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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

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Information about Form 990-PF and its instructions is at 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 THE GEORGE FOUNDATION		A Employer identification number 31-1030194	
Number and street (or P O box number if mail is not delivered to street address) PO BOX 21609		B Telephone number (see instructions) (614) 228-1541	
City or town, state or province, country, and ZIP or foreign postal code COLUMBUS, OH 432210609		C If exemption application is pending, check here <input type="checkbox"/>	
G Check all that apply <div><input type="checkbox"/> Initial return</div> <div><input type="checkbox"/> Initial return of a former public charity</div> <div><input type="checkbox"/> Final return</div> <div><input type="checkbox"/> Amended return</div> <div><input type="checkbox"/> Address change</div> <div><input type="checkbox"/> Name change</div>		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>	
H 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		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>	
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) <input type="checkbox"/> \$ 7,456,784		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>	
J Accounting method <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ (Part I, column (d) must be on cash basis.)			

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)	4,966			
	2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	18	18	18	
	4 Dividends and interest from securities.	361,650	361,650	361,650	
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	28,434			
	b Gross sales price for all assets on line 6a 656,262				
	7 Capital gain net income (from Part IV , line 2)		28,434		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
Operating and Administrative Expenses	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)				
	12 Total. Add lines 1 through 11	395,068	390,102	361,668	
	13 Compensation of officers, directors, trustees, etc				
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)	6,765	6,765	6,765	
	b Accounting fees (attach schedule)	4,630	4,630	4,630	
	c Other professional fees (attach schedule)				
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	7,291			
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	519	519	519	
	24 Total operating and administrative expenses. Add lines 13 through 23	19,205	11,914	11,914	0
	25 Contributions, gifts, grants paid	409,770			409,770
	26 Total expenses and disbursements. Add lines 24 and 25	428,975	11,914	11,914	409,770
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	-33,907			
	b Net investment income (if negative, enter -0-)		378,188		
	c Adjusted net income (if negative, enter -0-)			349,754	

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)	Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing	17,582	14,426	14,426
	2	Savings and temporary cash investments	103,508	51,808	51,808
	3	Accounts receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	4	Pledges receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7	Other notes and loans receivable (attach schedule) ▶ _____ Less allowance for doubtful accounts ▶ _____			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10a	Investments—U S and state government obligations (attach schedule)	1,709,195	 2,151,599	2,092,042
	b	Investments—corporate stock (attach schedule)	366,084	 366,084	2,742,713
	c	Investments—corporate bonds (attach schedule).	2,856,172	 2,434,717	2,555,795
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)			
	14	Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	15	Other assets (describe ▶ _____)			
	16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	5,052,541	5,018,634	7,456,784
Liabilities	17	Accounts payable and accrued expenses			
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶ _____)			
	23	Total liabilities (add lines 17 through 22)		0	
Net Assets or Fund Balances		Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/> 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 ▶ <input checked="" type="checkbox"/> and complete lines 27 through 31.			
	27	Capital stock, trust principal, or current funds			
	28	Paid-in or capital surplus, or land, bldg , and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds	5,052,541	5,018,634	
	30	Total net assets or fund balances (see page 17 of the instructions)	5,052,541	5,018,634	
	31	Total liabilities and net assets/fund balances (see page 17 of the instructions)	5,052,541	5,018,634	

Part III Analysis of Changes in Net Assets or Fund Balances

1	Total net assets or fund balances at beginning of year—Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year’s return)	1	5,052,541
2	Enter amount from Part I, line 27a	2	-33,907
3	Other increases not included in line 2 (itemize) ▶ _____	3	
4	Add lines 1, 2, and 3	4	5,018,634
5	Decreases not included in line 2 (itemize) ▶ _____	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	5,018,634

Part IV

Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)		(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
1 a	PUBLICALLY TRADED SECURITIES	P		
b				
c				
d				
e				

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 656,262		627,828	28,434
b			
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
a			28,434
b			
c			
d			
e			

2 Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	28,434
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8		3	

Part V

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

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

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

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

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2012	376,420	7,212,565	0 052189
2011	287,680	6,726,127	0 042771
2010	321,819	6,174,654	0 052119
2009	318,561	5,466,313	0 058277
2008	308,953	5,626,064	0 054915

2 Total of line 1, column (d).	2	0 260271
3 Average distribution ratio for the 5-year base period—divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	0 052054
4 Enter the net value of noncharitable-use assets for 2013 from Part X, line 5.	4	7,456,913
5 Multiply line 4 by line 3.	5	388,162
6 Enter 1% of net investment income (1% of Part I, line 27b).	6	3,782
7 Add lines 5 and 6.	7	391,944
8 Enter qualifying distributions from Part XII, line 4.	8	409,770

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

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the instructions)					
1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1		1	3,782		
Date of ruling or determination letter _____ (attach copy of letter if necessary—see instructions)					
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b		2			
c All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)					
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)				2	
3 Add lines 1 and 2.				3	3,782
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		4			
5 Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0-		5	3,782		
6 Credits/Payments		7	6,920		
a 2013 estimated tax payments and 2012 overpayment credited to 2013	6a			6,920	
b Exempt foreign organizations—tax withheld at source	6b				
c Tax paid with application for extension of time to file (Form 8868)	6c				
d Backup withholding erroneously withheld	6d				
7 Total credits and payments Add lines 6a through 6d.		7	6,920		
8 Enter any penalty for underpayment of estimated tax Check here <input type="checkbox"/> if Form 2220 is attached		8			
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed		9			
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid.		10	3,138		
11 Enter the amount of line 10 to be Credited to 2014 estimated tax 3,138 Refunded		11			

Part VII-A Statements Regarding Activities			
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		Yes	No
	1a		No
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)? 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.			No
	1b		No
c Did the foundation file Form 1120-POL for this year?.	1c		No
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation \$ (2) On foundation managers \$			
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers \$			
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.	2		No
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes	3		No
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?.	4a		No
b If "Yes," has it filed a tax return on Form 990-T for this year?.	4b		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.	5		No
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	Yes	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV.	7	Yes	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) OH			
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation .	8b	Yes	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2013 or the taxable year beginning in 2013 (see instructions for Part XIV)? If "Yes," complete Part XIV	9		No
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses.	10		No

Part VII-A

Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions).	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Yes	
Website address N/A				
14	The books are in care of JACK GEORGE Telephone no (614) 451-5468 Located at 2627 JOHNSTON ROAD 2627 JOHNSTON ROAD UPPER ARLINGTON OH ZIP +4 43220			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here and enter the amount of tax-exempt interest received or accrued during the year.	15		
16	At any time during calendar year 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?	16	Yes	No
See instructions for exceptions and filing requirements for Form TD F 90-22.1 If "Yes", enter the name of the foreign country				

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			Yes	No
1a	During the year did the foundation (either directly or indirectly) (1) Engage in the sale or exchange, or leasing of property with a disqualified person? Yes No (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?. Yes No (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? Yes No (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? Yes No (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?. Yes No (6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days). Yes No			
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)?. Organizations relying on a current notice regarding disaster assistance check here.	1b		
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2013?.	1c		
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 20 , 20 , 20 , 20			
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions).	2b		
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here 20 , 20 , 20 , 20			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?. Yes No			
b	If "Yes," did it have excess business holdings in 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.).	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2013?	4b		No

Part VII-B

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

5a

During the year did the foundation pay or incur any amount to

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

b

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

5b

Organizations relying on a current notice regarding disaster assistance check here.

☒

c

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

☐ Yes ☐ No

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

6a

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

☐ Yes ☒ No

b

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

6b

No

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

7a

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

☐ Yes ☒ No

b

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

7b

Part VIII

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

1

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

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
JACK GEORGE 2627 JOHNSTON ROAD UPPER ARLINGTON, OH 43220	PRESIDENT 3 00	0	0	0
JOAN GEORGE 2627 JOHNSTON ROAD UPPER ARLINGTON, OH 43220	SEC/TREAS 3 00	0	0	0
CAROL GEORGE 4927 STONEHAVEN DRIVE COLUMBUS, OH 43220	TRUSTEE 1 00	0	0	0
SARAH GEORGE 453 ELM AVENUE GLENDALE, MO 63122	TRUSTEE 1 00	0	0	0

2

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

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

Total

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

Part VIII

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

NONE

Total number of others receiving over \$50,000 for professional services. 1

Part IX-A

1

2

3

4

Part IX-B

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 page 24 of the instructions

3

Total. Add lines 1 through 3

Part X

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes		
a	Average monthly fair market value of securities.	1a	7,369,131
b	Average of monthly cash balances.	1b	201,339
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	7,570,470
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	
2	Acquisition indebtedness applicable to line 1 assets.	2	
3	Subtract line 2 from line 1d.	3	7,570,470
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	113,557
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	7,456,913
6	Minimum investment return. Enter 5% of line 5.	6	372,846

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	372,846
2a	Tax on investment income for 2013 from Part VI, line 5.	2a	3,782
b	Income tax for 2013 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	3,782
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	369,064
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	369,064
6	Deduction from distributable amount (see instructions).	6	
7	Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1.	7	369,064

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	409,770
b	Program-related investments—total from Part IX-B.	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes.	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required).	3a	
b	Cash distribution test (attach the required schedule).	3b	
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	409,770
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see instructions).	5	3,782
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	405,988
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				369,064
2 Undistributed income, if any, as of the end of 2013				
a Enter amount for 2012 only.				
b Total for prior years 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2013				
a From 2008.	11,563			
b From 2009.	53,145			
c From 2010.	19,258			
d From 2011.				
e From 2012.	22,712			
f Total of lines 3a through e.	106,678			
4 Qualifying distributions for 2013 from Part XII, line 4 ▶ \$ 409,770				
a Applied to 2012, but not more than line 2a				
b Applied to undistributed income of prior years (Election required—see instructions).				
c Treated as distributions out of corpus (Election required—see instructions).				
d Applied to 2013 distributable amount.				369,064
e Remaining amount distributed out of corpus	40,706			
5 Excess distributions carryover applied to 2013 (If an amount appears in column (d), the same amount must be shown in column (a).)				
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	147,384			
b Prior years' undistributed income Subtract line 4b from line 2b.				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.				
d Subtract line 6c from line 6b Taxable amount—see instructions				
e Undistributed income for 2012 Subtract line 4a from line 2a Taxable amount—see instructions				
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) (see instructions).				
8 Excess distributions carryover from 2008 not applied on line 5 or line 7 (see instructions). . .	11,563			
9 Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a	135,821			
10 Analysis of line 9				
a Excess from 2009. . . .	53,145			
b Excess from 2010. . . .	19,258			
c Excess from 2011. . . .				
d Excess from 2012. . . .	22,712			
e Excess from 2013. . . .	40,706			

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

1a

If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 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)

☐ 4942(j)(3) or ☐ 4942(j)(5)

2a	Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed.	Tax year	Prior 3 years			(e) Total
		(a) 2013	(b) 2012	(c) 2011	(d) 2010	
b	85% of line 2a					
c	Qualifying distributions from Part XII, line 4 for each year listed.					
d	Amounts included in line 2c not used directly for active conduct of exempt activities.					
e	Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c.					
3	Complete 3a, b, or c for the alternative test relied upon					
a	"Assets" alternative test—enter					
	(1) Value of all assets					
	(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b	"Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed.					
c	"Support" alternative test—enter					
	(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties).					
	(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii).					
	(3) Largest amount of support from an exempt organization					
	(4) Gross investment income					

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

1

Information Regarding Foundation Managers:

a

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

b

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

2

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

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

a

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

JACK GEORGE
PO BOX 21609
COLUMBUS, OH 43221
(614) 451-5468

b

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

LETTER - NONE REQUIRED

c

Any submission deadlines

NONE

d

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

NONE

Part XV

Supplementary Information (continued)

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year See Additional Data Table				
Total			3a	409,770
b Approved for future payment				
Total			3b	

Enter gross amounts unless otherwise indicated


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

[illegible]


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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
ALLEY CAT ALLIES BOX 98179 WASHINGTON,DC 20077			CHARITABLE	100
AMERICAN MUSEUM OF NATURAL HISTORY CENTRAL PARK WEST AT 79TH NEWYORK,NY 10024			CHARITABLE	140
AMERICAN RIVERS 801 PENNSYLVANIA AVE SE WASHINGTON,DC 20077			CHARITABLE	150
ARCHAEOLOGICAL CONSERVANCY 5301 CENTRAL AVENUE NE ALBUQUEQUE,NM 87108			CHARITABLE	50
ARCHAEOLOGICAL INSTITUTE OF AMERICA 656 BEACON STREET BOSTON,MA 02215			CHARITABLE	110
ASPCA BOX 96929 WASHINGTON,DC 20077			CHARITABLE	75
ART INSTITUTE OF CHICAGO MICHIGAN AVE AT ADAMS ST CHICAGO,IL 60603			CHARITABLE	100
AUDUBON CENTER FOR BIRDS OF PREY 1101 AUDUBON WAY MAITLAND,FL 32751			CHARITABLE	400
BALLET METROPOLITAN 322 MT VERNON AVE COLUMBUS,OH 43215			CHARITABLE	30,000
BAT CONSERVATION INTERNATIONAL BOX 149010 AUSTIN,TX 78714			CHARITABLE	350
BUCKEYE DIAMOND CLUB 3455 MILL RUN DRIVE HILLIARD,OH 43026			CHARITABLE	20,000
CAHOKIA MOUNDS MUSEUM SOCIETY 30 RAMEY STREET COLLINSVILLE,IL 62234			CHARITABLE	100
CAPA 55 E STATE STREET COLUMBUS,OH 43215			CHARITABLE	50
CLEVELAND MUSEUM OF ART BOX 606054 CLEVELAND,OH 44106			CHARITABLE	75
COLONIAL WILLIAMSBURG FOUNDATION BOX 1776 WILLIAMSBURG,VA 23187			CHARITABLE	50
Total ▶ 3a				409,770


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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
COLONY CATS & DOGS RESCUE BOX 163904 COLUMBUS,OH 43216			CHARITABLE	250
COLUMBUS CHAMBER MUSIC SOCIETY 4131 N HIGH STREET COLUMBUS,OH 43215			CHARITABLE	1,000
COLUMBUS MUSEUM OF ART 480 E BROAD STREET COLUMBUS,OH 43215			CHARITABLE	1,000
COLUMBUS SYMPHONY ORCHESTRA 55 E STATE STREET COLUMBUS,OH 43215			CHARITABLE	285,000
COLUMBUS ZOO BOX 400 POWELL,OH 43065			CHARITABLE	660
CONSUMER REPORTS FOUNDATION 101 TRUMAN AVENUE YONKERS,NY 10703			CHARITABLE	50
CORCORAN GALLERY OF ART 500 17TH STREET WASHINGTON,DC 20006			CHARITABLE	80
CORNELL LABORATORY OF ORNITHOLOGY 159 SAPSUCKER WOODS RD ITHICA,NY 14850			CHARITABLE	75
CRANE HOLLOW NATURE PRESERVE 18038 ST ROUTE 374 ROCKBRIDGE,OH 43149			CHARITABLE	100
CROW CANYON ARCHEOLOGY CENTER DEPT NH CORTEZ,CO 81321			CHARITABLE	1,000
ENVIRONMENTAL DEFENSE BOX 5055 HAGERSTOWN,MD 21741			CHARITABLE	100
FIELD MUSEUM OF NATURAL HISTORY 1400 SOUTH LAKE SHORE DR CHICAGO,IL 60605			CHARITABLE	100
FRANKLIN PARK CONSERVATORY 1777 E BROAD STREET COLUMBUS,OH 43203			CHARITABLE	100
FRICK COLLECTION 1 EAST 70TH STREET NEWYORK,NY 10021			CHARITABLE	120
FRIENDS OF GRANDVIEW HEIGHTS LIBRAR 1685 W 1ST AVENUE COLUMBUS,OH 43212			CHARITABLE	100
Total  3a				409,770


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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
FRIENDS OF NATURAL HISTORY FOUNDATI 105 W HIGHWAY 54 DURHAM,NC 27713			CHARITABLE	100
FRIEND OF THE NATIONAL ZOO 3001 CONNECTICUT AVENUE WASHINGTON,DC 20008			CHARITABLE	50
FRIENDS OF PIERPOINT MORGAN LIBRARY 29 EAST 36TH STREET NEW YORK,NY 10016			CHARITABLE	150
GREAT SMOKEY MTN HISTORY SOCIETY 115 PARK ROAD GATLINBURG,TN 37738			CHARITABLE	100
HUMANE SOCIETY 3015 SCIOTO DARBY HILLIARD,OH 43026			CHARITABLE	1,175
HUMANE SOCIETY OF THE US BOX 97015 WASHINGTON,DC 20077			CHARITABLE	50
INDIANAPOLIS MUSEUM OF ART 1200 W 38TH STREET INDIANAPOLIS,IN 46208			CHARITABLE	75
KALONA HISTORICAL SOCIETY BOX 292 KALONA,IA 52246			CHARITABLE	5,000
LEAGUE OF WOMEN VOTERS BOX 98050 WASHINGTON,DC 20090			CHARITABLE	150
MCBRIDE RAPTOR PROJECT 216 FIELD HOUSE UNIV OF I IOWA CITY,IA 52241			CHARITABLE	100
METROPOLITAN MUSEUM OF ART GRASIE STATION BOX 814 NEW YORK,NY 10028			CHARITABLE	200
MID OHIO FOOD BANK 1625 W MOUND STREET COLUMBUS,OH 43223			CHARITABLE	100
MISSOURI BOTANICAL GARDEN BOX 17419 ST LOUIS,MO 63178			CHARITABLE	215
MISSOURI HISTORICAL SOCIETY BOX 11904 ST LOUIS,MO 63112			CHARITABLE	90
MISSOURI HUMANE SOCIETY 1201 MACKLAND AVENUE ST LOUIS,MO 63110			CHARITABLE	150
Total  3a				409,770


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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
MUSEUM OF MODERN ART 11 WEST 53RD STREET NEW YORK,NY 10019			CHARITABLE	140
NAACP BOX 17210 BALTIMORE,MD 21298			CHARITABLE	100
NATIONAL AUDUBON SOCIETY 950 3RD AVENUE NEW YORK,NY 10126			CHARITABLE	150
NATIONAL PARKS & CONSERVATION ASSOC BOX 96918 1015 35TH ST NW WASHINGTON,DC 20077			CHARITABLE	175
NATIONAL WILDLIFE FEDERATION 1400 16TH STREET NW WASHINGTON,DC 20036			CHARITABLE	50
NATURAL RESOURCES DEFENSE COUNCIL BOX 1830 MERRIFIELD,VA 22116			CHARITABLE	100
NATURE CONSERVANCY BOX 79181 BALTIMORE,MD 21279			CHARITABLE	250
NEW ENGLAND WILDFLOWER SOCIETY 180 HEMENWAY ROAD FRAMINGHAM,MA 01701			CHARITABLE	55
OCEAN CONSERVANCY BOX 96003 WASHINGTON,DC 20077			CHARITABLE	50
OHIO ENVIRONMENTAL COUNCIL 400 DUBLIN AVENUE COLUMBUS,OH 43215			CHARITABLE	150
OHIO HISTORICAL SOCIETY 800 E 17TH AVENUE COLUMBUS,OH 43211			CHARITABLE	65
OHIO STATE UNIV COSTUMES & TEXTILES 1787 NEIL AVENUE COLUMBUS,OH 43215			CHARITABLE	150
OHIO STTAE UNIV DEVELOPMENT FUND 2400 OLENTANGY RIVER ROAD COLUMBUS,OH 43215			CHARITABLE	20,000
OHIO WILDLIFE CENTER 2661 BILLINGSLEY ROAD WORTHINGTON,OH 43235			CHARITABLE	100
OTTERBEIN COLLEGE THEATRE ONE OTTERBEIN COLLEGE WESTERVILLE,OH 43081			CHARITABLE	100
Total  3a				409,770

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
PHILLIPS COLLECTION 1600 21ST STREET NW WASHINGTON,DC 20009			CHARITABLE	100
PLANNED PARENTHOOD 810 7TH AVENUE NEWYORK,NY 10019			CHARITABLE	200
PRO MUSICA 444 E BROAD STREET COLUMBUS,OH 43215			CHARITABLE	5,500
RAPTOR RESOURCE PROJECT 2580 310TH STREET RIDGEWAY,IA 52165			CHARITABLE	150
SHEDD AQUARIUM SOCIETY 1200 SOUTH LAKE SHORE DR CHICAGO,IL 60605			CHARITABLE	100
SIERRA CLUB FOUNDATION 85 SECOND STREET SUITE 75 SAN FRANCISCO,CA 94105			CHARITABLE	1,000
SMITHSONIAN INSTITUTION BOX 55573 BOULDER,CO 80321			CHARITABLE	125
ST LOUIS ART MUSEUM BOX 78871 ST LOUIS,MO 63178			CHARITABLE	65
ST LOUIS SCIENCE CENTER BOX 790048 ST LOUIS,MO 63179			CHARITABLE	145
ST LOUIS ZOO 1 GOVERNMENT DRIVE ST LOUIS,MO 63110			CHARITABLE	185
SUNDAY AT CENTRAL 328 LILLY MAR CT DUBLIN,OH 43017			CHARITABLE	500
THURBER HOUSE 77 JEFFERSON AVENUE COLUMBUS,OH 43215			CHARITABLE	50
TOLEDO MUSEUM OF ART BOX 1013 TOLEDO,OH 43697			CHARITABLE	75
UNITED WAY OF CENTRAL OHIO 360 SOUTH THIRD STREET COLUMBUS,OH 43215			CHARITABLE	500
WEXNER CENTER N HIGH ST AT 15TH AVE COLUMBUS,OH 43210			CHARITABLE	50
Total  3a				409,770

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
WILDERNESS SOCIETY 900 17TH STREET NW WASHINGTON,DC 20006			CHARITABLE	100
WORLD WILDLIFE FUND 1250 24TH STREET NW WASHINGTON,DC 20077			CHARITABLE	100
WOSU STATIONS FUND 2400 OLENTANGY RIVER ROAD COLUMBUS,OH 43215			CHARITABLE	30,000
Total  3a				409,770

TY 2013 Accounting Fees Schedule

Name: THE GEORGE FOUNDATION

EIN: 31-1030194

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING	4,630	4,630	4,630	

TY 2013 Compensation Explanation

Name: THE GEORGE FOUNDATION

EIN: 31-1030194

Person Name	Explanation
JACK GEORGE	
JOAN GEORGE	
CAROL GEORGE	
SARAH GEORGE	

TY 2013 Investments Corporate
Bonds Schedule

Name: THE GEORGE FOUNDATION
EIN: 31-1030194

Name of Bond	End of Year Book Value	End of Year Fair Market Value
APPALACHIAN POWER CO 2/15	54,964	57,333
BANC ONE CORP SUB NOTES 3/19	58,701	60,603
BANC ONE CORP SUB NOTES 7/25	45,867	49,291
BANK OF AMERICA CORP	160,703	155,412
CINCINNATI FINANCIAL CORP DEBS 5/28	113,760	117,184
COMMONWEALTH EDISON NOW EXELON 7/13		
CONOCOPHILLIPS NOTES 2/19	100,974	115,477
FIFTH THIRD BANK SUB NOTES 2/15	97,158	104,159
GATX CORP NOTES 5/14	81,311	82,388
GE GLOBAL INSURANCE HLDG CORP NOTES	108,896	114,137
GTE CORP DEBS NOW VERIZON 4/18	112,296	116,476
GENERAL ELECTRIC CAPITAL CORP 5/13		
GENERAL ELECTRIC CAPITAL CORP 5/18	157,420	172,255
HUNTINGDON NATIONAL BANK SUB NOTES 6	169,343	182,233
HYDRO-QUEBEC ELECTRIC COMM. DEBS.		
INDIANA MICHIGAN POWER SENIOR NOTES	113,236	130,822
INTERNATIONAL BANK FOR RECONSTRUCTIO	59,877	60,360
IBM DEBENTURES 6/13		
IBM CORP SENIOR NOTES 9/17	106,025	114,830
JP MORGAN CHASE SUB NOTES 10/15	146,527	160,320
K-MART CORP. LEASE CTFC.	37,154	
MERRILL LYNCH & CO BONDS 7/18	107,879	117,294
NATIONAL CITY BANK CORP NOTE 5/19	101,299	118,494
NATIONAL RURAL UTIL COOP 4/17	104,324	111,414
NISOURCE FINANCE CORP 9/15/20	48,112	55,600
OHIO POWER COMPANY	107,606	110,705
PVNGS II FUNDING DEBENTURES	13,360	12,660
SBC COMMUNICATIONS NOTES 6/16		
SOUTHWESTERN BELL TELEPHONE DEBS 7/1	59,225	54,436
WEYERHAEUSER CO	111,139	115,003
ZURICH REINSURANCE SENIOR NOTES	57,561	66,909

**TY 2013 Investments Corporate
Stock Schedule**

Name: THE GEORGE FOUNDATION
EIN: 31-1030194

Name of Stock	End of Year Book Value	End of Year Fair Market Value
ACCO BRANDS CORP	460	1,895
AT&T INC	25,572	139,304
ALCATEL-LUCENT SPNSD ADR	2,206	607
AMERICAN ELECTRIC POWER INC	23,884	84,132
ANADARKO PETROLEUM CORP		67,105
BEAM INC	5,619	81,672
CENTURYLINK	3,004	2,038
CHEVRON CORP	18,557	288,542
CINCINNATI FINANCIAL CORP	18,862	150,145
COMCAST CORP	5,429	25,931
DUKE ENERGY CORP	11,443	27,466
EXXON MOBILE CORP	15,052	242,880
FIRST ENERGY CORP	20,306	54,978
FORTUNE BRANDS HOME & SECURITY INC	1,563	54,840
FRONTIER COMMUNICATIONS CORP	925	2,088
GATX CORPORATION	13,500	52,170
GENERAL ELECTRIC CO	16,445	201,816
IMATION CORP	1,235	468
INGREDION INC		34,230
INTERNATIONAL BUSINESS MACHINES CORP	26,348	187,570
KELLOGG COMPANY	13,054	61,070
KIMBERLY-CLARK CORPORATION	34,367	208,920
LSI LOGIC CORP	457	419
NEENAH PAPER INC	560	2,566
NORFOLK SOUTHERN CORP	16,569	167,094
OGE ENERGY CORPORATION	17,296	135,600
PFIZER INC		96,546
SCHWEITZER MAUDUIT INTL INC	99	10,294
SPECTRA ENERGY CORP	8,250	21,301
TENNECO AUTOMOTIVE INC	1,396	3,960

Name of Stock	End of Year Book Value	End of Year Fair Market Value
3M CO	30,110	140,250
VERIZON COMMUNICATIONS	14,011	92,088
VODAFONE GROUP PLC NEW SPNSD ADR	767	18,908
XCEL ENERGY INC	18,738	83,820

**TY 2013 Investments Government
Obligations Schedule****Name:** THE GEORGE FOUNDATION**EIN:** 31-1030194**US Government Securities - End of****Year Book Value:**

213,274

US Government Securities - End of**Year Fair Market Value:**

234,116

**State & Local Government
Securities - End of Year Book****Value:**

1,938,325

**State & Local Government
Securities - End of Year Fair****Market Value:**

1,857,926

TY 2013 Legal Fees Schedule

Name: THE GEORGE FOUNDATION

EIN: 31-1030194

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LEGAL	6,765	6,765	6,765	

TY 2013 Other Expenses Schedule**Name:** THE GEORGE FOUNDATION**EIN:** 31-1030194

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
EXPENSES				
MISCELLANEOUS	225	225	225	
OFFICE	294	294	294	

TY 2013 Taxes Schedule

Name: THE GEORGE FOUNDATION

EIN: 31-1030194

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LICENSES & TAXES	7,291			