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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.

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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 WOLFE FAMILY CHARITABLE FOUNDATION		<b>A Employer identification number</b>  34-1756997	
Number and street (or P O box number if mail is not delivered to street address) ONE SEAGATE NO 1960		<b>B Telephone number</b> (see instructions)  (419) 247-2880	
City or town, state or province, country, and ZIP or foreign postal code TOLEDO, OH 436041522		<b>C</b> If exemption application is pending, check here ▶ <input type="checkbox"/>	
<b>G</b> Check all that apply <div><input type="checkbox"/> Initial return <input type="checkbox"/> Final return <input type="checkbox"/> Address change</div> <div><input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Amended return <input type="checkbox"/> Name change</div>		<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)▶\$ 7,860,793		<b>F</b> If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ▶ <input type="checkbox"/>	
<b>J</b> 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)	8,977			
	2 Check ▶ <input type="checkbox"/> if the foundation is <b>not</b> required to attach Sch B				
	3 Interest on savings and temporary cash investments	15,057	15,057		
	4 Dividends and interest from securities. . . . .	351,672	351,672		
	5a Gross rents . . . . .				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	-15,994			
	b Gross sales price for all assets on line 6a 854,958				
	7 Capital gain net income (from Part IV, line 2) . . .		0		
	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) . . . . .	-17,459	127	0	
	12 <b>Total.</b> Add lines 1 through 11 . . . . .	342,253	366,856	0	
	13 Compensation of officers, directors, trustees, etc	0	0	0	0
	14 Other employee salaries and wages . . . . .				
	15 Pension plans, employee benefits . . . . .				
	16a Legal fees (attach schedule) . . . . .	2,265	2,265	0	0
	b Accounting fees (attach schedule) . . . . .	6,542	2,542	0	4,000
	c Other professional fees (attach schedule) . . . . .	1,590	1,590	0	0
	17 Interest . . . . .				
	18 Taxes (attach schedule) (see instructions)	9,700	0	0	0
	19 Depreciation (attach schedule) and depletion . . .				
	20 Occupancy . . . . .				
	21 Travel, conferences, and meetings . . . . .	3,225	0	0	3,225
	22 Printing and publications . . . . .				
	23 Other expenses (attach schedule) . . . . .	709	706	0	3
	24 <b>Total operating and administrative expenses.</b> Add lines 13 through 23 . . . . .	24,031	7,103	0	7,228
	25 Contributions, gifts, grants paid . . . . .	330,750			330,750
	26 <b>Total expenses and disbursements.</b> Add lines 24 and 25	354,781	7,103	0	337,978
	27 Subtract line 26 from line 12				
	a <b>Excess of revenue over expenses and disbursements</b>	-12,528			
	b <b>Net investment income</b> (if negative, enter -0-)		359,753		
	c <b>Adjusted net income</b> (if negative, enter -0-)			0	

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 . . . . .			
	2	Savings and temporary cash investments . . . . .	140,289	190,413	190,413
	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)	149,145 	149,661	157,038
	b	Investments—corporate stock (attach schedule) . . . . .	810,178 	1,071,786	5,390,774
	c	Investments—corporate bonds (attach schedule). . . . .	493,676 	482,731	546,484
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12	Investments—mortgage loans . . . . .			
	13	Investments—other (attach schedule) . . . . .	1,790,983 	1,479,670	1,576,084
	14	Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	15	Other assets (describe ▶ _____)			
	16	<b>Total assets</b> (to be completed by all filers—see the instructions Also, see page 1, item I)	3,384,271	3,374,261	7,860,793
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	<b>Total liabilities</b> (add lines 17 through 22) . . . . .	0	0	
Net Assets or Fund Balances		<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>			
	24	Unrestricted . . . . .	3,384,271	3,374,261	
	25	Temporarily restricted . . . . .			
	26	Permanently restricted . . . . .			
		<b>Foundations that do not follow SFAS 117, check here</b> ▶ <input type="checkbox"/> <b>and complete lines 27 through 31.</b>			
	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			
	30	<b>Total net assets or fund balances</b> (see page 17 of the instructions) . . . . .	3,384,271	3,374,261	
	31	<b>Total liabilities and net assets/fund balances</b> (see page 17 of the instructions) . . . . .	3,384,271	3,374,261	

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	3,384,271
2	Enter amount from Part I, line 27a . . . . .	2	-12,528
3	Other increases not included in line 2 (itemize) ▶ _____ 	3	2,543
4	Add lines 1, 2, and 3 . . . . .	4	3,374,286
5	Decreases not included in line 2 (itemize) ▶ _____ 	5	25
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30 . . . . .	6	3,374,261

Part IV Capital Gains and Losses for Tax on Investment Income

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
a See Additional Data Table			
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	-15,994
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	266,465	7,868,948	0 033863
2011	588,564	7,047,500	0 083514
2010	503,033	6,329,041	0 079480
2009	452,161	4,578,051	0 098767
2008	441,924	5,479,450	0 080651

2	Total of line 1, column (d). . . . .	2	0 376275
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 075255
4	Enter the net value of noncharitable-use assets for 2013 from Part X, line 5. . . . .	4	8,503,634
5	Multiply line 4 by line 3. . . . .	5	639,941
6	Enter 1% of net investment income (1% of Part I, line 27b). . . . .	6	3,598
7	Add lines 5 and 6. . . . .	7	643,539
8	Enter qualifying distributions from Part XII, line 4. . . . .	8	337,978

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	7,195
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 type="checkbox"/> and enter 1% of Part I, line 27b . . . . .			
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	0
3 Add lines 1 and 2. . . . .		3	7,195
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		4	0
5 Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0- . . . . .		5	7,195
6 Credits/Payments			
a 2013 estimated tax payments and 2012 overpayment credited to 2013	6a	8,335	
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	8,335
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	1,140
11 Enter the amount of line 10 to be Credited to 2014 estimated tax 1,140 Refunded		11	0

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? . . . . .		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)? . . . . .		1b	No
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.			
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 \$ 0 (2) On foundation managers \$ 0			
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers \$ 0			
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? . . . . .		2	No
If "Yes," attach a detailed description of the activities.			
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? . . . . .		5	No
If "Yes," attach the statement required by General Instruction T.			
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either <ul style="list-style-type: none"><li>By language in the governing instrument, or</li><li>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? . . . . .</li></ul>		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 ▶ELIZABETH WOLFE Telephone no ▶(505) 400-8582 Located at ▶ONE SEAGATE SUITE 1960 TOLEDO OH ZIP +4 ▶43604			
15	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 . . . . . ▶	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? <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 type="checkbox"/> Yes <input checked="" 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	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"/>	1b		No
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		No
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?. . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years ▶ 20____, 20____, 20____, 20____			
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 ). . . . .	2b		
c	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 ▶ 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?. . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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? ( <i>Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2013.</i> ). . . . .	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))?

YesNo

(2)

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

YesNo

(3)

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

YesNo

(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).

YesNo

(5)

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

YesNo

5b

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)?

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?

YesNo

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?

YesNo

6b

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

No

7a

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

YesNo

7b

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

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
See Additional Data Table				

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

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Part VIII

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

3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE".		
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
Total number of others receiving over \$50,000 for professional services. . . . .		0

Part IX-A

Summary of Direct Charitable Activities

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

Part IX-B

Summary of Program-Related Investments (see instructions)

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



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	8,341,324
b	Average of monthly cash balances. . . . .	1b	291,807
c	Fair market value of all other assets (see instructions). . . . .	1c	0
d	Total (add lines 1a, b, and c). . . . .	1d	8,633,131
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation). . . . .	1e	0
2	Acquisition indebtedness applicable to line 1 assets. . . . .	2	0
3	Subtract line 2 from line 1d. . . . .	3	8,633,131
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions). . . . .	4	129,497
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	8,503,634
6	Minimum investment return. Enter 5% of line 5. . . . .	6	425,182

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	425,182
2a	Tax on investment income for 2013 from Part VI, line 5. . . . .	2a	7,195
b	Income tax for 2013 (This does not include the tax from Part VI ). . . . .	2b	
c	Add lines 2a and 2b. . . . .	2c	7,195
3	Distributable amount before adjustments Subtract line 2c from line 1. . . . .	3	417,987
4	Recoveries of amounts treated as qualifying distributions. . . . .	4	0
5	Add lines 3 and 4. . . . .	5	417,987
6	Deduction from distributable amount (see instructions). . . . .	6	0
7	Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1. . . . .	7	417,987

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	337,978
b	Program-related investments—total from Part IX-B. . . . .	1b	0
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes. . . . .	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required). . . . .	3a	
b	Cash distribution test (attach the required schedule). . . . .	3b	
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	337,978
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see instructions). . . . .	5	0
6	Adjusted qualifying distributions. Subtract line 5 from line 4. . . . .	6	337,978
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				417,987
2 Undistributed income, if any, as of the end of 2013				
a Enter amount for 2012 only. . . . .			0	
b Total for prior years 20____, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2013				
a From 2008. . . . .				
b From 2009. . . . .	73,089			
c From 2010. . . . .	506,088			
d From 2011. . . . .	592,126			
e From 2012. . . . .	266,465			
f Total of lines 3a through e. . . . .	1,437,768			
4 Qualifying distributions for 2013 from Part XII, line 4 ▶ \$ 337,978				
a Applied to 2012, but not more than line 2a			0	
b Applied to undistributed income of prior years (Election required—see instructions). . . . .		0		
c Treated as distributions out of corpus (Election required—see instructions). . . . .	0			
d Applied to 2013 distributable amount. . . . .				337,978
e Remaining amount distributed out of corpus	0			
5 Excess distributions carryover applied to 2013 (If an amount appears in column (d), the same amount must be shown in column (a).)	80,009			80,009
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	1,357,759			
b Prior years' undistributed income Subtract line 4b from line 2b. . . . .		0		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed. . . . .		0		
d Subtract line 6c from line 6b Taxable amount—see instructions . . . . .		0		
e Undistributed income for 2012 Subtract line 4a from line 2a Taxable amount—see instructions . . . . .			0	
f Undistributed income for 2013 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2014 . . . . .				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions). . . . .	0			
8 Excess distributions carryover from 2008 not applied on line 5 or line 7 (see instructions). . . .	0			
9 Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a . . . . .	1,357,759			
10 Analysis of line 9				
a Excess from 2009. . . .				
b Excess from 2010. . . .	499,168			
c Excess from 2011. . . .	592,126			
d Excess from 2012. . . .	266,465			
e Excess from 2013. . . .				

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)

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) )

See Additional Data Table

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 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	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	330,750
b Approved for future payment				
Total . . . . .			3b	0

Enter gross amounts unless otherwise indicated

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

Form **990-PF** (2013)

Part XVII

Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

1

Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?

a

Transfers from the reporting foundation to a noncharitable exempt organization of

(1)

Cash.

1a(1)

No

(2)

Other assets.

1a(2)

No

b

Other transactions

(1)

Sales of assets to a noncharitable exempt organization.

1b(1)

No

(2)

Purchases of assets from a noncharitable exempt organization.

1b(2)

No

(3)

Rental of facilities, equipment, or other assets.

1b(3)

No

(4)

Reimbursement arrangements.

1b(4)

No

(5)

Loans or loan guarantees.

1b(5)

No

(6)

Performance of services or membership or fundraising solicitations.

1b(6)

No

c

Sharing of facilities, equipment, mailing lists, other assets, or paid employees.

1c

No

d

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

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

2a

Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527?

Yes

No

b

If "Yes," complete the following schedule.

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

Sign Here

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

\*\*\*\*\*

Signature of officer or trustee

2014-11-11

Date

\*\*\*\*\*

Title

May the IRS discuss this return with the preparer shown below (see instr.)?

Yes

No

Paid Preparer Use Only

Print/Type preparer's name  
DAVE BAYMILLER  
CPA

Preparer's Signature

Date  
2014-11-11

Check if self-employed ☐

PTIN  
P01331962

Firm's name ☐

GILMORE JASION MAHLER LTD

Firm's EIN ☐

34-1827159

Firm's address ☐

1715 INDIAN WOOD CIRCLE STE 100 MAUMEE,  
OH 43537

Phone no. (419) 794-2000

Form 990-PF (2013)

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(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 )
FEDERAL HOME LOAN BANK	P	2007-06-26	2013-08-14
NATION RURAL UTILITIES CORP	P	2009-01-23	2013-12-16
HARBOR FUNDS	P	2009-12-22	2013-01-15
HARBOR FUNDS	P	2009-12-22	2013-03-15
HARBOR FUNDS	P	2009-12-22	2013-06-17
HARBOR FUNDS	P	2009-12-22	2013-09-16
HARBOR FUNDS	P	2009-12-22	2013-09-26
1231 GAIN - REGENCY ENERGY PARTNERS LP	P	2013-10-30	2013-12-31
CAPITAL GAINS DIVIDENDS	P		

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
50,000		49,297	703
11,104		10,945	159
20,000		20,160	-160
20,000		20,096	-96
20,000		20,438	-438
20,000		21,018	-1,018
708,940		728,998	-20,058
18			18
4,896			4,896



Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			703
			159
			-160
			-96
			-438
			-1,018
			-20,058
			18
			4,896


Form 990PF Part VIII Line 1 - List all officers, directors, trustees, foundation managers and their compensation

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
FREDERIC D WOLFE	TRUSTEE 0 90	0	0	0
C/O THE WOLFE FAMILY FOUNDATION ONE SEAGATE TOLEDO, OH 43604				
MARY T WOLFE	TRUSTEE 0 90	0	0	0
C/O THE WOLFE FAMILY FOUNDATION ONE SEAGATE TOLEDO, OH 43604				
ELIZABETH T WOLFE	TRUSTEE 0 90	0	0	0
C/O THE WOLFE FAMILY FOUNDATION ONE SEAGATE TOLEDO, OH 43604				
CHRISTINE W NICHOLS	TRUSTEE 0 90	0	0	0
C/O THE WOLFE FAMILY FOUNDATION ONE SEAGATE TOLEDO, OH 43604				
FREDERICA R WOLFE	TRUSTEE 0 90	0	0	0
C/O THE WOLFE FAMILY FOUNDATION ONE SEAGATE TOLEDO, OH 43604				
WILLIAM A NICHOLS	TRUSTEE 0 90	0	0	0
C/O THE WOLFE FAMILY FOUNDATION ONE SEAGATE TOLEDO, OH 43604				
JOHN HELD	TRUSTEE 0 90	0	0	0
C/O THE WOLFE FAMILY FOUNDATION ONE SEAGATE TOLEDO, OH 43604				


**Form 990PF Part XV Line 1a - 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).**

FREDERIC D WOLFE
CHRISTINE W NICHOLS


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)				
<b>a</b> <i>Paid during the year</i>				
ALZHEIMER ASSOCIATION 2500 N REYNOLDS ROAD STE 2 TOLEDO,OH 43615			TO SUPPORT THE AWARENESS AND RESEARCH OF ALZHEIMER'S	100
AMERICAN CANCER SOCIETY 6600 SYLVANIA AVE STE 2A SYLVANIA,OH 43560			TO SUPPORT THE RESEARCH OF CANCER	100
AMERICAN HEART ASSOCIATION 7272 GREENVILLE AVE DALLAS,TX 75231			TO HELP SUPPORT PEOPLE AND ORGANIZATIONS TO LEAD HEALTHIER LIVES	100
AMERICAN RED CROSS 3100 W CENTRAL AVENUE TOLEDO,OH 43606			TO SUPPORT THE NEEDS OF BLOOD DONORS	450
AMMONOOSUC CONSERVATION TRUST 107 GLESSNER ROAD BETHLEHEM,NH 03574			TO HELP SUPPORT THE EFFORTS OF CONSERVING THE LAND FOR FUTURE GROWTH	10,000
AURORA PROJECTS INC 1035 N SUPERIOR ST TOLEDO,OH 43604			TO HELP ADDRESS THE NEEDS OF HOMELESS WOMEN AND CHILREN	100
BLACK SWAMP CONSERVANCY PO BOX 332 PERRYSBURG,OH 43552			TO SUPPORT THE PRESERVATION OF LAND ON LAKE ERIE ISLE	100
CAMP COURAGEOUS INC 12701 WATERVILLE-SWANTON RD WHITEHOUSE,OH 43571			TO SUPPORT OUTDOOR RECREATIONAL ACTIVITIES	100
CARE PO BOX 7039 MERRIFIELD,VA 221169753			TO HELP SUPPORT THE FIGHT AGAINST GLOBAL POVERTY	100
CENTRAL CITY MINISTRIES 1933 SPIELBUSCH AVENUE TOLEDO,OH 43604			TO SUPPORT RELIGIOUS PROGRAMS AND EVENTS	500
CHERRY STREET MISSIONS MINISTRIES 105 17TH STREET TOLEDO,OH 43604			TO SUPPORT RELIGIOUS PROGRAMS AND EVENTS	300
CHRIST CHURCH 245 E PUTNAM AVE GREENWICH,CT 06830			TO SUPPORT RELIGIOUS PROGRAMS AND EVENTS	19,500
CLEVELAND CLINIC 2049 EAST 100TH STREET CLEVELAND,OH 44195			TO SUPPORT THE MEDICAL NEEDS AND RESEARCH OF INDIVID	500
CULVER MILITARY ACADEMY 1300 ACADEMY RD CULVER,IN 46511			TO SUPPORT AN EDUCATIONAL SYSTEM THAT INTEGRATES CUL	1,000
DBSA 2906 POWHATTAN PKWY TOLEDO,OH 43606			TO SUPPORT THE EDUCATION OF DEPRESSION AND BIPOLAR DISEASE	300
<b>Total . . . . .</b>  <b>3a</b>				330,750


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)				
<b>a</b> <i>Paid during the year</i>				
DIABETIC YOUTH SERVICES 2100 W CENTRAL AVE TOLEDO, OH 43606			TO HELP SUPPORT CHILDREN WHO ARE DEALING WITH DIABETES	100
DOCTORS WITHOUT BORDERS 333 7TH AVENUE NEW YORK, NY 10001			TO HELP IN THE AID OF PEOPLE IN OUTHER COUNTRIES	100
EPISCOPAL DIOCESE OF OHIO 2230 EUCLID AVE CLEVELAND, OH 44115			TO SUPPORT RELIGIOUS PROGRAMS AND EVENTS	500
EPISCOPAL RELIEF & DEVELOPMENT 815 SECOND AVENUE NEW YORK, NY 10017			TO SUPPORT CHURCHES AND OTHER LOCAL ORGANIZATIONS TO HELP SAVE LIVES AND TRANSFORM COMMUNITIES WORLDWIDE	100
EUPHRATES INSTITUTE 1 MAYBECK PLACE ELSAH, IL 62028			TO SUPPORT FREEDOM AND EQUALITY BETWEEN THE WEST AND MIDDLE EAST	300
GOODWILL INDUSTRIES OF NW OHIO 626 N HURON TOLEDO, OH 43604			TO SUPPORT THE COLLABORATION OF VOLUNTEERS AND AREA	100
GREENWICH LAND TRUST 132 EAST PUTNAM AVE 2 EAST STE D COS COB, CT 06807			TO HELP PRESERVE LAND FROM DEVELOPMENT	6,000
GREENWICH LIBRARY 101 WEST PUTNAM GREENWICH, CT 068305387			TO HELP SUPPORT READING PROGRAMS TO THE COMMUNITY	200
GREENWICH TREE CONSERVANCY PO BOX 4215 GREENWICH, CT 06831			TO HELP SUPPORT THE CONSERVANCY AND PRESERVE AND ENHANCE THE TREE AND FOREST RESOURCES OF GREENWICH CONNECTICUT	500
HABITAT FOR HUMANITY 1310 CONANT ST MAUMEE, OH 43537			TO HELP PROVIDE AFFORDABLE HOMES TO FAMILIES IN NEED	200
HARVARD BUSINESS SCHOOL 86 BRATTLE STREET CAMBRIDGE, MA 02138			TO SUPPORT THE EDUCATIONAL NEEDS OF STUDENT	5,000
HARVARD MAGAZINE 7 WARE ST CAMBRIDGE, MA 02138			TO HELP THE ALUMNI STAY CONNECTED TO THE UNIVERSITY	50
HERITAGE FOUNDATION 214 MASSACHUSETTS AVE NE WASHINGTON, DC 200024999			TO SUPPORT THE PROMOTION OF CONSERVATIVE PUBLIC POLICIES	500
JUNIOR ACHIEVEMENT 2239 CHEYENNE BLVD TOLEDO, OH 43614			TO SUPPORT THE EDUCATIONAL NEEDS OF STUDENT	500
LEAGUE OF WOMEN VOTERS 17 SOUTH HIGH STREET STE 650 COLUMBUS, OH 43215			TO SUPPORT THE ACTIVE PARTICIPATION AND UNDERSTANDIN	100
<b>Total . . . . .</b>  <b>3a</b>				330,750

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)				
<b>a</b> <i>Paid during the year</i>				
LITTLE TRAVERSE CONSERVANCY 3264 POWELL ROAD HARBOR SPRINGS,MI 49740			TO SUPPORT THE PRESERVATION OF LAND IN NORTHERN MICH	100
LOST TREE VILLAGE CHARITABLE FOUNDATION 11555 LOST TREE WAY NORTH PALM BEACH,FL 33408			TO SUPPORT THE DEDICATION TO BUILDING A STRONGER COM	3,000
MASTERWORKS CHORALE PO BOX 382231 CAMBRIDGE,MA 02238			TO SUSTAIN A WORKING COMMUNITY OF ARTISTS	100
MAUMEE VALLEY COUNTRY DAY SCHOOL 1715 S REYNOLDS TOLEDO,OH 43614			TO SUPPORT THE EDUCATIONAL NEEDS OF STUDENT	5,000
NORTHERN MIGHIGAN HOSPITAL FOUNDATION 360 CONNABLE AVE PETOSKEY,MI 497702272			TO SUPPORT THE LEGACY OF HEALTHCARE EXCELLENCE	250
OHIO HISTORICAL SOCIETY 800 E 17TH AVE COLUMBUS,OH 43211			TO SUPPORT THE PRESERVATION OF LOCAL HISTORY	100
OWENS COMMUNITY COLLEGE FOUNDATION PO BOX 10000 TOLEDO,OH 436991947			TO SUPPORT THE EDUCATIONAL NEEDS OF STUDENT	100
PLANNED PARENTHOOD OF NORTHWEST OHIO 1301 JEFFERSON AVE TOLEDO,OH 43604			TO SUPPORT SEXUAL HEALTH EDUCATION AND RESOURCES	1,200
SAUDER VILLAGE 22611 ST RTE 2 ARCHBOLD,OH 43502			TO SUPPORT THE EDUCATION OF LOCAL HISTORY	100
SPECIAL OLYMPICS OHIO 3303 WINCHESTER PIKE COLUMBUS,OH 43232			TO HELP SUPPORT THE TRAINING AND COMPETITION OF SPECIAL NEEDS AND DISBILITIES	100
ST TIMOTHY'S EPISCOPAL CHURCH 871 E BOUNDARY ST PERRYSBURG,OH 43551			TO SUPPORT RELIGIOUS PROGRAMS AND EVENTS	3,000
SUSAN G KOMEN FOR THE CURE NW OHIO 3100 W CENTRAL AVE STE 235 TOLEDO,OH 43606			TO SUPPORT CANCER RESEARCH	100
THE ARTS COMMISSION 1838 PARKWOOD AVE TOLEDO,OH 43604			TO HELP PROMTOE AND DEVELOP VISUAL, PERFORMING AND LITERARY ARTS	1,000
THE GLASS HOUSE NEED ADDRESS MAUMEE,OH 43537			NEED ADDRESS	25,000
THE HARVEY SCHOOL 260 JAY STREET KATONAH,NY 10536			TO SUPPORT THE EDUCATIONAL NEEDS OF STUDENT	1,000
<b>Total . . . . .</b>  <b>3a</b>				330,750

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)				
<b>a</b> <i>Paid during the year</i>				
THE LEARNING CLUB OF TOLEDO 1702 UPTON AVE TOLEDO, OH 43607			TO SUPPORT THE EDUCATIONAL NEEDS OF STUDENT	100
THE OHIO FOUNDATION OF INDEPENDENT COLLEGES 250 EAST BROAD STREET STE 1700 COLUMBUS, OH 43215			TO SUPPORT THE EDUCATIONAL NEEDS OF STUDENT	500
THE SALVATION ARMY 620 NORTH ERIE STREET TOLEDO, OH 43604			TO SUPOORT THE FIGHT AGAINST POVERTY	650
THE SIGHT CENTER OF NORTHWEST OHIO 1002 GARDEN LAKE PARKWAY TOLEDO, OH 43614			TO SUPPORT THE HOPE FOR CONTINUED INDEPENDENCE FOR T	100
THE TOLEDO ZOO PO BOX 140130 TOLEDO, OH 43614			TO SUPPORT THE CONSERVATION OF ENDANGERED SPECIES	500
TOLEDO CAMPUS MINISTRY 2086 BROOKDALE RD TOLEDO, OH 43606			TO SUPPORT RELIGIOUS PROGRAMS AND EVENTS	50
TOLEDO COMMUNITY FOUNDATION INC 300 MADISON AVE TOLEDO, OH 43604			TO HELP SUPPORT THE CREATING OF A BETTER COMMUNITY	3,000
TOLEDO HOSPITAL FOUNDATION 2142 N COVE BLVD TOLEDO, OH 43606			TO SUPPORT THE HEALTH NEEDS OF INDIVIDUALS IN THE COMMUNITY	100
TOLEDO LUCAS COUNTY CARENET 3231 CENTRAL PARK WEST 200 TOLEDO, OH 43617			TO SUPPORT LOW INCOME RESIDENTS WITH HEALTHCARE	200
TOLEDO LUCAS COUNTY LIBRARY 325 MICHIGAN ST TOLEDO, OH 43604			TO HELP SUPPORT THE PUBLIC IN READING AND EDUCATION	100
TOLEDO NORTHWESTERN OHIO FOODBANK 24 E WOODRUFF AVE TOLEDO, OH 43604			TO HELP SUPPORT THE FIGHT AGAINST POVERTY	250
TOLEDO OPERA 425 JEFFERSON AVE TOLEDO, OH 43604			TO SUPPORT THE CULTURAL FABRIC OF THE REGION BY CREATING OPERA EXPERIENCES	25,000
TOLEDO PUBLIC SCHOOLS FOUNDATION 420 E MANHATTAN BLVD RM 107 TOLEDO, OH 43608			TO SUPPORT THE EDUCATIONAL NEEDS OF STUDENT	500
TOLEDO SCHOOL FOR THE ARTS 333 14TH STREET TOLEDO, OH 43604			TO SUPPORT THE EDUCATIONAL NEEDS OF STUDENT	350
TOLEDO SYMPHONY ORCHESTRA 1838 PARKWOOD AVE TOLEDO, OH 43604			TO SUSTAIN A WORKING COMMUNITY OF ARTISTS	105,000
<b>Total . . . . .</b>  <b>3a</b>				330,750

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)				
<b>a</b> <i>Paid during the year</i>				
UNITED WAY OF GREATER TOLEDO 424 JACKSON STREET TOLEDO, OH 436041410			TO SUPPORT THE COLLABORATION OF VOLUNTEERS AND AREA	5,000
UNIVERSITY OF SAN FRANCISCO 2130 FULTON ST SAN FRANCISCO, CA 94117			TO SUPPORT THE EDUCATIONAL NEEDS OF STUDENTS	500
VICTORY CENTER 5532 W CENTRAL AVE TOLEDO, OH 43615			TO HELP SUPPORT AND EDUCATE CANCER PATIENTS AND FAMI	100
WAY PUBLIC LIBRARY FOUNDATION 101 EAST INDIANA AVE PERRYSBURG, OH 43551			TO HELP SUPPORT THE PUBLIC IN READING AND EDUCATION	100
WILBERFORCE UNIVERSITY 1055 N BICKETT RD WILBERFORCE, OH 45384			TO HELP PROMOTE THE LIBERAL ARTS EDUCATION	1,000
YALE UNIVERSITY 157 CHURCH STREET NEW HAVEN, CT 06510			TO SUPPORT THE EDUCATIONAL NEEDS OF STUDENT	100,000
<b>Total . . . . .</b>			<b>3a</b>	330,750



<b>Schedule B</b> (Form 990, 990-EZ, or 990-PF) <small>Department of the Treasury Internal Revenue Service</small>	<b>Schedule of Contributors</b>  ▶ <b>Attach to Form 990, 990-EZ, or 990-PF.</b> ▶ <b>Information about Schedule B (Form 990, 990-EZ, or 990-PF) and its instructions is at <u>www.irs.gov/form990</u>.</b>	OMB No 1545-0047
		<b>2013</b>

<b>Name of the organization</b> THE WOLFE FAMILY CHARITABLE FOUNDATION	<b>Employer identification number</b> 34-1756997
---	---

Organization type (check one)

<b>Filers of:</b>	<b>Section:</b>
Form 990 or 990-EZ	<input type="checkbox"/> 501(c)( ) (enter number) organization
	<input type="checkbox"/> 4947(a)(1) nonexempt charitable trust <b>not</b> treated as a private foundation
	<input type="checkbox"/> 527 political organization
Form 990-PF	<input checked="" type="checkbox"/> 501(c)(3) exempt private foundation
	<input type="checkbox"/> 4947(a)(1) nonexempt charitable trust treated as a private foundation
	<input type="checkbox"/> 501(c)(3) taxable private foundation

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

General Rule

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

Special Rules

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

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

<b>Name of organization</b> THE WOLFE FAMILY CHARITABLE FOUNDATION	<b>Employer identification number</b> 34-1756997
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Part I	Contributors (see instructions) Use duplicate copies of Part I if additional space is needed		
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	CHRISTINE NICHOLS 27 WALSH LANE  GREENWICH, CT 06830	\$ 8,977	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/>  (Complete Part II for noncash contributions )
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/>  (Complete Part II for noncash contributions )
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/>  (Complete Part II for noncash contributions )
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/>  (Complete Part II for noncash contributions )
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/>  (Complete Part II for noncash contributions )
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/>  (Complete Part II for noncash contributions )
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/>  (Complete Part II for noncash contributions )
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/>  (Complete Part II for noncash contributions )

[illegible]

<b>Name of organization</b> THE WOLFE FAMILY CHARITABLE FOUNDATION	<b>Employer identification number</b> 34-1756997
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<b>Part III</b>	<b>Exclusively religious, charitable, etc., individual contributions to section 501(c)(7), (8), or (10) organizations that total more than \$1,000 for the year.</b> Complete columns (a) through (e) and the following line entry For organizations completing Part III, enter the total of <i>exclusively</i> religious, charitable, etc , contributions of <b>\$1,000 or less</b> for the year (Enter this information once See instructions ) ▶ \$ Use duplicate copies of Part III if additional space is needed
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(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
—			
(e) Transfer of gift			
Transferee's name, address, and ZIP 4		Relationship of transferor to transferee	
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
—			
(e) Transfer of gift			
Transferee's name, address, and ZIP 4		Relationship of transferor to transferee	
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
—			
(e) Transfer of gift			
Transferee's name, address, and ZIP 4		Relationship of transferor to transferee	
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
—			
(e) Transfer of gift			
Transferee's name, address, and ZIP 4		Relationship of transferor to transferee	

## TY 2013 Accounting Fees Schedule

**Name:** THE WOLFE FAMILY CHARITABLE FOUNDATION

**EIN:** 34-1756997

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
GJM	6,542	2,542	0	4,000

**TY 2013 Distribution from Corpus Election**

**Name:** THE WOLFE FAMILY CHARITABLE FOUNDATION

**EIN:** 34-1756997

**Election:** PURSUANT TO REGULATION SECTION 53.4942(A)-3(D)(2), THE WOLFE FAMILY CHARITABLE FOUNDATION HEREBY ELECTS TO APPLY \$266,465 OF THE 2012 QUALIFIED DISTRIBUTIONS TO CORPUS DISTRIBUTIONS.

**TY 2013 Investments Corporate  
Bonds Schedule****Name:** THE WOLFE FAMILY CHARITABLE FOUNDATION**EIN:** 34-1756997

<b>Name of Bond</b>	<b>End of Year Book Value</b>	<b>End of Year Fair Market Value</b>
COLGATE-PALMOLIVE CO	49,975	51,565
JP MORGAN CHASE	244,045	294,787
NATIONAL RURAL UTILITIES CORP	38,805	39,894
NORTHERN TRUST CORP	50,000	51,336
PFIZER INC.	49,950	60,181
WALT DISNEY CO	49,956	48,721

**TY 2013 Investments Corporate  
Stock Schedule****Name:** THE WOLFE FAMILY CHARITABLE FOUNDATION**EIN:** 34-1756997

<b>Name of Stock</b>	<b>End of Year Book Value</b>	<b>End of Year Fair Market Value</b>
ANDERSONS INC.	250,849	297,828
AUTOMATIC DATA PROCESSING	19,860	26,660
EXXON MOBIL	23,256	202,602
HEALTH CARE REIT, INC.	2,389	13,393
HEALTH CARE REIT, INC.	544,707	4,278,100
HOME DEPOT	10,759	27,255
JP MORGAN CHASE	36,487	51,404
KEYCORP	101,781	268,400
NATIONAL HEALTH INV. INC	58,209	168,300
PEPSICO INC	21,928	25,052
WELLS FARGO & CO.	1,561	31,780



# **TY 2013 Investments Government Obligations Schedule**

**Name:** THE WOLFE FAMILY CHARITABLE FOUNDATION

**EIN:** 34-1756997

**US Government Securities - End of**

**Year Book Value:**

149,661

**US Government Securities - End of**

**Year Fair Market Value:**

157,038

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

**Value:**

0

**State & Local Government  
Securities - End of Year Fair**

**Market Value:**

0

**TY 2013 Investments - Other Schedule****Name:** THE WOLFE FAMILY CHARITABLE FOUNDATION**EIN:** 34-1756997

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
BUCKEYE PARTNERS LP	AT COST	196,253	208,059
ENERGY TRANSFER EQUITY	AT COST	58,452	71,931
HARBOR BOND FUND - INST	AT COST	0	0
REGENCY ENERGY PARTNERS	AT COST	182,824	201,152
VANGUARD HIGH YIELD CORP FUND	AT COST	25,000	25,941
VANGUARD HIGH YIELD CORP FUND- ADM	AT COST	512,996	547,965
VANGUARD LONG-TERM INVEST-GR - ADM	AT COST	504,145	521,036

# TY 2013 Legal Fees Schedule

**Name:** THE WOLFE FAMILY CHARITABLE FOUNDATION

**EIN:** 34-1756997

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LEGAL FEES	2,265	2,265	0	0

TY 2013 Other Decreases Schedule

**Name:** THE WOLFE FAMILY CHARITABLE FOUNDATION

**EIN:** 34-1756997

Description	Amount
NONDEDUCTIBLE EXPENSES FROM PUBLICLY TRADED PARTNERSHIPS	25

**TY 2013 Other Expenses Schedule****Name:** THE WOLFE FAMILY CHARITABLE FOUNDATION**EIN:** 34-1756997

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
OTHER EXPENSES	582	582	0	0
PORTFOLIO DEDUCTIONS VIA ENERGY TRANSFER EQUITY LP	69	69	0	0
CHARITABLE DEDUCTION VIA BUCKEYE PARTNERS LP	1	0	0	1
CHARITABLE DEDUCTION VIA REGENCY ENERGY PARTNERS LP	2	0	0	2
1231 LOSS VIA ENERGY TRANSFER EQUITY LP	1	1	0	0
1231 LOSS VIA BUCKEYE PARTNERS LP	54	54	0	0

**TY 2013 Other Income Schedule****Name:** THE WOLFE FAMILY CHARITABLE FOUNDATION**EIN:** 34-1756997

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
ENERGY TRANSFER EQUITY LP	-1,306	106	0
BUCKEYE PARTNERS LP	-1,429	8	0
REGENCY ENERGY PARTNERS LP	-14,724	13	0

TY 2013 Other Increases Schedule

**Name:** THE WOLFE FAMILY CHARITABLE FOUNDATION

**EIN:** 34-1756997

Description	Amount
CHANGE IN ACCRUED INCOME	2,543

**TY 2013 Other Professional Fees Schedule****Name:** THE WOLFE FAMILY CHARITABLE FOUNDATION**EIN:** 34-1756997

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
UBS FEE	150	150	0	0
TRUST CO OF TOLEDO FEE	1,440	1,440	0	0



# TY 2013 Taxes Schedule

**Name:** THE WOLFE FAMILY CHARITABLE FOUNDATION

**EIN:** 34-1756997

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
STATE	200	0	0	0
FEDERAL	9,500	0	0	0