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Form **990-PF**

Department of the Treasury
Internal Revenue Service

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

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

OMB No 1545-0052

2012
Open to Public Inspection

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

Name of foundation THE SIMMS FAMILY FOUNDATION C/O VOGEL CONSULTING SC		A Employer identification number 36-3413327	
Number and street (or P O box number if mail is not delivered to street address) 3415 GATEWAY ROAD		B Telephone number (see instructions) (262) 790-4960	
City or town, state, and ZIP code BROOKFIELD, WI 53045		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) ☒ \$ 6,541,586	J Accounting method ☒ Cash ☐ Accrual ☐ Other (specify) _____ (Part I, column (d) must be on cash basis.)	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐	

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)				
	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.	122,162	122,162		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	38,978			
	b Gross sales price for all assets on line 6a _____ 1,183,636				
	7 Capital gain net income (from Part IV , line 2)		38,978		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
Operating and Administrative Expenses	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)	☒ 181	181		
	12 Total. Add lines 1 through 11	161,321	161,321		
	13 Compensation of officers, directors, trustees, etc	0	0		0
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)	☒ 9,930	0		9,930
	c Other professional fees (attach schedule)	☒ 90,717	90,717		0
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	☒ 13,231	5,396		0
	19 Depreciation (attach schedule) and depletion	☒ 1,090	0		
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	☒ 1,423	413		0
	24 Total operating and administrative expenses. Add lines 13 through 23	116,391	96,526		9,930
	25 Contributions, gifts, grants paid	398,465			398,465
	26 Total expenses and disbursements. Add lines 24 and 25	514,856	96,526		408,395
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	-353,535			
	b Net investment income (if negative, enter -0-)		64,795		
	c Adjusted net income (if negative, enter -0-)				

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)	Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing			
	2	Savings and temporary cash investments	38,741	36,973	36,973
	3	Accounts receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	4	Pledges receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see page 15 of the instructions)			
	7	Other notes and loans receivable (attach schedule) ▶ _____ Less allowance for doubtful accounts ▶ _____			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10a	Investments—U S and state government obligations (attach schedule)	247,544	 145,362	182,014
	b	Investments—corporate stock (attach schedule)	3,685,492	 3,642,611	4,275,130
	c	Investments—corporate bonds (attach schedule).			
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)	1,984,939	 1,791,975	2,045,833
	14	Land, buildings, and equipment basis ▶ _____ 4,784 Less accumulated depreciation (attach schedule) ▶ _____ 3,148	2,726	 1,636	1,636
15	Other assets (describe ▶ _____)				
16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	5,959,442	5,618,557	6,541,586	
Liabilities	17	Accounts payable and accrued expenses			
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶ _____)			
	23	Total liabilities (add lines 17 through 22)	0	0	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ ☐ and complete lines 24 through 26 and lines 30 and 31.				
	24	Unrestricted			
	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	6,430,745	6,430,745	
	28	Paid-in or capital surplus, or land, bldg , and equipment fund	0	0	
	29	Retained earnings, accumulated income, endowment, or other funds	-471,303	-812,188	
	30	Total net assets or fund balances (see page 17 of the instructions)	5,959,442	5,618,557	
31	Total liabilities and net assets/fund balances (see page 17 of the instructions)	5,959,442	5,618,557		

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 5,959,442
2	Enter amount from Part I, line 27a	2 -353,535
3	Other increases not included in line 2 (itemize) ▶ _____ 	3 12,650
4	Add lines 1, 2, and 3	4 5,618,557
5	Decreases not included in line 2 (itemize) ▶ _____	5 0
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6 5,618,557

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)
1 a	NORTHERN TRUST	P	2012-01-01	2012-12-31
b	NORTHERN TRUST	P	2011-01-01	2012-12-31
c	NORTHERN TRUST MAF K-1 SECT 1250	P	2011-01-01	2012-12-31
d	CAPITAL GAINS DIVIDENDS	P		
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 424,153		424,808	-655
b 751,128		719,850	31,278
c 20			20
d 8,335			8,335
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(I) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
a			-655
b			31,278
c			20
d			8,335
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	38,978
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8		3	

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☒ No

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

1 Enter the appropriate amount in each column for each year, see page 18 of the instructions before making any entries

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2011	326,461	6,645,324	0 049126
2010	266,112	6,293,287	0 042285
2009	295,171	5,788,110	0 050996
2008	290,152	6,560,892	0 044224
2007	324,688	6,487,412	0 050049

2 Total of line 1, column (d).	2	0 236680
3 Average distribution ratio for the 5-year base period—divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	0 047336
4 Enter the net value of noncharitable-use assets for 2012 from Part X, line 5.	4	6,444,561
5 Multiply line 4 by line 3.	5	305,060
6 Enter 1% of net investment income (1% of Part I, line 27b).	6	648
7 Add lines 5 and 6.	7	305,708
8 Enter qualifying distributions from Part XII, line 4.	8	408,395

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 page 18 of the instructions)

1a		Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1			
		Date of ruling or determination letter _____ (attach copy of letter if necessary—see instructions)			
b		Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☒ and enter 1% of Part I, line 27b		1	648
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	648
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	648
6		Credits/Payments			
a		2012 estimated tax payments and 2011 overpayment credited to 2012	6a	6,080	
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	6,080
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	5,432
11		Enter the amount of line 10 to be Credited to 2013 estimated tax 700	Refunded	11	4,732

Part VII-A

Statements Regarding Activities

1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		Yes	No
		1a		No
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)?			No
	If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.			
c	Did the foundation file Form 1120-POL for this year?	1c		No
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation \$ 0 (2) On foundation managers \$ 0			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers \$ 0			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.	2		No
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes	3		No
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a		No
b	If "Yes," has it filed a tax return on Form 990-T for this year?	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.	5		No
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	Yes	
7	Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), and Part XV	7	Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) IL			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation .	8b	Yes	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2012 or the taxable year beginning in 2012 (see instructions for Part XIV)? If "Yes," complete Part XIV	9		No
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10		No

Part VII-A

Statements Regarding Activities *(continued)*

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions).	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Yes	
Website address ▶N/A				
14	The books are in care of ▶VOGEL CONSULTING SC Telephone no ▶(262) 790-4960 Located at ▶3415 GATEWAY ROAD BROOKFIELD WI ZIP +4 ▶53045			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here ▶ ☐ and enter the amount of tax-exempt interest received or accrued during the year ▶	15		
16	At any time during calendar year 2012, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?	16		No
See instructions for exceptions and filing requirements for Form TD F 90-22.1 If "Yes", enter the name of the foreign country ▶				

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			Yes	No
1a	During the year did the foundation (either directly or indirectly) (1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☒ No (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?. ☐ Yes ☒ No (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☒ No (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?. ☐ Yes ☒ No (6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days). ☐ Yes ☒ No			
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)?. . . Organizations relying on a current notice regarding disaster assistance check here. ▶ ☐	1b		
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2012?.	1c		No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2012, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2012?. ☐ Yes ☒ No If "Yes," list the years ▶ 20____, 20____, 20____, 20____			
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions).	2b		
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ▶ 20____, 20____, 20____, 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?. ☐ Yes ☒ No			
b	If "Yes," did it have excess business holdings in 2012 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (<i>Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2012.</i>).	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2012?	4b		No

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required (continued)

5a	During the year did the foundation pay or incur any amount to			
	(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	☐ 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		
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?	6b		No
	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?	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 (see instructions).				
(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
See Additional Data Table				
2 Compensation of five highest-paid employees (other than those included on line 1—see instructions). If none, enter "NONE."				
(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				
Total number of other employees paid over \$50,000.				0

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
NORTHERN TRUST	INVESTMENT ADVISOR	84,062
PO BOX 803878		
CHICAGO,IL 60680		
Total number of others receiving over \$50,000 for professional services.		0

Part IX-A

Summary of Direct Charitable Activities

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

Part IX-B

Summary of Program-Related Investments (see instructions)

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

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	6,407,104
b	Average of monthly cash balances.	1b	135,598
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	6,542,702
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	6,542,702
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	98,141
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	6,444,561
6	Minimum investment return. Enter 5% of line 5.	6	322,228

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	322,228
2a	Tax on investment income for 2012 from Part VI, line 5.	2a	648
b	Income tax for 2012 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	648
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	321,580
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	321,580
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	321,580

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	408,395
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	408,395
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see instructions).	5	648
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	407,747
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				321,580
2 Undistributed income, if any, as of the end of 2012				
a Enter amount for 2011 only.			0	
b Total for prior years 20____, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2012				
a From 2007.				
b From 2008.				
c From 2009.				
d From 2010.				
e From 2011.	671			
f Total of lines 3a through e.	671			
4 Qualifying distributions for 2012 from Part XII, line 4 ▶ \$ 408,395				
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.				321,580
e Remaining amount distributed out of corpus	86,815			
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	87,486			
b Prior years' undistributed income Subtract line 4b from line 2b.		0		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.		0		
d Subtract line 6c from line 6b Taxable amount—see instructions		0		
e Undistributed income for 2011 Subtract line 4a from line 2a Taxable amount—see instructions			0	
f Undistributed income for 2012 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2013.				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions).	0			
8 Excess distributions carryover from 2007 not applied on line 5 or line 7 (see instructions). . . .	0			
9 Excess distributions carryover to 2013. Subtract lines 7 and 8 from line 6a.	87,486			
10 Analysis of line 9				
a Excess from 2008.				
b Excess from 2009.				
c Excess from 2010.				
d Excess from 2011.	671			
e Excess from 2012.	86,815			

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

1a

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

b

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

☐ 4942(j)(3) or ☐ 4942(j)(5)

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

Part XVSupplementary Information (Complete this part only if the organization had \$5,000 or more in assets at any time during the year—see instructions.)

1

Information Regarding Foundation Managers:

a

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

b

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

2

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

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

a

The name, address, and telephone number of the person to whom applications should be addressed

b

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

c

Any submission deadlines

d

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

Part XV

Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year See Additional Data Table				
Total			3a	398,465
b Approved for future payment				
Total			3b	0

Enter gross amounts unless otherwise indicated		Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions)
		(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1	Program service revenue					
a	_____					
b	_____					
c	_____					
d	_____					
e	_____					
f	_____					
g	Fees and contracts from government agencies					
2	Membership dues and assessments. . . .					
3	Interest on savings and temporary cash investments					
4	Dividends and interest from securities. . . .			14	122,162	
5	Net rental income or (loss) from real estate					
a	Debt-financed property.					
b	Not debt-financed property.					
6	Net rental income or (loss) from personal property					
7	Other investment income.			14	181	
8	Gain or (loss) from sales of assets other than inventory			18	38,978	
9	Net income or (loss) from special events					
10	Gross profit or (loss) from sales of inventory. .					
11	Other revenue a _____					
b	_____					
c	_____					
d	_____					
e	_____					
12	Subtotal. Add columns (b), (d), and (e). .		0		161,321	0
13	Total. Add line 12, columns (b), (d), and (e).			13	161,321	

[illegible]

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

[illegible]

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

b If "Yes," complete the following schedule

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

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

*****	2013-05-13	*****
Signature of officer or trustee	Date	Title

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

Paid Preparer Use Only	Print/Type preparer's name	Preparer's Signature	Date	Check if self-employed ☐	PTIN P00366024
	SHANNON M ZUR	SHANNON M ZUR			
	Firm's name ☐	VOGEL CONSULTING GROUP SC		Firm's EIN ☐ 39-1774588	
		3415 GATEWAY ROAD			
	Firm's address ☐	BROOKFIELD, WI 53045		Phone no (262) 790-4960	

Form 990PF Part VIII Line 1 - List all officers, directors, trustees, foundation managers and their compensation

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
JOHN D SIMMS JR	PRESIDENT, DIRECTOR 0 00	0	0	0
3415 GATEWAY RD BROOKFIELD,WI 53045				
JEAN M SIMMS	ASST SECRETARY, DIRECTOR 0 00	0	0	0
3415 GATEWAY RD BROOKFIELD,WI 53045				
FREDERICK V SIMMS	VP,SECRETARY & DIRECTOR 0 00	0	0	0
3415 GATEWAY RD BROOKFIELD,WI 53045				
MICHELLE P SIMMS	TREASURER 0 00	0	0	0
3415 GATEWAY RD BROOKFIELD,WI 53045				
MARY JEAN BECK-CALCAGNO	ASST TREASURER, DIRECTOR 0 00	0	0	0
3415 GATEWAY RD BROOKFIELD,WI 53045				
JOHN D SIMMS	DIRECTOR 0 00	0	0	0
3415 GATEWAY RD BROOKFIELD,WI 53045				

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
ADMIRAL NIMITZ FOUNDATION PO BOX 1188 FREDERICKBURG,TX 78624	NONE	PUBLIC	CHARITABLE	150
ADVOCATE CHARITABLE FOUNDATION LUTHERAN GENERAL FOUNDATION PARK RIDGE,IL 60068	NONE	PUBLIC	CHARITABLE	750
ADVOCATE CHARITABLE FOUNDATION LUTHERAN GENERAL FOUNDATION PARK RIDGE,IL 60068	NONE	PUBLIC	CHARITABLE	6,000
ADVOCATE CHARITABLE FOUNDATION LUTHERAN GENERAL FOUNDATION PARK RIDGE,IL 60068	NONE	PUBLIC	CHARITABLE	20,000
ALLIANCE FOR CHARACTER AND EDUCATION(THE) 1480 RENAISSANCE DR PARK RIDGE,IL 60068	NONE	PUBLIC	CHARITABLE	1,000
ALZHEIMER'S DISEASE RESEARCH 22512 GATEWAY CENTER DR CLARKSBURG,MD 20871	NONE	PUBLIC	CHARITABLE	1,000
AMERICAN AIR MUSEUM US MEMBERSHIP CENTER WASHINGTON,DC 200777039	NONE	PUBLIC	CHARITABLE	300
AMERICAN DIABETES ASSOCIATION PO BOX 1643 MERRIFIELD,VA 22116	NONE	PUBLIC	CHARITABLE	250
ANNUAL CATHOLIC APPEAL 835 N RUSH ST CHICAGO,IL 60611	NONE	PUBLIC	CHARITABLE	1,000
ARABIAN HORSEMEN'S DISTRESS FUND THE 236 HENRY SANFORD RD BRIDGEWATER,CT 06752	NONE	PUBLIC	CHARITABLE	500
ARTHRITIS FOUNDATION PO BOX 1187 CHICAGO,IL 60690	NONE	PUBLIC	CHARITABLE	200
AURORA LAKELAND MEDICAL CENTER W3985 COUNTY RD NN ELKHORN,WI 53121	NONE	PUBLIC	CHARITABLE	2,000
AVENUES TO INDEPENDENCE FOUNDATION 515 BUSSE HWY PARK RIDGE,IL 60068	NONE	PUBLIC	CHARITABLE	200
AVENUES TO INDEPENDENCE FOUNDATION 515 BUSSE HWY PARK RIDGE,IL 60068	NONE	PUBLIC	CHARITABLE	500
AVENUES TO INDEPENDENCE FOUNDATION 515 BUSSE HWY PARK RIDGE,IL 60068	NONE	PUBLIC	CHARITABLE	10,000

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
AVOW HOSPICE 1095 WHIPPOORWILL LANE NAPLES,FL 34105	NONE	PUBLIC	CHARITABLE	500
BCCA SCHOLARSHIP FUND 8700 BAY COLONY DR NAPLES,FL 34108	NONE	PUBLIC	CHARITABLE	1,000
BENEVOLENT ORDER OF ELKS PO BOX 14849 CHICAGO,IL 60614	NONE	PUBLIC	CHARITABLE	200
BLUE GAVEL SCHOLARSHIP FUND INC 700 S FOURTEENTH AVE NAPLES,FL 341087396	NONE	PUBLIC	CHARITABLE	1,000
BOCA BALLET THEATRE COMPANY 131-B SE MIZNER BLVD BOCA RATON,FL 33432	NONE	PUBLIC	CHARITABLE	2,500
BOCA RATON HISTORICAL SOCIETY 71 N FEDERAL HIGHWAY BOCA RATON,FL 33432	NONE	PUBLIC	CHARITABLE	250
BOCA RATON MUSEUM OF ART 801 WPALMETTO PARK RD BOCA RATON,FL 334863599	NONE	PUBLIC	CHARITABLE	250
BOCA RATON REGIONAL HOSPITAL 745 MEADOWS RD BOCA RATON,FL 33486	NONE	PUBLIC	CHARITABLE	2,500
BOY'S & GIRL'S CLUB OF COLLIER COUNTY 6060 PELICAN BLVD NAPLES,FL 34108	NONE	PUBLIC	CHARITABLE	500
CENTER OF CONCERN 1580 N NORTHWEST HWY PARK RIDGE,IL 60068	NONE	PUBLIC	CHARITABLE	1,000
CENTER OF CONCERN 1580 N NORTHWEST HWY PARK RIDGE,IL 60068	NONE	PUBLIC	CHARITABLE	1,000
CHANCE COLE WALKER FOUNDATION THE 107 BELLE PLAINE AVE PARK RIDGE,IL 60068	NONE	PUBLIC	CHARITABLE	2,000
CHICAGO BOTANIC GARDEN 1000 LAKE COOK RD GLENCOE,IL 600220400	NONE	PUBLIC	CHARITABLE	2,500
CHICAGO BOTANIC GARDEN 1000 LAKE COOK RD GLENCOE,IL 600220400	NONE	PUBLIC	CHARITABLE	100,000
COMMEMORATIVE AIR FORCE PO BOX 1380 MERRIFIELD,VA 22116	NONE	PUBLIC	CHARITABLE	100

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
CONSERVANCY OF SOUTHWEST FLORIDA THE 1450 MERRIHUE DR NAPLES,FL 34108	NONE	PUBLIC	CHARITABLE	15,000
CONSUMER REPORTS FOUNDATION PO BOX 96552 WASHINGTON,DC 20090	NONE	PUBLIC	CHARITABLE	50
CONSUMER REPORTS FOUNDATION PO BOX 96552 WASHINGTON,DC 20090	NONE	PUBLIC	CHARITABLE	50
DISABLED AMERICAN VETERANS PO BOX 14301 CINCINNATI,OH 45250	NONE	PUBLIC	CHARITABLE	100
DISABLED AMERICAN VETERANS PO BOX 14301 CINCINNATI,OH 45250	NONE	PUBLIC	CHARITABLE	100
ELKHORN SNO DRIFTERS W7990 COUNTY RD A DELAVAN,WI 53115	NONE	PUBLIC	CHARITABLE	500
EVAN SCHOLARS FOUNDATION 1 BRIAR ROAD GOLF,IL 600290301	NONE	PUBLIC	CHARITABLE	250
EVERGREEN COUNTRY DAY SCHOOL 1093 SWEDE GULCH RD EVERGREEN,CO 80439	NONE	PUBLIC	CHARITABLE	5,000
EVERGREEN COUNTRY DAY SCHOOL 1093 SWEDE GULCH RD EVERGREEN,CO 80439	NONE	PUBLIC	CHARITABLE	5,000
FOUNDERS FUND INC THE 707 GULF PARK DR NAPLES,FL 33963	NONE	PUBLIC	CHARITABLE	1,000
FRANK LLOYD WRIGHT PRESERVATION TRUST 951 CHICAGO AVE OAK PARK,IL 60302	NONE	PUBLIC	CHARITABLE	250
GENEVA AREA FOUNDATION INC PO BOX 71 LAKE GENEVA,WI 53147	NONE	PUBLIC	CHARITABLE	250
GENEVA LAKE ASSOCIATION PO BOX 412 LAKE GENEVA,WI 53147	NONE	PUBLIC	CHARITABLE	100
GENEVA LAKE CONSERVANCY PO BOX 588 FONTANA,WI 53125	NONE	PUBLIC	CHARITABLE	1,000
GENEVA LAKE MUSEUM 255 MILL ST LAKE GENEVA,WI 53147	NONE	PUBLIC	CHARITABLE	250

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
GENEVA LAKE SAILING SCHOOL 1250 SOUTH LAKE SHORE DR FONTANA,WI 53125	NONE	PUBLIC	CHARITABLE	20,000
GEORGE SNOW SCHOLARSHIP FOUNDATION 998 S FEDERAL HWY STE 203 BOCA RATON,FL 33432	NONE	PUBLIC	CHARITABLE	5,000
GEORGE WILLIAMS COLLEGE PO BOX 210 WILLIAMS BAY,WI 531910210	NONE	PUBLIC	CHARITABLE	13,000
GOW SCHOOL THE 2491 EMERY RD SOUTH WALES,NY 141399985	NONE	PUBLIC	CHARITABLE	2,000
GOW SCHOOL THE 2491 EMERY RD SOUTH WALES,NY 141399985	NONE	PUBLIC	CHARITABLE	10,000
HAVE DREAMS 515 BUSSE HWY PARK RIDGE,IL 60068	NONE	PUBLIC	CHARITABLE	1,000
HAVE DREAMS 515 BUSSE HWY PARK RIDGE,IL 60068	NONE	PUBLIC	CHARITABLE	2,500
INLAND LAKE YACHTING ASSOC PO BOX 311 FONTANA,WI 53125	NONE	PUBLIC	CHARITABLE	500
IOWA STATE UNIVERSITY FOUNDATION P O BOX 2230 AMES,IA 500102230	NONE	PUBLIC	CHARITABLE	500
KALO FOUNDATION OF PARK RIDGE THE 255 N NORTHWEST HIGHWAY PARK RIDGE,IL 60068	NONE	PUBLIC	CHARITABLE	250
KNIGHTS OF COLUMBUS 1009 S KNIGHT PARK RIDGE,IL 60068	NONE	PUBLIC	CHARITABLE	100
KNIGHTS OF COLUMBUS 1009 S KNIGHT PARK RIDGE,IL 60068	NONE	PUBLIC	CHARITABLE	150
KRAVIS CENTER FOR THE PERFORMING ARTS 701 OKEECHOBEE BLVD WEST PALM BEACH,FL 33401	NONE	PUBLIC	CHARITABLE	300
LEADERSHIP INSTITUTE THE 1101 N HIGHLAND ST ARLINGTON,VA 22201	NONE	PUBLIC	CHARITABLE	1,000
LUTHERAN SOCIAL SERVICES OF IL LSSI 1001 E TOUHY AVE DES PLAINES,IL 60018	NONE	PUBLIC	CHARITABLE	5,000

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
LYNN UNIVERSITY 3601 N MILITARY TRAIL BOCA RATON, FL 33431	NONE	PUBLIC	CHARITABLE	1,000
MAINE CENTER FOR MENTAL HEALTH 832 BUSSE HIGHWAY PARK RIDGE, IL 60068	NONE	PUBLIC	CHARITABLE	1,000
MAX MCGRAW WILDLIFE FOUNDATION PO BOX 9 DUNDEE, IL 60118	NONE	PUBLIC	CHARITABLE	8,600
MERCY HOSPITAL LAKE GENEVA PO BOX 5003 JANESVILLE, WI 535475003	NONE	PUBLIC	CHARITABLE	1,000
MICHIGAN STATE UNIVERSITY 535 CHESTNUT RD EAST LANSING, MI 48824	NONE	PUBLIC	CHARITABLE	250
MIDWEST PALLIATIVE HOSPICE & CARE 2050 CLAIRE CT GLENVIEW, IL 60025	NONE	PUBLIC	CHARITABLE	500
MISERICORDIA HEART OF MERCY 6300 N RIDGE CHICAGO, IL 606302788	NONE	PUBLIC	CHARITABLE	2,500
NAPLES CHILDREN & EDUCATIONAL FUND 6200 SHIRLEY ST 206 NAPLES, FL 34108	NONE	PUBLIC	CHARITABLE	5,000
NAPLES PHILHARMONIC CENTER FOR THE ARTS 5833 PELICAN BAY BLVD NAPLES, FL 34108	NONE	PUBLIC	CHARITABLE	2,500
NATIONAL SPACE SOCIETY 1155 15TH STREET WASHINGTON, DC 20005	NONE	PUBLIC	CHARITABLE	600
NCH HEALTHCARE FOUNDATION PO BOX 234 NAPLES, FL 341013029	NONE	PUBLIC	CHARITABLE	5,000
NCH HEALTHCARE FOUNDATION PO BOX 234 NAPLES, FL 341013029	NONE	PUBLIC	CHARITABLE	5,000
NO NAPLES FIREFIGHTERS & PARAMEDICS 2325 VANDERBILT RD NAPLES, FL 34108	NONE	PUBLIC	CHARITABLE	100
NORTH SHORE HEALTH SYSTEM FOUNDATION 2650 RIDGE AVE BURCH 103A EVANSTON, IL 60201	NONE	PUBLIC	CHARITABLE	10,000
NORTHWESTERN UNIVERSITY 1201 DAVIS ST EVANSTON, IL 60208	NONE	PUBLIC	CHARITABLE	12,000

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
NORTHWESTERN UNIVERSITY 1201 DAVIS ST EVANSTON,IL 60208	NONE	PUBLIC	CHARITABLE	500
NORTHWESTERN UNIVERSITY 1999 CAMPUS DR EVANSTON,IL 60208	NONE	PUBLIC	CHARITABLE	2,000
NORWOOD LIFE CARE FOUNDATION 6016 N NINA AVE CHICAGO,IL 60631	NONE	PUBLIC	CHARITABLE	1,000
NORWOOD LIFE CARE FOUNDATION 6016 N NINA AVE CHICAGO,IL 60631	NONE	PUBLIC	CHARITABLE	3,000
PARALYZED VETERAN OF AMERICA 7 MILL BROOK RD WILTON,NH 03086	NONE	PUBLIC	CHARITABLE	150
PARK RIDGE CIVIC ORCHESTRA PO BOX 717 PARK RIDGE,IL 60068	NONE	PUBLIC	CHARITABLE	13,000
PARK RIDGE CIVIC ORCHESTRA PO BOX 717 PARK RIDGE,IL 60068	NONE	PUBLIC	CHARITABLE	15,000
PARK RIDGE COMMUNITY FUND 515 BUSSE HWY PARK RIDGE,IL 60068	NONE	PUBLIC	CHARITABLE	1,000
PARK RIDGE FINE ARTS PO BOX 89A PARK RIDGE,IL 60068	NONE	PUBLIC	CHARITABLE	5,000
PARK RIDGE HISTORICAL SOCIETY 721 N PROSPECT AVE PARK RIDGE,IL 60068	NONE	PUBLIC	CHARITABLE	100
PARK RIDGE LIONS CLUB PO BOX 200 PARK RIDGE,IL 60068	NONE	PUBLIC	CHARITABLE	100
PINE CREST SCHOOL 2700 ST ANDREWS BLVD BOCA RATON,FL 33434	NONE	PUBLIC	CHARITABLE	5,000
PINE CREST SCHOOL 2700 ST ANDREWS BLVD BOCA RATON,FL 33434	NONE	PUBLIC	CHARITABLE	10,000
PLANETARY SOCIETY THE 85 SOUTH GRAND AVE PASADENA,CA 911051602	NONE	PUBLIC	CHARITABLE	600
RAINBOW HOSPICE 1550 BISHOP COURT MT PROSPECT,IL 60056	NONE	PUBLIC	CHARITABLE	50

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
RAINBOW HOSPICE 1550 BISHOP COURT MT PROSPECT, IL 60056	NONE	PUBLIC	CHARITABLE	200
RAINBOW HOSPICE 1550 BISHOP COURT MT PROSPECT, IL 60056	NONE	PUBLIC	CHARITABLE	1,000
RAINBOW HOSPICE 1550 BISHOP COURT MT PROSPECT, IL 60056	NONE	PUBLIC	CHARITABLE	10,000
RAINBOW HOSPICE 1550 BISHOP COURT MT PROSPECT, IL 60056	NONE	PUBLIC	CHARITABLE	500
RAVINIA ANNUAL FUND ASSOCIATION 1575 OAKWOOD AVE HIGHLAND PARK, IL 600359919	NONE	PUBLIC	CHARITABLE	6,000
SALVATION ARMY THE PO BOX 4121 CAROL STREAM, IL 60197	NONE	PUBLIC	CHARITABLE	1,000
SHELTER FOR ABUSED WOMEN & CHILDREN 801 LAUREL OAK DR NAPLES, FL 34108	NONE	PUBLIC	CHARITABLE	200
SMILE TRAIN THE PO BOX 96231 WASHINGTON, DC 200906231	NONE	PUBLIC	CHARITABLE	500
SMITHSONIAN MUSEUM PO BOX 9016 PITTSFIELD, MA 012029951	NONE	PUBLIC	CHARITABLE	350
ST BENEDICT 137 DEWEY AVE FONTANA, WI 53125	NONE	PUBLIC	CHARITABLE	1,000
ST JUDE CHILDREN RESEARCH HOSP PO BOX 167 MEMPHIS, TN 38101	NONE	PUBLIC	CHARITABLE	500
ST NECTARIOS GREEK ORTHODOX CHURCH 133 S ROSELLE RD PALATINE, IL 60067	NONE	PUBLIC	CHARITABLE	250
ST NORBERT COLLEGE ANNUAL FUND 100 GRANT ST DEPERE, WI 54115	NONE	PUBLIC	CHARITABLE	250
ST PAUL OF THE CROSS 320 S WASHINGTON ST PARK RIDGE, IL 60068	NONE	PUBLIC	CHARITABLE	10,000
ST SCHOLASTICA ACADEMY 7416 N RIDGE CHICAGO, IL 60648	NONE	PUBLIC	CHARITABLE	2,000

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
TOWN OF LINN FIRE AND EMS PO BOX 130 ZENDA, WI 53195	NONE	PUBLIC	CHARITABLE	500
US SAILING P O BOX 1260 PORTSMOUTH, RI 02871	NONE	PUBLIC	CHARITABLE	250
USO PO BOX 96898 WASHINGTON, DC 200906860	NONE	PUBLIC	CHARITABLE	200
VETERANS OF FOREIGN WARS PO BOX 8958 TOPEKA, KS 66608	NONE	PUBLIC	CHARITABLE	150
WALWORTH COUNTY FAIR FOUNDATION PO BOX 286 ELKHORN, WI 53121	NONE	PUBLIC	CHARITABLE	500
WATER SAFETY PATROL PO BOX 98 LAKE GENEVA, WI 53147	NONE	PUBLIC	CHARITABLE	500
WORLD WAR II VETERANS COMMITTEE PO BOX 96543 WASHINGTON, DC 200906543	NONE	PUBLIC	CHARITABLE	500
WORLD WAR II VETERANS COMMITTEE PO BOX 96543 WASHINGTON, DC 200906543	NONE	PUBLIC	CHARITABLE	500
WTTW CHANNEL 11 PBS 5400 N ST LOUIS AVE CHICAGO, IL 60625	NONE	PUBLIC	CHARITABLE	150
WTTW CHANNEL 11 PBS 5400 N ST LOUIS AVE CHICAGO, IL 60625	NONE	PUBLIC	CHARITABLE	200
WTTW CHANNEL 11 PBS 5400 N ST LOUIS AVE CHICAGO, IL 60625	NONE	PUBLIC	CHARITABLE	365
Total  3a				398,465

TY 2012 Accounting Fees Schedule

Name: THE SIMMS FAMILY FOUNDATION
C/O VOGEL CONSULTING SC
EIN: 36-3413327

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
VOGEL CONSULTING GROUP	9,930	0		9,930

Note: To capture the full content of this document, please select landscape mode (11" x 8.5") when printing.

TY 2012 Depreciation Schedule

Name: THE SIMMS FAMILY FOUNDATION
C/O VOGEL CONSULTING SC

EIN: 36-3413327

Description of Property	Date Acquired	Cost or Other Basis	Prior Years' Depreciation	Computation Method	Rate / Life (# of years)	Current Year's Depreciation Expense	Net Investment Income	Adjusted Net Income	Cost of Goods Sold Not Included
HARDWARE	2010-12-26	1,931	831	200DB	5 0000000000000	440	0		
SOFTWARE	2010-12-26	403	173	200DB	5 0000000000000	92	0		
HARDWARE	2010-10-11	2,450	1,054	200DB	5 0000000000000	558	0		

**TY 2012 Investments Corporate
Stock Schedule**

Name: THE SIMMS FAMILY FOUNDATION
C/O VOGEL CONSULTING SC

EIN: 36-3413327

Name of Stock	End of Year Book Value	End of Year Fair Market Value
NORTHERN TRUST ACCT 9538	238,803	244,301
NORTHERN TRUST ACCT 9542	446,724	489,430
NORTHERN TRUST ACCT 9541	451,227	481,344
NORTHERN TRUST ACCT 9540	240,039	264,602
NORTHERN TRUST ACCT 9537	1,086,716	1,197,644
NORTHERN TRUST ACCT 2982 - EQUITIES	298,541	401,408
NORTHERN TRUST ACCT 9536	880,561	1,196,401

TY 2012 Investments Government Obligations Schedule

Name: THE SIMMS FAMILY FOUNDATION
C/O VOGEL CONSULTING SC

EIN: 36-3413327

US Government Securities - End of Year Book Value:	145,362
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US Government Securities - End of Year Fair Market Value:	182,014
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State & Local Government Securities - End of Year Book Value:	0
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State & Local Government Securities - End of Year Fair Market Value:	0
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TY 2012 Investments - Other Schedule

Name: THE SIMMS FAMILY FOUNDATION
C/O VOGEL CONSULTING SC

EIN: 36-3413327

Category / Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
NORTHERN TRUST ACCT 2982 - REAL ESTATE	AT COST	79,930	146,352
NORTHERN TRUST ACCT 2982 - COMMODITIES	AT COST	255,002	371,003
GLOBAL EMERGING MARKETS FUND	AT COST	457,043	523,498
NORTHERN TRUST ALPHA STRATGIES	AT COST	500,000	504,542
AURORA OFFSHORE FUND LTD II	AT COST	500,000	500,438

TY 2012 Land, Etc. Schedule**Name:** THE SIMMS FAMILY FOUNDATION

C/O VOGEL CONSULTING SC

EIN: 36-3413327

Category / Item	Cost / Other Basis	Accumulated Depreciation	Book Value	End of Year Fair Market Value
HARDWARE	1,931	1,271	660	660
SOFTWARE	403	265	138	138
HARDWARE	2,450	1,612	838	838

TY 2012 Other Expenses Schedule**Name:** THE SIMMS FAMILY FOUNDATION

C/O VOGEL CONSULTING SC

EIN: 36-3413327

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
DUES	695	0		0
USPS	315	0		0
NORTHERN TRUST MAF K-1 - OTHER INCOME	413	413		0

TY 2012 Other Income Schedule

Name: THE SIMMS FAMILY FOUNDATION

C/O VOGEL CONSULTING SC

EIN: 36-3413327

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
NON DIVIDEND DISTRIBUTION	59	59	59
ADR FEE REFUNDS	103	103	103
TAX REFUNDS	19	19	19

TY 2012 Other Increases Schedule

Name: THE SIMMS FAMILY FOUNDATION
C/O VOGEL CONSULTING SC
EIN: 36-3413327

Description	Amount
COST BASIS ADJUSTMENT	12,650

TY 2012 Other Professional Fees Schedule**Name:** THE SIMMS FAMILY FOUNDATION

C/O VOGEL CONSULTING SC

EIN: 36-3413327

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
NORTHERN TRUST MAF - K-1	6,655	6,655		0
INVESTMENT SERVICES	84,062	84,062		0

TY 2012 Taxes Schedule**Name:** THE SIMMS FAMILY FOUNDATION

C/O VOGEL CONSULTING SC

EIN: 36-3413327

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOREIGN TAX WITHHELD	5,396	5,396		0
FEDERAL TAX PAYMENTS	7,807	0		0
IL CHARITY TAX	28	0		0