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Return of Private Foundation

or Section 4947(a)(1) Trust Treated as Private Foundation

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Information about Form 990-PF and its separate instructions is at www.irs.gov/form990pf.

2013

Open to Public Inspection

For calendar year 2013 or tax year beginning

, and ending

Name of foundation THE SEMLER FAMILY FOUNDATION, INC.		A Employer identification number 20-3523866
Number and street (or P.O. box number if mail is not delivered to street address) 8015 HEYWARD DRIVE		B Telephone number 317-285-1615
City or town, state or province, country, and ZIP or foreign postal code INDIANAPOLIS, IN 46250-2263		C If exemption application is pending, check here ☐
G Check all that apply: ☐ Initial return ☐ Final return ☐ Address change ☐ Initial return of a former public charity ☐ Amended return ☐ Name change		D 1. Foreign organizations, check here ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ☐
H Check type of organization: ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here ☐
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 2,223,331.		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐
J Accounting method: ☒ Cash ☐ Accrual ☐ Other (specify) _____		

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a).)		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received		5,000.		N/A	
2 Check ☐ If the foundation is not required to attach Sch. B					
3 Interest on savings and temporary cash investments		4.	4.		STATEMENT 1
4 Dividends and interest from securities		76,526.	76,526.		STATEMENT 2
5a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10		157,722.			
b Gross sales price for all assets on line 6a		7,085,840.			
7 Capital gain net income (from Part IV, line 2)			157,722.		
8 Net short-term capital gain					
9 Income modifications					
10a Gross sales less returns and allowances					
b Less Cost of goods sold					
c Gross profit or (loss)					
11 Other income					
12 Total. Add lines 1 through 11		239,252.	234,252.		
13 Compensation of officers, directors, trustees, etc		0.	0.		0.
14 Other employee salaries and wages					
15 Pension plans, employee benefits					
16a Legal fees					
b Accounting fees					
c Other professional fees STMT 3		15,673.	15,673.		0.
17 Interest					
18 Taxes STMT 4		10,208.	0.		0.
19 Depreciation and depletion					
20 Occupancy					
21 Travel, conferences, and meetings					
22 Printing and publications					
23 Other expenses					
24 Total operating and administrative expenses. Add lines 13 through 23		25,881.	15,673.		0.
25 Contributions, gifts, grants paid		94,950.			94,950.
26 Total expenses and disbursements. Add lines 24 and 25		120,831.	15,673.		94,950.
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements		118,421.			
b Net investment income (if negative, enter -0-)			218,579.		
c Adjusted net income (if negative, enter -0-)				N/A	

P9

Part II Balance Sheets

Attached schedules and amounts in the description column should be for end-of-year amounts only

		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing	100,838.	1,034.	1,034.
	2 Savings and temporary cash investments	91,668.		
	3 Accounts receivable ▶			
	Less: allowance for doubtful accounts ▶			
	4 Pledges receivable ▶			
	Less: allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons			
	7 Other notes and loans receivable ▶			
	Less: allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments - U.S. and state government obligations			
	b Investments - corporate stock STMT 5	1,389,703.	2,024,762.	2,222,297.
	c Investments - corporate bonds STMT 6	200,449.	0.	0.
	11 Investments - land, buildings, and equipment: basis ▶			
Less: accumulated depreciation ▶				
12 Investments - mortgage loans				
13 Investments - other				
14 Land, buildings, and equipment: basis ▶				
Less: accumulated depreciation ▶				
15 Other assets (describe ▶)				
16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item 1)	1,782,658.	2,025,796.	2,223,331.	
Liabilities	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable		112,342.	STATEMENT 7
	22 Other liabilities (describe ▶)			
	23 Total liabilities (add lines 17 through 22)	0.	112,342.	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31. ▶ ☐			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. ▶ ☒			
	27 Capital stock, trust principal, or current funds	1,571,318.	1,583,693.	
	28 Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
	29 Retained earnings, accumulated income, endowment, or other funds	211,340.	329,761.	
	30 Total net assets or fund balances	1,782,658.	1,913,454.	
31 Total liabilities and net assets/fund balances	1,782,658.	2,025,796.		

Part III Analysis of Changes in Net Assets or Fund Balances

1 Total net assets or fund balances at beginning of year - Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	1,782,658.
2 Enter amount from Part I, line 27a	2	118,421.
3 Other increases not included in line 2 (itemize) ▶ <u>ADJUSTMENT</u>	3	12,375.
4 Add lines 1, 2, and 3	4	1,913,454.
5 Decreases not included in line 2 (itemize) ▶	5	0.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	1,913,454.

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a TRIAD - SHORT TERM	P		
b TRIAD - LONG TERM	P		
c AMERITRADE - SHORT TERM	P		
d AMERITRADE - LONG TERM	P		
e			

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 5,881,597.		5,706,340.	175,257.
b 229,284.		219,252.	10,032.
c 970,728.		996,552.	-25,824.
d 4,231.		5,974.	-1,743.
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a			175,257.
b			10,032.
c			-25,824.
d			-1,743.
e			

2 Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	157,722.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8	{ }	3	N/A

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

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

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

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

☐ Yes ☒ No

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2012	74,150.	1,604,117.	.046225
2011	86,330.	1,689,515.	.051098
2010	89,098.	1,654,130.	.053864
2009	83,220.	1,519,112.	.054782
2008	102,519.	1,786,164.	.057396

2 Total of line 1, column (d)	2	.263365
3 Average distribution ratio for the 5-year base period - divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	.052673
4 Enter the net value of noncharitable-use assets for 2013 from Part X, line 5	4	2,147,305.
5 Multiply line 4 by line 3	5	113,105.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	2,186.
7 Add lines 5 and 6	7	115,291.
8 Enter qualifying distributions from Part XII, line 4	8	94,950.

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

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

1a Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)		1	4,372.
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☐ and enter 1% of Part I, line 27b		2	0.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b).		3	4,372.
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		4	0.
3 Add lines 1 and 2		5	4,372.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)			
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-			
6 Credits/Payments:			
a 2013 estimated tax payments and 2012 overpayment credited to 2013	6a 5,764.	7	5,764.
b Exempt foreign organizations - tax withheld at source	6b	8	
c Tax paid with application for extension of time to file (Form 8868)	6c	9	
d Backup withholding erroneously withheld	6d	10	1,392.
7 Total credits and payments. Add lines 6a through 6d		11	0.
8 Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached			
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed			
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid			
11 Enter the amount of line 10 to be: Credited to 2014 estimated tax ☐ 1,392. Refunded ☐			

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for the definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. ☐ \$ 0. (2) On foundation managers. ☐ \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ☐ \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ☐ IN		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2013 or the taxable year beginning in 2013 (see instructions for Part XIV)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

N/A

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► N/A	13	X	
14	The books are in care of ► JP MORGAN CHASE BANK, N.A. Telephone no. ► 317-684-3167 Located at ► 1 EAST OHIO STREET, INDIANAPOLIS, IN ZIP+4 ► 46204			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year ► 15 N/A			
16	At any time during calendar year 2013, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for Form TD F 90-22.1. If "Yes," enter the name of the foreign country ►	16	Yes	No X

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

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

	Yes	No
1a During the year did the foundation (either directly or indirectly):		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	☐ Yes ☒ No	
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	☐ Yes ☒ No	
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	☐ Yes ☒ No	
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	☐ Yes ☒ No	
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	☐ Yes ☒ No	
(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)	☐ Yes ☒ No	
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here	N/A	1b
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2013?		1c X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):		
a At the end of tax year 2013, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2013? If "Yes," list the years ►	☐ Yes ☒ No	
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.)	N/A	2b
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ►		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	☐ Yes ☒ No	
b If "Yes," did it have excess business holdings in 2013 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2013.)	N/A	3b
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		4a X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2013?		4b X

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

5a During the year did the foundation pay or incur any amount to:

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?

☐ Yes ☒ No

(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?

☐ Yes ☒ No

(3) Provide a grant to an individual for travel, study, or other similar purposes?

☐ Yes ☒ No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)?

☐ Yes ☒ No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?

☐ Yes ☒ No

b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?

N/A

5b

Organizations relying on a current notice regarding disaster assistance check here

☒

c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?

N/A

☐ Yes ☐ No

If "Yes," attach the statement required by Regulations section 53.4945-5(d)

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?

☐ Yes ☒ No

6b

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

X

If "Yes" to 6b, file Form 8870.

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?

☐ Yes ☒ No

b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?

N/A

7b

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors

1 List all officers, directors, trustees, foundation managers and their compensation.

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
SEE STATEMENT 8		0.	0.	0.

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

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

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

0

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

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
Total number of others receiving over \$50,000 for professional services		0

Part IX-A Summary of Direct Charitable Activities

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

Part IX-B Summary of Program-Related Investments

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.	Amount
1 N/A	
2	
All other program-related investments. See instructions.	
3	
Total. Add lines 1 through 3	0.

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:	
a	Average monthly fair market value of securities	1a 2,076,195.
b	Average of monthly cash balances	1b 103,810.
c	Fair market value of all other assets	1c
d	Total (add lines 1a, b, and c)	1d 2,180,005.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e 0.
2	Acquisition indebtedness applicable to line 1 assets	2 0.
3	Subtract line 2 from line 1d	3 2,180,005.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4 32,700.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5 2,147,305.
6	Minimum investment return. Enter 5% of line 5	6 107,365.

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

1	Minimum investment return from Part X, line 6	1 107,365.
2a	Tax on investment income for 2013 from Part VI, line 5	2a 4,372.
b	Income tax for 2013. (This does not include the tax from Part VI.)	2b
c	Add lines 2a and 2b	2c 4,372.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3 102,993.
4	Recoveries of amounts treated as qualifying distributions	4 0.
5	Add lines 3 and 4	5 102,993.
6	Deduction from distributable amount (see instructions)	6 0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7 102,993.

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

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:	
a	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	1a 94,950.
b	Program-related investments - total from Part IX-B	1b 0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2
3	Amounts set aside for specific charitable projects that satisfy the:	
a	Suitability test (prior IRS approval required)	3a
b	Cash distribution test (attach the required schedule)	3b
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4 94,950.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5 0.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6 94,950.

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

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2012	(c) 2012	(d) 2013
1 Distributable amount for 2013 from Part XI, line 7				102,993.
2 Undistributed income, if any, as of the end of 2013				
a Enter amount for 2012 only			0.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2013:				
a From 2008	13,708.			
b From 2009	7,824.			
c From 2010	9,357.			
d From 2011	3,167.			
e From 2012				
f Total of lines 3a through e	34,056.			
4 Qualifying distributions for 2013 from Part XII, line 4: ► \$	94,950.			
a Applied to 2012, but not more than line 2a			0.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2013 distributable amount				94,950.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2013 (If an amount appears in column (d), the same amount must be shown in column (a).)	8,043.			8,043.
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	26,013.			
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 2012. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2013. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2014				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)	0.			
8 Excess distributions carryover from 2008 not applied on line 5 or line 7	5,665.			
9 Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a	20,348.			
10 Analysis of line 9:				
a Excess from 2009	7,824.			
b Excess from 2010	9,357.			
c Excess from 2011	3,167.			
d Excess from 2012				
e Excess from 2013				

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

N/A

- 1 a** If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2013, enter the date of the ruling

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

☐ 4942(j)(3) or ☐ 4942(j)(5)

- 2 a** Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed

b 85% of line 2a

- c** Qualifying distributions from Part XII,
line 4 for each year listed

- d** Amounts included in line 2c not used directly for active conduct of exempt activities

- e** Qualifying distributions made directly for active conduct of exempt activities.

- 3** Subtract line 2d from line 2c
Complete 3a, b, or c for the
alternative test relied upon:

- a "Assets" alternative test - enter:

- (1) Value of all assets**

- (2) Value of assets qualifying under section 4942(j)(3)(B)(i)**

- b** "Endowment" alternative test - enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed

- c "Support" alternative test - enter:

- (1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)

- (2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)

- (3) Largest amount of support from an exempt organization**

- (4) Gross investment income

Part XV **Supplementary Information** (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year-see instructions.)

- ### 1 Information Regarding Foundation Managers:

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

NONE

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

NONE

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

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

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

JERRY D. SEMLER, 317-285-1615

8015 HEYWARD DRIVE, INDIANAPOLIS, IN 46250

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

SUBMIT LETTER DESCRIBING NEED FOR AND PURPOSE OF REQUESTED CONTRIBUTION.

- c Any submission deadlines:**

N/A

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

N/A

Part XV Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
SEE ATTACHMENT #1		PUBLIC CHARITY	PROGRAM SUPPORT	94,950.
Total				94,950.
b Approved for future payment				
NONE				
Total				0.

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

▶ Attach to Form 990, Form 990-EZ, or Form 990-PF.
▶ Information about Schedule B (Form 990, 990-EZ, or 990-PF) and
its instructions is at www.irs.gov/form990.

OMB No 1545-0047

2013

Name of the organization

Employer identification number

THE SEMLER FAMILY FOUNDATION, INC.**20-3523866**

Organization type (check one):

Filers of:

Section:

Form 990 or 990-EZ

☐

501(c)() (enter number) organization

☐4947(a)(1) nonexempt charitable trust **not** treated as a private foundation☐

527 political organization

Form 990-PF

☒

501(c)(3) exempt private foundation

☐

4947(a)(1) nonexempt charitable trust treated as a private foundation

☐

501(c)(3) taxable private foundation

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

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

Special Rules

- ☐ For a section 501(c)(3) organization filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi) and received from any one contributor, during the year, a contribution of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 for use *exclusively* for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals. Complete Parts I, II, and III.
- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions for use *exclusively* for religious, charitable, etc., purposes, but these contributions did not total to more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Do not complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions of \$5,000 or more during the year. ▶ \$ _____

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

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990, 990-EZ, or 990-PF. Schedule B (Form 990, 990-EZ, or 990-PF) (2013)

Name of organization

Employer identification number

THE SEMLER FAMILY FOUNDATION, INC.**20-3523866****Part I Contributors** (see instructions) Use duplicate copies of Part I if additional space is needed.

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
<u>1</u>	<u>JERRY D. SEMLER</u> <u>8015 HEYWARD DR</u> <u>INDIANAPOLIS, IN 46250-4226</u>	\$ <u>5,000.</u>	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
		\$ _____	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
		\$ _____	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
		\$ _____	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
		\$ _____	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
		\$ _____	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
		\$ _____	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)

Name of organization

Employer identification number

THE SEMLER FAMILY FOUNDATION, INC.**20-3523866****Part II Noncash Property** (see instructions). Use duplicate copies of Part II if additional space is needed.

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

Name of organization

Employer identification number

THE SEMLER FAMILY FOUNDATION, INC.**20-3523866**

Part III Exclusively religious, charitable, etc., individual contributions to section 501(c)(7), (8), or (10) organizations that total more than \$1,000 for the year. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of exclusively religious, charitable, etc., contributions of \$1,000 or less for the year. (Enter this information once) ▶ \$

Use duplicate copies of Part III if additional space is needed

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee

FORM 990-PF INTEREST ON SAVINGS AND TEMPORARY CASH INVESTMENTS STATEMENT 1

SOURCE	(A) REVENUE PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME
JP MORGAN CHASE	4.	4.	
TOTAL TO PART I, LINE 3	4.	4.	

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
AMERITRADE	9,372.	0.	9,372.	9,372.	
TRIAD SECURITIES	67,154.	0.	67,154.	67,154.	
TO PART I, LINE 4	76,526.	0.	76,526.	76,526.	

FORM 990-PF OTHER PROFESSIONAL FEES STATEMENT 3

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
INVESTMENT MANAGEMENT FEES	6,623.	6,623.		0.
TRIAD FEES	8,800.	8,800.		0.
AMERITRADE FEES	250.	250.		0.
TO FORM 990-PF, PG 1, LN 16C	15,673.	15,673.		0.

FORM 990-PF

TAXES

STATEMENT

4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
EXCISE TAX	10,208.	0.		0.
TO FORM 990-PF, PG 1, LN 18	10,208.	0.		0.

FORM 990-PF

CORPORATE STOCK

STATEMENT

5

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
TRIAD SECURITIES SEE STATEMENT	2,024,762.	2,222,297.
TOTAL TO FORM 990-PF, PART II, LINE 10B	2,024,762.	2,222,297.

FORM 990-PF

CORPORATE BONDS

STATEMENT

6

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
TRIAD SECURITIES SEE STATEMENT	0.	0.
TOTAL TO FORM 990-PF, PART II, LINE 10C	0.	0.

FORM 990-PF

PART VIII - LIST OF OFFICERS, DIRECTORS
TRUSTEES AND FOUNDATION MANAGERS

STATEMENT 8

NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN CONTRIB	EXPENSE ACCOUNT
JERRY D. SEMLER 8015 HEYWARD DRIVE INDIANAPOLIS, IN 46250	PRESIDENT 1.00	0.	0.	0.
ROSEMARY R. SEMLER 8015 HEYWARD DRIVE INDIANAPOLIS, IN 46250	VICE-PRESIDENT 1.00	0.	0.	0.
MICHAEL R. SEMLER 8015 HEYWARD DRIVE INDIANAPOLIS, IN 46250	TREASURER 1.00	0.	0.	0.
KIMBERLY D. HAMILTON 8015 HEYWARD DRIVE INDIANAPOLIS, IN 46250	SECRETARY 1.00	0.	0.	0.
MARY D. DODSON 8015 HEYWARD DRIVE INDIANAPOLIS, IN 46250	DIRECTOR 1.00	0.	0.	0.
JOHN R. SEMLER 8015 HEYWARD DRIVE INDIANAPOLIS, IN 46250	DIRECTOR 1.00	0.	0.	0.
KRISTIN D. TERRELL 8015 HEYWARD DRIVE INDIANAPOLIS, IN 46250	DIRECTOR 1.00	0.	0.	0.
JEFFREY R. SEMLER 8015 HEYWARD DRIVE INDIANAPOLIS, IN 46250	DIRECTOR 1.00	0.	0.	0.
SALLY D. BUTLER 8015 HEYWARD DRIVE INDIANAPOLIS, IN 46250	DIRECTOR 1.00	0.	0.	0.
TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII		0.	0.	0.

SFF 2013 Contributions

Recipient	Purpose	Ck #	Amount	Address	City	State	Zip	Phone	Fed Tax ID#
American Red Cross	William Semler	1285	\$100	441 E 10th Street	Indianapolis	IN	46202-3388	317-684-4314	53-0196605
Bail State University	Bowen Center Pledge - 4th of 5	1208	\$1,000	2800 W Bethel Avenue	Muncie	IN	47304	765-285-8312	3119149
Best Buddies Indiana	Molly Hamilton	1295	\$100	8604 Allisonville Road, #165	Indianapolis	IN	46250	317-436-8440	52-1614576
Bishop Chabard High School	Annual Support	1281	\$5,000	5885 N Crittenden Avenue	Indianapolis	IN	46220-2840	317-251-1451	35-1063332
Boy Scouts of America - Crossroads of America Council	Annual Support	1218	\$2,500	7125 Fall Creek Road	Indianapolis	IN	46256	317-925-1900	35-0867962
Boy Scouts of America - Troop 107	4th of 5 Pledge Payments	1206	\$250	7125 Fall Creek Road	Indianapolis	IN	46256	317-925-1900	35-0867962
Center for Leadership Development	Annual Support	1216	\$2,000	2425 Dr Martin Luther King Jr St	Indianapolis	IN	46208-5546	317-923-8111	35-1389882
Children's Museum of Indianapolis	Annual Support	1280	\$5,000	3000 N Meridian Street	Indianapolis	IN	46208-4716	317-924-5431	35-0867985
Chinzel House Foundation	4th of 5 Payments on Pledge	1215	\$1,000	10 W Market Street, Suite 1990	Indianapolis	IN	46204-2973	317-464-2030	35-2051932
Conner Praine	Civil War Project - 3rd of 5 Payments	1214	\$5,000	13400 Allisonville Road	Fishers	IN	46038-3457	317-776-6000	20-3402627
Cornelia Research Foundation of America	Annual Support	1220	\$1,000	9002 N Meridian St, Ste 212	Indianapolis	IN	46200	317-844-5610	31-1243592
Hoosier Salon Patrons Association	Annual Support	1219	\$2,500	714 E 65th Street	Indianapolis	IN	46220	317-253-5340	35-0393284
Hoosier Veterans Assistance Foundation	Jack Semler	1286	\$100	964 N Pennsylvania Street	Indianapolis	IN	46204	317-951-0688	35-1890547
Indiana Historical Society	Hannah Semler	1298	\$1,000	1721 Pleasant Street, Suite B	Noblesville	IN	46060	317-773-4974	35-1610723
Indiana Repertory Theatre	Concerts on Canal	1221	\$1,000	450 W Ohio Street	Indianapolis	IN	46202-3269	317-233-3109	35-0876384
Indiana University Foundation	Annual Support	1213	\$2,500	140 W Washington Street	Indianapolis	IN	46204	317-635-5277	35-1186290
Indiana University Zoological Society	100 Voices of Hope Fund	1276	\$1,000	340 W Michigan Street	Indianapolis	IN	46202	317-274-3711	35-6018940
Juvenile Diabetes Research Foundation	4th of 5 Payments - Saving Orangutans	1212	\$5,000	1200 W Washington St	Indianapolis	IN	46222-4552	317-630-2710	35-1074747
Kidney Cancer Association	PJ, Rosemary, Lily Butler	1290	\$300	10401 N Meridian St, Ste 150	Indianapolis	IN	46280	317-469-9604	23-1907729
Lake Maxinkuckee Environmental Council	John, Thomas, David Semler	1297	\$300	P O Box 803338 #38269	Chicago	IL	60680-3338	800-850-9132	36-3719712
Make-A-Wish	Annual Support	1211	\$1,000	116 N Main Street	Culver	IN	46511	574-842-3686	31-1071826
Manan University	Annie Butler	1289	\$100	7330 Woodland Drive	Indianapolis	IN	46278	614-923-0555	34-1471131
Manan University	Rosary Walk - Final Payment	1207	\$7,500	3200 Cold Spring Road	Indianapolis	IN	46222-1997	317-955-6100	35-0868175
Manan University	1/2 of Medical School Pledge	1279	\$12,500	3200 Cold Spring Road	Indianapolis	IN	46222-1997	317-955-6100	35-0868175
Manne Toys for Tots Foundation	William, Andrew Semler	1287	\$100	18251 Quantico Gateway Drive	Triangle	VA	22172	703-221-2279	20-3021444
Matthew 25	Conner Hamilton	1294	\$100	1045 W 14th Street, Suite A	Carmel	IN	46032	317-663-4039	18501480
Merciful H E L P Center	Charlie Semler	1284	\$100	1045 W 14th Street, Suite A	Carmel	IN	46032	317-663-4039	18501480
Mighty Acorn Foundation	Sophie and Jack Terrell	1296	\$200	50935 Hemingway Lane	Elkhart	IN	46514	574-381-6737	46-2778460
O'Connor House	Grace Hamilton	1293	\$100	P O Box 1061	Carmel	IN	46082	317-844-9562	20-5533460
Providence Cristo Rey High School	Computer Support	1222	\$15,000	75 N Bellevue Place	Indianapolis	IN	46222	317-860-1000	20-3585867
Purdue University Foundation	Bootcamp for Veterans	1277	\$5,000	403 W Wood Street	West Lafayette	IN	47907-2007	765-496-3163	31-0958507
Purdue University Foundation	Patrick Dodson	1300	\$100	403 W Wood Street	West Lafayette	IN	47907-2007	765-496-3163	31-0958507
Riley Children's Foundation	Dance Marathon Fund	1225	\$1,000	30 S Meridian St, Ste 200	Indianapolis	IN	46204	317-634-4474	35-0868147
Riley Children's Foundation	Patrick Hamilton	1288	\$100	30 S Meridian St, Ste 200	Indianapolis	IN	46204	317-634-4474	35-0868147
Sagamore Institute for Policy Research	Annual Support	1209	\$2,500	1630 N Meridian St, Ste 450	Indianapolis	IN	46202-1437	317-472-2050	20-1161578
Saint Meinrad Archabbey	James Sweeney Endowment	1278	\$1,000	200 Hill Drive	St Meinrad	IN	47577	812-357-6522	35-0868161
Seeds of Hope, Inc	Matthew, Emily & Cooper Dodson	1299	\$100	1425 S Mickle Avenue	Indianapolis	IN	46241	317-244-0420	35-2086855
Special Olympics Indiana	Christopher Semler	1282	\$100	6100 W 96th St, Ste 270	Indianapolis	IN	46278	317-328-2000	35-1262574
St Mary of the Lake Catholic Church	Henry, Matthew & Scott Semler	1292	\$300	1333 S Mayflower Ave, Ste 400	Monrovia	CA	91016	626-792-8247	20-11773824
St Theodore Guern Catholic High School	Fr. Thad Education Project in home country	1223	\$5,000	124 College Avenue	Culver	IN	46511	574-842-3667	35-1712806
St Vincent Foundation	1st of 5 Payments - Academic Wing	1217	\$5,000	15300 Gray Road	Noblesville	IN	46062	317-582-0120	116773049-009
St Vincent Foundation	B A B E Store - Lucy Semler	1283	\$100	8402 Harcourt Road, Suite 210	Indianapolis	IN	46260	317-338-7012	35-6088862
Sycamore Foundation	Payton Manning Children's Hospital - Ellie Semler	1291	\$1,000	8402 Harcourt Road, Suite 210	Indianapolis	IN	46260	317-338-7012	35-6088862
Tatum's Bags of Fun	Legacy Fund - Jay Ruckelshaus	1210	\$1,000	201 N Illinois St, Ste 1701	Indianapolis	IN	46204	317-208-4800	35-1859255
United Way of Marshall County	Maggie Dodson	1301	\$100	1341 Kirkham Lane	Indianapolis	IN	46260	317-446-9249	45-5268324
	Cornerstone Partners Program	1224	\$1,000	2701 N Michigan	Plymouth	IN	46563	574-936-3366	23-7220922

\$94,950

ATT: 20-3523866

Semler Family Foundation ATTACHMENT #1