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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 07/01 **, 2012, and ending** 06/30 **, 20**13

Name of foundation: TOM AND JULIE WOOD FAMILY FOUNDATION INC.

A Employer identification number: 27-4826335

Number and street (or P O box number if mail is not delivered to street address): 3003 E. 98TH STREET — Room/suite:

B Telephone number (see instructions): (317) 977-1403

City or town, state, and ZIP code: INDIANAPOLIS, IN 46280

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: [X] 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)* ▶ $ 9,765,019.

J Accounting method [X] 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))*

	Line	Description	(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)	6,700,000.			
	2	Check ▶ ☐ if the foundation is not required to attach Sch B				
	3	Interest on savings and temporary cash investments	284.	284.		ATCH 1
	4	Dividends and interest from securities	203,143.	203,143.		ATCH 2
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10	27,818.			
	b	Gross sales price for all assets on line 6a 4,125,326.				
	7	Capital gain net income (from Part IV, line 2)		27,818.		
	8	Net short-term capital gain				
	9	Income modifications				
	10a	Gross sales less returns and allowances				
	b	Less Cost of goods sold				
	c	Gross profit or (loss) (attach schedule)				
	11	Other income (attach schedule) ATCH 3	4.	4.		
	12	**Total.** Add lines 1 through 11	6,931,249.	231,249.		
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc	0			
	14	Other employee salaries and wages				
	15	Pension plans, employee benefits				
	16a	Legal fees (attach schedule)				
	b	Accounting fees (attach schedule) ATCH 4	4,348.	2,174.		2,174.
	c	Other professional fees (attach schedule) *	8,155.	8,155.		
	17	Interest				
	18	Taxes (attach schedule) (see instructions) ATCH 6	1,186.	186.		
	19	Depreciation (attach schedule) and depletion				
	20	Occupancy				
	21	Travel, conferences, and meetings				
	22	Printing and publications				
	23	Other expenses (attach schedule) ATCH 7	288.			
	24	**Total operating and administrative expenses.** Add lines 13 through 23	13,977.	10,515.		2,174.
	25	Contributions, gifts, grants paid	9,000.			9,000.
	26	**Total expenses and disbursements** Add lines 24 and 25	22,977.	10,515.	0	11,174.
	27	Subtract line 26 from line 12				
	a	**Excess of revenue over expenses and disbursements**	6,908,272.			
	b	**Net investment income** (if negative, enter -0-)		220,734.		
	c	**Adjusted net income** (if negative, enter -0-)				

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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 (a) Book Value	End of year (b) Book Value	End of year (c) Fair Market Value
Assets 1	Cash - non-interest-bearing			
2	Savings and temporary cash investments	30,523.	193,507.	193,507.
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 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			
10 a	Investments - U S and state government obligations (attach schedule)			
b	Investments - corporate stock (attach schedule)	575,000.	1,802,740.	1,739,574.
c	Investments - corporate bonds (attach schedule)	2,335,363.	1,216,509.	1,151,708.
11	Investments - land, buildings, and equipment basis ▶			
	Less accumulated depreciation (attach schedule) ▶			
12	Investments - mortgage loans			
13	Investments - other (attach schedule) ATCH 8		6,636,402.	6,680,230.
14	Land, buildings, and equipment basis ▶			
	Less accumulated depreciation (attach schedule) ▶			
15	Other assets (describe ▶)			
16	**Total assets** (to be completed by all filers - see the instructions Also, see page 1, item I)	2,940,886.	9,849,158.	9,765,019.
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. ▶ X			
27	Capital stock, trust principal, or current funds			
28	Paid-in or capital surplus, or land, bldg , and equipment fund			
29	Retained earnings, accumulated income, endowment, or other funds	2,940,886.	9,849,158.	
30	**Total net assets or fund balances** (see instructions)	2,940,886.	9,849,158.	
31	**Total liabilities and net assets/fund balances** (see instructions)	2,940,886.	9,849,158.	

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	2,940,886.
2	Enter amount from Part I, line 27a	2	6,908,272.
3	Other increases not included in line 2 (itemize) ▶	3	
4	Add lines 1, 2, and 3	4	9,849,158.
5	Decreases not included in line 2 (itemize) ▶	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	9,849,158.

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	SEE PART IV SCHEDULE			
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				
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				
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	27,818.
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	0

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	753,132.	1,432,898.	0.525601
2010	507,446.	183,205.	2.769826
2009			
2008			
2007			

2	**Total** of line 1, column (d)	2	3.295427
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	1.098476
4	Enter the net value of noncharitable-use assets for 2012 from Part X, line 5	4	5,273,614.
5	Multiply line 4 by line 3	5	5,792,938.
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	2,207.
7	Add lines 5 and 6	7	5,795,145.
8	Enter qualifying distributions from Part XII, line 4	8	11,174.

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 05/10/2011 (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	4,415.
c	All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	2	
3	Add lines 1 and 2	3	4,415.
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	4,415.
6	Credits/Payments		
a	2012 estimated tax payments and 2011 overpayment credited to 2012 — 6a: 723.		
b	Exempt foreign organizations - tax withheld at source — 6b:		
c	Tax paid with application for extension of time to file (Form 8868) — 6c: 5,000.		
d	Backup withholding erroneously withheld — 6d:		
7	Total credits and payments Add lines 6a through 6d	7	5,723.
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	1,308.
11	Enter the amount of line 10 to be **Credited to 2013 estimated tax** ▶ 1,308. **Refunded** ▶	11	

Part VII-A Statements Regarding Activities

			Yes	No
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a		X
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes (see Instructions for the definition)? *If the answer is "Yes" to **1a** or **1b**, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities*	1b		X
c	Did the foundation file **Form 1120-POL** for this year?	1c		X
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year **(1)** On the foundation ▶ $ ______ **(2)** On foundation managers ▶ $ ______			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ▶ $ ______			
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		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*	3		X
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		X
b	If "Yes," has it filed a tax return on **Form 990-T** for this year?	4b		X
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? *If "Yes," attach the statement required by General Instruction T*	5		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?	6	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*	7	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*	8b	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*	9		X
10	Did any persons become substantial contributors during the tax year? *If "Yes," attach a schedule listing their names and addresses*	10		X

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

		Line	Yes	No
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 ▶ MR. JOHN WOOD Telephone no ▶ 317-574-2349
Located at ▶ 3003 E. 98TH STREET, SUITE 201 INDIANAPOLIS, IN ZIP+4 ▶ 46280

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

		Line	Yes	No
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		
	See the 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.

		Line	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)?	1b		X
	Organizations relying on a current notice regarding disaster assistance check here ▶ ☐			
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2012?	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? ☐ Yes ☒ No			
	If "Yes," list the years ▶ ____ , ____ , ____ , ____			
b	Are there any years listed in 2a for which the foundation is **not** applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to **all** years listed, answer "No" and attach statement - see instructions)	2b		X
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)*	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

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

		Yes	No
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		X
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		X

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
ATCH 9		0	0	0

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 ▶

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

3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE."

(a) Name and address of each person paid more than $50,000	(b) Type of service	(c) Compensation
NONE		
Total number of others receiving over $50,000 for professional services ▶		

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 N/A	
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 NONE	
2	
All other program-related investments See instructions	
3 NONE	
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	4,699,659.
b	Average of monthly cash balances	1b	654,264.
c	Fair market value of all other assets (see instructions)	1c	
d	**Total** (add lines 1a, b, and c)	1d	5,353,923.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation) 1e		
2	Acquisition indebtedness applicable to line 1 assets	2	
3	Subtract line 2 from line 1d	3	5,353,923.
4	Cash deemed held for charitable activities Enter 1 1/2 % of line 3 (for greater amount, see instructions)	4	80,309.
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3 Enter here and on Part V, line 4	5	5,273,614.
6	**Minimum investment return.** Enter 5% of line 5	6	263,681.

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	263,681.
2a	Tax on investment income for 2012 from Part VI, line 5	2a	4,415.		
b	Income tax for 2012 (This does not include the tax from Part VI)	2b			
c	Add lines 2a and 2b			2c	4,415.
3	Distributable amount before adjustments Subtract line 2c from line 1			3	259,266.
4	Recoveries of amounts treated as qualifying distributions			4	
5	Add lines 3 and 4			5	259,266.
6	Deduction from distributable amount (see instructions)			6	
7	**Distributable amount** as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1			7	259,266.

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	11,174.
b	Program-related investments - total from Part IX-B	1b	
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	11,174.
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	0
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	11,174.

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				259,266.
2 Undistributed income, if any, as of the end of 2012				
a Enter amount for 2011 only				
b Total for prior years 20 10 ,20 09 ,20 08				
3 Excess distributions carryover, if any, to 2012				
a From 2007				
b From 2008				
c From 2009				
d From 2010 503,129.				
e From 2011 681,764.				
f **Total** of lines 3a through e	1,184,893.			
4 Qualifying distributions for 2012 from Part XII, line 4 ▶ $ 11,174.				
a Applied to 2011, but not more than line 2a				
b Applied to undistributed income of prior years (Election required - see instructions)				
c Treated as distributions out of corpus (Election required - see instructions)				
d Applied to 2012 distributable amount				11,174.
e Remaining amount distributed out of corpus				
5 Excess distributions carryover applied to 2012 *(If an amount appears in column (d), the same amount must be shown in column (a).)*	248,092.			248,092.
6 **Enter the net total of each column as indicated below:**				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	936,801.			
b Prior years' undistributed income Subtract line 4b from line 2b				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed				
d Subtract line 6c from line 6b Taxable amount - see instructions				
e Undistributed income for 2011 Subtract line 4a from line 2a Taxable amount - see instructions				
f Undistributed income for 2012 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2013				
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions)				
8 Excess distributions carryover from 2007 not applied on line 5 or line 7 (see instructions)				
9 **Excess distributions carryover to 2013.** Subtract lines 7 and 8 from line 6a	936,801.			
10 Analysis of line 9				
a Excess from 2008				
b Excess from 2009				
c Excess from 2010 255,037.				
d Excess from 2011 681,764.				
e Excess from 2012				

Part XIV Private Operating Foundations (see instructions and Part VII-A, question 9) NOT APPLICABLE

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 foundation is a private operating foundation described in section ☐ 4942(j)(3) or ☐ 4942(j)(5)

	Tax year	Prior 3 years			(e) Total
	(a) 2012	(b) 2011	(c) 2010	(d) 2009	
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
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 XV Supplementary Information (Complete this part only if the foundation had $5,000 or more in assets at any time during the year - see instructions.)

1 **Information Regarding Foundation Managers:**

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

JULIE D. WOOD

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

NONE

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

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

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

ATCH 10

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

NONE

c Any submission deadlines

NONE

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

NONE

Part XV Supplementary Information (continued)

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

Recipient Name and address (home or business)	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
a *Paid during the year*				
ATCH 11				
Total ▶ **3a**				9,000.
b *Approved for future payment*				
Total ▶ **3b**				

Part XVI-A Analysis of Income-Producing Activities

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	203,427.	
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					
8 Gain or (loss) from sales of assets other than inventory			18	27,818.	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue a					
b ATCH 12				4.	
c					
d					
e					
12 Subtotal Add columns (b), (d), and (e)				231,249.	

13 **Total.** Add line 12, columns (b), (d), and (e) . . . 13 231,249.

(See worksheet in line 13 instructions to verify calculations.)

Part XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes

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

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	1a(1)		X
	(2) Other assets	1a(2)		X
b	Other transactions			
	(1) Sales of assets to a noncharitable exempt organization	1b(1)		X
	(2) Purchases of assets from a noncharitable exempt organization	1b(2)		X
	(3) Rental of facilities, equipment, or other assets	1b(3)		X
	(4) Reimbursement arrangements	1b(4)		X
	(5) Loans or loan guarantees	1b(5)		X
	(6) Performance of services or membership or fundraising solicitations	1b(6)		X
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c		X

d If the answer to any of the above is "Yes," complete the following schedule Column **(b)** should always show the fair market value of the goods, other assets, or services given by the reporting foundation If the foundation received less than fair market value in any transaction or sharing arrangement, show in column **(d)** the value of the goods, other assets, or services received

(a) Line no	(b) Amount involved	(c) Name of noncharitable exempt organization	(d) Description of transfers, transactions, and sharing arrangements
	N/A		N/A

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

b If "Yes," complete the following schedule

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

Sign Here

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

▶ Tom Wood 12/7/2014 ▶ Treasurer

Signature of officer or trustee | Date | Title

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

Paid Preparer Use Only

Print/Type preparer's name	Preparer's signature	Date	Check ☐ if self-employed	PTIN
KENNETH KEBER	Kenneth J. Keber	1/30/14		P00240883

Firm's name ▶ CROWE HORWATH LLP — Firm's EIN ▶ 35-0921680

Firm's address ▶ 330 E JEFFERSON BLVD, PO BOX 7 SOUTH BEND, IN 46624-0007 — Phone no 574-232-3992

Schedule B
(Form 990, 990-EZ, or 990-PF)
Department of the Treasury
Internal Revenue Service

Schedule of Contributors

▶ **Attach to Form 990, Form 990-EZ, or Form 990-PF.**

OMB No 1545-0047

2012

Name of the organization

TOM AND JULIE WOOD FAMILY FOUNDATION INC.

Employer identification number

27-4826335

Organization type (check one)

Filers of:	**Section:**
Form 990 or 990-EZ	☐ 501(c)( ) (enter number) organization
	☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation
	☐ 527 political organization
Form 990-PF	☒ 501(c)(3) exempt private foundation
	☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation
	☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule.**
Note. Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule See instructions

General Rule

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

Special Rules

☐ For a section 501(c)(3) organization filing Form 990 or 990-EZ that met the 33 1/3 % support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi) and received from any one contributor, during the year, a contribution of the greater of **(1)** $5,000 or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1 Complete Parts I and II

☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than $1,000 for use *exclusively* for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals Complete Parts I, II, and III

☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions for use *exclusively* for religious, charitable, etc , purposes, but these contributions did not total to more than $1,000 If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc , purpose Do not complete any of the parts unless the **General Rule** applies to this organization because it received nonexclusively religious, charitable, etc , contributions of $5,000 or more during the year . . . . ▶ $ ______________

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

Name of organization TOM AND JULIE WOOD FAMILY FOUNDATION INC.

Employer identification number 27-4826335

Part I **Contributors** (see instructions). Use duplicate copies of Part I if additional space is needed

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	JULIE WOOD 3003 E. 98TH STREET INDIANAPOLIS, IN 46280	$ 6,700,000.	Person [X] Payroll [ ] Noncash [ ] (Complete Part II if there is a noncash contribution)
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II if there is a noncash contribution)
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II if there is a noncash contribution)
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II if there is a noncash contribution)
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II if there is a noncash contribution)
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II if there is a noncash contribution)

Name of organization TOM AND JULIE WOOD FAMILY FOUNDATION INC.

Employer identification number 27-4826335

Part II **Noncash Property** (see instructions) Use duplicate copies of Part II if additional space is needed.

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
----		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
----		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
----		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
----		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
----		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
----		$	

Name of organization TOM AND JULIE WOOD FAMILY FOUNDATION INC.

Employer identification number 27-4826335

Part III ***Exclusively*** **religious, charitable, etc., individual contributions to section 501(c)(7), (8), or (10) organizations that total more than $1,000 for the year.** Complete columns **(a)** through **(e)** and the following line entry.

For organizations completing Part III, enter the total of *exclusively* religious, charitable, etc., contributions of **$1,000 or less** for the year (Enter this information once. See instructions.) ▶ $

Use duplicate copies of Part III if additional space is needed.

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

FORM 990-PF - PART IV
CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME

Kind of Property		Description				P or D	Date acquired	Date sold
Gross sale price less expenses of sale	Depreciation allowed/ allowable	Cost or other basis	FMV as of 12/31/69	Adj basis as of 12/31/69	Excess of FMV over adj basis		Gain or (loss)	
		VERIZON COMMUN 3.50% PROPERTY TYPE: SECURITIES				P	02/14/2012	07/18/2012
109,382.		105,966.					3,416.	
		4000 SHS ANNALY CAPITAL MGMT PROPERTY TYPE: SECURITIES				P	05/09/2012	07/19/2012
103,290.		100,000.					3,290.	
		4000 SHS ARMOUR RESIDENTIAL PROPERTY TYPE: SECURITIES				P	05/31/2012	07/25/2012
101,600.		100,000.					1,600.	
		4000 SHS CORP OFFICE PROP TR PROPERTY TYPE: SECURITIES				P	06/20/2012	07/24/2012
101,398.		100,000.					1,398.	
		4000 SHS PS BUSINESS PARKS, INC PROPERTY TYPE: SECURITIES				P	05/03/2012	07/17/2012
101,798.		100,000.					1,798.	
		3000 SHS PUBLIC STORAGE PROPERTY TYPE: SECURITIES				P	06/06/2012	07/10/2012
78,538.		75,000.					3,538.	
		MEDTRONIC INC 3.12% PROPERTY TYPE: SECURITIES				P	05/29/2012	08/20/2012
103,880.		104,223.					-343.	
		VERIZON COMMUN 3.50% PROPERTY TYPE: SECURITIES				P	02/14/2012	08/09/2012
109,188.		105,933.					3,255.	
		HSBC HOLDINGS PLC 5.10% PROPERTY TYPE: SECURITIES				P	02/15/2012	08/07/2012
114,118.		110,023.					4,095.	
		4000 SHS AFFILIATED MANAGERS PROPERTY TYPE: SECURITIES				P	08/01/2012	08/16/2012
100,718.		100,000.					718.	
		100 SHS BB&T CORPORATION PROPERTY TYPE: SECURITIES				P	07/24/2012	08/06/2012
2,525.		2,500.					25.	
		3900 SHS BB&T CORPORATION PROPERTY TYPE: SECURITIES				P	07/24/2012	08/13/2012
97,888.		97,500.					388.	

FORM 990-PF - PART IV
CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME

Kind of Property		Description				P or D	Date acquired	Date sold
Gross sale price less expenses of sale	Depreciation allowed/ allowable	Cost or other basis	FMV as of 12/31/69	Adj basis as of 12/31/69	Excess of FMV over adj basis		Gain or (loss)	
		3550 SHS PROSPECT CAPITAL CORP PROPERTY TYPE: SECURITIES				P	04/24/2012	08/22/2012
88,003.		88,750.					-747.	
		450 SHS PROSPECT CAPITAL CORP PROPERTY TYPE: SECURITIES				P	04/24/2012	08/22/2012
11,160.		11,250.					-90.	
		4000 SHS STANLEY BLACK & DECKER PROPERTY TYPE: SECURITIES				P	07/18/2012	08/01/2012
102,798.		100,000.					2,798.	
		AETNA INC 3.95% PROPERTY TYPE: SECURITIES				P	02/17/2012	09/12/2012
109,451.		107,890.					1,561.	
		BP CAP MARKETS PL 3.24% PROPERTY TYPE: SECURITIES				P	05/29/2012	09/14/2012
102,831.		102,107.					724.	
		4000 SHS SENIOR HOUSING PPTY PROPERTY TYPE: SECURITIES				P	07/17/2012	09/17/2012
97,471.		100,000.					-2,529.	
		4000 SHS WELLS FARGO & COMPANY PROPERTY TYPE: SECURITIES				P	08/09/2012	09/06/2012
99,808.		100,000.					-192.	
		ZIMMER HOLDINGS 3.37% PROPERTY TYPE: SECURITIES				P	02/16/2012	11/14/2012
103,970.		104,469.					-499.	
		4000 SHS COMMONWEALTH REIT PROPERTY TYPE: SECURITIES				P	07/20/2012	11/27/2012
96,021.		100,000.					-3,979.	
		4000 SHS KILROY REALTY CORP PROPERTY TYPE: SECURITIES				P	08/06/2012	11/15/2012
97,798.		100,000.					-2,202.	
		4000 SHS JPMORGAN CHASE & CO PROPERTY TYPE: SECURITIES				P	08/20/2012	11/13/2012
100,092.		100,000.					92.	
		4000 SHS PNC FINANCIAL SRV GRP PROPERTY TYPE: SECURITIES				P	09/14/2012	11/19/2012
99,198.		100,000.					-802.	

FORM 990-PF - PART IV
CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME

Kind of Property		Description				P or D	Date acquired	Date sold
Gross sale price less expenses of sale	Depreciation allowed/ allowable	Cost or other basis	FMV as of 12/31/69	Adj basis as of 12/31/69	Excess of FMV over adj basis		Gain or (loss)	
		4000 SHS BANK OF NEW YORK MELLON PROPERTY TYPE: SECURITIES				P	09/12/2012	11/29/2012
100,293.		100,000.					293.	
		4000 SHS COMCAST CORPORATION PROPERTY TYPE: SECURITIES				P	11/29/2012	12/18/2012
100,598.		100,000.					598.	
		4000 SHS NEXTERA ENERGY CAPITAL PROPERTY TYPE: SECURITIES				P	11/14/2012	12/13/2012
99,718.		100,000.					-282.	
		LOWE'S COMPANIES 3.80% PROPERTY TYPE: SECURITIES				P	02/15/2012	01/14/2013
110,274.		108,903.					1,371.	
		STANLEY BLACK & D 3.40% PROPERTY TYPE: SECURITIES				P	02/17/2012	01/22/2013
51,890.		52,110.					-220.	
		4000 SHS FIRST REPUBLIC BANK PROPERTY TYPE: SECURITIES				P	11/15/2012	01/17/2013
100,918.		100,000.					918.	
		4000 SHS WELLS FARGO & COMPANY PROPERTY TYPE: SECURITIES				P	11/13/2012	01/03/2013
100,236.		100,000.					236.	
		4000 SHS TORCHMARK CORP PROPERTY TYPE: SECURITIES				P	09/17/2012	01/15/2013
104,078.		100,000.					4,078.	
		100,000 SHS BARCLAYS BANK PLC PROPERTY TYPE: SECURITIES				P	02/10/2012	02/15/2013
100,000.		100,000.						
		GILEAD SCIENCES 4.40% PROPERTY TYPE: SECURITIES				P	02/17/2012	02/07/2013
111,552.		106,887.					4,665.	
		4000 SHS CAPITAL ONE FINANCIAL PROPERTY TYPE: SECURITIES				P	08/13/2012	02/05/2013
100,598.		100,000.					598.	
		4000 SHS DUKE ENERGY CORP PROPERTY TYPE: SECURITIES				P	01/09/2013	02/07/2013
99,798.		100,000.					-202.	

FORM 990-PF - PART IV
CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME

Kind of Property		Description				P or D	Date acquired	Date sold
Gross sale price less expenses of sale	Depreciation allowed/ allowable	Cost or other basis	FMV as of 12/31/69	Adj basis as of 12/31/69	Excess of FMV over adj basis		Gain or (loss)	
		4000 SHS STIFEL FINANCIAL CORP PROPERTY TYPE: SECURITIES				P	12/18/2012	01/29/2013
102,278.		100,000.					2,278.	
		4000 SHS THE GOLDMAN SACHS GRP PROPERTY TYPE: SECURITIES				P	10/17/2012	03/18/2013
100,238.		100,000.					238.	
		4000 GENERAL ELEC CAP CORP PROPERTY TYPE: SECURITIES				P	01/22/2013	03/04/2013
100,598.		100,000.					598.	
		4000 SHS PRUDENTIAL FINCL INC. PROPERTY TYPE: SECURITIES				P	11/27/2012	02/27/2013
100,518.		100,000.					518.	
		4000 SHS SUNTRUST BANKS INC. PROPERTY TYPE: SECURITIES				P	12/13/2012	03/19/2013
99,638.		100,000.					-362.	
		306 SHS MFS EMGING MKTS DEBT I PROPERTY TYPE: SECURITIES				P	01/18/2013	02/06/2013
4,914.		4,990.					-76.	
		0.9540 SHS MFS EMGING MKTS DEBT I PROPERTY TYPE: SECURITIES				P	01/31/2013	02/06/2013
15.		15.						
		54 SHS AGILENT TECHNOLOGIES INC					01/17/2013	02/26/2013
2,204.		2,395.					-191.	
		45 SHS CORP CALIF CL A PROPERTY TYPE: SECURITIES				P	01/17/2013	02/27/2013
1,541.		1,588.					-47.	
		20 SHS GARMIN LTD PROPERTY TYPE: SECURITIES				P	01/17/2013	02/26/2013
680.		791.					-111.	
		0.2640 SHS MFS MKTS DEBT I PROPERTY TYPE: SECURITIES				P	02/28/2013	03/15/2013
4.		4.						
		29 SHS EXPRESS SCRIPTS HLDG CO PROPERTY TYPE: SECURITIES				P	01/17/2013	04/24/2013
1,641.		1,604.					37.	

FORM 990-PF - PART IV
CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME

Kind of Property		Description				P or D	Date acquired	Date sold
Gross sale price less expenses of sale	Depreciation allowed/ allowable	Cost or other basis	FMV as of 12/31/69	Adj basis as of 12/31/69	Excess of FMV over adj basis		Gain or (loss)	
		26 SHS MCDONALDS CORP PROPERTY TYPE: SECURITIES				P	01/17/2013	04/24/2013
2,630.		2,393.					237.	
		58 SHS MICROSOFT CORP PROPERTY TYPE: SECURITIES				P	01/17/2013	04/22/2013
1,794.		1,594.					200.	
		18 SHS SPDR GOLD TRUST PROPERTY TYPE: SECURITIES				P	01/18/2013	04/25/2013
2,534.		2,942.					-408.	
		0.0010 MFS EMGING MKTS DEBT I PROPERTY TYPE: SECURITIES				P	03/28/2013	04/19/2013
		67 SHS EMC CORPORATION MASS PROPERTY TYPE: SECURITIES				P	01/17/2013	05/28/2013
1,607.		1,608.					-1.	
		11 SHS EMC CORPORATION MASS PROPERTY TYPE: SECURITIES				P	04/25/2013	05/28/2013
264.		250.					14.	
		21 SHS UNDER ARMOUR INC PROPERTY TYPE: SECURITIES				P	02/26/2013	06/06/2013
1,246.		986.					260.	
		791 SHS ABBOTT LABS PROPERTY TYPE: SECURITIES				P	01/03/2013	01/07/2013
26,161.		25,992.					169.	
		366 SHS ROYAL DUTCH SHEL PLC PROPERTY TYPE: SECURITIES				P	01/03/2013	02/04/2013
25,897.		25,986.					-89.	
		350 SHS ROYAL DUTCH SHEL PLC PROPERTY TYPE: SECURITIES				P	01/07/2013	02/04/2013
24,765.		24,864.					-99.	
		151 SHS PHILIP MORRIS INTL INC PROPERTY TYPE: SECURITIES				P	01/03/2013	03/26/2013
13,768.		13,021.					747.	
		143 SHS PHILIP MORRIS INTL INC PROPERTY TYPE: SECURITIES				P	01/07/2013	03/26/2013
13,038.		12,359.					679.	

FORM 990-PF - PART IV
CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME

Kind of Property		Description				P or D	Date acquired	Date sold
Gross sale price less expenses of sale	Depreciation allowed/ allowable	Cost or other basis	FMV as of 12/31/69	Adj basis as of 12/31/69	Excess of FMV over adj basis		Gain or (loss)	
		262 SHS TIME WARNER INC PROPERTY TYPE: SECURITIES				P	01/03/2013	03/26/2013
14,948.		13,015.					1,933.	
		257 SHS TIME WARNER INC PROPERTY TYPE: SECURITIES				P	01/07/2013	03/26/2013
14,662.		12,579.					2,083.	
		2078 SHS AMERICAN CAP AGY CORP PROPERTY TYPE: SECURITIES				P	01/17/2013	05/29/2013
54,866.		65,021.					-10,155.	
TOTAL GAIN(LOSS)							27,818.	

ATTACHMENT 1

FORM 990PF, PART I - INTEREST ON TEMPORARY CASH INVESTMENTS

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
MERRILL LYNCH MONEY MARKET ACCT #02487	136.	136.
MERRILL LYNCH MONEY MARKET ACCT #02578	68.	68.
MERRILL LYNCH MONEY MARKET ACCT #02507	80.	80.
TOTAL	284.	284.

FORM 990PF, PART I - DIVIDENDS AND INTEREST FROM SECURITIES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
MERRILL LYNCH WEALTH MGT INTEREST #02487	90,688.	90,688.
MERRILL LYNCH WEALTH MGT DIV #02487	49,153.	49,153.
MERRILL LYNCH WEALTH MGT DIV #02578	2,707.	2,707.
MERRILL LYNCH WEALTH MGT DIV #02507	61,307.	61,307.
ACCRUED INTEREST	9,633.	9,633.
LESS BOND PREMIUM AMORTIZATION	-10,345.	-10,345.
TOTAL	203,143.	203,143.

FORM 990PF, PART I - OTHER INCOME

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
MISCELLANEOUS INCOME	4.	4.
TOTALS	4.	4.

FORM 990PF, PART I - ACCOUNTING FEES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME	ADJUSTED NET INCOME	CHARITABLE PURPOSES
ACCOUNTING FEES	4,348.	2,174.		2,174.
TOTALS	4,348.	2,174.		2,174.

FORM 990PF, PART I - OTHER PROFESSIONAL FEES

DESCRIPTION		REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
ACCOUNT FEES		8,155.	8,155.
	TOTALS	8,155.	8,155.

FORM 990PF, PART I - TAXES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
FOREIGN TAX-ML #02578	11.	11.
FOREIGN TAX-ML #02507	175.	175.
EXCISE TAX	1,000.	
TOTALS	1,186.	186.

ATTACHMENT 7

FORM 990PF, PART I - OTHER EXPENSES

DESCRIPTION		REVENUE AND EXPENSES PER BOOKS
MISCELLANEOUS EXPENSE		288.
	TOTALS	288.

ATTACHMENT 8

FORM 990PF, PART II - OTHER INVESTMENTS

DESCRIPTION	ENDING BOOK VALUE	ENDING FMV
MERRILL LYNCH EQUITIES	3,816,093.	3,916,313.
MERRILL LYNCH MUTUAL FUNDS	2,820,309.	2,763,917.
TOTALS	6,636,402.	6,680,230.

FORM 990PF, PART VIII - LIST OF OFFICERS, DIRECTORS, AND TRUSTEES

ATTACHMENT 9

NAME AND ADDRESS	TITLE AND AVERAGE HOURS PER WEEK DEVOTED TO POSITION			
JULIE D WOOD 3003 E. 98TH STREET, SUITE 201 INDIANAPOLIS, IN 46280	PRESIDENT/DIRECTOR	0	0	0
JEFFREY WOOD 3003 E. 98TH STREET, SUITE 201 INDIANAPOLIS, IN 46280	DIRECTOR	0	0	0
LARRY V HEID 3003 E. 98TH STREET, SUITE 201 INDIANAPOLIS, IN 46280	DIRECTOR	0	0	0
CHRISTOPHER WOOD 3003 E. 98TH STREET, SUITE 201 INDIANAPOLIS, IN 46280	DIRECTOR	0	0	0
APRIL WOOD 3003 E. 98TH STREET, SUITE 201 INDIANAPOLIS, IN 46280	DIRECTOR	0	0	0
	GRAND TOTALS			

ATTACHMENT 10

FORM 990PF, PART XV - NAME, ADDRESS AND PHONE FOR APPLICATIONS

MR. JOHN WOOD
3003 E. 98TH STREET
INDIANAPOLIS, IN 46280
317-574-2349

FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

ATTACHMENT 11

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
STARFISH INITIATIVE 814 N DELAWARE ST, INDIANAPOLIS, IN 46260	NONE EXEMPT	CHARITABLE	9,000
		TOTAL CONTRIBUTIONS PAID	9,000

FORM 990-PF, PART XVI-A - ANALYSIS OF OTHER REVENUE

ATTACHMENT 12

DESCRIPTION	BUSINESS CODE	AMOUNT	EXCLUSION CODE	AMOUNT	RELATED OR EXEMPT FUNCTION INCOME
MISCELLANEOUS REVENUE			01	4.	
TOTALS				4.	

SCHEDULE D (Form 1041)

Department of the Treasury
Internal Revenue Service

Capital Gains and Losses

▶ Attach to Form 1041, Form 5227, or Form 990-T.
▶ Information about Schedule D (Form 1041) and its separate instructions is at *www.irs.gov/form1041*.

OMB No 1545-0092

2012

Name of estate or trust	Employer identification number
TOM AND JULIE WOOD FAMILY FOUNDATION INC.	27-4826335

Note: *Form 5227 filers need to complete **only** Parts I and II*

Part I **Short-Term Capital Gains and Losses - Assets Held One Year or Less**

(a) Description of property (Example 100 shares 7% preferred of "Z" Co)	(b) Date acquired (mo , day, yr)	(c) Date sold (mo , day, yr)	(d) Sales price	(e) Cost or other basis (see instructions)	(f) Gain or (loss) for the entire year Subtract (e) from (d)
1a					

b Enter the short-term gain or (loss), if any, from Schedule D-1, line 1b	1b	27,818.
2 Short-term capital gain or (loss) from Forms 4684, 6252, 6781, and 8824	2	
3 Net short-term gain or (loss) from partnerships, S corporations, and other estates or trusts	3	
4 Short-term capital loss carryover Enter the amount, if any, from line 9 of the 2011 Capital Loss Carryover Worksheet	4	( )
5 **Net short-term gain or (loss).** Combine lines 1a through 4 in column (f) Enter here and on line 13, column (3) on the back ▶	5	27,818.

Part II **Long-Term Capital Gains and Losses - Assets Held More Than One Year**

(a) Description of property (Example 100 shares 7% preferred of "Z" Co)	(b) Date acquired (mo , day, yr)	(c) Date sold (mo , day, yr)	(d) Sales price	(e) Cost or other basis (see instructions)	(f) Gain or (loss) for the entire year Subtract (e) from (d)
6a					

b Enter the long-term gain or (loss), if any, from Schedule D-1, line 6b	6b	
7 Long-term capital gain or (loss) from Forms 2439, 4684, 6252, 6781, and 8824	7	
8 Net long-term gain or (loss) from partnerships, S corporations, and other estates or trusts	8	
9 Capital gain distributions	9	
10 Gain from Form 4797, Part I	10	
11 Long-term capital loss carryover Enter the amount, if any, from line 14 of the 2011 Capital Loss Carryover Worksheet	11	( )
12 **Net long-term gain or (loss).** Combine lines 6a through 11 in column (f) Enter here and on line 14a, column (3) on the back ▶	12	

Part III Summary of Parts I and II

Caution: *Read the instructions* ***before*** *completing this part.*

			(1) Beneficiaries' (see instr)	(2) Estate's or trust's	(3) Total
13	**Net short-term gain or (loss)**	13			27,818.
14	**Net long-term gain or (loss):**				
a	Total for year	14a			
b	Unrecaptured section 1250 gain (see line 18 of the wrksht)	14b			
c	28% rate gain	14c			
15	**Total net gain or (loss).** Combine lines 13 and 14a ▶	15			27,818.

Note: *If line 15, column (3), is a net gain, enter the gain on Form 1041, line 4 (or Form 990-T, Part I, line 4a) If lines 14a and 15, column (2), are net gains, go to Part V, and* ***do not*** *complete Part IV If line 15, column (3), is a net loss, complete Part IV and the* ***Capital Loss Carryover Worksheet,*** *as necessary*

Part IV Capital Loss Limitation

16 Enter here and enter as a (loss) on Form 1041, line 4 (or Form 990-T, Part I, line 4c, if a trust), the **smaller** of
a The loss on line 15, column (3) **or** b $3,000 . . . . 16 ( )

Note: *If the loss on line 15, column (3), is more than $3,000,* ***or*** *if Form 1041, page 1, line 22 (or Form 990-T, line 34), is a loss, complete the* ***Capital Loss Carryover Worksheet*** *in the instructions to figure your capital loss carryover*

Part V Tax Computation Using Maximum Capital Gains Rates

Form 1041 filers. Complete this part **only** if both lines 14a and 15 in column (2) are gains, or an amount is entered in Part I or Part II and there is an entry on Form 1041, line 2b(2), **and** Form 1041, line 22, is more than zero

Caution: *Skip this part and complete the* ***Schedule D Tax Worksheet*** *in the instructions if*

- *Either line 14b, col (2) or line 14c, col (2) is more than zero, or*
- *Both Form 1041, line 2b(1), and Form 4952, line 4g are more than zero*

Form 990-T trusts. Complete this part **only** if both lines 14a and 15 are gains, or qualified dividends are included in income in Part I of Form 990-T, **and** Form 990-T, line 34, is more than zero Skip this part and complete the **Schedule D Tax Worksheet** in the instructions if either line 14b, col (2) or line 14c, col (2) is more than zero

17	Enter taxable income from Form 1041, line 22 (or Form 990-T, line 34)			17	
18	Enter the **smaller** of line 14a or 15 in column (2) but not less than zero	18			
19	Enter the estate's or trust's qualified dividends from Form 1041, line 2b(2) (or enter the qualified dividends included in income in Part I of Form 990-T)	19			
20	Add lines 18 and 19	20			
21	If the estate or trust is filing Form 4952, enter the amount from line 4g, otherwise, enter -0- ▶	21			
22	Subtract line 21 from line 20 If zero or less, enter -0-			22	
23	Subtract line 22 from line 17 If zero or less, enter -0-			23	
24	Enter the **smaller** of the amount on line 17 or $2,400			24	
25	Is the amount on line 23 equal to or more than the amount on line 24? ☐ **Yes.** Skip lines 25 and 26, go to line 27 and check the "No" box ☐ **No.** Enter the amount from line 23			25	
26	Subtract line 25 from line 24			26	
27	Are the amounts on lines 22 and 26 the same? ☐ **Yes.** Skip lines 27 thru 30, go to line 31 ☐ **No.** Enter the smaller of line 17 or line 22			27	
28	Enter the amount from line 26 (If line 26 is blank, enter -0-)			28	
29	Subtract line 28 from line 27			29	
30	Multiply line 29 by 15% (.15)				30
31	Figure the tax on the amount on line 23 Use the 2012 Tax Rate Schedule for Estates and Trusts (see the Schedule G instructions in the instructions for Form 1041)				31
32	Add lines 30 and 31				32
33	Figure the tax on the amount on line 17 Use the 2012 Tax Rate Schedule for Estates and Trusts (see the Schedule G instructions in the instructions for Form 1041)				33
34	**Tax on all taxable income.** Enter the **smaller** of line 32 or line 33 here and on Form 1041, Schedule G, line 1a (or Form 990-T, line 36)				34

SCHEDULE D-1 (Form 1041)

Department of the Treasury Internal Revenue Service

Continuation Sheet for Schedule D (Form 1041)

▶ Attach to Schedule D to list additional transactions for lines 1a and 6a.

▶ Information about Schedule D (Form 1041) and its separate instructions is at *www.irs.gov/form1041*.

OMB No 1545-0092

2012

Name of estate or trust: TOM AND JULIE WOOD FAMILY FOUNDATION INC.

Employer identification number: 27-4826335

Part I Short-Term Capital Gains and Losses - Assets Held One Year or Less

(a) Description of property (Example 100 sh 7% preferred of "Z" Co)	(b) Date acquired (mo , day, yr)	(c) Date sold (mo , day, yr)	(d) Sales price	(e) Cost or other basis (see instructions)	(f) Gain or (loss) Subtract (e) from (d)
1a					
VERIZON COMMUN 3.50%	02/14/2012	07/18/2012	109,382.	105,966.	3,416.
4000 SHS ANNALY CAPITAL MGMT	05/09/2012	07/19/2012	103,290.	100,000.	3,290.
4000 SHS ARMOUR RESIDENTIAL	05/31/2012	07/25/2012	101,600.	100,000.	1,600.
4000 SHS CORP OFFICE PROP TR	06/20/2012	07/24/2012	101,398.	100,000.	1,398.
4000 SHS PS BUSINESS PARKS, INC	05/03/2012	07/17/2012	101,798.	100,000.	1,798.
3000 SHS PUBLIC STORAGE	06/06/2012	07/10/2012	78,538.	75,000.	3,538.
MEDTRONIC INC 3.12%	05/29/2012	08/20/2012	103,880.	104,223.	-343.
VERIZON COMMUN 3.50%	02/14/2012	08/09/2012	109,188.	105,933.	3,255.
HSBC HOLDINGS PLC 5.10%	02/15/2012	08/07/2012	114,118.	110,023.	4,095.
4000 SHS AFFILIATED MANAGERS	08/01/2012	08/16/2012	100,718.	100,000.	718.
100 SHS BB&T CORPORATION	07/24/2012	08/06/2012	2,525.	2,500.	25.
3900 SHS BB&T CORPORATION	07/24/2012	08/13/2012	97,888.	97,500.	388.
3550 SHS PROSPECT CAPITAL CORP	04/24/2012	08/22/2012	88,003.	88,750.	-747.
450 SHS PROSPECT CAPITAL CORP	04/24/2012	08/22/2012	11,160.	11,250.	-90.
4000 SHS STANLEY BLACK & DECKER	07/18/2012	08/01/2012	102,798.	100,000.	2,798.
AETNA INC 3.95%	02/17/2012	09/12/2012	109,451.	107,890.	1,561.
BP CAP MARKETS PL 3.24%	05/29/2012	09/14/2012	102,831.	102,107.	724.
4000 SHS SENIOR HOUSING PPTY	07/17/2012	09/17/2012	97,471.	100,000.	-2,529.
4000 SHS WELLS FARGO & COMPANY	08/09/2012	09/06/2012	99,808.	100,000.	-192.
ZIMMER HOLDINGS 3.37%	02/16/2012	11/14/2012	103,970.	104,469.	-499.
4000 SHS COMMONWEALTH REIT	07/20/2012	11/27/2012	96,021.	100,000.	-3,979.
4000 SHS KILROY REALTY CORP	08/06/2012	11/15/2012	97,798.	100,000.	-2,202.
4000 SHS JPMORGAN CHASE & CO	08/20/2012	11/13/2012	100,092.	100,000.	92.
4000 SHS PNC FINANCIAL SRV GRP	09/14/2012	11/19/2012	99,198.	100,000.	-802.

1b Total. Combine the amounts in column (f) Enter here and on Schedule D, line 1b . . . .

SCHEDULE D-1 (Form 1041)

Department of the Treasury
Internal Revenue Service

Continuation Sheet for Schedule D (Form 1041)

▶ Attach to Schedule D to list additional transactions for lines 1a and 6a.
▶ Information about Schedule D (Form 1041) and its separate instructions is at *www.irs.gov/form1041*.

OMB No 1545-0092

2012

Name of estate or trust: TOM AND JULIE WOOD FAMILY FOUNDATION INC.

Employer identification number: 27-4826335

Part I Short-Term Capital Gains and Losses - Assets Held One Year or Less

(a) Description of property (Example 100 sh 7% preferred of "Z" Co)	(b) Date acquired (mo, day, yr)	(c) Date sold (mo, day, yr)	(d) Sales price	(e) Cost or other basis (see instructions)	(f) Gain or (loss) Subtract (e) from (d)
1a 4000 SHS BANK OF NEW YORK MELLON	09/12/2012	11/29/2012	100,293.	100,000.	293.
4000 SHS COMCAST CORPORATION	11/29/2012	12/18/2012	100,598.	100,000.	598.
4000 SHS NEXTERA ENERGY CAPITAL	11/14/2012	12/13/2012	99,718.	100,000.	-282.
LOWE'S COMPANIES 3.80%	02/15/2012	01/14/2013	110,274.	108,903.	1,371.
STANLEY BLACK & D 3.40%	02/17/2012	01/22/2013	51,890.	52,110.	-220.
4000 SHS FIRST REPUBLIC BANK	11/15/2012	01/17/2013	100,918.	100,000.	918.
4000 SHS WELLS FARGO & COMPANY	11/13/2012	01/03/2013	100,236.	100,000.	236.
4000 SHS TORCHMARK CORP	09/17/2012	01/15/2013	104,078.	100,000.	4,078.
GILEAD SCIENCES 4.40%	02/17/2012	02/07/2013	111,552.	106,887.	4,665.
4000 SHS CAPITAL ONE FINANCIAL	08/13/2012	02/05/2013	100,598.	100,000.	598.
4000 SHS DUKE ENERGY CORP	01/09/2013	02/07/2013	99,798.	100,000.	-202.
4000 SHS STIFEL FINANCIAL CORP	12/18/2012	01/29/2013	102,278.	100,000.	2,278.
4000 SHS THE GOLDMAN SACHS GRP	10/17/2012	03/18/2013	100,238.	100,000.	238.
4000 GENERAL ELEC CAP CORP	01/22/2013	03/04/2013	100,598.	100,000.	598.
4000 SHS PRUDENTIAL FINCL INC.	11/27/2012	02/27/2013	100,518.	100,000.	518.
4000 SHS SUNTRUST BANKS INC.	12/13/2012	03/19/2013	99,638.	100,000.	-362.
306 SHS MFS EMGING MKTS DEBT I	01/18/2013	02/06/2013	4,914.	4,990.	-76.
0.9540 SHS MFS EMGING MKTS DEBT I	01/31/2013	02/06/2013	15.	15.	
54 SHS AGILENT TECHNOLOGIE S INC	01/17/2013	02/26/2013	2,204.	2,395.	-191.
45 SHS CORP CALIF CL A	01/17/2013	02/27/2013	1,541.	1,588.	-47.
20 SHS GARMIN LTD	01/17/2013	02/26/2013	680.	791.	-111.
0.2640 SHS MFS MKTS DEBT I	02/28/2013	03/15/2013	4.	4.	
29 SHS EXPRESS SCRIPTS HLDG CO	01/17/2013	04/24/2013	1,641.	1,604.	37.
26 SHS MCDONALDS CORP	01/17/2013	04/24/2013	2,630.	2,393.	237.

1b Total. Combine the amounts in column (f) Enter here and on Schedule D, line 1b . . . .

SCHEDULE D-1
(Form 1041)

Department of the Treasury
Internal Revenue Service

Continuation Sheet for Schedule D (Form 1041)

▶ Attach to Schedule D to list additional transactions for lines 1a and 6a.
▶ Information about Schedule D (Form 1041) and its separate instructions is at *www.irs.gov/form1041*.

OMB No 1545-0092

2012

Name of estate or trust: TOM AND JULIE WOOD FAMILY FOUNDATION INC.

Employer identification number: 27-4826335

Part I Short-Term Capital Gains and Losses - Assets Held One Year or Less

(a) Description of property (Example 100 sh 7% preferred of "Z" Co)	(b) Date acquired (mo , day, yr)	(c) Date sold (mo , day, yr)	(d) Sales price	(e) Cost or other basis (see instructions)	(f) Gain or (loss) Subtract (e) from (d)
1a					
58 SHS MICROSOFT CORP	01/17/2013	04/22/2013	1,794.	1,594.	200.
18 SHS SPDR GOLD TRUST	01/18/2013	04/25/2013	2,534.	2,942.	-408.
67 SHS EMC CORPORATION MASS	01/17/2013	05/28/2013	1,607.	1,608.	-1.
11 SHS EMC CORPORATION MASS	04/25/2013	05/28/2013	264.	250.	14.
21 SHS UNDER ARMOUR INC	02/26/2013	06/06/2013	1,246.	986.	260.
791 SHS ABBOTT LABS	01/03/2013	01/07/2013	26,161.	25,992.	169.
366 SHS ROYAL DUTCH SHEL PLC	01/03/2013	02/04/2013	25,897.	25,986.	-89.
350 SHS ROYAL DUTCH SHEL PLC	01/07/2013	02/04/2013	24,765.	24,864.	-99.
151 SHS PHILIP MORRIS INTL INC	01/03/2013	03/26/2013	13,768.	13,021.	747.
143 SHS PHILIP MORRIS INTL INC	01/07/2013	03/26/2013	13,038.	12,359.	679.
262 SHS TIME WARNER INC	01/03/2013	03/26/2013	14,948.	13,015.	1,933.
257 SHS TIME WARNER INC	01/07/2013	03/26/2013	14,662.	12,579.	2,083.
2078 SHS AMERICAN CAP AGY CORP	01/17/2013	05/29/2013	54,866.	65,021.	-10,155.

1b Total. Combine the amounts in column (f) Enter here and on Schedule D, line 1b . . . . 27,818.

Name of estate or trust as shown on Form 1041 Do not enter name and employer identification number if shown on the other side	Employer identification number

Part II Long-Term Capital Gains and Losses - Assets Held More Than One Year

(a) Description of property (Example 100 sh 7% preferred of "Z" Co)	(b) Date acquired (mo , day, yr)	(c) Date sold (mo , day, yr)	(d) Sales price	(e) Cost or other basis (see instructions)	(f) Gain or (loss) Subtract (e) from (d)
6a 100,000 SHS BARCLAYS BANK PLC	02/10/2012	02/15/2013	100,000.	100,000.	

6b Total. Combine the amounts in column (f) Enter here and on Schedule D, line 6b	

FEDERAL ELECTIONS

DESCRIPTION: ELECTION TO AMORTIZE BOND PREMIUMS

TAXPAYER HEREBY ELECTS TO AMORTIZE BOND PREMIUMS PURSUANT TO TREASURY REGULATION 1.171-4(A).

TOM AND JULIE WOOD FAMILY FOUNDATION INC.
FORM 990-PF
2012 BALANCE SHEET ATTACHMENT

CORPORATE STOCKS - LINE 10B

DESCRIPTION	BEGINNING BALANCE 6/30/2012	ENDING BALANCE 6/30/2013	FMV 6/30/2013
ANNALY CAPITAL MGT	100,000	100,000	98,520
APOLLO COMS REAL ESTATE	-	100,000	106,200
BOSTON PROPERTIES INC	-	100,000	96,280
CITIGROUP INC	-	100,000	95,400
COLONY FINCL CO (CLNY)	-	102,740	103,080
FEDERAL AGRIC MTG CORP	-	100,000	95,080
GENERAL GROWTH PROP	-	100,000	92,720
HATTERAS FINCL CORP	-	100,000	96,920
JPMORGAN CHASE & CO	-	100,000	95,320
KENNEDY WILSON, INC	-	100,000	101,335
LASALLE HOTEL PROPERTIES	-	100,000	92,360
MAIDEN HOLDINGS LTD	-	100,000	105,200
NEXTERA ENERGY CAP HLDGS	-	100,000	90,320
PARTNERE LTD SERIES F	-	100,000	94,920
PITNEY BOWES INC	-	100,000	101,000
ARMOUR RESIDENTIAL	100,000	-	-
CORP OFFICE PROP TR	100,000	-	-
PB BUSINESS PARKS, INC	100,000	-	-
PROSPECT CAPITAL CORP	100,000	-	-
PUBLIC STORAGE	75,000	100,000	93,000
SELECTIVE INSURANCE GRP	-	100,000	92,240
VORNADO REALTY TRUST	-	100,000	89,680
TOTAL CORPORATE STOCKS TO LINE 10B	**575,000**	**1,802,740**	**1,739,574**

CORPORATE BONDS - LINE 10C

DESCRIPTION	BEGINNING BALANCE 6/30/2012	ENDING BALANCE 6/30/2013	FMV 6/30/2013
AUD AUSTRALIAN GOVT 5 500%	27,173	27,173	23,179
AUD AUSTRALIAN GOVT 6 250%	27,926	27,926	23,678
MXN GEN ELEC CAP CRP 8 750%	85,162	85,162	84,332
BRL ANHEUSER-BUSCH 9 750%	93,929	93,929	68,751
USD ARCELORMITTAL 9 850%	30,375	29,741	29,563
JEFFRIES GROUP INC 8 500%	27,292	27,030	30,125
WYNDHAM WORLDWIDE 7 375%	29,604	29,091	29,892
AETNA INC 3 950%	108,078	-	-
CARDINAL HEALTH INC 4 625%	140,319	138,705	133,658
DELL INC 4 625%	113,893	112,477	94,545
HSBC HOLDINGS PLC 5 100%	110,132	-	-
APPLIED MATERIALS INC 4 300%	112,746	111,473	105,025
USD RIO TINTO FIN USA 3 750%	216,255	214,688	197,510
GENWORTH FINANCIAL INC 7 625%	26,006	25,926	29,052
VERIZON COMMUNICATIONS 3 500%	212,004	-	-
LOWE'S COMPANIES INC 3 800%	109,389	-	-
ZIMMER HOLDINGS INC 3 375%	104,636	-	-
GILEAD SCIENCES INC 4 400%	107,295	-	-
QWEST CORP 6 750%	28,510	28,209	27,831
STANLEY BLACK & DECKER 3 400%	52,228	-	-
GOLDMAN SACHS GROUP INC 5 750%	103,720	103,412	110,301
BARCLAYS BANK PLC	100,000	-	-
ALCOA INC	26,919	26,759	24,325
MEDTRONIC INC 3 125%	104,281	-	-
BP CAPITAL MARKETS PLC 3 245%	102,149	-	-
MOTOROLA INCORPORATED 7 500%	30,071	29,789	30,345
MORGAN STANLEY 6 250%	105,271	105,019	109,597
TOTAL CORPORATE BONDS TO LINE 10C	**2,335,363**	**1,216,509**	**1,151,708**

TOTAL INVESTMENTS	**2,910,363**	**3,019,249**	**2,891,283**

TOM AND JULIE WOOD FAMILY FOUNDATION INC

FORM 990-PF

2012 BALANCE SHEET ATTACHMENT

OTHER INVESTMENTS- LINE 13

EQUITIES

DESCRIPTION	BEGINNING BALANCE 6/30/2012	ENDING BALANCE 6/30/2013	FMV 6/30/2013
1,764 ABBVIE INC SHS	-	64,149	72,924
968 ALTRIA GROUP INC	-	32,084	33,870
6,302 ANNALY CAP MGMT INC	-	87,012	79,216
1,370 AT&T INC	-	48,036	48,498
1,107 BCE INC	-	48,190	45,409
1,355 BRISTOL-MYERS SQUIBB CO	-	47,763	60,555
576 CHEVRON CORP	-	64,581	68,164
1,910 CMS ENERGY CORP	-	48,130	51,895
2,086 CONAGRA FOODS INC	-	64,139	72,864
963 DIGITAL RLTY TR INC	-	64,221	58,743
679 DU PONT E I DE NEMOURS	-	32,159	35,648
1,121 EATON CORP PLC	-	64,486	73,773
2,979 GENERAL ELECTRIC	-	64,441	69,083
3,085 HATTERAS FINL CORP	-	81,637	76,014
2,923 INTEL CORP	-	64,136	70,824
1,033 JPMORGAN CHASE & CO	-	47,847	54,532
738 KIMBERLY CLARK	-	64,574	71,689
1,022 KRAFT FOODS GROUP INC	-	48,090	57,099
699 MCDONALDS CORP	-	64,214	69,201
744 MERK AND CO INC SHS	-	31,866	34,559
2,282 MICROSOFT CORP	-	64,821	78,832
670 NEXTERA ENERGY INC SHS	-	48,178	54,592
722 OCCIDENTAL PETE CORP CAL	-	63,980	64,424
1,349 PACCAR INC	-	64,422	72,387
74 PHILIP MORRIS INTL INC	-	6,717	6,410
655 SEMPRA ENERGY	-	48,188	53,553
2,223 SPECTRA ENERGY CORP	-	64,180	76,605
1,115 THOMSON REUTERS CORP	-	36,358	36,316
582 TORONTO DOMINION BANK	-	48,334	46,775
976 VENTAS INC	-	64,254	67,793
1,424 VERIZON COMMUNICATIONS COM	-	64,066	71,684
721 WELLS FARGO & CO NEW DEL	-	26,836	29,756
1,755 XCEL ENERGY INC	-	48,249	49,737
327 ACE LIMITED	-	28,790	29,260
630 AGRIUM INC	-	56,812	54,785
580 ALLERGAN INC	-	57,274	48,859
772 AMER EXPRESS COMPANY	-	57,265	57,715
656 ANADARKO PETE CORP	-	56,642	56,370
622 ANHEUSER-BUSCH INBEV ADR	-	56,805	56,142
131 APPLE INC	-	57,276	51,945
209 AUTOZONE INC NEVADA COM	-	86,546	88,551
213 BLACKROCK INC	-	56,943	54,709
941 CAMERON INTL CORP	-	57,710	57,552
898 COGNIZANT TECH SOLUTNS A	-	57,486	56,251
1,449 COMCAST CORP NEW CL A	-	57,386	60,496
996 CVS CAREMARK CORP	-	57,515	56,951
663 DEERE CO	-	56,874	53,869
1,241 EDISON INTL CALIF	-	57,297	59,767
927 FLUOR CORP NEW DEL COM	-	57,089	54,980
1,894 FORD MOTOR CO	-	29,082	29,300
1,869 FREEPRT-MCMRAN CPR & GLD	-	55,848	51,603
750 F5 NETWORKS INC	-	57,181	51,600
565 GILEAD SCIENCES INC COM	-	28,639	28,968
70 GOOGLE INC CL A	-	60,737	61,626
1,122 HOME DEPOT INC	-	85,610	86,921
368 HONEYWELL INTL INC DEL	-	28,773	29,197
3,451 INTEL CORP	-	85,816	83,618
727 MARATHON PETROLEUM CORP	-	56,886	51,661
935 OCCIDENTAL PETE CORP AL	-	85,736	83,430
2,683 PERKINELMER INC	-	87,070	87,198
918 QUALCOMM INC	-	57,269	56,081
772 SBA COMMUNICATIONS CRP A	-	57,020	57,221
2,510 SKYWORKS SOLUTIONS INC	-	56,796	54,944
375 UNION PACIFIC CORP	-	57,588	57,855
483 VISA INC CL A SHRS	-	86,455	88,268
1,152 WAL-MART STORES INC	-	85,941	85,812
1,439 WELLS FARGO & CO NEW DEL	-	57,602	59,388
TOTAL EQUITIES	**-**	**3,816,093**	**3,916,313**

TOM AND JULIE WOOD FAMILY FOUNDATION INC
FORM 990-PF
2012 BALANCE SHEET ATTACHMENT

MUTUAL FUNDS

DESCRIPTION	BEGINNING BALANCE 6/30/2012	ENDING BALANCE 6/30/2013	FMV 6/30/2013
9,937 ALLIANZGI NFJ DIVID	-	163,531	167,438
8,881 CBRE CLARION GLOBAL	-	81,719	80,107
17,419 EATON VANCE TAX-MANAGED	-	163,326	161,474
6,899 FIDUCIARY/CLAY MLP OPP	-	163,385	188,343
11,780 GAMCO NAT RES GOLD	-	164,857	123,101
4,738 ISHARES DOW JONES INTRNL	-	163,348	150,811
8,492 NUVEEN ENERGY MLP TOTAL	-	163,321	186,994
5,364 POWERSHARES GLOBAL	-	163,287	146,491
8,877 POWERSHARES FIN PFD	-	163,263	158,810
3,252 POWERSHARES EXCHANGE	-	81,633	80,487
16,668 BLACKROCK FLOATING RATE	-	174,347	173,017
21,422 BLACKROCK HI YLD BD	-	174,177	170,955
3,521 ISHARES MSCI EMERGING	-	140,830	135,559
2,535 ISHARES DOW JONES INTRNL	-	85,392	80,689
2,344 ISHARES S&P GLOBAL	-	85,661	82,485
18,080 MFS EMERGING MKTS DEBT	-	172,627	165,437
2,953 SECTOR SPDR FINANCIAL	-	57,443	57,421
1,536 VANGUARD SMALL CAP	-	143,441	143,939
1,510 VANGUARD MID-CAP ETF	-	143,379	143,661
1,279 VANGUARD DIVIDEND	-	85,955	84,670
1,855 VANGUARD FTSE ALL WORLD	-	85,388	82,028
TOTAL MUTUAL FUNDS	-	2,820,309	2,763,916
TOTAL OTHER INVESTMENTS-LINE 13	-	6,636,402	6,680,230

Form **8868**
(Rev January 2013)
Department of the Treasury
Internal Revenue Service

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 . . . . ▶ [X]
- 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

Enter filer's identifying number, see instructions

Type or print	Name of exempt organization or other filer, see instructions TOM AND JULIE WOOD FAMILY FOUNDATION INC.	Employer identification number (EIN) or 27-4826335
File by the due date for filing your return See instructions	Number, street, and room or suite no If a P O box, see instructions 3003 E. 98TH STREET	Social security number (SSN)
	City, town or post office, state, and ZIP code For a foreign address, see instructions INDIANAPOLIS, IN 46280	

Enter the Return code for the return that this application is for (file a separate application for each return) 0 4

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

- The books are in the care of ▶ MR. JON MARTIN

Telephone No ▶ 317 574-2344 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 02/17 , 20 14 , to file the exempt organization return for the organization named above The extension is for the organization's return for

▶ [ ] calendar year 20 ___ or

▶ [X] tax year beginning 07/01 , 2012 , and ending 06/30 , 20 13

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**	$ 5,723.
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**	$ 723.
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**	$ 5,000.

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

For Privacy Act and Paperwork Reduction Act Notice, see Instructions. Form **8868** (Rev 1-2013)