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## Return of Organization Exempt From Income Tax

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code  
(except black lung benefit trust or private foundation)

2012

Open to Public  
InspectionDepartment of the Treasury  
Internal Revenue Service

The organization may have to use a copy of this return to satisfy state reporting requirements

**A** For the 2012 calendar year, or tax year beginning Oct 1, 2012, and ending Sep 30, 2013

**B** Check if applicable:  
☐ Address change  
☐ Name change  
☐ Initial return  
☐ Terminated  
☐ Amended return  
☐ Application pending

**C** Name of organization: Society of St Vincent de Paul  
 Doing Business As: Archdiocesan Council of Indianapolis Inc  
 Number and street (or P O box if mail is not delivered to street addr): 3001 E 30th Street  
 City, town or country: Indianapolis State: IN ZIP code + 4: 46218

**D** Employer Identification Number: 37-1507632

**E** Telephone number: (317) 924-5769

**F** Name and address of principal officer: Patrick N Jerrell 5209 Greenheart Dr Indianapolis IN 46237

**G** Gross receipts \$ 2,202,345.

**H(a)** Is this a group return for affiliates? ☒ Yes ☐ No  
**H(b)** Are all affiliates included? ☒ Yes ☐ No  
 If 'No,' attach a list (see instructions)

**I** Tax-exempt status: ☒ 501(c)(3) ☐ 501(c) ( ) (insert no.) ☐ 4947(a)(1) or ☐ 527

**J** Website: N/A

**K** Form of organization: ☒ Corporation ☐ Trust ☐ Association ☐ Other

**L** Year of Formation: 1946

**M** State of legal domicile: IN

**Part I Summary**

**Activities & Governance**

1 Briefly describe the organization's mission or most significant activities: The Society (SVDP) of the Indianapolis Archdiocese provides support services and supplies to individuals and families in need, without discrimination. It is operated by volunteers only, and donations come from individuals, businesses, other organizations.

2 Check this box ☐ if the organization discontinued its operations or disposed of more than 25% of its net assets

3 Number of voting members of the governing body (Part VI, line 1a) 3 15

4 Number of independent voting members of the governing body (Part VI, line 1b) 4 15

5 Total number of individuals employed in calendar year 2012 (Part V, line 2a) 5 0

6 Total number of volunteers (estimate if necessary) 6 10,325

7a Total unrelated business revenue from Part VIII, column (C), line 12 7a 0.

7b Net unrelated business taxable income from Form 990-T, line 34 7b

	Prior Year	Current Year
8 Contributions and grants (Part VIII, line 1h)	3,112,497.	2,107,009.
9 Program service revenue (Part VIII, line 2g)		
10 Investment income (Part VIII, column (A), lines 3, 4, and 7d)	84,388.	95,336.
11 Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)		
12 Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12)	3,196,885.	2,202,345.
13 Grants and similar amounts paid (Part IX, column (A), lines 1-3)		
14 Benefits paid to or for members (Part IX, column (A), line 4)		
15 Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10)		
16a Professional fundraising fees (Part IX, column (A), line 11e)		
b Total fundraising expenses (Part IX, column (D), line 25) 40,100.		
17 Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e)	2,041,015.	2,277,815.
18 Total expenses - Add lines 13-17 (must equal Part IX, column (A), line 25)	2,041,015.	2,277,815.
19 Revenue less expenses - Subtract line 18 from line 12	1,155,870.	-75,470.
20 Total assets (Part X, line 16)	Beginning of Current Year 4,389,115.	End of Year 4,313,645.
21 Total liabilities (Part X, line 26)		
22 Net assets or fund balances - Subtract line 21 from line 20	4,389,115.	4,313,645.

**Part II Signature Block**

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 officer) is based on all information of which preparer has any knowledge.

**Sign Here**

Signature of officer: Patrick N. Jerrell Date: 8/11/14  
 Type or print name and title: Patrick N Jerrell President

**Paid Preparer Use Only**

Print/Type preparer's name: Lucy Riegel Preparer's signature: Lucy Riegel Date: 8-11-14  
 Firm's name: LUCY RIEGEL CPA, P.C. Check ☐ if self-employed PTIN: P00035235  
 Firm's address: 4631 BOULEVARD PLACE INDIANAPOLIS IN 46208 Firm's EIN: 35-1871812  
 Phone no: (317) 923-8021

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

BAA For Paperwork Reduction Act Notice, see the separate instructions.

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Form 990 (2012)

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**Part III Statement of Program Service Accomplishments**

Check if Schedule O contains a response to any question in this Part III

☒

1. Briefly describe the organization's mission:

The Society (SVDP) of the Indianapolis  
Archdiocese provides support services and supplies to individuals and  
See Form 990, Page 2, Part III, Line 1 (continued)

2. Did the organization undertake any significant program services during the year which were not listed on the prior Form 990 or 990-EZ?

☐ Yes ☒ No

If 'Yes,' describe these new services on Schedule O

3. Did the organization cease conducting, or make significant changes in how it conducts, any program services?

☐ Yes ☒ No

If 'Yes,' describe these changes on Schedule O

4. Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses. Section 501(c)(3) and 501(c)(4) organizations and section 4947(a)(1) trusts are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported.

4a (Code \_\_\_\_\_) (Expenses \$ 497,609. including grants of \$ 0.) (Revenue \$ 0.)

Pratt Quigley Food Pantry provides free food to the needy regardless  
of race, religions. Food stuffs are procured from Gleaners Food Bank,  
private donors and bulk purchases from vendors (special works division)

Households served: 23,295Persons served: 82,607Seniors served: 5,420Number of volunteers: 2,878 Number of volunteer hours: 64,7644b (Code \_\_\_\_\_) (Expenses \$ 315,205. including grants of \$ 0.) (Revenue \$ 0.)

Distribution Center provides free distribution of furniture, appliances,  
household goods & clothing to the needy. (special works division)

Households served: 3,378Persons served: 5,344Children served: 4,887Number of volunteers: 1,634Number of volunteer hours: 33,2924c (Code \_\_\_\_\_) (Expenses \$ 908,458. including grants of \$ 0.) (Revenue \$ 0.)

Fifty conferences covering central and southern Indiana provide food,  
clothing, household goods and financial aid to the needy regardless  
of race, religion or gender. (local conferences division)

Number of people helped: 49,722Value of goods provided: \$655,770Number of people visited: 59,325Number of volunteer hours: 98,336

4d Other program services (Describe in Schedule O)

(Expenses \$ 352,154. including grants of \$ 0.) (Revenue \$ 0.)4e Total program service expenses 2,073,426.

**Part IV Checklist of Required Schedules**

	Yes	No
1 Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? If 'Yes,' complete Schedule A	X	
2 Is the organization required to complete Schedule B, Schedule of Contributors (see instructions)?	X	
3 Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? If 'Yes,' complete Schedule C, Part I		X
4 <b>Section 501(c)(3) organizations</b> Did the organization engage in lobbying activities, or have a section 501(h) election in effect during the tax year? If 'Yes,' complete Schedule C, Part II		X
5 Is the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization that receives membership dues, assessments, or similar amounts as defined in Revenue Procedure 98-19? If 'Yes,' complete Schedule C, Part III		X
6 Did the organization maintain any donor advised funds or any similar funds or accounts for which donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? If 'Yes,' complete Schedule D, Part I		X
7 Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas or historic structures? If 'Yes,' complete Schedule D, Part II		X
8 Did the organization maintain collections of works of art, historical treasures, or other similar assets? If 'Yes,' complete Schedule D, Part III		X
9 Did the organization report an amount in Part X, line 21, for escrow or custodial account liability, serve as a custodian for amounts not listed in Part X, or provide credit counseling, debt management credit repair, or debt negotiation services? If 'Yes,' complete Schedule D, Part IV		X
10 Did the organization, directly or through a related organization, hold assets in temporarily restricted endowments, permanent endowments, or quasi-endowments? If 'Yes,' complete Schedule D, Part V		X
11 If the organization's answer to any of the following questions is 'Yes', then complete Schedule D, Parts VI, VII, VIII, IX, or X as applicable		
a Did the organization report an amount for land, buildings and equipment in Part X, line 10? If 'Yes,' complete Schedule D, Part VI	X	
b Did the organization report an amount for investments—other securities in Part X, line 12 that is 5% or more of its total assets reported in Part X, line 16? If 'Yes,' complete Schedule D, Part VII	X	
c Did the organization report an amount for investments—program related in Part X, line 13 that is 5% or more of its total assets reported in Part X, line 16? If 'Yes,' complete Schedule D, Part VIII		X
d Did the organization report an amount for other assets in Part X, line 15 that is 5% or more of its total assets reported in Part X, line 16? If 'Yes,' complete Schedule D, Part IX		X
e Did the organization report an amount for other liabilities in Part X, line 25? If 'Yes,' complete Schedule D, Part X		X
f Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses the organization's liability for uncertain tax positions under FIN 48 (ASC 740)? If 'Yes,' complete Schedule D, Part X		X
12a Did the organization obtain separate, independent audited financial statements for the tax year? If 'Yes,' complete Schedule D, Parts XI, and XII	X	
b Was the organization included in consolidated, independent audited financial statements for the tax year? If 'Yes,' and if the organization answered 'No' to line 12a, then completing Schedule D, Parts XI and XII is optional		X
13 Is the organization a school described in section 170(b)(1)(A)(ii)? If 'Yes,' complete Schedule E		X
14a Did the organization maintain an office, employees, or agents outside of the United States?		X
b Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking, fundraising, business, investment, and program service activities outside the United States, or aggregate foreign investments valued at \$100,000 or more? If 'Yes,' complete Schedule F, Parts I and IV		X
15 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or assistance to any organization or entity located outside the United States? If 'Yes,' complete Schedule F, Parts II and IV		X
16 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or assistance to individuals located outside the United States? If 'Yes,' complete Schedule F, Parts III and IV		X
17 Did the organization report a total of more than \$15,000 of expenses for professional fundraising services on Part IX, column (A), lines 6 and 11e? If 'Yes,' complete Schedule G, Part I (see instructions)		X
18 Did the organization report more than \$15,000 total of fundraising event gross income and contributions on Part VIII, lines 1c and 8a? If 'Yes,' complete Schedule G, Part II		X
19 Did the organization report more than \$15,000 of gross income from gaming activities on Part VIII, line 9a? If 'Yes,' complete Schedule G, Part III		X
20a Did the organization operate one or more hospital facilities? If 'Yes,' complete Schedule H		X
b If 'Yes' to line 20a, did the organization attach a copy of its audited financial statements to this return?		

**Part IV Checklist of Required Schedules (continued)**

	Yes	No
<b>21</b> Did the organization report more than \$5,000 of grants and other assistance to governments and organizations in the United States on Part IX, column (A), line 1? <i>If 'Yes,' complete Schedule I, Parts I and II</i>		X
<b>22</b> Did the organization report more than \$5,000 of grants and other assistance to individuals in the United States on Part IX, column (A), line 2? <i>If 'Yes,' complete Schedule I, Parts I and III</i>		X
<b>23</b> Did the organization answer 'Yes' to Part VII, Section A, line 3, 4, or 5 about compensation of the organization's current and former officers, directors, trustees, key employees, and highest compensated employees? <i>If 'Yes,' complete Schedule J</i>		X
<b>24a</b> Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the last day of the year, and that was issued after December 31, 2002? <i>If 'Yes,' answer lines 24b through 24d and complete Schedule K. If 'No,' go to line 25</i>		X
<b>24b</b> Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception?		
<b>24c</b> Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds?		
<b>24d</b> Did the organization act as an 'on behalf of' issuer for bonds outstanding at any time during the year?		
<b>25a</b> <b>Section 501(c)(3) and 501(c)(4) organizations.</b> Did the organization engage in an excess benefit transaction with a disqualified person during the year? <i>If 'Yes,' complete Schedule L, Part I</i>		X
<b>25b</b> Is the organization aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? <i>If 'Yes,' complete Schedule L, Part I</i>		X
<b>26</b> Was a loan to or by a current or former officer, director, trustee, key employee, highest compensated employee, or disqualified person outstanding as of the end of the organization's tax year? <i>If 'Yes,' complete Schedule L, Part II</i>		X
<b>27</b> Did the organization provide a grant or other assistance to an officer, director, trustee, key employee, substantial contributor or employee thereof, a grant selection committee member, or to a 35% controlled entity or family member of any of these persons? <i>If 'Yes,' complete Schedule L, Part III</i>		X
<b>28</b> Was the organization a party to a business transaction with one of the following parties (see Schedule L, Part IV instructions for applicable filing thresholds, conditions, and exceptions)?		
<b>28a</b> A current or former officer, director, trustee, or key employee? <i>If 'Yes,' complete Schedule L, Part IV</i>		X
<b>28b</b> A family member of a current or former officer, director, trustee, or key employee? <i>If 'Yes,' complete Schedule L, Part IV</i>		X
<b>28c</b> An entity of which a current or former officer, director, trustee, or key employee (or a family member thereof) was an officer, director, trustee, or direct or indirect owner? <i>If 'Yes,' complete Schedule L, Part IV</i>		X
<b>29</b> Did the organization receive more than \$25,000 in non-cash contributions? <i>If 'Yes,' complete Schedule M</i>	X	
<b>30</b> Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? <i>If 'Yes,' complete Schedule M</i>		X
<b>31</b> Did the organization liquidate, terminate, or dissolve and cease operations? <i>If 'Yes,' complete Schedule N, Part I</i>		X
<b>32</b> Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? <i>If 'Yes,' complete Schedule N, Part II</i>		X
<b>33</b> Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? <i>If 'Yes,' complete Schedule R, Part I</i>		X
<b>34</b> Was the organization related to any tax-exempt or taxable entity? <i>If 'Yes,' complete Schedule R, Parts II, III, IV, and V, line 1</i>		X
<b>35a</b> Did the organization have a controlled entity within the meaning of section 512(b)(13)?		X
<b>35b</b> If 'Yes' to line 35a, did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? <i>If 'Yes,' complete Schedule R, Part V, line 2</i>		
<b>36</b> <b>Section 501(c)(3) organizations.</b> Did the organization make any transfers to an exempt non-charitable related organization? <i>If 'Yes,' complete Schedule R, Part V, line 2</i>		X
<b>37</b> Did the organization conduct more than 5% of its activities through an entity that is not a related organization and that is treated as a partnership for federal income tax purposes? <i>If 'Yes,' complete Schedule R, Part VI</i>		X
<b>38</b> Did the organization complete Schedule O and provide explanations in Schedule O for Part VI, lines 11b and 19? <b>Note.</b> All Form 990 filers are required to complete Schedule O	X	

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Form 990 (2012)

**Part V Statements Regarding Other IRS Filings and Tax Compliance**Check if Schedule O contains a response to any question in this Part V. ☐

		Yes	No
<b>1 a</b>	Enter the number reported in Box 3 of Form 1096. Enter -0- if not applicable.	0	
<b>1 b</b>	Enter the number of Forms W-2G included in line 1a. Enter -0- if not applicable.	0	
<b>1 c</b>	Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners?		X
<b>2 a</b>	Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements, filed for the calendar year ending with or within the year covered by this return.	0	
<b>2 b</b>	If at least one is reported on line 2a, did the organization file all required federal employment tax returns? <b>Note.</b> If the sum of lines 1a and 2a is greater than 250, you may be required to e-file (see instructions).		
<b>3 a</b>	Did the organization have unrelated business gross income of \$1,000 or more during the year?		X
<b>3 b</b>	If 'Yes' has it filed a Form 990-T for this year? If 'No,' provide an explanation in Schedule O.		
<b>4 a</b>	At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a financial account in a foreign country (such as a bank account, securities account, or other financial account)?		X
<b>4 b</b>	If 'Yes,' enter the name of the foreign country: See instructions for filing requirements for Form TD F 90-22.1, Report of Foreign Bank and Financial Accounts.		
<b>5 a</b>	Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?		X
<b>5 b</b>	Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?		X
<b>5 c</b>	If 'Yes,' to line 5a or 5b, did the organization file Form 8886-T?		
<b>6 a</b>	Does the organization have annual gross receipts that are normally greater than \$100,000, and did the organization solicit any contributions that were not tax deductible as charitable contributions?		X
<b>6 b</b>	If 'Yes,' did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?		
<b>7</b>	<b>Organizations that may receive deductible contributions under section 170(c).</b>		
<b>7 a</b>	Did the organization receive a payment in excess of \$75 made partly as a contribution and partly for goods and services provided to the payor?		X
<b>7 b</b>	If 'Yes,' did the organization notify the donor of the value of the goods or services provided?		
<b>7 c</b>	Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?		X
<b>7 d</b>	If 'Yes,' indicate the number of Forms 8282 filed during the year.		
<b>7 e</b>	Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?		X
<b>7 f</b>	Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?		X
<b>7 g</b>	If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required?		N/A
<b>7 h</b>	If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C?		N/A
<b>8</b>	<b>Sponsoring organizations maintaining donor advised funds and section 509(a)(3) supporting organizations.</b> Did the supporting organization, or a donor advised fund maintained by a sponsoring organization, have excess business holdings at any time during the year?		N/A
<b>9</b>	<b>Sponsoring organizations maintaining donor advised funds.</b>		
<b>9 a</b>	Did the organization make any taxable distributions under section 4966?		N/A
<b>9 b</b>	Did the organization make a distribution to a donor, donor advisor, or related person?		N/A
<b>10</b>	<b>Section 501(c)(7) organizations.</b> Enter		
<b>10 a</b>	Initiation fees and capital contributions included on Part VIII, line 12.		N/A
<b>10 b</b>	Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities.		N/A
<b>11</b>	<b>Section 501(c)(12) organizations.</b> Enter		
<b>11 a</b>	Gross income from members or shareholders.		N/A
<b>11 b</b>	Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them).		N/A
<b>12 a</b>	<b>Section 4947(a)(1) non-exempt charitable trusts.</b> Is the organization filing Form 990 in lieu of Form 1041?		N/A
<b>12 b</b>	If 'Yes,' enter the amount of tax-exempt interest received or accrued during the year.		
<b>13</b>	<b>Section 501(c)(29) qualified nonprofit health insurance issuers.</b>		
<b>13 a</b>	Is the organization licensed to issue qualified health plans in more than one state? <b>Note.</b> See the instructions for additional information the organization must report on Schedule O.		N/A
<b>13 b</b>	Enter the amount of reserves the organization is required to maintain by the states in which the organization is licensed to issue qualified health plans.		N/A
<b>13 c</b>	Enter the amount of reserves on hand.		N/A
<b>14 a</b>	Did the organization receive any payments for indoor tanning services during the tax year?		X
<b>14 b</b>	If 'Yes,' has it filed a Form 720 to report these payments? If 'No,' provide an explanation in Schedule O.		N/A

**Part VI. Governance, Management and Disclosure** For each 'Yes' response to lines 2 through 7b below, and for a 'No' response to line 8a, 8b, or 10b below, describe the circumstances, processes, or changes in Schedule O. See instructions.

Check if Schedule O contains a response to any question in this Part VI

☒**Section A. Governing Body and Management**

	Yes	No
<b>1 a</b> Enter the number of voting members of the governing body at the end of the tax year. If there are material differences in voting rights among members of the governing body, or if the governing body delegated broad authority to an executive committee or similar committee, explain in Schedule O.	15	
<b>1 b</b> Enter the number of voting members included in line 1a, above, who are independent	15	
<b>2</b> Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee or key employee?		X
<b>3</b> Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors or trustees, or key employees to a management company or other person?		X
<b>4</b> Did the organization make any significant changes to its governing documents since the prior Form 990 was filed?		X
<b>5</b> Did the organization become aware during the year of a significant diversion of the organization's assets?		X
<b>6</b> Did the organization have members or stockholders?		X
<b>7 a</b> Did the organization have members, stockholders, or other persons who had the power to elect or appoint one or more members of the governing body?		X
<b>b</b> Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or other persons other than the governing body?		X
<b>8</b> Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following:		
<b>a</b> The governing body?	X	
<b>b</b> Each committee with authority to act on behalf of the governing body?	X	
<b>9</b> Is there any officer, director or trustee, or key employee listed in Part VII, Section A, who cannot be reached at the organization's mailing address? If 'Yes,' provide the names and addresses in Schedule O		X

**Section B. Policies** (This Section B requests information about policies not required by the Internal Revenue Code.)

	Yes	No
<b>10 a</b> Did the organization have local chapters, branches, or affiliates?	X	
<b>b</b> If 'Yes,' did the organization have written policies and procedures governing the activities of such chapters, affiliates, and branches to ensure their operations are consistent with the organization's exempt purposes?	X	
<b>11 a</b> Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form?		X
<b>b</b> Describe in Schedule O the process, if any, used by the organization to review this Form 990.		
<b>12 a</b> Did the organization have a written conflict of interest policy? If 'No,' go to line 13	X	
<b>b</b> Were officers, directors or trustees, and key employees required to disclose annually interests that could give rise to conflicts?	X	
<b>c</b> Did the organization regularly and consistently monitor and enforce compliance with the policy? If 'Yes,' describe in Schedule O how this is done	X	
<b>13</b> Did the organization have a written whistleblower policy?	X	
<b>14</b> Did the organization have a written document retention and destruction policy?	X	
<b>15</b> Did the process for determining compensation of the following persons include a review and approval by independent persons, comparability data, and contemporaneous substantiation of the deliberation and decision?		
<b>a</b> The organization's CEO, Executive Director, or top management official		X N/A
<b>b</b> Other officers of key employees of the organization		X N/A
If 'Yes' to line 15a or 15b, describe the process in Schedule O (See instructions)		
<b>16 a</b> Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a taxable entity during the year?		X
<b>b</b> If 'Yes,' did the organization follow a written policy or procedure requiring the organization to evaluate its participation in joint venture arrangements under applicable federal tax law, and taken steps to safeguard the organization's exempt status with respect to such arrangements?		

**Section C. Disclosure**

**17** List the states with which a copy of this Form 990 is required to be filed Indiana

**18** Section 6104 requires an organization to make its Forms 1023 (or 1024 if applicable), 990, and 990-T (501(c)(3)s only) available for public inspection. Indicate how you make these available. Check all that apply.

☐ Own website ☐ Another's website ☒ Upon request ☐ Other (explain in Schedule O)

**19** Describe in Schedule O whether (and if so, how) the organization makes its governing documents, conflict of interest policy, and financial statements available to the public during the tax year

**20** State the name, physical address, and telephone number of the person who possesses the books and records of the organization

Jim Donges, CFO 3001 E 30th Street Indianapolis IN 46218 (317) 924-5775

**Part VII Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors**Check if Schedule O contains a response to any question in this Part VII ☐**Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees****1 a** Complete this table for all persons required to be listed. Report compensation for the calendar year ending with or within the organization's tax year.

- List all of the organization's **current** officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation. Enter -0- in columns (D), (E), and (F) if no compensation was paid.

- List all of the organization's **current** key employees, if any. See instructions for definition of 'key employee.'

- List the organization's **five current** highest compensated employees (other than an officer, director, trustee, or key employee) who received reportable compensation (Box 5 of Form W-2 and/or Box 7 of Form 1099-MISC) of more than \$100,000 from the organization and any related organizations.

- List all of the organization's **former** officers, key employees, and highest compensated employees who received more than \$100,000 of reportable compensation from the organization and any related organizations.

- List all of the organization's **former directors or trustees** that received, in the capacity as a former director or trustee of the organization, more than \$10,000 of reportable compensation from the organization and any related organizations.

List persons in the following order: individual trustees or directors; institutional trustees; officers; key employees; highest compensated employees; and former such persons.

☒ Check this box if neither the organization nor any related organization compensated any current officer, director, or trustee

(A) Name and Title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(1) Patrick N. Jerrell President	25.00			X				0.	0.	0.
(2) Carol Douglas Vice President	2.00			X				0.	0.	0.
(3) Jim Donges CFO	20.00			X				0.	0.	0.
(4) Elaine Jerrell Secretary	2.00			X				0.	0.	0.
(5) Joe Ransel Treasurer	15.00			X				0.	0.	0.
(6) Sheila Gilbert Past Council President	2.00	X						0.	0.	0.
(7) Joe Carey Past Council President	2.00	X						0.	0.	0.
(8) Sister Rosaria Raidl Spiritual Advisor	2.00	X						0.	0.	0.
(9) Brian Carey District Council Pres, North	7.00	X						0.	0.	0.
(10) Karl Knable District Council Pres, South	7.00	X						0.	0.	0.
(11) Sharon Teal District Council Pres, East	7.00	X						0.	0.	0.
(12) Angel Ingram District Council Pres, West	7.00	X						0.	0.	0.
(13) Scott Alber District Council Pres, Southern	7.00	X						0.	0.	0.
(14) Jeff Blackwell Development Director	25.00	X						0.	0.	0.



**Part VII Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees (cont)**

(A) Name and title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(15) Don Striegel Pantry Chairperson	30.00	X						0.	0.	0.
(16) Pete Withey Pantry Co-manager	30.00							0.	0.	0.
(17) Clarence Hirsh Pantry Co-manager	30.00							0.	0.	0.
(18) Betty Farrell Distribution Center Manager	40.00							0.	0.	0.
(19)										
(20)										
(21)										
(22)										
(23)										
(24)										
(25)										
<b>1 b Sub-total</b>								0.	0.	0.
<b>c Total from continuation sheets to Part VII, Section A</b>										
<b>d Total (add lines 1b and 1c)</b>								0.	0.	0.

**2** Total number of individuals (including but not limited to those listed above) who received more than \$100,000 of reportable compensation from the organization **0**

**3** Did the organization list any **former** officer, director or trustee, key employee, or highest compensated employee on line 1a? If 'Yes,' complete Schedule J for such individual

	Yes	No
<b>3</b>		X
<b>4</b>		X
<b>5</b>		X

**4** For any individual listed on line 1a, is the sum of reportable compensation and other compensation from the organization and related organizations greater than \$150,000? If 'Yes' complete Schedule J for such individual

**5** Did any person listed on line 1a receive or accrue compensation from any unrelated organization or individual for services rendered to the organization? If 'Yes,' complete Schedule J for such person

**Section B. Independent Contractors**

**1** Complete this table for your five highest compensated independent contractors that received more than \$100,000 of compensation from the organization. Report compensation for the calendar year ending with or within the organization's tax year

(A) Name and business address	(B) Description of services	(C) Compensation
N/A		

**2** Total number of independent contractors (including but not limited to those listed above) who received more than \$100,000 in compensation from the organization **0**

**Part VIII** Statement of RevenueCheck if Schedule O contains a response to any question in this Part VIII ☐

		(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512, 513, or 514
<b>CONTRIBUTIONS, GIFTS, GRANTS AND OTHER SIMILAR AMOUNTS</b>	<b>1 a</b> Federated campaigns	<b>1 a</b>			
	<b>b</b> Membership dues	<b>1 b</b>			
	<b>c</b> Fundraising events	<b>1 c</b>			
	<b>d</b> Related organizations	<b>1 d</b>			
	<b>e</b> Government grants (contributions)	<b>1 e</b>			
	<b>f</b> All other contributions, gifts, grants, and similar amounts not included above	<b>1 f</b> 2,107,009.			
	<b>g</b> Noncash contributions included in lns 1a-1f \$				
	<b>h Total.</b> Add lines 1a-1f	2,107,009.			
<b>PROGRAM SERVICE REVENUE</b>	<b>2 a</b> _____	<b>Business Code</b>			
	<b>b</b> _____				
	<b>c</b> _____				
	<b>d</b> _____				
	<b>e</b> _____				
	<b>f</b> All other program service revenue				
	<b>g Total.</b> Add lines 2a-2f				
	<b>3</b> Investment income (including dividends, interest and other similar amounts)		95,336.	95,336.	0.
<b>4</b> Income from investment of tax-exempt bond proceeds					
<b>5</b> Royalties					
<b>OTHER REVENUE</b>	<b>6 a</b> Gross rents	(i) Real (ii) Personal			
	<b>b</b> Less rental expenses				
	<b>c</b> Rental income or (loss)				
	<b>d</b> Net rental income or (loss)				
	<b>7 a</b> Gross amount from sales of assets other than inventory	(i) Securities (ii) Other			
	<b>b</b> Less cost or other basis and sales expenses				
	<b>c</b> Gain or (loss)				
	<b>d</b> Net gain or (loss)				
	<b>8 a</b> Gross income from fundraising events (not including \$ _____ of contributions reported on line 1c) See Part IV, line 18	<b>a</b>			
	<b>b</b> Less direct expenses	<b>b</b>			
	<b>c</b> Net income or (loss) from fundraising events				
	<b>9 a</b> Gross income from gaming activities See Part IV, line 19	<b>a</b>			
<b>b</b> Less direct expenses	<b>b</b>				
<b>c</b> Net income or (loss) from gaming activities					
<b>10 a</b> Gross sales of inventory, less returns and allowances	<b>a</b>				
<b>b</b> Less cost of goods sold	<b>b</b>				
<b>c</b> Net income or (loss) from sales of inventory					
<b>11 a</b> _____	<b>Business Code</b>				
<b>b</b> _____					
<b>c</b> _____					
<b>d</b> All other revenue					
<b>e Total.</b> Add lines 11a-11d					
<b>12 Total revenue.</b> See instructions		2,202,345.	95,336.	0.	0.

**Part IX Statement of Functional Expenses**

Section 501(c)(3) and 501(c)(4) organizations must complete all columns. All other organizations must complete column (A).

Check if Schedule O contains a response to any question in this Part IX ☐

Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
1 Grants and other assistance to governments and organizations in the United States. See Part IV, line 21.				
2 Grants and other assistance to individuals in the United States. See Part IV, line 22.				
3 Grants and other assistance to governments, organizations, and individuals outside the United States. See Part IV, lines 15 and 16.				
4 Benefits paid to or for members.				
5 Compensation of current officers, directors, trustees, and key employees.				
6 Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B).				
7 Other salaries and wages.				
8 Pension plan accruals and contributions (include section 401(k) and section 403(b) employer contributions).				
9 Other employee benefits.				
10 Payroll taxes.				
11 Fees for services (non-employees):				
a Management.				
b Legal.				
c Accounting.				
d Lobbying.				
e Professional fundraising services. See Part IV, line 17.				
f Investment management fees.				
g Other. (If line 11g amt exceeds 10% of line 25, column (A) amt, list line 11g expenses on Sch O.)				
12 Advertising and promotion.				
13 Office expenses.				
14 Information technology.				
15 Royalties.				
16 Occupancy.				
17 Travel.				
18 Payments of travel or entertainment expenses for any federal, state, or local public officials.				
19 Conferences, conventions, and meetings.				
20 Interest.				
21 Payments to affiliates.				
22 Depreciation, depletion, and amortization.	132,639.	132,639.	0.	0.
23 Insurance.				
24 Other expenses. Itemize expenses not covered above. (List miscellaneous expenses in line 24e. If line 24e amount exceeds 10% of line 25, column (A) amount, list line 24e expenses on Schedule O.)				
a Program, Part III: a, b, c, d.	2,073,426.	2,073,426.	0.	0.
b				
c non-program costs	71,750.	0.	31,650.	40,100.
d				
e All other expenses.				
25 Total functional expenses. Add lines 1 through 24e.	2,277,815.	2,206,065.	31,650.	40,100.
26 Joint costs. Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation. Check here <input type="checkbox"/> if following SOP 98-2 (ASC 958-720).				

**Part X Balance Sheet**Check if Schedule O contains a response to any question in this Part X ☐

		(A) Beginning of year		(B) End of year
<b>ASSETS</b>	1 Cash – non-interest-bearing	1,133,222.	1	918,250.
	2 Savings and temporary cash investments		2	
	3 Pledges and grants receivable, net		3	
	4 Accounts receivable, net		4	
	5 Loans and other receivables from current and former officers, directors, trustees, key employees, and highest compensated employees Complete Part II of Schedule L		5	
	6 Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), persons described in section 4958(c)(3)(B), and contributing employers and sponsoring organizations of section 501(c)(9) voluntary employees' beneficiary organizations (see instructions) Complete Part II of Schedule L		6	
	7 Notes and loans receivable, net		7	
	8 Inventories for sale or use		8	
	9 Prepaid expenses and deferred charges	4,760.	9	2,808.
	10a Land, buildings, and equipment cost or other basis Complete Part VI of Schedule D	10a 3,100,472.		
	b Less accumulated depreciation	10b 1,045,201.	10c 2,055,271.	
	11 Investments – publicly traded securities	1,320,585.	11	1,337,316.
	12 Investments – other securities See Part IV, line 11		12	
	13 Investments – program-related See Part IV, line 11		13	
	14 Intangible assets		14	
	15 Other assets See Part IV, line 11		15	
16 <b>Total assets.</b> Add lines 1 through 15 (must equal line 34)	4,389,115.	16	4,313,645.	
<b>LIABILITIES</b>	17 Accounts payable and accrued expenses		17	
	18 Grants payable		18	
	19 Deferred revenue		19	
	20 Tax-exempt bond liabilities		20	
	21 Escrow or custodial account liability Complete Part IV of Schedule D		21	
	22 Loans and other payables to current and former officers, directors, trustees, key employees, highest compensated employees, and disqualified persons Complete Part II of Schedule L		22	
	23 Secured mortgages and notes payable to unrelated third parties		23	
	24 Unsecured notes and loans payable to unrelated third parties		24	
	25 Other liabilities (including federal income tax, payables to related third parties, and other liabilities not included on lines 17-24) Complete Part X of Schedule D		25	
	26 <b>Total liabilities.</b> Add lines 17 through 25	0.	26	0.
<b>NET ASSETS OR FUND BALANCES</b>	<b>Organizations that follow SFAS 117 (ASC 958), check here <input checked="" type="checkbox"/> and complete lines 27 through 29, and lines 33 and 34.</b>			
	27 Unrestricted net assets	4,386,758.	27	4,311,288.
	28 Temporarily restricted net assets	2,357.	28	2,357.
	29 Permanently restricted net assets		29	
	<b>Organizations that do not follow SFAS 117 (ASC 958), check here <input type="checkbox"/> and complete lines 30 through 34.</b>			
	30 Capital stock or trust principal, or current funds		30	
	31 Paid-in or capital surplus, or land, building, or equipment fund		31	
	32 Retained earnings, endowment, accumulated income, or other funds		32	
	33 Total net assets or fund balances	4,389,115.	33	4,313,645.
34 Total liabilities and net assets/fund balances	4,389,115.	34	4,313,645.	

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Form 990 (2012)

**Part XI Reconciliation of Net Assets**Check if Schedule O contains a response to any question in this Part XI ☐

1	Total revenue (must equal Part VIII, column (A), line 12)	1	2,202,345.
2	Total expenses (must equal Part IX, column (A), line 25)	2	2,277,815.
3	Revenue less expenses. Subtract line 2 from line 1	3	-75,470.
4	Net assets or fund balances at beginning of year (must equal Part X, line 33, column (A))	4	4,389,115.
5	Net unrealized gains (losses) on investments	5	
6	Donated services and use of facilities	6	
7	Investment expenses	7	
8	Prior period adjustments	8	
9	Other changes in net assets or fund balances (explain in Schedule O)	9	
10	Net assets or fund balances at end of year Combine lines 3 through 9 (must equal Part X, line 33, column (B))	10	4,313,645.

**Part XII Financial Statements and Reporting**Check if Schedule O contains a response to any question in this Part XII ☒

- 1 Accounting method used to prepare the Form 990: ☐ Cash ☐ Accrual ☒ Other \_\_\_\_\_
- If the organization changed its method of accounting from a prior year or checked 'Other,' explain in Schedule O
- 2a Were the organization's financial statements compiled or reviewed by an independent accountant? ☐ Yes ☒ No
- If 'Yes,' check a box below to indicate whether the financial statements for the year were compiled or reviewed on a separate basis, consolidated basis, or both
- ☐ Separate basis ☐ Consolidated basis ☐ Both consolidated and separate basis
- b Were the organization's financial statements audited by an independent accountant? *SEE SCHEDULE D* ☒ Yes ☒ No
- If 'Yes,' check a box below to indicate whether the financial statements for the year were audited on a separate basis, consolidated basis, or both
- ☒ Separate basis ☐ Consolidated basis ☐ Both consolidated and separate basis
- c If 'Yes' to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant? ☒ Yes ☐ No
- If the organization changed either its oversight process or selection process during the tax year, explain in Schedule O
- 3a As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Single Audit Act and OMB Circular A-133? ☐ Yes ☒ No
- b If 'Yes,' did the organization undergo the required audit or audits? If the organization did not undergo the required audit or audits, explain why in Schedule O and describe any steps taken to undergo such audits

	Yes	No
2a		X
2b	X	
2c	X	
3a		X
3b		

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Form 990 (2012)

**SCHEDULE A**  
**(Form 990 or 990-EZ)**

Department of the Treasury  
Internal Revenue Service

**Public Charity Status and Public Support**

Complete if the organization is a section 501(c)(3) organization or a section 4947(a)(1) nonexempt charitable trust.

► Attach to Form 990 or Form 990-EZ. ► See separate instructions.

OMB No 1545-0047

**2012**

Open to Public  
Inspection

Name of the organization

Society of St Vincent de Paul

Employer identification number

37-1507632

**Part I Reason for Public Charity Status** (All organizations must complete this part.) See instructions.

The organization is not a private foundation because it is (For lines 1 through 11, check only one box.)

- 1 ☐ A church, convention of churches or association of churches described in **section 170(b)(1)(A)(i)**.
- 2 ☐ A school described in **section 170(b)(1)(A)(ii)**. (Attach Schedule E.)
- 3 ☐ A hospital or a cooperative hospital service organization described in **section 170(b)(1)(A)(iii)**.
- 4 ☐ A medical research organization operated in conjunction with a hospital described in **section 170(b)(1)(A)(iii)**. Enter the hospital's name, city, and state \_\_\_\_\_
- 5 ☐ An organization operated for the benefit of a college or university owned or operated by a governmental unit described in **section 170(b)(1)(A)(iv)**. (Complete Part II.)
- 6 ☐ A federal, state, or local government or governmental unit described in **section 170(b)(1)(A)(v)**.
- 7 ☐ An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in **section 170(b)(1)(A)(vi)**. (Complete Part II.)
- 8 ☐ A community trust described in **section 170(b)(1)(A)(vi)**. (Complete Part II.)
- 9 ☒ An organization that normally receives (1) more than 33-1/3% of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions — subject to certain exceptions, and (2) no more than 33-1/3% of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975. See **section 509(a)(2)**. (Complete Part III.)
- 10 ☐ An organization organized and operated exclusively to test for public safety. See **section 509(a)(4)**.
- 11 ☐ An organization organized and operated exclusively for the benefit of, to perform the functions of, or carry out the purposes of one or more publicly supported organizations described in **section 509(a)(1)** or **section 509(a)(2)**. See **section 509(a)(3)**. Check the box that describes the type of supporting organization and complete lines 11e through 11h.
- a ☐ Type I    b ☐ Type II    c ☐ Type III — Functionally integrated    d ☐ Type III — Non-functionally integrated
- e ☐ By checking this box, I certify that the organization is not controlled directly or indirectly by one or more disqualified persons other than foundation managers and other than one or more publicly supported organizations described in **section 509(a)(1)** or **section 509(a)(2)**.
- f If the organization received a written determination from the IRS that is a Type I, Type II or Type III supporting organization, check this box ☐
- g Since August 17, 2006, has the organization accepted any gift or contribution from any of the following persons?
- (i) A person who directly or indirectly controls, either alone or together with persons described in (ii) and (iii) below, the governing body of the supported organization?
- (ii) A family member of a person described in (i) above?
- (iii) A 35% controlled entity of a person described in (i) or (ii) above?

	Yes	No
11 g (i)		
11 g (ii)		
11 g (iii)		

(i) Name of supported organization	(ii) EIN	(iii) Type of organization (described on lines 1-9 above or IRC section (see instructions))	(iv) Is the organization in column (i) listed in your governing document?		(v) Did you notify the organization in column (i) of your support?		(vi) Is the organization in column (i) organized in the U.S.?		(vii) Amount of monetary support
			Yes	No	Yes	No	Yes	No	
(A)									
(B)									
(C)									
(D)									
(E)									
Total									

BAA For Paperwork Reduction Act Notice, see the Instructions for Form 990 or 990-EZ.

Schedule A (Form 990 or 990-EZ) 2012

**Part II Support Schedule for Organizations Described in Sections 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi)**

(Complete only if you checked the box on line 5, 7, or 8 of Part I or if the organization failed to qualify under Part III. If the organization fails to qualify under the tests listed below, please complete Part III.)

**Section A. Public Support**

Calendar year (or fiscal year beginning in) ▶	(a) 2008	(b) 2009	(c) 2010	(d) 2011	(e) 2012	(f) Total
1 Gifts, grants, contributions, and membership fees received (Do not include any 'unusual grants'.)						
2 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
3 The value of services or facilities furnished by a governmental unit to the organization without charge						
4 <b>Total.</b> Add lines 1 through 3						
5 The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f)						
6 <b>Public support.</b> Subtract line 5 from line 4						

**Section B. Total Support**

Calendar year (or fiscal year beginning in) ▶	(a) 2008	(b) 2009	(c) 2010	(d) 2011	(e) 2012	(f) Total
7 Amounts from line 4						
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources						
9 Net income from unrelated business activities, whether or not the business is regularly carried on						
10 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part IV.)						
11 <b>Total support.</b> Add lines 7 through 10						
12 Gross receipts from related activities, etc (see instructions)					12	
13 <b>First five years.</b> If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and <b>stop here</b> ▶ <input type="checkbox"/>						

**Section C. Computation of Public Support Percentage**

14 Public support percentage for 2012 (line 6, column (f) divided by line 11, column (f))	14	%
15 Public support percentage from 2011 Schedule A, Part II, line 14	15	%
16a <b>33-1/3% support test – 2012.</b> If the organization did not check the box on line 13, and the line 14 is 33-1/3% or more, check this box and <b>stop here.</b> The organization qualifies as a publicly supported organization ▶ <input type="checkbox"/>		
b <b>33-1/3% support test – 2011.</b> If the organization did not check a box on line 13 or 16a, and line 15 is 33-1/3% or more, check this box and <b>stop here.</b> The organization qualifies as a publicly supported organization ▶ <input type="checkbox"/>		
17a <b>10%-facts-and-circumstances test – 2012.</b> If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the 'facts-and-circumstances' test, check this box and <b>stop here.</b> Explain in Part IV how the organization meets the 'facts-and-circumstances' test. The organization qualifies as a publicly supported organization ▶ <input type="checkbox"/>		
b <b>10%-facts-and-circumstances test – 2011.</b> If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the 'facts-and-circumstances' test, check this box and <b>stop here.</b> Explain in Part IV how the organization meets the 'facts-and-circumstances' test. The organization qualifies as a publicly supported organization ▶ <input type="checkbox"/>		
18 <b>Private foundation.</b> If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions ▶ <input type="checkbox"/>		

**Part III Support Schedule for Organizations Described in Section 509(a)(2)**

(Complete only if you checked the box on line 9 of Part I or if the organization failed to qualify under Part II. If the organization fails to qualify under the tests listed below, please complete Part II.)

**Section A. Public Support**

Calendar year (or fiscal yr beginning in) ▶	(a) 2008	(b) 2009	(c) 2010	(d) 2011	(e) 2012	(f) Total
1 Gifts, grants, contributions and membership fees received (Do not include any 'unusual grants')	1,990,129.	1,769,933.	1,932,836.	3,112,497.	1,758,896.	10,564,291.
2 Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose					348,113.	348,113.
3 Gross receipts from activities that are not an unrelated trade or business under section 513						
4 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
5 The value of services or facilities furnished by a governmental unit to the organization without charge						
6 <b>Total.</b> Add lines 1 through 5	1,990,129.	1,769,933.	1,932,836.	3,112,497.	2,107,009.	10,912,404.
7a Amounts included on lines 1, 2, and 3 received from disqualified persons						
b Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of \$5,000 or 1% of the amount on line 13 for the year						
c Add lines 7a and 7b						
8 <b>Public support</b> (Subtract line 7c from line 6)						10,912,404.

**Section B. Total Support**

Calendar year (or fiscal yr beginning in) ▶	(a) 2008	(b) 2009	(c) 2010	(d) 2011	(e) 2012	(f) Total
9 Amounts from line 6	1,990,129.	1,769,933.	1,932,836.	3,112,497.	2,107,009.	10,912,404.
10a Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources	11,302.	42,140.	-3,078.	84,388.	95,336.	230,088.
b Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975						
c Add lines 10a and 10b	11,302.	42,140.	-3,078.	84,388.	95,336.	230,088.
11 Net income from unrelated business activities not included in line 10b, whether or not the business is regularly carried on						
12 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part IV)						
13 <b>Total support.</b> (Add lines 9, 10c, 11, and 12)	2,001,431.	1,812,073.	1,929,758.	3,196,885.	2,202,345.	11,142,492.
14 <b>First five years.</b> If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and <b>stop here</b> ▶ <input type="checkbox"/>						

**Section C. Computation of Public Support Percentage**

15 Public support percentage for 2012 (line 8, column (f) divided by line 13, column (f))	15	97.94 %
16 Public support percentage from 2011 Schedule A, Part III, line 15	16	98.50 %

**Section D. Computation of Investment Income Percentage**

17 Investment income percentage for 2012 (line 10c, column (f) divided by line 13, column (f))	17	2.06 %
18 Investment income percentage from 2011 Schedule A, Part III, line 17	18	1.50 %

19a **33-1/3% support tests – 2012.** If the organization did not check the box on line 14, and line 15 is more than 33-1/3%, and line 17 is not more than 33-1/3%, check this box and **stop here.** The organization qualifies as a publicly supported organization. ▶ ☒

b **33-1/3% support tests – 2011.** If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33-1/3%, and line 18 is not more than 33-1/3%, check this box and **stop here.** The organization qualifies as a publicly supported organization. ▶ ☐

20 **Private foundation.** If the organization did not check a box on line 14, 19a, or 19b, check this box and see instructions. ▶ ☐



## Part IV

<b>Part IV</b>	<b>Supplemental Information.</b> Complete this part to provide the explanations required by Part II, line 10; Part II, line 17a or 17b; and Part III, line 12. Also complete this part for any additional information. (See instructions).
----------------	--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

[illegible]

**SCHEDULE D  
(Form 990)**

Department of the Treasury  
Internal Revenue Service

**Supplemental Financial Statements**

▶ **Complete if the organization answered 'Yes,' to Form 990, Part IV, lines 6, 7, 8, 9, 10, 11a, 11b, 11c, 11d, 11e, 11f, 12a, or 12b.**  
▶ **Attach to Form 990.** ▶ **See separate instructions.**

OMB No 1545-0047

**2012**

**Open to Public Inspection**

Name of the organization

Employer identification number

Society of St Vincent de Paul

37-1507632

**Part I Organizations Maintaining Donor Advised Funds or Other Similar Funds or Accounts.** Complete if the organization answered 'Yes' to Form 990, Part IV, line 6.

	(a) Donor advised funds	(b) Funds and other accounts
1 Total number at end of year	N/A	
2 Aggregate contributions to (during year)		
3 Aggregate grants from (during year)		
4 Aggregate value at end of year		

5 Did the organization inform all donors and donor advisors in writing that the assets held in donor advised funds are the organization's property, subject to the organization's exclusive legal control? ☐ Yes ☐ No

6 Did the organization inform all grantees, donors, and donor advisors in writing that grant funds can be used only for charitable purposes and not for the benefit of the donor or donor advisor, or for any other purpose conferring impermissible private benefit? ☐ Yes ☐ No

**Part II Conservation Easements.** Complete if the organization answered 'Yes' to Form 990, Part IV, line 7.

1 Purpose(s) of conservation easements held by the organization (check all that apply)

<input type="checkbox"/> Preservation of land for public use (e.g., recreation or education)	<input type="checkbox"/> Preservation of an historically important land area
<input type="checkbox"/> Protection of natural habitat	<input type="checkbox"/> Preservation of a certified historic structure
<input type="checkbox"/> Preservation of open space	

2 Complete lines 2a through 2d if the organization held a qualified conservation contribution in the form of a conservation easement on the last day of the tax year

	Held at the End of the Tax Year
a Total number of conservation easements	2a
b Total acreage restricted by conservation easements	2b
c Number of conservation easements on a certified historic structure included in (a)	2c
d Number of conservation easements included in (c) acquired after 8/17/06, and not on a historic structure listed in the National Register	2d

3 Number of conservation easements modified, transferred, released, extinguished, or terminated by the organization during the tax year ▶ \_\_\_\_\_

4 Number of states where property subject to conservation easement is located ▶ \_\_\_\_\_

5 Does the organization have a written policy regarding the periodic monitoring, inspection, handling of violations, and enforcement of the conservation easements it holds? ☐ Yes ☐ No

6 Staff and volunteer hours devoted to monitoring, inspecting, and enforcing conservation easements during the year ▶ \_\_\_\_\_

7 Amount of expenses incurred in monitoring, inspecting, and enforcing conservation easements during the year ▶ \$ \_\_\_\_\_

8 Does each conservation easement reported on line 2(d) above satisfy the requirements of section 170(h)(4)(B)(i) and section 170(h)(4)(B)(ii)? ☐ Yes ☐ No

9 In Part XIII, describe how the organization reports conservation easements in its revenue and expense statement, and balance sheet, and include, if applicable, the text of the footnote to the organization's financial statements that describes the organization's accounting for conservation easements

**Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets.** Complete if the organization answered 'Yes' to Form 990, Part IV, line 8.

1 a If the organization elected, as permitted under SFAS 116 (ASC 958), not to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide, in Part XIII, the text of the footnote to its financial statements that describes these items

b If the organization elected, as permitted under SFAS 116 (ASC 958), to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide the following amounts relating to these items

(i) Revenues included in Form 990, Part VIII, line 1 ▶ \$ N/A

(ii) Assets included in Form 990, Part X ▶ \$

2 If the organization received or held works of art, historical treasures, or other similar assets for financial gain, provide the following amounts required to be reported under SFAS 116 (ASC 958) relating to these items

a Revenues included in Form 990, Part VIII, line 1 ▶ \$

b Assets included in Form 990, Part X ▶ \$

**Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets** (continued)

- 3 Using the organization's acquisition, accession, and other records, check any of the following that are a significant use of its collection items (check all that apply) **N/A**
- a ☐ Public exhibition d ☐ Loan or exchange programs
- b ☐ Scholarly research e ☐ Other \_\_\_\_\_
- c ☐ Preservation for future generations
- 4 Provide a description of the organization's collections and explain how they further the organization's exempt purpose in Part XIII
- 5 During the year, did the organization solicit or receive donations of art, historical treasures, or other similar assets to be sold to raise funds rather than to be maintained as part of the organization's collection? ☐ Yes ☐ No

**Part IV Escrow and Custodial Arrangements.** Complete if the organization answered 'Yes' to Form 990, Part IV, line 9, or reported an amount on Form 990, Part X, line 21. **N/A**

- 1 a Is the organization an agent, trustee, custodian, or other intermediary for contributions or other assets not included on Form 990, Part X? ☐ Yes ☐ No
- b If 'Yes,' explain the arrangement in Part XIII and complete the following table.
- |                                   | Amount |
|-----------------------------------|--------|
| 1 c Beginning balance             |        |
| 1 d Additions during the year     |        |
| 1 e Distributions during the year |        |
| 1 f Ending balance                |        |
- 2 a Did the organization include an amount on Form 990, Part X, line 21? ☐ Yes ☐ No
- b If 'Yes,' explain the arrangement in Part XIII. Check here if the explanation has been provided in Part XIII ☐

**Part V Endowment Funds.** Complete if the organization answered 'Yes' to Form 990, Part IV, line 10.

- |                                                  | (a) Current | (b) Prior year | (c) Two years | (d) Three years | (e) Four years |
|--------------------------------------------------|-------------|----------------|---------------|-----------------|----------------|
| 1 a Beginning of year balance                    |             |                |               |                 |                |
| b Contributions                                  |             |                |               |                 |                |
| c Net investment earnings, gains, and losses     |             |                |               |                 |                |
| d Grants or scholarships                         |             |                |               |                 |                |
| e Other expenditures for facilities and programs |             |                |               |                 |                |
| f Administrative expenses                        |             |                |               |                 |                |
| g End of year balance                            |             |                |               |                 |                |
- 2 Provide the estimated percentage of the current year end balance (line 1g, column (a)) held as
- a Board designated or quasi-endowment ▶ \_\_\_\_\_ %
- b Permanent endowment ▶ \_\_\_\_\_ %
- c Temporarily restricted endowment ▶ \_\_\_\_\_ %
- The percentages in lines 2a, 2b, and 2c should equal 100%

- 3 a Are there endowment funds not in the possession of the organization that are held and administered for the organization by

	Yes	No
3a(i) unrelated organizations		
3a(ii) related organizations		
3b If 'Yes' to 3a(ii), are the related organizations listed as required on Schedule R?		

- (i) unrelated organizations
- (ii) related organizations
- b If 'Yes' to 3a(ii), are the related organizations listed as required on Schedule R?
- 4 Describe in Part XIII the intended uses of the organization's endowment funds

**Part VI Land, Buildings, and Equipment.** See Form 990, Part X, line 10.

Description of property	(a) Cost or other basis (investment)	(b) Cost or other basis (other)	(c) Accumulated depreciation	(d) Book value
1 a Land	221,937.			221,937.
b Buildings	2,240,789.		616,438.	1,624,351.
c Leasehold improvements				
d Equipment	637,746.		428,763.	208,983.
e Other				
<b>Total.</b> Add lines 1a through 1e (Column (d) must equal Form 990, Part X, column (B), line 10(c) )				2,055,271.

BAA

Schedule D (Form 990) 2012

**Part VII. Investments – Other Securities.** See Form 990, Part X, line 12.

(a) Description of security or category (including name of security)	(b) Book value	(c) Method of valuation Cost or end-of-year market value
(1) Financial derivatives		
(2) Closely-held equity interests		
(3) Other		
(A) -----		
(B) -----		
(C) -----		
(D) -----		
(E) -----		
(F) -----		
(G) -----		
(H) -----		
(I) -----		
Total (Column (b) must equal Form 990, Part X, column (B) line 12.)		

**Part VIII. Investments – Program Related.** See Form 990, Part X, line 13.

(a) Description of investment type	(b) Book value	(c) Method of valuation Cost or end-of-year market value
(1)		
(2)		
(3)		
(4)		
(5)		
(6)		
(7)		
(8)		
(9)		
(10)		
Total (Column (b) must equal Form 990, Part X, column (B) line 13.)		

**Part IX. Other Assets.** See Form 990, Part X, line 15.

(a) Description	(b) Book value
(1)	
(2)	
(3)	
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
(10)	
Total. (Column (b) must equal Form 990, Part X, column (B), line 15.)	

**Part X. Other Liabilities.** See Form 990, Part X, line 25.

(a) Description of liability	(b) Book value
(1) Federal income taxes	
(2)	
(3)	
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
(10)	
(11)	
Total. (Column (b) must equal Form 990, Part X, column (B) line 25.)	

2. FIN 48 (ASC 740) Footnote. In Part XIII, provide the text of the footnote to the organization's financial statements that reports the organization's liability for uncertain tax positions under FIN 48 (ASC 740). Check here if the text of the footnote has been provided in Part XIII ☐

**Part XI Reconciliation of Revenue per Audited Financial Statements With Revenue per Return**

1	Total revenue, gains, and other support per audited financial statements		1	962,217.
2	Amounts included on line 1 but not on Form 990, Part VIII, line 12			
	a Net unrealized gains on investments	2a		
	b Donated services and use of facilities	2b		
	c Recoveries of prior year grants	2c		
	d Other (Describe in Part XIII)	2d		
	e Add lines 2a through 2d		2e	
3	Subtract line 2e from line 1		3	962,217.
4	Amounts included on Form 990, Part VIII, line 12, but not on line 1:			
	a Investment expenses not included on Form 990, Part VIII, line 7b	4a		
	b Other (Describe in Part XIII)	4b	1,240,128.	
	c Add lines 4a and 4b		4c	1,240,128.
5	Total revenue. Add lines 3 and 4c. (This must equal Form 990, Part I, line 12)		5	2,202,345.

**Part XII Reconciliation of Expenses per Audited Financial Statements With Expenses per Return**

1	Total expenses and losses per audited financial statements		1	1,151,185.
2	Amounts included on line 1 but not on Form 990, Part IX, line 25			
	a Donated services and use of facilities	2a		
	b Prior year adjustments	2b		
	c Other losses	2c		
	d Other (Describe in Part XIII)	2d		
	e Add lines 2a through 2d		2e	
3	Subtract line 2e from line 1		3	1,151,185.
4	Amounts included on Form 990, Part IX, line 25, but not on line 1:			
	a Investment expenses not included on Form 990, Part VIII, line 7b	4a		
	b Other (Describe in Part XIII)	4b	1,126,630.	
	c Add lines 4a and 4b		4c	1,126,630.
5	Total expenses. Add lines 3 and 4c. (This must equal Form 990, Part I, line 18)		5	2,277,815.

**Part XIII Supplemental Information**

Complete this part to provide the descriptions required for Part II, lines 3, 5, and 9, Part III, lines 1a and 4, Part IV, lines 1b and 2b, Part V, line 4, Part X, line 2, Part XI, lines 2d and 4b, and Part XII, lines 2d and 4b. Also complete this part to provide any additional information.

Pt XI Line 4b income of affiliates included in the archdiocesan SVDP

Pt XII Line 4b expenses of affiliates included in the archdiocesan SVDP

SEE NOTE ON SCHEDULE O

**SCHEDULE M  
(Form 990)**

Department of the Treasury  
Internal Revenue Service

**Noncash Contributions**

► Complete if the organization answered 'Yes' on  
Form 990, Part IV, lines 29 or 30.

► Attach to Form 990.

OMB No 1545-0047

**2012**

**Open To Public  
Inspection**

Name of the organization

Society of St Vincent de Paul

Employer identification number

37-1507632

**Part I Types of Property**

	(a) Check if applicable	(b) Number of contributions or items contributed	(c) Noncash contribution amounts reported on Form 990, Part VIII, line 1g	(d) Method of determining noncash contribution amounts
1 Art – Works of art				
2 Art – Historical treasures				
3 Art – Fractional interests				
4 Books and publications				
5 Clothing and household goods			0.	
6 Cars and other vehicles				
7 Boats and planes				
8 Intellectual property				
9 Securities – Publicly traded				
10 Securities – Closely held stock				
11 Securities – Partnership, LLC, or trust interests				
12 Securities – Miscellaneous				
13 Qualified conservation contribution – Historic structures				
14 Qualified conservation contribution –Other				
15 Real estate – Residential				
16 Real estate – Commercial				
17 Real estate – Other				
18 Collectibles				
19 Food inventory			0.	
20 Drugs and medical supplies				
21 Taxidermy				
22 Historical artifacts				
23 Scientific specimens				
24 Archeological artifacts				
25 Other ► ( )				
26 Other ► ( )				
27 Other ► ( )				
28 Other ► ( )				

29 Number of Forms 8283 received by the organization during the tax year for contributions for which the organization completed Form 8283, Part IV, Donee Acknowledgement

29

30a During the year, did the organization receive by contribution any property reported in Part I, lines 1-28 that it must hold for at least three years from the date of the initial contribution, and which is not required to be used for exempt purposes for the entire holding period?

b If 'Yes,' describe the arrangement in Part II

31 Does the organization have a gift acceptance policy that requires the review of any non-standard contributions?

32a Does the organization hire or use third parties or related organizations to solicit, process, or sell noncash contributions?

b If 'Yes,' describe in Part II

33 If the organization did not report an amount in column (c) for a type of property for which column (a) is checked, describe in Part II

	Yes	No
30 a		X
31		X
32 a		X
33		

**BAA For Paperwork Reduction Act Notice, see the Instructions for Form 990.**

Schedule M (Form 990) 2012

**Part II** **Supplemental Information.** Complete this part to provide the information required by Part I, lines 30b, 32b, and 33, and whether the organization is reporting in Part I, column (b), the number of contributions, the number of items received, or a combination of both. Also complete this part for any additional information.

lines 5 & 19 Hundreds of thousands of gifts of food items are received

each year & redistributed from the food pantries.

Thousands of gifts of household items and clothing are

received each year and redistributed free or for a small fee

through the distribution centers and stores.

**SCHEDULE O**  
**(Form 990 or 990-EZ)**

Department of the Treasury  
Internal Revenue Service

**Supplemental Information to Form 990 or 990-EZ**

Complete to provide information for responses to specific questions on  
Form 990 or 990-EZ or to provide any additional information.

▶ Attach to Form 990 or 990-EZ.

OMB No 1545-0047

**2012**

Open to Public  
Inspection

Name of the organization

Society of St Vincent de Paul

Employer identification number

37-1507632

Pt XII, Line 1 SVDP uses modified cash basis of accounting. It does not  
recognize donated property, goods and services. Donated  
property consists of clothing, household goods, and  
food. These are distributed to the needy, free of charge.

Pt VI, Line 11b Tax return is reviewed by officers, before signing.  
There are 58 affiliates within the SVDP of the  
Archdiocese of Indianapolis. These affiliates are not  
audited. However, the Indianapolis division, which  
is responsible for coordinating all affiliates, is audited.

This is the SPECIAL WORKS DIVISION. It includes  
an Indianapolis Distribution Center (household & personal  
goods), the Pratt-Quigley pantry & various programs  
totalling 130,956 as reported in the program section  
of this return (Part III, 4 d) plus fund-raising & M&G costs.

+++++

RECONCILIATION OF SPECIAL WORKS AUDIT TO 990 AMOUNTS

SPECIAL WORKS AUDIT   AFFILIATES   TOTAL PER 990

REVENUE	962,217	1,240,128	2,202,345
EXPENSE	1,151,185	1,126,630	2,277,815
NET	- 188,968	113,498	- 75,470

+++++



Name of the organization

Employer identification number

Society of St Vincent de Paul

37-1507632

Part VI, Section C, line 19

Governing documents are available upon request.

Schedule O (Form 990 or 990-EZ), Supplemental Information to Form 990 or 990-EZ  
Form 990, Page 10, Line 24e All Other Expenses (continued)

[illegible]

**Supporting Statement of:**

Form 990 p 9/Other amt. not included

Description	Amount
<u>Contributions:</u>	
—	795,611.
—	792,403.
—	19,270.
—	80,607.
—	71,005.
<u>Receipts, exempt purpose:</u>	
—	71,277.
—	176,063.
—	100,773.
Total	<u>2,107,009.</u>

**Supporting Statement of:**

Sch D, page 2/Buildings col (a)

Description	Amount
<u>Buildings:</u>	
Special works division	1,941,846.
St Mary's store	64,100.
Bedford Store	79,022.
Boulevard Place pantry	142,021.
Distribution center, Bloomington	13,800.
Total	<u>2,240,789.</u>

**Supporting Statement of:**

Sch D, page 2/Equipment col (a)

Description	Amount
<u>Special works division:</u>	
autos & trucks	227,969.
furniture, equipment software	386,940.
Thrift store, Bedford	6,724.
St Mary's store	6,650.
Distribution center, Bloomington	9,463.
Total	<u>637,746.</u>

## Schedule O (Form 990), Supplemental Information to Form 990

**Form 990, Page 2, Part III, Line 1 (continued)**

Briefly describe the organization's mission:

families in need, without discrimination. It is operated by volunteers only and donations come from individuals, businesses, other organization.

## Schedule O (Form 990), Supplemental Information to Form 990

**Form 990, Page 2, Part III, Line 4d (continued)**

Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses. Section 501(c)(3) and 501(c)(4) organizations are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported

Code:	Description:	
	<b>SPECIAL WORKS PROGRAMS:</b>	
Expenses	42,840.	Food/supplies
Grants Of	0.	
Revenue	0.	
Code:	Description:	
Expenses	63,200.	Conference support
Grants Of	0.	
Revenue	0.	
Code:	Description:	
Expenses	12,544.	Beggars for poor
Grants Of	0.	
Revenue	0.	
Code:	Description:	
Expenses	8,100.	Twin-ning
Grants Of	0.	
Revenue	0.	
Code:	Description:	
Expenses	1,775.	Stop smoking
Grants Of	0.	
Revenue	0.	
Code:	Description:	
Expenses	19,829.	Pantry security
Grants Of	0.	
Revenue	0.	

130,956  
SPECIAL WORKS

Schedule O (Form 990), Supplemental Information to Form 990  
Form 990, Page 2, Part III, Line 4d (continued)

Continued

Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses. Section 501(c)(3) and 501(c)(4) organizations are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported

Code	Description
	Insurance claim
Expenses	24,908.
Grants Of	0.
Revenue	0.

Code	Description
	Various small programs
Expenses	7,576.
Grants Of	0.
Revenue	0.

Code	Description
	OTHER DIVISION PROGRAMS:
	St Mary's store
Expenses	66,823.
Grants Of	0.
Revenue	0.

Code	Description
	Bedford thrift store
Expenses	51,394.
Grants Of	0.
Revenue	0.

Code	Description
	Boulevard Place pantry
Expenses	65,979.
Grants Of	0.
Revenue	0.

Code	Description
	Archdiocesan council support
Expenses	24,540.
Grants Of	0.
Revenue	0.

Code	Description
	PROGRAM SUPPORT:
	Newsletter
Expenses	12,462.
Grants Of	0.
Revenue	0.

TOTAL  
PART III  
LINE 4d

352,154



Blue & Co., LLC / 12800 N. Meridian Street, Suite 400 / Carmel, IN 46032  
main 317 848 8920 fax 317 573 2458 email blue@blueandco.com

## REPORT OF INDEPENDENT AUDITORS

Board of Directors  
Society of St. Vincent de Paul  
Archdiocesan Council of Indianapolis, Inc. – Special Works

### Report on the Financial Statements

We have audited the accompanying financial statements of Society of St. Vincent de Paul Archdiocesan Council of Indianapolis, Inc. – Special Works (the Organization), which comprise the statements of assets, liabilities, and net assets – modified cash basis as of September 30, 2013 and 2012, and the related statements of support, revenues, and expenses - modified cash basis for the years then ended, and the related notes to the financial statements.

### Management's Responsibility for the Financial Statements

Management is responsible for the preparation and fair presentation of these financial statements in accordance the modified cash basis of accounting described in Note 2; this includes determining that the modified cash basis of accounting is an acceptable basis for the preparation of the financial statements in the circumstances. Management is also responsible for the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

### Auditor's Responsibility

Our responsibility is to express an opinion on these financial statements based on our audits. We conducted our audits in accordance with auditing standards generally accepted in the United States of America. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the financial statements are free from material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the financial statements. The procedures selected depend on the auditor's judgment, including the assessment of the risks of material misstatement of the financial statements, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the entity's preparation and fair presentation of the financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control. Accordingly, we express no such opinion. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the financial statements.

REPORT OF INDEPENDENT AUDITORS  
(Continued)

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our opinion.

Opinion

In our opinion, the financial statements referred to above present fairly, in all material respects, the assets, liabilities, and nets assets of the Organization as of September 30, 2013 and 2012, and its support, revenues, and expenses for the years then ended, in accordance with the modified cash basis of accounting the Organization uses, as described in Note 2.

Basis of Accounting

We draw attention to Note 2 of the financial statements, which describes the basis of accounting. The financial statements are prepared on the modified cash basis of accounting, which is a comprehensive basis of accounting other than accounting principles generally accepted in the United States of America. Our opinion is not modified with respect to that matter.

*Blue & Co., LLC*

Carmel, Indiana  
January 13, 2014

**SOCIETY OF ST. VINCENT DE PAUL ARCHDIOCESAN COUNCIL OF  
INDIANAPOLIS, INC. – SPECIAL WORKS**

STATEMENTS OF ASSETS, LIABILITIES, AND NET ASSETS  
(Modified Cash Basis)  
SEPTEMBER 30, 2013 AND 2012

<b>ASSETS</b>		
	<u>2013</u>	<u>2012</u>
Cash and cash equivalents	\$ 160,726	\$ 598,451
Board designated cash - microloan program	100,038	-0-
Investments	1,337,316	1,320,585
Gift certificate inventory	-0-	1,040
Deposits and other advances	2,808	2,808
Property and equipment, net	<u>1,742,927</u>	<u>1,609,899</u>
	<u>\$ 3,343,815</u>	<u>\$ 3,532,783</u>
 <b>LIABILITIES AND NET ASSETS</b>		
Net assets		
Unrestricted		
Operating	\$ 1,840,444	\$ 1,756,548
Board designated	<u>1,501,014</u>	<u>1,773,878</u>
Total unrestricted	3,341,458	3,530,426
Temporarily restricted	<u>2,357</u>	<u>2,357</u>
	<u>\$ 3,343,815</u>	<u>\$ 3,532,783</u>

*See accompanying notes to financial statements.*



**SOCIETY OF ST. VINCENT DE PAUL ARCHDIOCESAN COUNCIL OF  
INDIANAPOLIS, INC. – SPECIAL WORKS**

**STATEMENT OF SUPPORT, REVENUES, AND EXPENSES**  
(Modified Cash Basis)  
**YEAR ENDED SEPTEMBER 30, 2013**  
(With Comparative Total for the Year Ended September 30, 2012)

	2013			2012
	<u>Unrestricted</u>	<u>Temporarily Restricted</u>	<u>Total</u>	<u>Total</u>
<b>Support and revenues</b>				
Contributions	\$ 641,188	\$ 154,423	\$ 795,611	\$ 1,671,983
Sales of donated goods	71,277	-0-	71,277	53,620
Investment income, net	95,329	-0-	95,329	84,378
Net assets released from restrictions	154,423	(154,423)	-0-	-0-
Total support and revenues	962,217	-0-	962,217	1,809,981
<b>Expenses</b>				
Program services				
Food pantry	497,609	-0-	497,609	395,352
Distribution center	315,205	-0-	315,205	300,221
Depreciation of program assets	123,203	-0-	123,203	107,601
Other programs	130,956	-0-	130,956	123,438
Newsletter/educational	12,462	-0-	12,462	13,209
Total program services	1,079,435	-0-	1,079,435	939,821
Fundraising	40,100	-0-	40,100	42,015
Management and general	31,650	-0-	31,650	28,753
Total expenses	1,151,185	-0-	1,151,185	1,010,589
Change in net assets	(188,968)	-0-	(188,968)	799,392
<b>Net assets, beginning of year</b>	3,530,426	2,357	3,532,783	2,733,391
<b>Net assets, end of year</b>	<u>\$ 3,341,458</u>	<u>\$ 2,357</u>	<u>\$ 3,343,815</u>	<u>\$ 3,532,783</u>

*See accompanying notes to financial statements.*

# **SOCIETY OF ST. VINCENT DE PAUL ARCHDIOCESAN COUNCIL OF INDIANAPOLIS, INC. – SPECIAL WORKS**

## **NOTES TO FINANCIAL STATEMENTS SEPTEMBER 30, 2013 AND 2012**

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### **1. NATURE OF ACTIVITIES**

The Society of St. Vincent de Paul Archdiocesan Council of Indianapolis, Inc. – Special Works (SVdP), is a not-for-profit organization located in Indianapolis, Indiana whose mission is to provide basic needs to people and families in need without discrimination. SVdP has no paid employees and its operations are supported completely by volunteers. All supporting donations come directly from individuals, private businesses, and public institutions. The distribution center provides free distribution of furniture, appliances and clothing and long term loaning of sickroom equipment. The client choice food pantry provides free food to the needy regardless of race, religion, or gender. Foodstuffs are procured from Gleaners Food Bank, the USDA, private donors and bulk purchases from vendors. Beggars for the Poor provides food, clothing and personal care items to the homeless of downtown Indianapolis.

### **2. SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES**

#### Accounting Method

SVdP prepares its financial statements on the modified cash basis of accounting. Under that basis, contributions and other revenues are recognized when received rather than when promised or earned, and expenses (including food and other items purchased for distribution) are generally recognized when paid rather than when the obligation is incurred. Fixed assets are capitalized and depreciated. The modified cash basis of accounting differs from accounting principles generally accepted in the United States of America primarily because SVdP has not recognized pledges receivable from donors, accounts payable to vendors, inventory on hand, and their related effects on the change in net assets. In addition, SVdP does not recognize the value of donated property, goods and services.

#### Basis of Presentation

The financial statements presented herein include the operations of the distribution center, food pantry, E.A.S.Y. Food Program, Beggars for the Poor, and development and administrative departments. These activities constitute the "Special Works" division of SVdP. These financial statements do not include the "Council" division of SVdP, which acts as the central umbrella for the organization, collects dues from members, and pays for annual convention and national meeting expenses. These financial statements also do not include the balances and activities of the Society of St. Vincent de Paul Conferences which are groups throughout the geographic region that serve the needy locally.

# **SOCIETY OF ST. VINCENT DE PAUL ARCHDIOCESAN COUNCIL OF INDIANAPOLIS, INC. – SPECIAL WORKS**

## **NOTES TO FINANCIAL STATEMENTS SEPTEMBER 30, 2013 AND 2012**

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### **Cash Equivalents**

SVdP considers all highly liquid investments purchased with original maturities of three months or less to be cash equivalents, but excludes cash equivalents held by fund managers and included in investments. Cash equivalents are carried at cost, which approximates market value, and consist of bank money market accounts.

### **Investments and Investment Return**

Investments consist of equity exchange traded funds and money market mutual funds which are recorded at fair market value for financial reporting purposes. Investments also include certificates of deposit and cash that are carried at cost which approximates fair value. Investment return includes interest, dividends, and realized and unrealized gains and losses. Changes in unrealized appreciation or depreciation of investments are recorded as increases or decreases in unrestricted net assets in the period such changes occur, unless their use is temporarily restricted by donors to a specified purpose or future use.

### **Gift Certificate Inventory**

Gift certificate inventory is stated at cost determined on the specific identification method.

### **Property and Equipment**

SVdP capitalizes all significant purchases of property and equipment at cost. The value of donated property is not recognized in the financial statements. Costs of ordinary maintenance and repairs are expensed as incurred. Depreciation is computed on the straight-line method over the estimated useful lives of the assets, which range from 3 to 30 years.

### **Net Assets**

The financial statements report net assets, support, revenues, gains and losses based on the existence or absence of donor-imposed restrictions. Accordingly, the net assets of SVdP are classified and reported as follows:

Unrestricted net assets – Unrestricted net assets are resources available to support operations. The only limits on the use of unrestricted net assets are the broad limits resulting from the nature of SVdP, the environment in which it operates, the purposes specified in its corporate documents and its application for tax-exempt status, and any limits resulting from contractual agreements with creditors and others that are entered into in the course of its operations. Unrestricted net assets are not subject to donor-imposed restrictions. SVdP maintains two unrestricted funds as follows:

# **SOCIETY OF ST. VINCENT DE PAUL ARCHDIOCESAN COUNCIL OF INDIANAPOLIS, INC. – SPECIAL WORKS**

## **NOTES TO FINANCIAL STATEMENTS SEPTEMBER 30, 2013 AND 2012**

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Operating - includes all programs and administrative functions of SVdP.

Board designated - includes all funds not available for general operations without the prior approval of the Board of Directors.

Temporarily restricted net assets – Temporarily restricted net assets are resources that are restricted by a donor for use for a particular purpose or in a particular future period. When a donor's restriction is satisfied, either by using the resources in the manner specified by the donor or by the passage of time, the expiration of the restriction is reported in the Statement of Support, Revenues, and Expenses by reclassifying the net assets from temporarily restricted to unrestricted net assets.

### Support and Revenue Recognition

Contributions are recognized as support in the period the cash is received. Support that is restricted by the donor is reported as an increase in temporarily restricted net assets. Support that is not restricted by the donor is reported as an increase in unrestricted net assets.

Contributions that must be used to acquire property and equipment are reported as temporarily restricted support. Absent donor stipulations regarding how long those assets must be maintained, SVdP reports expirations of donor restrictions as the acquired assets are purchased. SVdP reclassifies temporarily restricted net assets to unrestricted net assets at that time.

### Income Tax Status

SVdP is organized as a not-for-profit corporation under Section 501(c)(3) of the United States Internal Revenue Code. As such, SVdP is generally exempt from income taxes. However, SVdP is required to file Federal Form 990 – Return of Organization Exempt from Income Tax which is an informational return only. Prior to October 1, 2008, SVdP was not required to file Form 990. SVdP is subject to routine audits by taxing jurisdictions. However, as of the date the financial statements were available to be issued, there were no audits for any tax periods in progress.

Management is required to evaluate tax positions taken by SVdP and disclose the existence of a tax liability if SVdP has taken an uncertain position that more likely than not would not be sustained upon examination by various federal and state taxing authorities. Management has analyzed the tax positions taken by SVdP, and has concluded that as of September 30, 2013 and 2012, there are no uncertain positions taken or expected to be taken that would require disclosure in the accompanying financial statements.

# **SOCIETY OF ST. VINCENT DE PAUL ARCHDIOCESAN COUNCIL OF INDIANAPOLIS, INC. – SPECIAL WORKS**

## **NOTES TO FINANCIAL STATEMENTS SEPTEMBER 30, 2013 AND 2012**

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### Estimates

The preparation of financial statements in conformity with the modified cash basis requires management to make estimates and assumptions that affect the reported amount of assets and liabilities and disclosures of contingent assets and liabilities at the date of the financial statements and the reported amount of support, revenues and expenses during the reporting period. Actual results could differ from these estimates.

### Subsequent Events

SVdP evaluates events occurring subsequent to the date of the financial statements in determining the accounting for and disclosure of transactions and events that affect the financial statements. Subsequent events have been evaluated through January 13, 2014, which is the date the financial statements were available to be issued.

## **3. INVESTMENTS**

The Fair Value Measurements and Disclosures topic of the Financial Accounting Standards Board (FASB) Accounting Standards Codification provides a comprehensive framework for measuring fair value. That framework provides a fair value hierarchy that prioritizes the inputs to valuation techniques used to measure fair value. The hierarchy gives the highest priority to unadjusted quoted market prices in active markets for identical assets or liabilities (level 1 measurements) and the lowest priority to unobservable inputs (level 3 measurements).

The three levels of the fair value hierarchy, which are applicable to SVdP's investments, are described as follows:

- Level 1 – Inputs to the valuation methodology are unadjusted quoted prices for identical assets or liabilities in active markets.
- Level 2 – Inputs to the valuation methodology include: quoted prices for similar assets or liabilities in active markets; quoted prices for identical or similar assets or liabilities in inactive markets; inputs other than quoted prices that are observable for the asset or liability; inputs that are derived principally from or corroborated by observable market data by correlation or other means. If the asset or liability has a specified (contractual) term, the level 2 input must be observable for substantially the full term of the asset or liability.
- Level 3 – Inputs to the valuation methodology are unobservable and significant to the fair value measurement.

# SOCIETY OF ST. VINCENT DE PAUL ARCHDIOCESAN COUNCIL OF INDIANAPOLIS, INC. – SPECIAL WORKS

## NOTES TO FINANCIAL STATEMENTS SEPTEMBER 30, 2013 AND 2012

The asset or liability's fair value measurement level within the fair value hierarchy is based on the lowest level of any input that is significant to the fair value measurement. Valuation techniques used need to maximize the use of observable inputs and minimize the use of unobservable inputs.

Following is a description of the valuation methodologies used for assets measured at fair value. There have been no changes in methodologies used at September 30, 2013 and 2012.

*Money market mutual funds:* Generally transact subscription and redemption activity at a \$1 stable net asset value (NAV); however, on a daily basis, the funds are valued at their daily NAV calculated using the amortized cost of the securities held in the fund.

*Exchange traded funds:* Valued at the closing price reported on the active market on which the individual securities are traded.

Investments consist of the following at September 30:

	2013		
	Level 1	Level 2	Total
Money market mutual funds	\$ -0-	\$ 263,808	\$ 263,808
Equity exchange traded funds			
Large cap	193,934	-0-	193,934
Mid cap	184,745	-0-	184,745
Small cap	50,107	-0-	50,107
International	31,850	-0-	31,850
Emerging market	33,531	-0-	33,531
	<u>\$ 494,167</u>	<u>\$ 263,808</u>	<u>757,975</u>
Cash			1,163
Certificates of deposit			578,178
			<u>\$ 1,337,316</u>

# SOCIETY OF ST. VINCENT DE PAUL ARCHDIOCESAN COUNCIL OF INDIANAPOLIS, INC. – SPECIAL WORKS

## NOTES TO FINANCIAL STATEMENTS SEPTEMBER 30, 2013 AND 2012

	2012		
	Level 1	Level 2	Total
Money market mutual funds	\$ -0-	\$ 49,460	\$ 49,460
Equity exchange traded funds			
Large cap	165,306	-0-	165,306
Mid cap	151,369	-0-	151,369
Small cap	39,217	-0-	39,217
International	27,316	-0-	27,316
Emerging market	33,859	-0-	33,859
	<u>\$ 417,067</u>	<u>\$ 49,460</u>	466,527
Cash			305
Certificates of deposit			853,753
			<u>\$ 1,320,585</u>

The preceding methods used in arriving at fair value may produce a value not indicative of net realizable value or reflective of future fair values. Furthermore, although SVdP believes its valuation methods are appropriate and consistent with other market participants, the use of different methodologies or assumptions to determine the fair value of certain financial instruments could result in different fair value measurements at the reporting date.

SVdP's policy is to recognize transfers between levels as of the end of the reporting period. There were no significant transfers between levels at September 30, 2013. At September 30, 2012, \$49,460 was transferred from Level 1 to Level 2. Transfers to Level 2 from Level 1 were made to reflect the fact that money market mutual funds are valued at their net asset value on a daily basis using amortized cost of securities held in the fund, consistent with the 2013 presentation.

Certificates of deposit at September 30, 2013 bear interest at rates ranging from .20% to 1.19% with maturity dates ranging from January 2014 through February 2015.

The following summarizes the return on investments and cash and cash equivalents during the years ended September 30:

	2013	2012
Interest and dividend income	\$ 19,321	\$ 14,053
Realized and unrealized gains, net	<u>76,008</u>	<u>70,325</u>
Investment income, net	<u>\$ 95,329</u>	<u>\$ 84,378</u>

# SOCIETY OF ST. VINCENT DE PAUL ARCHDIOCESAN COUNCIL OF INDIANAPOLIS, INC. – SPECIAL WORKS

## NOTES TO FINANCIAL STATEMENTS SEPTEMBER 30, 2013 AND 2012

### 4. PROPERTY AND EQUIPMENT

Property and equipment consist of the following at September 30:

	2013	2012
Land	\$ 221,937	\$ 221,937
Buildings and improvements	1,941,846	1,820,869
Autos and trucks	227,969	236,864
Furniture, equipment, and software	386,940	264,698
	2,778,692	2,544,368
Accumulated depreciation	(1,035,765)	(934,469)
Property and equipment, net	<u>\$ 1,742,927</u>	<u>\$ 1,609,899</u>

Depreciation expense for the years ended September 30, 2013 and 2012 amounted to \$123,203 and \$107,601, respectively.

### 5. NET ASSETS

#### Board Designated Net Assets

The Board of Directors has designated unrestricted net assets for the following purposes at September 30:

	2013	2012
Future programs	\$ 1,255,052	\$ 1,597,916
Current cash flow	4,112	4,112
Truck replacement	21,850	21,850
Appliances	90,000	120,000
Bedding	30,000	30,000
MicroLoan program	100,000	-0-
	<u>\$ 1,501,014</u>	<u>\$ 1,773,878</u>

MicroLoan program – During the year ended September 30, 2013, SVdP's Board of Directors has set aside \$100,000 to be used for the MicroLoan program. Related to this board designation, \$80,000 in cash has been placed in a credit union in Marion County and \$20,000 in cash has been placed in a credit union in Bartholomew County. The credit unions will assist SVdP in administering the program. SVdP plans to provide loans to qualifying individuals in need of up to \$500 at 4% interest with a 12 month payback period for non-recurring emergency expenses.



**SOCIETY OF ST. VINCENT DE PAUL ARCHDIOCESAN COUNCIL OF  
INDIANAPOLIS, INC. – SPECIAL WORKS**

**NOTES TO FINANCIAL STATEMENTS  
SEPTEMBER 30, 2013 AND 2012**

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Temporarily Restricted Net Assets

Temporarily restricted net assets include the following at September 30:

	<u>2013</u>	<u>2012</u>
Security and technology improvements	\$ 2,357	\$ 2,357

Net Assets Released From Restrictions

Net assets were released from donor-imposed restrictions as follows during the years ended September 30:

	<u>2013</u>	<u>2012</u>
Food program	\$ 127,837	\$ 290,663
Food purchases	-0-	35,000
Distribution center operations	6,583	20,875
Food pantry truck	17,000	-0-
Beggars for the poor	2,485	6,001
Twinning program	518	1,590
Outreach Programs	-0-	25,000
	<u>\$ 154,423</u>	<u>\$ 379,129</u>

**6. RISKS AND UNCERTAINTIES**

SVdP's investments (Note 3) are exposed to various risks such as interest rate, market and credit. Due to the level of risk associated with these securities and the level of uncertainty related to changes in the value, it is at least reasonably possible that changes in the various risk factors will occur in the near term that could materially affect the amounts reported in the accompanying financial statements.

**7. CONCENTRATIONS**

SVdP maintains its cash and cash equivalents in financial institution deposit accounts which at times may exceed federally insured limits. SVdP has not experienced any losses in such accounts and believes it is not exposed to any significant credit risk on cash, cash equivalents, and certificates of deposit.

SVdP's investments are managed and held by one investment management firm (68% and 62%, respectively at September 30, 2013 and 2012) and two financial institutions (32% and 38%, respectively at September 30, 2013 and 2012). Two certificates of deposit represent 32% of total investments at September 30, 2013.

**SOCIETY OF ST. VINCENT DE PAUL ARCHDIOCESAN COUNCIL OF  
INDIANAPOLIS, INC. – SPECIAL WORKS**

**NOTES TO FINANCIAL STATEMENTS  
SEPTEMBER 30, 2013 AND 2012**

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Four certificates of deposit represent 65% of total investments at September 30, 2012. Two equity exchange traded funds represent 21% and 18%, of total investments at September 30, 2013 and 2012, respectively.

One donor accounted for 41% of total contributions for the year ended September 30, 2012. No individual donor accounted for more than 10% of total contributions for the year ended September 30, 2013.

- If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only **Part II** and check this box ☒ **Note.** Only complete Part II if you have already been granted an automatic 3-month extension on a previously filed Form 8868.
- If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** (on page 1).

**Part II Additional (Not Automatic) 3-Month Extension of Time.** Only file the original (no copies needed).

<b>Type or print</b>  File by the due date for filing your return. See instructions.	Name of exempt organization or other filer, see instructions.		<b>Enter filer's identifying number, see instructions</b>	
	Society of St. Vincent De Paul Archdiocesan Council of Indianapolis		Employer identification number (EIN) or	
	3001 E. 30th Street		37-1507632	
	Number, street, and room or suite no. If a P.O. box, see instructions.		Social security number (SSN)	
	City, town or post office, state, and ZIP code. For a foreign address, see instructions.			
	Indianapolis IN 46218			

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

☐ ☐

Application Is For	Return Code	Application Is For	Return Code
Form 990 or Form 990-EZ	01		
Form 990-BL	02	Form 1041-A	08
Form 4720 (individual)	03	Form 4720 (other than individual)	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

**STOP! Do not complete Part II if you were not already granted an automatic 3-month extension on a previously filed Form 8868.**

- The books are in the care of **James Donges**  
Telephone No. **317-924-5775** Fax No. **317-924-5781**
- 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.

- 4 I request an additional 3-month extension of time until **August 15**, 20 **14**.
- 5 For calendar year , or other tax year beginning **Oct. 1**, 20 **12**, and ending **September 30**, 20 **13**.
- 6 If the tax year entered in line 5 is for less than 12 months, check reason: ☐ Initial return ☐ Final return  
☐ Change in accounting period
- 7 State in detail why you need the extension **We are an all volunteer organization and not all units report in a timely fashion**

<b>8a</b> If this application is for Forms 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	<b>8a</b>	\$
<b>b</b> If this application is for Forms 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 and any amount paid previously with Form 8868.	<b>8b</b>	\$
<b>c Balance due.</b> Subtract line 8b from line 8a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	<b>8c</b>	\$

**Signature and Verification must be completed for Part II only.**

Under penalties of perjury, I declare that I have examined this form, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete, and that I am authorized to prepare this form.

Signature ►

Title ► **President**

Date ►