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Form **990-PF****Return of Private Foundation**  
or Section 4947(a)(1) Trust Treated as Private Foundation

OMB No 1545-0052

**2013**Department of the Treasury  
Internal Revenue Service

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

Open to Public Inspection

For calendar year 2013 or tax year beginning , and ending

Name of foundation <b>GIBSON FOUNDATION</b>		A Employer identification number <b>35-1422779</b>
Number and street (or P.O. box number if mail is not delivered to street address) <b>PO BOX 270</b>	Room/suite	B Telephone number (see instructions) <b>574-286-3804</b>
City or town, state or province, country, and ZIP or foreign postal code <b>CULVER IN 46511</b>		C If exemption application is pending, check here <input type="checkbox"/>
G Check all that apply <input type="checkbox"/> Initial return <input type="checkbox"/> Final return <input checked="" type="checkbox"/> Address change <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Amended return <input type="checkbox"/> Name change		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 type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input checked="" 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) ► \$ <b>2,143,170</b>	J Accounting method <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify)	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>

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)				
	2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments	4	4		
	4 Dividends and interest from securities	67,858	67,858		
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10 Stmt 1	121,125			
	b Gross sales price for all assets on line 6a 198,121				
	7 Capital gain net income (from Part IV, line 2)		118,121		
	8 Net short-term capital gain			0	
	9 Income modifications				
	10a Gross sales less returns and allowances				
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	188,987	185,983	0		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	0			
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule) See Stmt 2	1,400	1,400		
	b Accounting fees (attach schedule) Stmt 3	1,266	1,266		
	c Other professional fees (attach schedule)				
	17 Interest				
	18 Taxes (attach schedule) (see instructions)				
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (att sch) Stmt 4	3,253	3,253		
	24 Total operating and administrative expenses. Add lines 13 through 23	5,919	5,919	0	0
	25 Contributions, gifts, grants paid	100,205			100,205
26 Total expenses and disbursements. Add lines 24 and 25	106,124	5,919	0	100,205	
27 Subtract line 26 from line 12					
a Excess of revenue over expenses and disbursements	82,863				
b Net investment income (if negative, enter -0-)		180,064			
c Adjusted net income (if negative, enter -0-)			0		

For Paperwork Reduction Act Notice, see instructions.

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SCANNED DEC 29 2014

Part II Balance Sheets		Beginning of year	End of year	
			(a) Book Value	(b) Book Value
Assets	1 Cash – non-interest-bearing	45,097	18,975	18,975
	2 Savings and temporary cash investments			
	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 (att. schedule) ▶ Less allowance for doubtful accounts ▶	0		
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments – U S and state government obligations (attach schedule) Stmt 5	145,683	71,145	71,113
	b Investments – corporate stock (attach schedule)			
	c Investments – corporate bonds (attach schedule) See Stmt 6	208,596	214,826	226,576
	11 Investments – land, buildings, and equipment basis ▶ Less accumulated depreciation (attach sch.) ▶			
	12 Investments – mortgage loans			
	13 Investments – other (attach schedule) See Statement 7	1,368,184	1,545,477	1,826,506
	14 Land, buildings, and equipment basis ▶ Less accumulated depreciation (attach sch.) ▶			
	15 Other assets (describe ▶)			
	16 Total assets (to be completed by all filers – see the instructions. Also, see page 1, item I)	1,767,560	1,850,423	2,143,170
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	0	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31. ▶ <input type="checkbox"/>			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. ▶ <input checked="" type="checkbox"/>			
	27 Capital stock, trust principal, or current funds	1,777,488	1,767,560	
	28 Paid-in or capital surplus, or land, bldg, and equipment fund			
	29 Retained earnings, accumulated income, endowment, or other funds	-9,928	82,863	
	30 Total net assets or fund balances (see instructions)	1,767,560	1,850,423	
	31 Total liabilities and net assets/fund balances (see instructions)	1,767,560	1,850,423	

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

1 Total net assets or fund balances at beginning of year – Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	1,767,560
2 Enter amount from Part I, line 27a	2	82,863
3 Other increases not included in line 2 (itemize) ▶	3	
4 Add lines 1, 2, and 3	4	1,850,423
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	1,850,423

**Part IV Capital Gains and Losses for Tax on Investment Income**

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse, or common stock, 200 shs. MLC Co.)		(b) How acquired P – Purchase D – Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
<b>1a CAPITAL GAIN DISTRIBUTIONS:</b>				
<b>b GNMA FUND ADMIRAL SHARES</b>				
<b>c TOTAL BOND MKT INDEX ADM</b>				
<b>d TIFF</b>				
<b>e</b>				

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
<b>a</b>			
<b>b 112</b>			<b>112</b>
<b>c 527</b>			<b>527</b>
<b>d 117,482</b>			<b>117,482</b>
<b>e</b>			

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))
<b>a</b>			
<b>b</b>			<b>112</b>
<b>c</b>			<b>527</b>
<b>d</b>			<b>117,482</b>
<b>e</b>			

<b>2 Capital gain net income or (net capital loss)</b> <span style="border-left: 1px solid black; padding-left: 5px;">If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7</span>		<b>2</b>	<b>118,121</b>
<b>3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6)</b> If gain, also enter in Part I, line 8, column (c) (see instructions). If (loss), enter -0- in Part I, line 8		<b>3</b>	

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

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

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

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

☐ Yes ☒ No

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

**1** Enter the appropriate amount in each column for each year, see 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	92,241	1,994,969	0.046237
2011	94,097	1,929,769	0.048761
2010	75,580	1,884,185	0.040113
2009	67,765	1,666,173	0.040671
2008	93,269	1,806,405	0.051632

<b>2 Total of line 1, column (d)</b>	<b>2</b>	<b>0.227414</b>
<b>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</b>	<b>3</b>	<b>0.045483</b>
<b>4 Enter the net value of noncharitable-use assets for 2013 from Part X, line 5</b>	<b>4</b>	<b>2,041,151</b>
<b>5 Multiply line 4 by line 3</b>	<b>5</b>	<b>92,838</b>
<b>6 Enter 1% of net investment income (1% of Part I, line 27b)</b>	<b>6</b>	<b>1,801</b>
<b>7 Add lines 5 and 6</b>	<b>7</b>	<b>94,639</b>
<b>8 Enter qualifying distributions from Part XII, line 4</b>	<b>8</b>	<b>100,205</b>

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

Part VI instructions

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

1a	Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1 Date of ruling or determination letter (attach copy of letter if necessary—see instructions)	1	1,801
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		
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	1,801
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	0
5	<b>Tax based on investment income.</b> Subtract line 4 from line 3. If zero or less, enter -0-	5	1,801
6	Credits/Payments		
a	2013 estimated tax payments and 2012 overpayment credited to 2013	6a	1,200
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	1,200
8	Enter any <b>penalty</b> for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8	
9	<b>Tax due.</b> If the total of lines 5 and 8 is more than line 7, enter <b>amount owed</b>	9	601
10	<b>Overpayment.</b> If line 7 is more than the total of lines 5 and 8, enter the <b>amount overpaid</b>	10	
11	Enter the amount of line 10 to be <b>Credited to 2014 estimated tax</b> <input type="checkbox"/> <b>Refunded</b> <input type="checkbox"/>	11	

**Part VII-A Statements Regarding Activities**

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

**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		<b>X</b>
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		<b>X</b>
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► <b>N/A</b>	13	<b>X</b>	
14	The books are in care of ► <b>KAREN NOLL</b> <b>PO BOX 270</b> Located at ► <b>CULVER</b> IN ZIP+4 ► <b>46511</b> Telephone no ► <b>574-842-2076</b>			
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 ► <b>15</b>			
16	At any time during calendar year 2013, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for Form TD F 90-22.1 If "Yes," enter the name of the foreign country ►	16	Yes	No <b>X</b>

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

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies		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 type="checkbox"/> Yes <input checked="" 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? (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 ) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here ► <input type="checkbox"/> <b>N/A</b>	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? <b>N/A</b>	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 <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement – see instructions ) <b>N/A</b>	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? <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? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2013 ) <b>N/A</b>	3b	
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	<b>X</b>
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2013?	4b	<b>X</b>

**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)? ☐ Yes ☒ No  
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) **N/A**

**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? ☐ Yes ☒ 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? ☐ Yes ☒ No **N/A**

**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
DAVID D GIBSON PO BOX 270 CULVER IN 46511	PRES/TREAS 8.00	0	0	0
VIRGINIA L GIBSON PO BOX 270 CULVER IN 46511	VP/SECRETARY 8.00	0	0	0
CAMERON S GIBSON PO BOX 270 CULVER IN 46511	DIRECTOR 4.00	0	0	0
GAYLE M ECK PO BOX 270 CULVER IN 46511	DIRECTOR 4.00	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

0

Form 990-PF (2013) **GIBSON FOUNDATION****35-1422779**Page **7****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 ▶**Part IX-A Summary of Direct Charitable Activities**

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

	Expenses
<b>1 EDUCATION CONTRIBUTIONS</b>	
<b>2 CIVIC CONTRIBUTIONS</b>	34,700
<b>3 RELIGIOUS CONTRIBUTIONS</b>	34,670
<b>4 EDUCATIONAL SCHOLARSHIPS</b>	18,000
	10,835

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

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2

	Amount
<b>1 N/A</b>	
<b>2</b>	
All other program-related investments See instructions	
<b>3</b>	
<b>Total.</b> Add lines 1 through 3 <span style="float: right;">▶</span>	

Form **990-PF** (2013)



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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
a	Average monthly fair market value of securities	1a	2,038,090
b	Average of monthly cash balances	1b	34,145
c	Fair market value of all other assets (see instructions)	1c	0
d	Total (add lines 1a, b, and c)	1d	2,072,235
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0
2	Acquisition indebtedness applicable to line 1 assets	2	0
3	Subtract line 2 from line 1d	3	2,072,235
4	Cash deemed held for charitable activities. Enter 1½% of line 3 (for greater amount, see instructions)	4	31,084
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	2,041,151
6	Minimum investment return. Enter 5% of line 5	6	102,058

**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	102,058
2a	Tax on investment income for 2013 from Part VI, line 5	2a	1,801
b	Income tax for 2013 (This does not include the tax from Part VI)	2b	
c	Add lines 2a and 2b	2c	1,801
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	100,257
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	100,257
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	100,257

**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	100,205
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	100,205
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	1,801
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	98,404

**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				100,257
2 Undistributed income, if any, as of the end of 2013				
a Enter amount for 2012 only			16,801	
b Total for prior years 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2013				
a From 2008				
b From 2009				
c From 2010				
d From 2011				
e From 2012				
f Total of lines 3a through e				
4 Qualifying distributions for 2013 from Part XII, line 4 ▶ \$ <u>100,205</u>				
a Applied to 2012, but not more than line 2a			16,801	
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				83,404
e Remaining amount distributed out of corpus				
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				
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				16,853
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)				
9 Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a				
10 Analysis of line 9				
a Excess from 2009				
b Excess from 2010				
c Excess from 2011				
d Excess from 2012				
e Excess from 2013				

Form **990-PF** (2013)

**Part XV** **Supplementary Information** (continued)**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year <b>See Statement 8</b>				100,205
<b>Total</b>			▶ <b>3a</b>	<b>100,205</b>
b Approved for future payment <b>N/A</b>				
<b>Total</b>			▶ <b>3b</b>	

## Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated

Enter gross amounts unless otherwise indicated		Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions )
		(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1	Program service revenue					
a						
b						
c						
d						
e						
f						
g	Fees and contracts from government agencies					
2	Membership dues and assessments					
3	Interest on savings and temporary cash investments			14	4	
4	Dividends and interest from securities			14	67,858	
5	Net rental income or (loss) from real estate					
a	Debt-financed property					
b	Not debt-financed property					
6	Net rental income or (loss) from personal property					
7	Other investment income					
8	Gain or (loss) from sales of assets other than inventory					121,125
9	Net income or (loss) from special events					
10	Gross profit or (loss) from sales of inventory					
11	Other revenue a					
b						
c						
d						
e						
12	Subtotal. Add columns (b), (d), and (e)		0		67,862	121,125
13	Total. Add line 12, columns (b), (d), and (e)				13	188,987

(See worksheet in line 13 instructions to verify calculations )

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

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# Federal Statements

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## Statement 1 - Form 990-PF, Part I, Line 6a - Sale of Assets

Whom Sold	Description	Date Acquired	Date Sold	How Received		Cost	Expense	Depreciation	Net Gain / Loss
				Purchase Price	Sale Price				
VANGUARD GNMA FUND	Various	5/08/13		\$ 80,000	\$ 80,000	\$ 76,996	\$	\$	\$ 3,004
Total				\$ 80,000	\$ 80,000	\$ 76,996	\$ 0	\$ 0	\$ 3,004

## Statement 2 - Form 990-PF, Part I, Line 16a - Legal Fees

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
LEGAL FEES	\$ 1,400	\$ 1,400	\$	\$
Total	\$ 1,400	\$ 1,400	\$ 0	\$ 0

## Statement 3 - Form 990-PF, Part I, Line 16b - Accounting Fees

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
ACCOUNTING FEES	\$ 1,266	\$ 1,266	\$	\$
Total	\$ 1,266	\$ 1,266	\$ 0	\$ 0

## Statement 4 - Form 990-PF, Part I, Line 23 - Other Expenses

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
Expenses	\$	\$	\$	\$
INSURANCE	1,100	1,100		
SAFE DEPOSIT RENTAL	150	150		
PO BOX RENTAL	71	71		

## Federal Statements

### Statement 4 - Form 990-PF, Part I, Line 23 - Other Expenses (continued)

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
FEDERAL TAX	\$		\$	\$
FEDERAL TAX ESTIMATES	1,262	1,262		
FEDERAL TAX PENALTY				
SUBSCRIPTIONS	572	572		
PRINTED CHECKS				
BUSINESS ENTITY REPORT	20	20		
MISC. EXPENSE	78	78		
Total	\$ 3,253	\$ 3,253	\$ 0	\$ 0

### Statement 5 - Form 990-PF, Part II, Line 10a - US and State Government Investments

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
VANGUARD GNMA ADMIRAL FUND	\$ 145,683	\$ 71,145	Cost	\$ 71,113
Total	\$ 145,683	\$ 71,145		\$ 71,113

### Statement 6 - Form 990-PF, Part II, Line 10c - Corporate Bond Investments

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
VANGUARD BOND MARKET INDEX (ADMIRAL)	\$ 208,596	\$ 214,826	Cost	\$ 226,576
Total	\$ 208,596	\$ 214,826		\$ 226,576



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### Statement 7 - Form 990-PF, Part II, Line 13 - Other Investments

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
TIFF INVESTMENT FUND	\$ 1,368,184	\$ 1,545,477	Cost	\$ 1,826,506
Total	\$ 1,368,184	\$ 1,545,477		\$ 1,826,506

**Federal Statements****Form 990-PF, Part XV, Line 2b - Application Format and Required Contents**

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Description

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**Form 990-PF, Part XV, Line 2c - Submission Deadlines**

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Description

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## Federal Statements

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Statement 8 - Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the  
Year

Name		Address		Status	Purpose	Amount
Address	Relationship					
ADAMS STREET MINISTRIES PLYMOUTH IN 46563	PO BOX 104				CIVIC	200
ALZHEIMERS SERVICES SOUTH BEND IN 46617	922 E COLFAX AVE				CIVIC	250
ANCILLA COLLEGE DONALDSON IN 46513	PO BOX 1				EDUCATION	5,000
ANCILLA COLLEGE DONALDSON IN 46513	PO BOX 1				SCHOLARSHIP	400
BALL STATE UNIVERSITY MUNCIE IN 47306	LUCINA HALL ROOM 245				SCHOLARSHIP	400
BOWLING GREEN STATE UNIVERSITY BOWLING GREEN OH 43403	110 MCFALL CENTER				SCHOLARSHIP	400
BOYS & GIRLS CLUB OF MARS PLYMOUTH IN 46563	314 E JEFFERSON				CIVIC	5,000
CASA OF MARSHALL COUNTY PLYMOUTH IN 46563	PO BOX 373				CIVIC	
CENTRAL METHODIST UNIVERSITY FAYETTE MO 65248	411 CENTRAL METHODIST SQU				SCHOLARSHIP	400
CENTRAL METHODIST UNIVERSITY FAYETTE MO 65248	411 CENTRAL METHODIST SQU				SCHOLARSHIP	400
COMMUNITY RESOURCE CENTER PLYMOUTH IN 46563	PO BOX 1085				CIVIC	
CRIME STOPPERS SOUTH BEND IN 46601	701 W SAMPLE ST				CIVIC	250
CULVER BOYS & GIRLS CLUB CULVER IN 46511	PO BOX 44				CIVIC	1,000
CULVER EDUCATIONAL FDN CULVER IN 46511	1300 ACADEMY RD #153				EDUCATION	500
CULVER EDUCATIONAL FDN CULVER IN 46511	1300 ACADEMY RD #153				EDUCATION	500
CULVER LAKE FEST FIREWORKS CULVER IN 46511	PO BOX 146				CIVIC	100
EDGAR COUNTY COMMUNITY FOUNDATION PARIS IL 61944	PO BOX 426				CIVIC	5,000

## Federal Statements

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**Statement 8 - Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the**  
**Year (continued)**

Name	Address	Relationship	Status	Purpose	Amount
ENCORE PERFORMING ARTS PLYMOUTH IN 46563	1305 W HARRISON ST			CIVIC	2,500
FLAGLER COLLEGE ST AUGUSTINE FL 32084	74 KING ST			SCHOLARSHIP	400
FRIENDS OF THE LIBRARY PLYMOUTH IN 46563	201 N CENTER ST			CIVIC	250
GOSHEN COLLEGE GOSHEN IN 46526	1700 S MAIN ST			SCHOLARSHIP	400
GOSHEN COLLEGE GOSHEN IN 46526	1700 S MAIN ST			SCHOLARSHIP	
HEART AND HANDS INC PLYMOUTH IN 46563	PO BOX 51			CIVIC	200
HEARTLAND ARTISTS GALLERY PLYMOUTH IN 46563	10542 SR 17			CIVIC	500
HEMINGER HOUSE PLYMOUTH IN 46563	PO BOX 4			CIVIC	400
INDIANA STATE UNIVERSITY TERRE HAUTE IN 47809	530 N 5TH STREET			SCHOLARSHIP	400
INDIANA STATE UNIVERSITY TERRE HAUTE IN 47809	530 N 5TH STREET			SCHOLARSHIP	500
INDIANA UNIVERSITY BLOOMINGTON IN 47405	601 E KIRKWOOD AVE			SCHOLARSHIP	
INDIANA UNIVERSITY BLOOMINGTON IN 47405	601 E KIRKWOOD AVE			SCHOLARSHIP	400
INDIANA UNIVERSITY BLOOMINGTON IN 47405	601 E KIRKWOOD AVE			SCHOLARSHIP	400
IPFW FORT WAYNE IN 46805	2101 E COLISEUM BLVD			SCHOLARSHIP	400
IPFW FORT WAYNE IN 46805	2101 E COLISEUM BLVD			SCHOLARSHIP	400
ISU FOUNDATION TERRE HAUTE IN 47809	COLLEGE OF BUSINESS, 922			SCHOLARSHIP	1,000
ISU FOUNDATION TERRE HAUTE IN 47809	COLLEGE OF BUSINESS, 922			EDUCATION	500

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**Statement 8 - Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the**  
**Year (continued)**

Name		Address		Relationship	Status	Purpose	Amount
Address							
IU FOUNDATION				PO BOX 500		EDUCATION	12,000
BLOOMINGTON IN 47402							
IU FOUNDATION				PO BOX 500		EDUCATION	6,000
BLOOMINGTON IN 47402							
IU FOUNDATION				PO BOX 500		EDUCATION	1,000
BLOOMINGTON IN 47402							
IU FOUNDATION				PO BOX 500		EDUCATION	2,600
BLOOMINGTON IN 47402							
IUSB				PO BOX 7111		SCHOLARSHIP	400
SOUTH BEND IN 46634							
IUSB				PO BOX 7111		SCHOLARSHIP	400
SOUTH BEND IN 46634							
IUSB				PO BOX 7111		SCHOLARSHIP	400
SOUTH BEND IN 46634							
IUSB				PO BOX 7111		SCHOLARSHIP	400
SOUTH BEND IN 46634							
IUSB				PO BOX 7111		SCHOLARSHIP	200
SOUTH BEND IN 46634							
IUSB				PO BOX 7111		SCHOLARSHIP	400
SOUTH BEND IN 46634							
IVY TECH COLLEGE				220 DEAN JOHNSON BLVD		SCHOLARSHIP	400
SOUTH BEND IN 46601							
LAKE MAXINKUCKEE ENVIRONM						ENVIRONMENTAL	1,000
CULVER IN 46511				PO BOX 187			
LASALLE COUNCIL BSA				1340 SOUTH BEND AVE		CIVIC	1,000
SOUTH BEND IN 46617							
LASALLE COUNCIL BSA				1340 SOUTH BEND AVE		CIVIC	
SOUTH BEND IN 46617							
LOVEWAY				54151 CR 33		CIVIC	
MIDDLEBURY IN 46540							
MARSHALL COUNTY COMMUNITY FDN				2701 N MICHIGAN ST		CIVIC	5,000
PLYMOUTH IN 46563							
MARSHALL COUNTY HUMANE SO				PO BOX 22		CIVIC	250
PLYMOUTH IN 46563							

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**Statement 8 - Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the  
Year (continued)**

Name		Address		Relationship	Status	Purpose	Amount
MARSHALL COUNTY NEIGHBORH PLYMOUTH IN 46563		402 W GARRO ST				CIVIC	1,000
MARSHALL COUNTY READING PLYMOUTH IN 46563		1500 LAKE AVENUE				EDUCATION	100
MARSHALL-STARKE DEVELOPME PLYMOUTH IN 46563		PO BOX 160				CIVIC	250
MEMORIAL HEALTH FDN SOUTH BEND IN 46601		615 N MICHIGAN ST				CIVIC	500
NORTHERN INDIANA CENTER FOR HISTORY SOUTH BEND IN 46601		808 W WASHINGTON				CIVIC	
PLYMOUTH HIGH SCHOOL PLYMOUTH IN 46563		1 BIG RED DRIVE				EDUCATION	500
PLYMOUTH OPTIMIST CLUB PLYMOUTH IN 46563		PO BOX 337				CIVIC	250
PHJC FOUNDATION DONALDSON IN 46513		PO BOX 1				RELIGIOUS	5,000
POTAWATOMI WILDLIFE PARK TIPPECANOE IN 46570		16998 SR 331				ENVIRONMENTAL	1,000
POTAWATOMI WILDLIFE PARK TIPPECANOE IN 46570		16998 SR 331				ENVIRONMENTAL	1,500
PURDUE UNIVERSITY WEST LAFAYETTE IN 47907		610 PURDUE MALL				SCHOLARSHIP	235
PURDUE UNIVERSITY WEST LAFAYETTE IN 47907		610 PURDUE MALL				SCHOLARSHIP	400
PURDUE UNIVERSITY WEST LAFAYETTE IN 47907		610 PURDUE MALL				SCHOLARSHIP	400
PURDUE UNIVERSITY WEST LAFAYETTE IN 47907		610 PURDUE MALL				SCHOLARSHIP	400
PURDUE UNIVERSITY WEST LAFAYETTE IN 47907		610 PURDUE MALL				SCHOLARSHIP	400
PURDUE UNIVERSITY WEST LAFAYETTE IN 47907		610 PURDUE MALL				SCHOLARSHIP	400
PURDUE UNIVERSITY WEST LAFAYETTE IN 47907		610 PURDUE MALL				SCHOLARSHIP	400
PURDUE UNIVERSITY WEST LAFAYETTE IN 47907		610 PURDUE MALL				SCHOLARSHIP	400

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**Statement 8 - Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the**  
**Year (continued)**

Name	Address	Relationship	Status	Purpose	Amount
REINS OF LIFE	55200 QUINCE RD			CIVIC	
SOUTH BEND IN 46619	1714 HINMAN AVE			CIVIC	5,000
SIGMA CHI FOUNDATION	515 N STATE ST			RELIGIOUS	7,000
EVANSTON IL 60201	PO BOX 421			RELIGIOUS	6,000
ST ELIZABETH'S EPISCOPAL	PO BOX 971			SCHOLARSHIP	
CULVER IN 46511	PO BOX 971			SCHOLARSHIP	
ST THOMAS EPISCOPAL CHURCH	PO BOX 670			SCHOLARSHIP	
PLYMOUTH IN 46563	PO BOX 984			CIVIC	920
ST. JOSEPH'S COLLEGE	INDIANAPOLIS IN 46206			CIVIC	250
RENSSELAER IN 47978	THE SCHOOL OF INQUIRY - PLYMOUTH UN	1	BIG RED DRIVE	EDUCATION	5,000
ST. JOSEPH'S COLLEGE	PLYMOUTH IN 46563			CIVIC	2,500
RENSSELAER IN 47978	UNITED WAY OF MARSHALL COUNTY			CIVIC	1,000
THE FOUNDATION OF SJRMC	PLYMOUTH IN 46563			CIVIC	500
PLYMOUTH IN 46563	PLYMOUTH IN 46563			CIVIC	
THE SALVATION ARMY	PLYMOUTH IN 46563			CIVIC	
INDIANAPOLIS IN 46206	PLYMOUTH IN 46563			CIVIC	
THE SCHOOL OF INQUIRY - PLYMOUTH UN	2701 N MICHIGAN ST			CIVIC	
PLYMOUTH IN 46563	PO BOX 3434			CIVIC	
UNITED WAY OF MARSHALL COUNTY	PO BOX 141			CIVIC	
WNIT PUBLIC TELEVISION	103 DUMBARTON COURT			CIVIC	
YELLOW RIVER FESTIVAL	MASSACHUSETTS HALL			EDUCATION	
PLYMOUTH IN 46563	201 E. GREENE ST.			SCHOLARSHIP	
BAHAMAS HABITAT	1401 S US 421			SCHOLARSHIP	
CARY NC 27511	WESTVILLE IN 46391			ENVIRONMENTAL	
HARVARD UNIVERSITY	WYTHOUGAN VALLEY PRESERVATION COUNC	12954	6TH ROAD		
CAMBRIDGE MA 02138	PLYMOUTH IN 46563				
GEORGIA MILITARY COLLEGE					
MILLEDGEVILLE GA 31061					
PURDUE NORTH CENTRAL					

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## Federal Statements

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### Statement 8 - Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the Year (continued)

Name		Address		Relationship	Status	Purpose	Amount
UNITED WAY OF ST JOSEPH COUNTY		SOUTH BEND IN 46615		3517 E JEFFERSON BLVD		CIVIC	1,000
Total							100,205