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Form **990-PF**

Department of the Treasury  
Internal Revenue Service

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

▶ Do not enter Social Security numbers on this form as it may be made public. By law, the IRS cannot redact the information on the form.

▶ Information about Form 990-PF and its instructions is at [www.irs.gov/form990pf](http://www.irs.gov/form990pf).

OMB No 1545-0052

**2013**

**Open to Public Inspection**

**For calendar year 2013, or tax year beginning 01-01-2013 , and ending 12-31-2013**

Name of foundation LUMOS		<b>A Employer identification number</b> 20-8203226
Number and street (or P O box number if mail is not delivered to street address) Room/suite 3502 SCARSDALE ROAD		<b>B Telephone number (see instructions)</b> (615) 783-0101
City or town, state or province, country, and ZIP or foreign postal code NASHVILLE, TN 37215		<b>C</b> If exemption application is pending, check here <input type="checkbox"/>
<b>G</b> Check all that apply: <input type="checkbox"/> Initial return <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Final return <input type="checkbox"/> Amended return <input type="checkbox"/> Address change <input type="checkbox"/> Name change		<b>D 1.</b> Foreign organizations, check here <input type="checkbox"/> <b>2.</b> Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
<b>H</b> Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		<b>E</b> If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
<b>I</b> Fair market value of all assets at end of year (from Part II, col. (c), line 16) ▶ \$ 3,548,699	<b>J</b> Accounting method: <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ (Part I, column (d) must be on cash basis.)	<b>F</b> If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>

<b>Part I Analysis of Revenue and Expenses</b> <small>(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions) )</small>		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
<b>Revenue</b>	<b>1</b> Contributions, gifts, grants, etc , received (attach schedule)				
	<b>2</b> Check <input checked="" type="checkbox"/> if the foundation is <b>not</b> required to attach Sch B				
	<b>3</b> Interest on savings and temporary cash investments	140	140		
	<b>4</b> Dividends and interest from securities. . . . .	100,347	100,347		
	<b>5a</b> Gross rents . . . . .				
	<b>b</b> Net rental income or (loss) _____				
	<b>6a</b> Net gain or (loss) from sale of assets not on line 10	117,967			
	<b>b</b> Gross sales price for all assets on line 6a 2,150,017				
	<b>7</b> Capital gain net income (from Part IV, line 2) . . .		117,967		
	<b>8</b> Net short-term capital gain . . . . .				
	<b>9</b> Income modifications . . . . .				
	<b>10a</b> Gross sales less returns and allowances				
<b>b</b> Less Cost of goods sold . . . . .					
<b>c</b> Gross profit or (loss) (attach schedule) . . . . .					
<b>11</b> Other income (attach schedule) . . . . .					
<b>12 Total.</b> Add lines 1 through 11 . . . . .	218,454	218,454			
<b>Operating and Administrative Expenses</b>	<b>13</b> Compensation of officers, directors, trustees, etc	76,500	19,125		57,375
	<b>14</b> Other employee salaries and wages . . . . .				
	<b>15</b> Pension plans, employee benefits . . . . .	18,202	4,551		13,595
	<b>16a</b> Legal fees (attach schedule) . . . . .				
	<b>b</b> Accounting fees (attach schedule) . . . . .	3,692	0		3,692
	<b>c</b> Other professional fees (attach schedule) . . . . .	14,382	14,382		0
	<b>17</b> Interest . . . . .				
	<b>18</b> Taxes (attach schedule) (see instructions)	9,705	0		0
	<b>19</b> Depreciation (attach schedule) and depletion . . .				
	<b>20</b> Occupancy . . . . .				
	<b>21</b> Travel, conferences, and meetings . . . . .	138	0		138
	<b>22</b> Printing and publications . . . . .				
	<b>23</b> Other expenses (attach schedule) . . . . .	385	300		85
	<b>24 Total operating and administrative expenses.</b> Add lines 13 through 23 . . . . .	123,004	38,358		74,885
	<b>25</b> Contributions, gifts, grants paid . . . . .	81,168			81,168
<b>26 Total expenses and disbursements.</b> Add lines 24 and 25	204,172	38,358		156,053	
<b>27</b> Subtract line 26 from line 12					
<b>a Excess of revenue over expenses and disbursements</b>	14,282				
<b>b Net investment income</b> (if negative, enter -0-)		180,096			
<b>c Adjusted net income</b> (if negative, enter -0-)					

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

<b>Part II Balance Sheets</b>		Beginning of year			End of year		
		(a) Book Value	(b) Book Value	(c) Fair Market Value	(a) Book Value	(b) Book Value	(c) Fair Market Value
<b>Assets</b>	<b>1</b>	Cash—non-interest-bearing . . . . .					
	<b>2</b>	Savings and temporary cash investments . . . . .	347,803	629,975	629,975		
	<b>3</b>	Accounts receivable ▶ _____ Less allowance for doubtful accounts ▶ _____					
	<b>4</b>	Pledges receivable ▶ _____ Less allowance for doubtful accounts ▶ _____					
	<b>5</b>	Grants receivable . . . . .					
	<b>6</b>	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions) . . . . .					
	<b>7</b>	Other notes and loans receivable (attach schedule) ▶ _____ Less allowance for doubtful accounts ▶ _____					
	<b>8</b>	Inventories for sale or use . . . . .					
	<b>9</b>	Prepaid expenses and deferred charges . . . . .					
	<b>10a</b>	Investments—U S and state government obligations (attach schedule)					
	<b>b</b>	Investments—corporate stock (attach schedule) . . . . .	2,007,944	2,537,207	2,537,207		
	<b>c</b>	Investments—corporate bonds (attach schedule) . . . . .	715,465	279,082	279,082		
	<b>11</b>	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____					
	<b>12</b>	Investments—mortgage loans . . . . .					
	<b>13</b>	Investments—other (attach schedule) . . . . .	99,100	101,844	101,844		
	<b>14</b>	Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____					
<b>15</b>	Other assets (describe ▶ _____)	1,293	591	591			
<b>16</b>	<b>Total assets</b> (to be completed by all filers—see the instructions Also, see page 1, item I)	3,171,605	3,548,699	3,548,699			
<b>Liabilities</b>	<b>17</b>	Accounts payable and accrued expenses . . . . .	3,750	3,825			
	<b>18</b>	Grants payable . . . . .					
	<b>19</b>	Deferred revenue . . . . .					
	<b>20</b>	Loans from officers, directors, trustees, and other disqualified persons					
	<b>21</b>	Mortgages and other notes payable (attach schedule) . . . . .					
	<b>22</b>	Other liabilities (describe ▶ _____)	431	6,103			
<b>23</b>	<b>Total liabilities</b> (add lines 17 through 22) . . . . .	4,181	9,928				
<b>Net Assets or Fund Balances</b>	<b>Foundations that follow SFAS 117, check here</b> <input checked="" type="checkbox"/>						
	<b>and complete lines 24 through 26 and lines 30 and 31.</b>						
	<b>24</b>	Unrestricted . . . . .	3,167,424	3,538,771			
	<b>25</b>	Temporarily restricted . . . . .					
	<b>26</b>	Permanently restricted . . . . .					
	<b>Foundations that do not follow SFAS 117, check here</b> <input type="checkbox"/>						
	<b>and complete lines 27 through 31.</b>						
	<b>27</b>	Capital stock, trust principal, or current funds . . . . .					
<b>28</b>	Paid-in or capital surplus, or land, bldg, and equipment fund						
<b>29</b>	Retained earnings, accumulated income, endowment, or other funds						
<b>30</b>	<b>Total net assets or fund balances</b> (see page 17 of the instructions) . . . . .	3,167,424	3,538,771				
<b>31</b>	<b>Total liabilities and net assets/fund balances</b> (see page 17 of the instructions) . . . . .	3,171,605	3,548,699				

**Part III Analysis of Changes in Net Assets or Fund Balances**

<b>1</b>	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) . . . . .	<b>1</b>	3,167,424
<b>2</b>	Enter amount from Part I, line 27a . . . . .	<b>2</b>	14,282
<b>3</b>	Other increases not included in line 2 (itemize) ▶ _____	<b>3</b>	357,065
<b>4</b>	Add lines 1, 2, and 3 . . . . .	<b>4</b>	3,538,771
<b>5</b>	Decreases not included in line 2 (itemize) ▶ _____	<b>5</b>	0
<b>6</b>	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30 . . . . .	<b>6</b>	3,538,771

**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)
<b>1 a</b>	PUBLICLY-TRADED SECURITIES	P		
<b>b</b>				
<b>c</b>				
<b>d</b>				
<b>e</b>				
(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)	
<b>a</b> 2,150,017		2,032,050	117,967	
<b>b</b>				
<b>c</b>				
<b>d</b>				
<b>e</b>				
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) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any		
<b>a</b>			117,967	
<b>b</b>				
<b>c</b>				
<b>d</b>				
<b>e</b>				
<b>2</b>	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 }	<b>2</b>	117,967
<b>3</b>	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8	}	<b>3</b>	

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?  Yes  No  
If "Yes," the foundation does not qualify under section 4940(e) Do not complete this part

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2012	153,423	3,124,307	0.049106
2011	143,821	3,089,623	0.046550
2010	108,044	2,947,944	0.036651
2009	146,780	2,377,977	0.061725
2008	107,604	2,885,565	0.037290
<b>2</b>	<b>Total</b> of line 1, column (d).		<b>2</b> 0.231322
<b>3</b>	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		<b>3</b> 0.046264
<b>4</b>	Enter the net value of noncharitable-use assets for 2013 from Part X, line 5.		<b>4</b> 3,389,675
<b>5</b>	Multiply line 4 by line 3.		<b>5</b> 156,820
<b>6</b>	Enter 1% of net investment income (1% of Part I, line 27b).		<b>6</b> 1,801
<b>7</b>	Add lines 5 and 6.		<b>7</b> 158,621
<b>8</b>	Enter qualifying distributions from Part XII, line 4.		<b>8</b> 156,053

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

**Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the instructions)**

<b>1a</b>	Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1 Date of ruling or determination letter _____ (attach copy of letter if necessary—see instructions)		
<b>b</b>	Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b . . . . .	<b>1</b>	3,602
<b>c</b>	All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)		
<b>2</b>	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	<b>2</b>	0
<b>3</b>	Add lines 1 and 2. . . . .	<b>3</b>	3,602
<b>4</b>	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	<b>4</b>	0
<b>5</b>	<b>Tax based on investment income.</b> Subtract line 4 from line 3 If zero or less, enter -0- . . . . .	<b>5</b>	3,602
<b>6</b>	Credits/Payments		
<b>a</b>	2013 estimated tax payments and 2012 overpayment credited to 2013	<b>6a</b>	4,193
<b>b</b>	Exempt foreign organizations—tax withheld at source . . . . .	<b>6b</b>	
<b>c</b>	Tax paid with application for extension of time to file (Form 8868)	<b>6c</b>	
<b>d</b>	Backup withholding erroneously withheld . . . . .	<b>6d</b>	
<b>7</b>	Total credits and payments Add lines 6a through 6d. . . . .	<b>7</b>	4,193
<b>8</b>	Enter any <b>penalty</b> for underpayment of estimated tax Check here <input type="checkbox"/> if Form 2220 is attached	<b>8</b>	
<b>9</b>	<b>Tax due.</b> If the total of lines 5 and 8 is more than line 7, enter <b>amount owed</b> . . . . .	<b>9</b>	
<b>10</b>	<b>Overpayment.</b> If line 7 is more than the total of lines 5 and 8, enter the <b>amount overpaid</b> . . . . .	<b>10</b>	591
<b>11</b>	Enter the amount of line 10 to be <b>Credited to 2014 estimated tax</b> 591 <b>Refunded</b>	<b>11</b>	0

**Part VII-A Statements Regarding Activities**

	Yes	No
<b>1a</b> 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? . . . . .	<b>1a</b>	No
<b>b</b> Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)? . . . . . <i>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.</i>	<b>1b</b>	No
<b>c</b> Did the foundation file <b>Form 1120-POL</b> for this year?. . . . .	<b>1c</b>	No
<b>d</b> Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year <b>(1)</b> On the foundation <input type="checkbox"/> \$ 0 <b>(2)</b> On foundation managers <input type="checkbox"/> \$ 0		
<b>e</b> Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input type="checkbox"/> \$ 0		
<b>2</b> Has the foundation engaged in any activities that have not previously been reported to the IRS? . . . . . <i>If "Yes," attach a detailed description of the activities.</i>	<b>2</b>	No
<b>3</b> 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? <i>If "Yes," attach a conformed copy of the changes</i> . . . . .	<b>3</b>	No
<b>4a</b> Did the foundation have unrelated business gross income of \$1,000 or more during the year?. . . . .	<b>4a</b>	No
<b>b</b> If "Yes," has it filed a tax return on <b>Form 990-T</b> for this year?. . . . .	<b>4b</b>	
<b>5</b> Was there a liquidation, termination, dissolution, or substantial contraction during the year? . . . . . <i>If "Yes," attach the statement required by General Instruction T.</i>	<b>5</b>	No
<b>6</b> 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? . . . . .	<b>6</b>	Yes
<b>7</b> Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col. (c), and Part XV.</i>	<b>7</b>	Yes
<b>8a</b> Enter the states to which the foundation reports or with which it is registered (see instructions) <input type="checkbox"/> TN		
<b>b</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? <i>If "No," attach explanation .</i>	<b>8b</b>	Yes
<b>9</b> 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)? <i>If "Yes," complete Part XIV</i> . . . . .	<b>9</b>	No
<b>10</b> Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses.</i>	<b>10</b>	No

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

<b>11</b>	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).	<b>11</b>		<b>No</b>		
<b>12</b>	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)	<b>12</b>		<b>No</b>		
<b>13</b>	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address <b>▶</b> <u>HTTP //BLOGS BELMONT EDU/LUMOS/</u>	<b>13</b>	<b>Yes</b>			
<b>14</b>	The books are in care of <b>▶</b> <u>CYNTHIA LEU</u> Telephone no <b>▶</b> <u>(615) 783-0101</u> Located at <b>▶</b> <u>3502 SCARDSALE RD NASHVILLE TN</u> ZIP +4 <b>▶</b> <u>37215</u>					
<b>15</b>	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of <b>Form 1041</b> —Check here <input type="checkbox"/> and enter the amount of tax-exempt interest received or accrued during the year <b>▶</b> <table border="1" style="display: inline-table;"><tr><td><b>15</b></td><td></td></tr></table>	<b>15</b>				
<b>15</b>						
<b>16</b>	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 instructions for exceptions and filing requirements for Form TD F 90-22.1 If "Yes", enter the name of the foreign country <b>▶</b>	<b>16</b>	<b>Yes</b>	<b>No</b>		

**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.			<b>Yes</b>	<b>No</b>
<b>1a</b>	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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> 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)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	(6) Agree to pay money or property to a government official? ( <b>Exception.</b> 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). <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
<b>b</b>	If any answer is "Yes" to 1a(1)–(6), did <b>any</b> of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here. <input type="checkbox"/>	<b>1b</b>		<b>No</b>
<b>c</b>	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?	<b>1c</b>		<b>No</b>
<b>2</b>	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))			
<b>a</b>	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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years <b>▶</b> 20____, 20____, 20____, 20____			
<b>b</b>	Are there any years listed in 2a for which the foundation is <b>not</b> 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 <b>all</b> years listed, answer "No" and attach statement—see instructions).	<b>2b</b>		
<b>c</b>	If the provisions of section 4942(a)(2) are being applied to <b>any</b> of the years listed in 2a, list the years here <b>▶</b> 20____, 20____, 20____, 20____			
<b>3a</b>	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
<b>b</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? ( <i>Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2013.</i> )	<b>3b</b>		
<b>4a</b>	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	<b>4a</b>		<b>No</b>
<b>b</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?	<b>4b</b>		<b>No</b>

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

<p><b>5a</b> During the year did the foundation pay or incur any amount to</p> <p><b>(1)</b> Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p><b>(2)</b> Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p><b>(3)</b> Provide a grant to an individual for travel, study, or other similar purposes? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p><b>(4)</b> Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see instructions). <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p><b>(5)</b> Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p><b>b</b> If any answer is "Yes" to 5a(1)–(5), did <b>any</b> 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)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No                  Organizations relying on a current notice regarding disaster assistance check here. <input type="checkbox"/></p> <p><b>c</b> 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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No                  If "Yes," attach the statement required by Regulations section 53.4945–5(d).</p> <p><b>6a</b> Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p><b>b</b> Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No                  If "Yes" to 6b, file Form 8870.</p> <p><b>7a</b> At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p><b>b</b> If yes, did the foundation receive any proceeds or have any net income attributable to the transaction? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p>	<b>5b</b>		
	<b>6b</b>		<b>No</b>
	<b>7b</b>		

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

**1 List all officers, directors, trustees, foundation managers and their compensation (see instructions).**

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
CYNTHIA LEU 3502 SCARDSALE RD NASHVILLE, TN 37215	PRESIDENT 30 00	76,500	11,750	0
AMY STRAUS JOSEFEK 115 CAMINO DE LAS COLINAS REDONDO BEACH, CA 90277	DIRECTOR 0 25	0	0	0
ADRIENNE SCHURE 522 WEST END AVENUE 14-D NEW YORK, NY 10024	DIRECTOR 0 25	0	0	0

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

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

**Total** number of other employees paid over \$50,000.  0

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

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

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
<b>Total</b> 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
<b>1</b>	
<b>2</b>	
<b>3</b>	
<b>4</b>	

**Part IX-B Summary of Program-Related Investments (see instructions)**

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
<b>1</b>	
<b>2</b>	
All other program-related investments. See page 24 of the instructions	
<b>3</b>	
<b>Total.</b> Add lines 1 through 3 . . . . .	0

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

<b>1</b>	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes		
<b>a</b>	Average monthly fair market value of securities. . . . .	<b>1a</b>	2,927,441
<b>b</b>	Average of monthly cash balances. . . . .	<b>1b</b>	513,853
<b>c</b>	Fair market value of all other assets (see instructions). . . . .	<b>1c</b>	0
<b>d</b>	<b>Total</b> (add lines 1a, b, and c). . . . .	<b>1d</b>	3,441,294
<b>e</b>	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation). . . . .	<b>1e</b>	0
<b>2</b>	Acquisition indebtedness applicable to line 1 assets. . . . .	<b>2</b>	0
<b>3</b>	Subtract line 2 from line 1d. . . . .	<b>3</b>	3,441,294
<b>4</b>	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions). . . . .	<b>4</b>	51,619
<b>5</b>	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3 Enter here and on Part V, line 4	<b>5</b>	3,389,675
<b>6</b>	<b>Minimum investment return.</b> Enter 5% of line 5. . . . .	<b>6</b>	169,484

**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.)

<b>1</b>	Minimum investment return from Part X, line 6. . . . .	<b>1</b>	169,484
<b>2a</b>	Tax on investment income for 2013 from Part VI, line 5. . . . .	<b>2a</b>	3,602
<b>b</b>	Income tax for 2013 (This does not include the tax from Part VI ). . . . .	<b>2b</b>	
<b>c</b>	Add lines 2a and 2b. . . . .	<b>2c</b>	3,602
<b>3</b>	Distributable amount before adjustments Subtract line 2c from line 1. . . . .	<b>3</b>	165,882
<b>4</b>	Recoveries of amounts treated as qualifying distributions. . . . .	<b>4</b>	0
<b>5</b>	Add lines 3 and 4. . . . .	<b>5</b>	165,882
<b>6</b>	Deduction from distributable amount (see instructions). . . . .	<b>6</b>	0
<b>7</b>	<b>Distributable amount</b> as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1. . . . .	<b>7</b>	165,882

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

<b>1</b>	Amounts paid (including administrative expenses) to accomplish charitable, etc , purposes		
<b>a</b>	Expenses, contributions, gifts, etc —total from Part I, column (d), line 26. . . . .	<b>1a</b>	156,053
<b>b</b>	Program-related investments—total from Part IX-B. . . . .	<b>1b</b>	0
<b>2</b>	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes. . . . .	<b>2</b>	
<b>3</b>	Amounts set aside for specific charitable projects that satisfy the		
<b>a</b>	Suitability test (prior IRS approval required). . . . .	<b>3a</b>	
<b>b</b>	Cash distribution test (attach the required schedule). . . . .	<b>3b</b>	
<b>4</b>	<b>Qualifying distributions.</b> Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	<b>4</b>	156,053
<b>5</b>	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see instructions). . . . .	<b>5</b>	0
<b>6</b>	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4. . . . .	<b>6</b>	156,053

**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
<b>1</b> Distributable amount for 2013 from Part XI, line 7				165,882
<b>2</b> Undistributed income, if any, as of the end of 2013				
<b>a</b> Enter amount for 2012 only. . . . .			81,168	
<b>b</b> Total for prior years 20___, 20___, 20___		0		
<b>3</b> Excess distributions carryover, if any, to 2013				
<b>a</b> From 2008. . . . .				
<b>b</b> From 2009. . . . .				
<b>c</b> From 2010. . . . .				
<b>d</b> From 2011. . . . .				
<b>e</b> From 2012. . . . .				
<b>f</b> Total of lines 3a through e. . . . .	0			
<b>4</b> Qualifying distributions for 2013 from Part XII, line 4 ▶ \$ <u>156,053</u>				
<b>a</b> Applied to 2012, but not more than line 2a			81,168	
<b>b</b> Applied to undistributed income of prior years (Election required—see instructions). . . . .		0		
<b>c</b> Treated as distributions out of corpus (Election required—see instructions). . . . .	0			
<b>d</b> Applied to 2013 distributable amount. . . . .				74,885
<b>e</b> Remaining amount distributed out of corpus	0			
<b>5</b> Excess distributions carryover applied to 2013 <i>(If an amount appears in column (d), the same amount must be shown in column (a).)</i>	0			0
<b>6</b> Enter the net total of each column as indicated below:				
<b>a</b> Corpus Add lines 3f, 4c, and 4e Subtract line 5	0			
<b>b</b> Prior years' undistributed income Subtract line 4b from line 2b. . . . .		0		
<b>c</b> 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		
<b>d</b> Subtract line 6c from line 6b Taxable amount—see instructions. . . . .		0		
<b>e</b> Undistributed income for 2012 Subtract line 4a from line 2a Taxable amount—see instructions. . . . .			0	
<b>f</b> Undistributed income for 2013 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2014. . . . .				90,997
<b>7</b> Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions). . . . .	0			
<b>8</b> Excess distributions carryover from 2008 not applied on line 5 or line 7 (see instructions). . . . .	0			
<b>9</b> Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a. . . . .	0			
<b>10</b> Analysis of line 9				
<b>a</b> Excess from 2009. . . . .				
<b>b</b> Excess from 2010. . . . .				
<b>c</b> Excess from 2011. . . . .				
<b>d</b> Excess from 2012. . . . .				
<b>e</b> Excess from 2013. . . . .				

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

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

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

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

	Tax year	Prior 3 years			<b>(e) Total</b>
	<b>(a) 2013</b>	<b>(b) 2012</b>	<b>(c) 2011</b>	<b>(d) 2010</b>	
<b>b</b> 85% of line 2a . . . . .					
<b>c</b> Qualifying distributions from Part XII, line 4 for each year listed . . . . .					
<b>d</b> Amounts included in line 2c not used directly for active conduct of exempt activities . . . . .					
<b>e</b> Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c . . . . .					

**3** Complete 3a, b, or c for the alternative test relied upon

**a** "Assets" alternative test—enter

**(1)** Value of all assets . . . . .

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

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

**c** "Support" alternative test—enter

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

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

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

**(4)** Gross investment income

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

**1 Information Regarding Foundation Managers:**

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

---

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

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**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

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

---

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

---

**c** Any submission deadlines

---

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

**Part XV Supplementary Information** (continued)

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
<b>a</b> <i>Paid during the year</i> BELMONT UNIVERSITY 1900 BELMONT BLVD NASHVILLE, TN 37212	N/A	501(C)(3)	ENDOWMENT FOR LUMOS TRAVEL SCHOLARSHIPS	81,168
<b>Total . . . . .</b>				<b>3a</b> 81,168
<b>b</b> <i>Approved for future payment</i>				
<b>Total . . . . .</b>				<b>3b</b> 0





## TY 2013 Accounting Fees Schedule

**Name:** LUMOS

**EIN:** 20-8203226

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING FEES	3,692	0		3,692

**TY 2013 Investments Corporate  
Bonds Schedule**

**Name:** LUMOS

**EIN:** 20-8203226

<b>Name of Bond</b>	<b>End of Year Book Value</b>	<b>End of Year Fair Market Value</b>
BANK OF AMERICA CORP, 3,350 SHARES	80,702	80,702
LEHMAN BROS HLDG CP TR V, 4,000 SHARES	1,000	1,000
MERRILL LYNCH PFD CAP TR, 2,000 SHARES	50,260	50,260
PPLUS TR CERT CLASS A, 4,000 SHARES	96,000	96,000
PREFERRED PLUS TR SRS, 2,000 SHARES	51,120	51,120

## TY 2013 Investments Corporate Stock Schedule

**Name:** LUMOS

**EIN:** 20-8203226

Name of Stock	End of Year Book Value	End of Year Fair Market Value
ADOBE SYS DEL PV\$ 0.001, 27 SHARES	1,617	1,617
AFFILIATED MANAGERS GRP, 3 SHARES	651	651
ALEXION PHARMS INC, 15 SHARES	1,993	1,993
AMAZON COM INC COM, 21 SHARES	8,375	8,375
AMERISOURCEBERGEN CORP, 30 SHARES	2,109	2,109
AMPHENOL CORP CL A NEW, 15 SHARES	1,338	1,338
APPLE INC, 7 SHARES	3,927	3,927
ARM HLDGS PLC SPD ADR, 74 SHARES	4,050	4,050
ASML HLDG NV NY REG SHS, 52 SHARES	4,872	4,872
BAIDU INC SPON ADR, 6 SHARES	1,067	1,067
BIOGEN IDEC INC, 14 SHARES	3,914	3,914
BLACKROCK INC, 2 SHARES	633	633
CABOT OIL & GAS CORP, 84 SHARES	3,256	3,256
CELGENE CORP COM, 41 SHARES	6,928	6,928
CERNER CORP COM, 44 SHARES	2,453	2,453
CHIPOTLE MEXICAN GRILL, 4 SHARES	2,131	2,131
COGNIZANT TECH SOLUTNS A, 13 SHARES	1,313	1,313
COLGATE PALMOLIVE, 27 SHARES	1,761	1,761
COMCAST CORP NEW CL A, 90 SHARES	4,677	4,677
CONTINENTAL RESOURCES, 6 SHARES	675	675
COSTCO WHOLESALE CRP DEL, 23 SHARES	2,737	2,737
CVS CAREMARK CORP, 19 SHARES	1,360	1,360
DELPHI AUTOMOTIVE PLC, 32 SHARES	1,924	1,924
DELTA AIR LINES INC, 43 SHARES	1,181	1,181
DISCOVERY COMMUNICATN, 31 SHARES	2,803	2,803
DISNEY (WALT) CO COM STK, 42 SHARES	3,209	3,209
EBAY INC COM, 24 SHARES	1,317	1,317
ECOLAB INC, 16 SHARES	1,668	1,668
FACEBOOK INC, 111 SHARES	6,066	6,066
FMC TECHS INC COM, 18 SHARES	940	940

<b>Name of Stock</b>	<b>End of Year Book Value</b>	<b>End of Year Fair Market Value</b>
FORTUNE BRANDS HOME AND, 21 SHARES	960	960
GAP INC DELAWARE, 27 SHARES	1,055	1,055
GILEAD SCIENCES INC COM, 104 SHARES	7,810	7,810
GOOGLE INC CL A, 10 SHARES	11,207	11,207
GREEN MOUNTN COFFEE ROS, 11 SHARES	831	831
HOME DEPOT INC, 77 SHARES	6,340	6,340
HONEYWELL INTL INC DEL, 36 SHARES	3,289	3,289
HUNT J B TRANS SVCS INC, 29 SHARES	2,242	2,242
ILLUMINA INC COM, 4 SHARES	442	442
KANSAS CITY SOUTHERN, 18 SHARES	2,229	2,229
KIMBERLY CLARK, 11 SHARES	1,149	1,149
LAS VEGAS SANDS CORP, 32 SHARES	2,524	2,524
LIBERTY GLOBAL PLC CL A, 25 SHARES	2,225	2,225
LINKEDIN CORP, 18 SHARES	3,903	3,903
LYONDELLBASELL INDUSTRIE, 47 SHARES	3,773	3,773
MARATHON PETROLEUM CORP, 33 SHARES	3,027	3,027
MASTERCARD INC, 11 SHARES	9,190	9,190
MICHAEL KORS HLDGS LTD, 48 SHARES	3,897	3,897
MONSANTO CO NEW DEL COM, 17 SHARES	1,981	1,981
MOODY'S CORP, 28 SHARES	2,197	2,197
NETFLIX COM INC, 5 SHARES	1,841	1,841
PIONEER NATURAL RES CO, 9 SHARES	1,657	1,657
PPG INDUSTRIES INC SHS, 12 SHARES	2,276	2,276
PRECISION CASTPARTS, 10 SHARES	2,693	2,693
PRICELINE COM INC, 6 SHARES	6,974	6,974
QUALCOMM INC, 25 SHARES	1,856	1,856
REGENERON PHARMACTCLS, 13 SHARES	3,578	3,578
SALESFORCE COM INC, 65 SHARES	3,587	3,587
SHERWIN WILLIAMS, 20 SHARES	3,670	3,670
STARBUCKS CORP, 80 SHARES	6,271	6,271

<b>Name of Stock</b>	<b>End of Year Book Value</b>	<b>End of Year Fair Market Value</b>
TD AMERITRADE HLDG CORP, 28 SHARES	858	858
TESLA MTRS INC, 8 SHARES	1,203	1,203
THREE D SYSTEMS NEW, 8 SHARES	743	743
TIME WARNER INC SHS, 23 SHARES	1,604	1,604
ULTA SALON COSMETICS &, 10 SHARES	965	965
UNION PACIFIC CORP, 21 SHARES	3,528	3,528
VALEANT PHARMACEUTICALS, 35 SHARES	4,109	4,109
VISA INC CL A SHRS, 25 SHARES	5,567	5,567
W W GRAINGER INCORP, 7 SHARES	1,788	1,788
WHOLE FOODS MKT INC COM, 59 SHARES	3,412	3,412
BASKET CLIRN ISSUER BAC, 10,500 SHARES	131,345	131,345
BLACKROCK GLOBAL, 6,049.833 SHARES	119,605	119,605
CITIGROUP INC COM NEW, 1,461 SHARES	76,133	76,133
DAVIS NY VENTURE, 429.455 SHARES	17,011	17,011
DELTA AIR LINES INC, 6,792 SHARES	186,576	186,576
EATON VANCE LARGE CAP, 6,814.304 SHARES	162,998	162,998
NATL HEALTH INVS INC, 3,620 SHARES	203,082	203,082
NUVEEN ENERGY MLP TOTAL, 1.0332 SHARES	20	20
PIONEER HIGH YIELD, 10,344.699 SHARES	112,550	112,550
SP500 CLIRN ISSUER BAC, 13,700 SHARES	137,000	137,000
SP500 STEPUP ISSUER BAC, 8,000 SHARES	107,760	107,760
ACE LIMITED, 12 SHARES	1,242	1,242
ACTIVISION BLIZZARD INC, 133 SHARES	2,371	2,371
AGILENT TECHNOLOGIES INC, 32 SHARES	1,830	1,830
AIR PRODUCTS&CHEM, 52 SHARES	5,813	5,813
ALLEGHANY CORP DEL COM, 7 SHARES	2,800	2,800
AMER EXPRESS COMPANY, 185 SHARES	16,785	16,785
AMERIPRISE FINL INC, 23 SHARES	2,646	2,646
BANK NEW YORK MELLON, 426 SHARES	14,884	14,884
BED BATH & BEYOND INC, 132 SHARES	10,600	10,600

<b>Name of Stock</b>	<b>End of Year Book Value</b>	<b>End of Year Fair Market Value</b>
BERKSHIRE HATHAWAYINC, 118 SHARES	13,990	13,990
BROOKFIELD ASSET MGMT, 77 SHARES	2,990	2,990
CANADIAN NATURAL RES LTD, 192 SHARES	6,497	6,497
CARMAX INC, 24 SHARES	1,128	1,128
COCA COLA COM, 78 SHARES	3,222	3,222
COSTCO WHOLESALE CRP DEL, 97 SHARES	11,545	11,545
CVS CAREMARK CORP, 211 SHARES	15,101	15,101
DIAGEO PLC SPSD ADR NEW, 50 SHARES	6,621	6,621
DISNEY (WALT) CO COM STK, 44 SHARES	3,362	3,362
ECOLAB INC, 17 SHARES	1,773	1,773
EOG RESOURCES INC, 49 SHARES	8,224	8,224
EXPRESS SCRIPTS HLDG CO, 98 SHARES	6,884	6,884
GOOGLE INC CL A, 15 SHARES	16,811	16,811
HARLEY DAVIDSON INC WIS, 41 SHARES	2,839	2,839
HEWLETT PACKARD CO DEL, 60 SHARES	1,679	1,679
IRON MOUNTAIN INC NEW, 104 SHARES	3,156	3,156
JPMORGAN CHASE & CO, 39 SHARES	2,281	2,281
LABORATORY CP AMER HLDGS, 59 SHARES	5,391	5,391
LOEWS CORP, 126 SHARES	6,078	6,078
MICROSOFT CORP, 88 SHARES	3,292	3,292
MONSANTO CO NEW DEL COM, 31 SHARES	3,613	3,613
OCCIDENTAL PETE CORP CAL, 38 SHARES	3,614	3,614
ORACLE CORP \$0.01 DEL, 82 SHARES	3,137	3,137
PACCAR INC, 46 SHARES	2,722	2,722
PHILIP MORRIS INTL INC, 37 SHARES	3,224	3,224
PROGRESSIVE CRP OHIO, 254 SHARES	6,927	6,927
TEXAS INSTRUMENTS, 106 SHARES	4,654	4,654
UNITEDHEALTH GROUP INC, 100 SHARES	7,530	7,530
VISA INC CL A SHRS, 14 SHARES	3,118	3,118
WELLS FARGO & CO NEW DEL, 303 SHARES	13,756	13,756

Name of Stock	End of Year Book Value	End of Year Fair Market Value
ALTRIA GROUP INC, 500 SHARES	19,195	19,195
AMER EXPRESS COMPANY, 150 SHARES	13,610	13,610
APPLE INC, 99 SHARES	55,541	55,541
BANK OF AMERICA CORP, 2000 SHARES	31,140	31,140
COCA COLA COM, 400 SHARES	16,524	16,524
COSTCO WHOLESALE CRP DEL, 150 SHARES	17,853	17,853
EATON CORP PLC, 500 SHARES	38,060	38,060
EMERSON ELEC CO, 500 SHARES	35,090	35,090
HARTFORD FINL SVCS GROUP, 350 SHARES	12,681	12,681
HOME DEPOT INC, 200 SHARES	16,468	16,468
HONEYWELL INTL INC DEL, 850 SHARES	77,664	77,664
HORMEL FOODS CORP, 350 SHARES	15,809	15,809
ISHARES U.S. REAL ESTATE, 790 SHARES	49,833	49,833
JOHNSON AND JOHNSON COM, 500 SHARES	45,795	45,795
JOHNSON CONTROLS INC, 600 SHARES	30,780	30,780
KIMBERLY CLARK, 425 SHARES	44,395	44,395
KINDER MORGAN ENERGY, 500 SHARES	40,330	40,330
LINKEDIN CORP, 75 SHARES	16,262	16,262
MCDONALDS CORP COM, 580 SHARES	56,277	56,277
MORGAN STANLEY, 600 SHARES	18,816	18,816
PRUDENTIAL FINANCIAL INC, 200 SHARES	18,444	18,444
STARBUCKS CORP, 225 SHARES	17,637	17,637
THE OAKMARK INTL FUND, 4,071.876 SHARES	107,171	107,171
VERIZON COMMUNICATNS COM, 900 SHARES	44,226	44,226

**TY 2013 Investments - Other Schedule**

**Name:** LUMOS

**EIN:** 20-8203226

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
MLCX ARN ISSUER BAC, 10,800 SHARES	FMV	101,844	101,844

## TY 2013 Other Assets Schedule

**Name:** LUMOS

**EIN:** 20-8203226

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
FEDERAL EXCISE TAX RECOVERABLE	1,293	591	591

## TY 2013 Other Expenses Schedule

**Name:** LUMOS

**EIN:** 20-8203226

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT - BANK SERVICE CHARGE	300	300		0
OTHER MISCELLANEOUS EXPENSES	85	0		85

**TY 2013 Other Increases Schedule**

**Name:** LUMOS

**ETIN:** 20-8203226

Description	Amount
CHANGE IN UNREALIZED GAIN/LOSS	357,065

## TY 2013 Other Liabilities Schedule

**Name:** LUMOS

**EIN:** 20-8203226

Description	Beginning of Year - Book Value	End of Year - Book Value
UNSETTLED INVESTMENT TRANSACTIONS	431	0
DEFERRED FEDERAL EXCISE TAX	0	6,103

## TY 2013 Other Professional Fees Schedule

**Name:** LUMOS

**EIN:** 20-8203226

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT MANAGER FEES	14,382	14,382		0

# TY 2013 Taxes Schedule

**Name:** LUMOS

**EIN:** 20-8203226

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
CURRENT AND DEFERRED FEDERAL EXCISE TAXES	9,705	0		0