKET VALUE

81369Y-88-6 SELECT SECTOR SPDR TR UTILS

249.000 9,018.78

34.920
12/31/2012

8,695.20

828807-CB-1 SIMON PPTY GROUP LP NT
6.75% DTD 05/15/2009 DUE 05/15/2014
CALLABLE

25,000.000 25,437.50

106.668
12/31/2012

26,667.00

858912-10-8 STERICYCLE INC

123.000 9,413.18

93.280
12/31/2012

11,473.44

872540-10-9 TJX CO INC

287.000 8,519.75

42.450
12/31/2012

12,183.15

87612E-10-6 TARGET CORP

301.000 15,524.74

59.170
12/31/2012

17,810.17

883556-10-2 THERMO FISHER SCIENTIFIC INC

307.000 13,873.21

63.780
12/31/2012

19,580.46

885215-56-6 THORNBURG INTL VALUE CL I FD
#209

1,732.440 42,087.67

28.090
12/31/2012

48,664.24

922908-55-3 VANGUARD REIT ETF

519.000 27,469.38

65.800
12/31/2012

34,150.20

926744-AY-9 VIGO CNTY IND REDEV AUTH ECONO REF
BDS TAXABLE 5.30% DTD 07/28/2005 DUE
02/01/2021 CALLABLE

25,000.000 24,050.00

107.353
12/31/2012

26,838.25

92826C-83-9 VISA INC CL A

185.000 16,670.34

151.580
12/31/2012

28,042.30

931142-10-3 WALMART STORES INC

282.000 15,745.34

68.230
12/31/2012

19,240.86

931422-10-9 WALGREEN CO

454.000 14,858.41

37.010
12/31/2012

16,802.54

949746-NX-5 WELLS FARGO & CO 5.625% 12/11/2017

5,000.000 4,595.00

119.270
12/31/2012

5,963.50

949746-10-1 WELLS FARGO & CO NEW

596.000 14,166.62

34.180
12/31/2012

20,371.28

TOTAL HOLDINGS

1,235,707.31

1,452,111.16

TOTAL INCOME CASH

136,224.37-

136,224.37-

TOTAL PRINCIPAL CASH

136,224.37

136,224.37

TOTAL ACCOUNT

1,235,707.31

1,452,111.16

Application for Extension of Time To File an Exempt Organization Return

OMB No 1545-1709

► File a separate application for each return.

- If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** and check this box ☒
- If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only **Part II** (on page 2 of this form)

Do not complete Part II unless you have already been granted an automatic 3-month extension on a previously filed Form 8868

Electronic filing (e-file). You can electronically file Form 8868 if you need a 3-month automatic extension of time to file (6 months for a corporation required to file Form 990-T), or an additional (not automatic) 3-month extension of time. You can electronically file Form 8868 to request an extension of time to file any of the forms listed in Part I or Part II with the exception of Form 8870, Information Return for Transfers Associated With Certain Personal Benefit Contracts, which must be sent to the IRS in paper format (see instructions) For more details on the electronic filing of this form, visit www.irs.gov/efile and click on *e-file for Charities & Nonprofits*.

Part I Automatic 3-Month Extension of Time. Only submit original (no copies needed).

A corporation required to file Form 990-T and requesting an automatic 6-month extension - check this box and complete

Part I only

All other corporations (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns.

Type or print	Name of exempt organization or other filer, see instructions.	Employer identification number (EIN) or
	LOWRY BERTELSEN CHARITABLE TRUST	35-6020338
	Number, street, and room or suite no. If a P.O. box, see instructions.	Social security number (SSN)
	OLD NATIONAL BANK, ONE MAIN STREET	
	City, town or post office, state, and ZIP code. For a foreign address, see instructions	
	EVANSVILLE, IN 47708	

Enter the Return code for the return that this application is for (file a separate application for each return)

04

Application Is For	Return Code	Application Is For	Return Code
Form 990 or Form 990-EZ	01	Form 990-T (corporation)	07
Form 990-BL	02	Form 1041-A	08
Form 4720 (individual)	03	Form 4720	09
Form 990-PF	04	Form 5227	10
Form 990-T (sec. 401(a) or 408(a) trust)	05	Form 6069	11
Form 990-T (trust other than above)	06	Form 8870	12

OLD NATIONAL BANK

- The books are in the care of ► **ONE MAIN STREET - EVANSVILLE, IN 47708**

Telephone No. ► **812-464-1200**

FAX No ►

- If the organization does not have an office or place of business in the United States, check this box ☐
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) . If this is for the whole group, check this box ☐ If it is for part of the group, check this box ☐ and attach a list with the names and EINs of all members the extension is for

- 1 I request an automatic 3-month (6 months for a corporation required to file Form 990-T) extension of time until **AUGUST 15, 2013**, to file the exempt organization return for the organization named above. The extension is for the organization's return for:
► ☒ calendar year **2012** or
► ☐ tax year beginning , and ending .

- 2 If the tax year entered in line 1 is for less than 12 months; check reason ☐ Initial return ☐ Final return
☐ Change in accounting period

3a If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions	3a	\$	0.
b If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit	3b	\$	621.
c Balance due. Subtract line 3b from line 3a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions	3c	\$	0.

Caution. If you are going to make an electronic fund withdrawal with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions.

LHA For Privacy Act and Paperwork Reduction Act Notice, see instructions.

Form **8868** (Rev. 1-2013)