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Return of Private Foundation

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

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

2013

Open to Public Inspection

For calendar year 2013 or tax year beginning

, and ending

| | | |
|--|--|--|
| Name of foundation ADL CHARITABLE TRUST | | A Employer identification number 35-2033079 |
| Number and street (or P O box number if mail is not delivered to street address) 9400 HUNT CLUB ROAD | Room/suite | B Telephone number (317) 870-2425 |
| City or town, state or province, country, and ZIP or foreign postal code ZIONSVILLE, IN 46077 | | C If exemption application is pending, check here <input type="checkbox"/> |
| G Check all that apply: <input type="checkbox"/> Initial return <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Final return <input type="checkbox"/> Amended return <input type="checkbox"/> Address change <input type="checkbox"/> Name change | | D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/> |
| H Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation | | E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/> |
| I Fair market value of all assets at end of year (from Part II, col (c), line 16) \$ 4,504,155. (Part I, column (d) must be on cash basis) | 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)) | | (a) Revenue and expenses per books | (b) Net investment income | (c) Adjusted net income | (d) Disbursements for charitable purposes (cash basis only) |
|--|--|------------------------------------|---------------------------|-------------------------|---|
| 1 Contributions, gifts, grants, etc., received | | | | N/A | |
| 2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B | | | | | |
| 3 Interest on savings and temporary cash investments | | 24,787. | 24,787. | | STATEMENT 1 |
| 4 Dividends and interest from securities | | 92,988. | 92,988. | | STATEMENT 2 |
| 5a Gross rents | | | | | |
| b Net rental income or (loss) | | | | | |
| 6a Net gain or (loss) from sale of assets not on line 10 | | 22,774. | | | |
| b Gross sales price for all assets on line 6a 1,354,095. | | | | | |
| 7 Capital gain net income (from Part IV, line 2) | | | 22,774. | | |
| 8 Net short-term capital gain | | | | | |
| 9 Income modifications | | | | | |
| 10a Gross sales less returns and allowances | | | | | |
| b Less Cost of goods sold | | | | | |
| c Gross profit or (loss) | | | | | |
| 11 Other income | | 20,417. | 20,417. | | STATEMENT 3 |
| 12 Total. Add lines 1 through 11 | | 160,966. | 160,966. | | |
| 13 Compensation of officers, directors, trustees, etc | | 0. | 0. | | 0. |
| 14 Other employee salaries and wages | | | | | |
| 15 Pension plans, employee benefits | | | | | |
| 16a Legal fees STMT 4 | | 150. | 0. | | 150. |
| b Accounting fees STMT 5 | | 15,140. | 0. | | 15,140. |
| c Other professional fees STMT 6 | | 8,787. | 8,689. | | 98. |
| 17 Interest | | | | | |
| 18 Taxes STMT 7 | | 1,760. | 1,760. | | 0. |
| 19 Depreciation and depletion | | | | | |
| 20 Occupancy | | 2,640. | 0. | | 2,640. |
| 21 Travel, conferences, and meetings | | | | | |
| 22 Printing and publications | | | | | |
| 23 Other expenses STMT 8 | | 2,321. | 2,321. | | 0. |
| 24 Total operating and administrative expenses. Add lines 13 through 23 | | 30,798. | 12,770. | | 18,028. |
| 25 Contributions, gifts, grants paid | | 460,350. | | | 460,350. |
| 26 Total expenses and disbursements. Add lines 24 and 25 | | 491,148. | 12,770. | | 478,378. |
| 27 Subtract line 26 from line 12: | | | | | |
| a Excess of revenue over expenses and disbursements | | -330,182. | | | |
| b Net investment income (if negative, enter -0-) | | | 148,196. | | |
| c Adjusted net income (if negative, enter -0-) | | | | N/A | |

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Operating and Administrative Expenses

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| Part II Balance Sheets | | Attached schedules and amounts in the description column should be for end-of-year amounts only | | Beginning of year | End of year | |
|--|---|---|----------------|-----------------------|-------------|----------|
| | | (a) Book Value | (b) Book Value | (c) Fair Market Value | | |
| Assets | 1 Cash - non-interest-bearing | | | 650,924. | 625,185. | 625,185. |
| | 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 | | | | | |
| | 7 Other notes and loans receivable ▶ | | | | | |
| | Less: allowance for doubtful accounts ▶ | | | | | |
| | 8 Inventories for sale or use | | | | | |
| | 9 Prepaid expenses and deferred charges | | | | | |
| | 10a Investments - U.S. and state government obligations STMT 10 | 2,385,609. | 2,533,890. | 2,739,601. | | |
| | b Investments - corporate stock STMT 11 | 632,742. | 701,641. | 1,130,285. | | |
| | c Investments - corporate bonds | | | | | |
| | Liabilities | 11 Investments - land, buildings, and equipment basis ▶ | | | | |
| Less accumulated depreciation ▶ | | | | | | |
| 12 Investments - mortgage loans | | | | | | |
| 13 Investments - other STMT 12 | | 529,433. | 8,944. | 9,084. | | |
| 14 Land, buildings, and equipment basis ▶ | | | | | | |
| Less accumulated depreciation ▶ | | | | | | |
| 15 Other assets (describe ▶) | | | | | | |
| 16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item 1) | | 4,198,708. | 3,869,660. | 4,504,155. | | |
| 17 Accounts payable and accrued expenses | | | | | | |
| 18 Grants payable | | | | | | |
| Net Assets or Fund Balances | 19 Deferred revenue | | | | | |
| | 20 Loans from officers, directors, trustees, and other disqualified persons | | | | | |
| | 21 Mortgages and other notes payable | | | | | |
| | 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 | 4,198,708. | 3,869,660. | | | |
| | 28 Paid-in or capital surplus, or land, bldg., and equipment fund | 0. | 0. | | | |
| | 29 Retained earnings, accumulated income, endowment, or other funds | 0. | 0. | | | |
| 30 Total net assets or fund balances | 4,198,708. | 3,869,660. | | | | |
| 31 Total liabilities and net assets/fund balances | 4,198,708. | 3,869,660. | | | | |

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 | 4,198,708. |
| 2 Enter amount from Part I, line 27a | 2 | -330,182. |
| 3 Other increases not included in line 2 (itemize) ▶ SEE STATEMENT 9 | 3 | 1,159. |
| 4 Add lines 1, 2, and 3 | 4 | 3,869,685. |
| 5 Decreases not included in line 2 (itemize) ▶ PRIOR PERIOD ADJUSTMENT | 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 | 3,869,660. |

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 | | | | |
| b SEE ATTACHED STATEMENTS | | | | |
| 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 | | | | |
| b | | | | |
| c | | | | |
| d | | | | |
| e 1,354,095. | | 1,331,321. | 22,774. | |
| Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69 | | | | (i) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h)) |
| (i) F.M.V. as of 12/31/69 | (j) Adjusted basis as of 12/31/69 | (k) Excess of col. (i) over col. (j), if any | | |
| a | | | | |
| b | | | | |
| c | | | | |
| d | | | | |
| e | | | 22,774. | |
| 2 Capital gain net income or (net capital loss) | | <div style="border-left: 1px solid black; border-right: 1px solid black; padding: 0 5px;"> If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 </div> | | 22,774. |
| 3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8 | | <div style="border-left: 1px solid black; border-right: 1px solid black; padding: 0 5px;"> If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8 </div> | | N/A |

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

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

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

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

☐ Yes ☒ No

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

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

| (a) Base period years Calendar year (or tax year beginning in) | (b) Adjusted qualifying distributions | (c) Net value of noncharitable-use assets | (d) Distribution ratio (col. (b) divided by col. (c)) |
|--|--|--|---|
| 2012 | 464,579. | 4,473,618. | .103849 |
| 2011 | 483,921. | 4,816,366. | .100474 |
| 2010 | 542,327. | 5,581,805. | .097160 |
| 2009 | 682,523. | 5,736,119. | .118987 |
| 2008 | 514,537. | 5,816,254. | .088465 |
| 2 Total of line 1, column (d) | | | .508935 |
| 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 | | | .101787 |
| 4 Enter the net value of noncharitable-use assets for 2013 from Part X, line 5 | | 4,475,114. | |
| 5 Multiply line 4 by line 3 | | | 455,508. |
| 6 Enter 1% of net investment income (1% of Part I, line 27b) | | | 1,482. |
| 7 Add lines 5 and 6 | | | 456,990. |
| 8 Enter qualifying distributions from Part XII, line 4 | | | 478,378. |

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) | | |
| 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 | 1 | 1,482. |
| c | All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b). | 2 | 0. |
| 2 | Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) | 3 | 1,482. |
| 3 | Add lines 1 and 2 | 4 | 0. |
| 4 | Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) | 5 | 1,482. |
| 5 | Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0- | | |
| 6 | Credits/Payments: | | |
| a | 2013 estimated tax payments and 2012 overpayment credited to 2013 | 6a | 2,632. |
| 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 | 2,632. |
| 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 | 1,150. |
| 11 | Enter the amount of line 10 to be: Credited to 2014 estimated tax <input checked="" type="checkbox"/> 1,150. Refunded <input type="checkbox"/> | 11 | 0. |

Part VII-A Statements Regarding Activities

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

N/A

Part VII-A Statements Regarding Activities (continued)

| | | | | |
|----|---|----|-----|---------|
| 11 | At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions) | 11 | | X |
| 12 | Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions) | 12 | | X |
| 13 | Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► N/A | 13 | X | |
| 14 | The books are in care of ► ALEXANDER C. LANGE Telephone no. ► (317) 870-2425 Located at ► 9400 HUNT CLUB ROAD, ZIONSVILLE, IN ZIP+4 ► 46077 | | | |
| 15 | Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year ► 15 N/A | | | |
| 16 | At any time during calendar year 2013, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for Form TD F 90-22.1. If "Yes," enter the name of the foreign country ► | 16 | Yes | No X |

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

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

| | Yes | No |
|---|---|------|
| 1a During the year did the foundation (either directly or indirectly): | | |
| (1) Engage in the sale or exchange, or leasing of property with a disqualified person? | <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 | N/A | 1b |
| c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2013? | | 1c X |
| 2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)): | | |
| a At the end of tax year 2013, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2013? If "Yes," list the years ► | <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.) | N/A | 2b |
| c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ► | | |
| 3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? | <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.) | N/A | 3b |
| 4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? | | 4a X |
| b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2013? | | 4b X |

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required (continued)**5a** During the year did the foundation pay or incur any amount to:

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No**b** If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?

N/A

5b

Organizations relying on a current notice regarding disaster assistance check here

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

N/A

☐ Yes ☐ No

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

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?☐ Yes ☒ No**6b****b** Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

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

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?☐ Yes ☒ No**b** If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?

N/A

7b**Part VIII** Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors**1** List all officers, directors, trustees, foundation managers and their compensation.

| (a) Name and address | (b) Title, and average hours per week devoted to position | (c) Compensation (If not paid, enter -0-) | (d) Contributions to employee benefit plans and deferred compensation | (e) Expense account, other allowances |
|---|---|---|---|---------------------------------------|
| ALEXANDER C. LANGE 9400 HUNT CLUB ROAD ZIONSVILLE, IN 46077 | TRUSTEE 1.00 | 0. | 0. | 0. |
| DOROTHEA L. MORTON 9400 HUNT CLUB ROAD ZIONSVILLE, IN 46077 | SUCCESSOR/CO-TRUSTEE 1.00 | 0. | 0. | 0. |
| CYNTHIA M. LANGE 9400 HUNT CLUB ROAD ZIONSVILLE, IN 46077 | SUCCESSOR/CO-TRUSTEE 1.00 | 0. | 0. | 0. |
| | | | | |
| | | | | |
| | | | | |

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

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

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

0

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

| (a) Name and address of each person paid more than \$50,000 | (b) Type of service | (c) Compensation |
|---|---------------------|------------------|
| NONE | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |

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

0

Part IX-A Summary of Direct Charitable Activities

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

| | Expenses |
|-------|----------|
| 1 N/A | |
| | |
| 2 | |
| | |
| 3 | |
| | |
| 4 | |
| | |

Part IX-B Summary of Program-Related Investments

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

| | Amount |
|--|--------|
| 1 N/A | |
| | |
| 2 | |
| | |
| All other program-related investments. See instructions. | |
| 3 | |
| | |

Total. Add lines 1 through 3

0.

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 | 3,044,896. |
| b | Average of monthly cash balances | 1b | 1,478,596. |
| c | Fair market value of all other assets | 1c | 19,771. |
| d | Total (add lines 1a, b, and c) | 1d | 4,543,263. |
| 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 | 4,543,263. |
| 4 | Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions) | 4 | 68,149. |
| 5 | Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4 | 5 | 4,475,114. |
| 6 | Minimum investment return. Enter 5% of line 5 | 6 | 223,756. |

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 | 223,756. |
| 2a | Tax on investment income for 2013 from Part VI, line 5 | 2a | 1,482. |
| b | Income tax for 2013. (This does not include the tax from Part VI.) | 2b | |
| c | Add lines 2a and 2b | 2c | 1,482. |
| 3 | Distributable amount before adjustments. Subtract line 2c from line 1 | 3 | 222,274. |
| 4 | Recoveries of amounts treated as qualifying distributions | 4 | 0. |
| 5 | Add lines 3 and 4 | 5 | 222,274. |
| 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 | 222,274. |

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 | 478,378. |
| 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 | 478,378. |
| 5 | Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b | 5 | 1,482. |
| 6 | Adjusted qualifying distributions. Subtract line 5 from line 4 | 6 | 476,896. |

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 | | | | 222,274. |
| 2 Undistributed income, if any, as of the end of 2013 | | | | |
| a Enter amount for 2012 only | | | 0. | |
| b Total for prior years: | | 0. | | |
| 3 Excess distributions carryover, if any, to 2013: | | | | |
| a From 2008 | 227,798. | | | |
| b From 2009 | 402,581. | | | |
| c From 2010 | 266,725. | | | |
| d From 2011 | 246,299. | | | |
| e From 2012 | 243,552. | | | |
| f Total of lines 3a through e | 1,386,955. | | | |
| 4 Qualifying distributions for 2013 from Part XII, line 4: ► \$ | 478,378. | | | |
| 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 | | | | 222,274. |
| e Remaining amount distributed out of corpus | 256,104. | | | |
| 5 Excess distributions carryover applied to 2013 (If an amount appears in column (d), the same amount must be shown in column (a)) | 0. | | | 0. |
| 6 Enter the net total of each column as indicated below: | | | | |
| a Corpus Add lines 3f, 4c, and 4e Subtract line 5 | 1,643,059. | | | |
| b Prior years' undistributed income. Subtract line 4b from line 2b | | 0. | | |
| c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed | | 0. | | |
| d Subtract line 6c from line 6b. Taxable amount - see instructions | | 0. | | |
| e Undistributed income for 2012. Subtract line 4a from line 2a. Taxable amount - see instr. | | | 0. | |
| f Undistributed income for 2013. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2014 | | | | 0. |
| 7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) | 0. | | | |
| 8 Excess distributions carryover from 2008 not applied on line 5 or line 7 | 227,798. | | | |
| 9 Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a | 1,415,261. | | | |
| 10 Analysis of line 9: | | | | |
| a Excess from 2009 | 402,581. | | | |
| b Excess from 2010 | 266,725. | | | |
| c Excess from 2011 | 246,299. | | | |
| d Excess from 2012 | 243,552. | | | |
| e Excess from 2013 | 256,104. | | | |

N/A

- ▶

☐ 4942(j)(3) or ☐ 4942(j)(5)

- (4) Gross investment income

[illegible]Form **990-PF** (2013)

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 STATEMENT | | | | 460,350. |
| | | | | |
| | | | | |
| | | | | |
| Total | | | ▶ 3a | 460,350. |
| b Approved for future payment | | | | |
| NONE | | | | |
| | | | | |
| | | | | |
| Total | | | ▶ 3b | 0. |

Part XVII

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

- | | | Yes | No |
|---|--|-------|----|
| 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) | X |
| | (2) Other assets | 1a(2) | X |
| | b Other transactions: | | |
| | (1) Sales of assets to a noncharitable exempt organization | 1b(1) | X |
| | (2) Purchases of assets from a noncharitable exempt organization | 1b(2) | X |
| | (3) Rental of facilities, equipment, or other assets | 1b(3) | X |
| | (4) Reimbursement arrangements | 1b(4) | X |
| | (5) Loans or loan guarantees | 1b(5) | X |
| | (6) Performance of services or membership or fundraising solicitations | 1b(6) | X |
| | c Sharing of facilities, equipment, mailing lists, other assets, or paid employees | 1c | X |
| | 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. | | |

[illegible]

- 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 |
|--------------------------|--------------------------|---------------------------------|
| N/A | | |
| | | |
| | | |
| | | |
| | | |

**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) is based on all information of which preparer has any knowledge.

Signature of officer or trustee

Date _____

Title

May the IRS discuss this return with the preparer shown below (see instr. 1)?

☒ Yes ☐ No

**Paid
Preparer
Use Only**

Print/Type preparer's name

PATTI M. HOWARD,
CPA

Preparer's signature

Date _____

Check ☐ self-employed

PTIN

P00919375

Firm's name ► CLIFTONLARSONALLEN LLP

Firm's EIN ▶ 41-0746749

Firm's address ► 9339 PRIORITY WAY W DR #200
INDIANAPOLIS, IN 46240

Phone no. (317) 574-9100

ADL CHARITABLE TRUST

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 GS PRIVATE EQUITY PARTNERS III | P | VARIOUS | VARIOUS |
| b GS PRIVATE EQUITY PARTNERS III | P | VARIOUS | VARIOUS |
| c POWERSHARES DB COMMODITY INDEX TRACKING FUND | P | VARIOUS | VARIOUS |
| d 513 SHARES WISDOMTREE TR JAPAN HEDGED EQUITY FD | P | 05/08/13 | 06/03/13 |
| e 500,000 SHARES CREDIT SUISSE GROUP AG N Y BRH MED | P | 11/16/12 | 02/26/13 |
| f 18,000 SHARES POWERSHARES DB COMMODITY INDEX TRAC | P | 05/26/09 | 05/08/13 |
| g 500,000 SHARES CREDIT SUISSE GROUP AG N Y BRH MED | P | 11/16/12 | 02/26/13 |
| h 40,000 SHARES PITNEY BOWES INC GLO BAL MEDIUM TER | P | 12/07/11 | 11/04/13 |
| i 40,000 SHARES TIME WARNER CABLE INC | P | 12/07/11 | 07/01/13 |
| j CS 005704 SHORT TERM (SEE ATTACHED) | P | VARIOUS | VARIOUS |
| k CS 005704 LONG TERM (SEE ATTACHED) | P | VARIOUS | VARIOUS |
| l | | | |
| m | | | |
| n | | | |
| o | | | |

| (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 28. | | | 28. |
| b | | 3,841. | -3,841. |
| c | | 3,403. | -3,403. |
| d 22,733. | | 25,133. | -2,400. |
| e 500,000. | | 500,000. | 0. |
| f 475,843. | | 492,910. | -17,067. |
| g 6,087. | | | 6,087. |
| h 41,434. | | 43,230. | -1,796. |
| i 40,000. | | 44,141. | -4,141. |
| j 59,937. | | 53,824. | 6,113. |
| k 208,033. | | 164,839. | 43,194. |
| l | | | |
| m | | | |
| n | | | |
| o | | | |

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) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-") |
|---------------------------|--------------------------------------|---|---|
| a | | | 28. |
| b | | | -3,841. |
| c | | | -3,403. |
| d | | | -2,400. |
| e | | | 0. |
| f | | | -17,067. |
| g | | | 6,087. |
| h | | | -1,796. |
| i | | | -4,141. |
| j | | | 6,113. |
| k | | | 43,194. |
| l | | | |
| m | | | |
| n | | | |
| o | | | |

| | | |
|---|---|---------|
| 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 | 22,774. |
| 3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter "-0-" in Part I, line 8 } | 3 | N/A |

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

| SOURCE | (A) REVENUE PER BOOKS | (B) NET INVESTMENT INCOME | (C) ADJUSTED NET INCOME |
|---|-----------------------------|---------------------------------|-------------------------------|
| CREDIT SUISSE 002180 | 18,792. | 18,792. | |
| CREDIT SUISSE 002180 OID | 4,086. | 4,086. | |
| CREDIT SUISSE 005704 | 1,275. | 1,275. | |
| CREDIT SUISSE 578658 | 475. | 475. | |
| GOLDMAN SACHS PRIVATE EQUITY PARTNERS III LP | 8. | 8. | |
| JPMORGAN | 1. | 1. | |
| POWERSHARES DB COMMODITY INDEX | 150. | 150. | |
| TOTAL TO PART I, LINE 3 | 24,787. | 24,787. | |

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

| SOURCE | GROSS AMOUNT | CAPITAL GAINS DIVIDENDS | (A) REVENUE PER BOOKS | (B) NET INVEST- MENT INCOME | (C) ADJUSTED NET INCOME |
|--|-----------------|-------------------------------|-----------------------------|-----------------------------------|-------------------------------|
| CREDIT SUISSE 002180 | 35,154. | 0. | 35,154. | 35,154. | |
| CREDIT SUISSE 005704 | 22,628. | 0. | 22,628. | 22,628. | |
| CREDIT SUISSE 578658 | 35,116. | 0. | 35,116. | 35,116. | |
| GOLDMAN SACHS PRIVATE EQUITY PARTNERS III LP | 90. | 0. | 90. | 90. | |
| TO PART I, LINE 4 | 92,988. | 0. | 92,988. | 92,988. | |

FORM 990-PF OTHER INCOME STATEMENT 3

| DESCRIPTION | (A) REVENUE PER BOOKS | (B) NET INVEST- MENT INCOME | (C) ADJUSTED NET INCOME |
|---|-----------------------------|-----------------------------------|-------------------------------|
| GS PRIVATE EQUITY III PORTFOLIO INCOME | 730. | 730. | |
| CS 578658 | 19,687. | 19,687. | |
| TOTAL TO FORM 990-PF, PART I, LINE 11 | 20,417. | 20,417. | |

| FORM 990-PF | LEGAL FEES | | | STATEMENT | 4 |
|----------------------------|------------------------------|-----------------------------------|-------------------------------|-------------------------------|---|
| DESCRIPTION | (A) EXPENSES PER BOOKS | (B) NET INVEST- MENT INCOME | (C) ADJUSTED NET INCOME | (D) CHARITABLE PURPOSES | |
| FAEGRE BAKER DANIELS | 150. | 0. | | 150. | |
| TO FM 990-PF, PG 1, LN 16A | 150. | 0. | | 150. | |

| FORM 990-PF | ACCOUNTING FEES | | | STATEMENT | 5 |
|------------------------------|------------------------------|-----------------------------------|-------------------------------|-------------------------------|---|
| DESCRIPTION | (A) EXPENSES PER BOOKS | (B) NET INVEST- MENT INCOME | (C) ADJUSTED NET INCOME | (D) CHARITABLE PURPOSES | |
| CLIFTONLARSONALLEN LLP | 15,140. | 0. | | 15,140. | |
| TO FORM 990-PF, PG 1, LN 16B | 15,140. | 0. | | 15,140. | |

| FORM 990-PF | OTHER PROFESSIONAL FEES | | | STATEMENT | 6 |
|--|------------------------------|-----------------------------------|-------------------------------|-------------------------------|---|
| DESCRIPTION | (A) EXPENSES PER BOOKS | (B) NET INVEST- MENT INCOME | (C) ADJUSTED NET INCOME | (D) CHARITABLE PURPOSES | |
| CREDIT SUISSE - INVESTMENT MGMT. FEE - 002180 | 3,009. | 3,009. | | 0. | |
| CREDIT SUISSE - INVESTMENT MGMT. FEE - 005704 | 5,680. | 5,680. | | 0. | |
| OFFICE EXPENSES | 98. | 0. | | 98. | |
| TO FORM 990-PF, PG 1, LN 16C | 8,787. | 8,689. | | 98. | |

| | | | |
|-------------|-------|-----------|---|
| FORM 990-PF | TAXES | STATEMENT | 7 |
|-------------|-------|-----------|---|

| DESCRIPTION | (A) EXPENSES PER BOOKS | (B) NET INVEST- MENT INCOME | (C) ADJUSTED NET INCOME | (D) CHARITABLE PURPOSES |
|---|------------------------------|-----------------------------------|-------------------------------|-------------------------------|
| FOREIGN TAXES WITHHELD - CS 005704 | 1,758. | 1,758. | | 0. |
| FOREIGN TAXES WITHHELD - GS PRIVATE EQUITY PARTNERS III | 2. | 2. | | 0. |
| TO FORM 990-PF, PG 1, LN 18 | 1,760. | 1,760. | | 0. |

| | | | |
|-------------|----------------|-----------|---|
| FORM 990-PF | OTHER EXPENSES | STATEMENT | 8 |
|-------------|----------------|-----------|---|

| DESCRIPTION | (A) EXPENSES PER BOOKS | (B) NET INVEST- MENT INCOME | (C) ADJUSTED NET INCOME | (D) CHARITABLE PURPOSES |
|--|------------------------------|-----------------------------------|-------------------------------|-------------------------------|
| PORTFOLIO DEDUCTIONS FROM POWERSHARES DB COMMODITY INDEX TRACKING FUND | 1,724. | 1,724. | | 0. |
| PORTFOLIO DEDUCTIONS FROM GS PRIVATE EQUITY PARTNERS III | 597. | 597. | | 0. |
| TO FORM 990-PF, PG 1, LN 23 | 2,321. | 2,321. | | 0. |

| | | | |
|-------------|--|-----------|---|
| FORM 990-PF | OTHER INCREASES IN NET ASSETS OR FUND BALANCES | STATEMENT | 9 |
|-------------|--|-----------|---|

| DESCRIPTION | AMOUNT |
|--|--------|
| CURRENT YEAR NONDIVIDEND DISTRIBUTIONS | 1,159. |
| TOTAL TO FORM 990-PF, PART III, LINE 3 | 1,159. |

| | | |
|-------------|--|--------------|
| FORM 990-PF | U.S. AND STATE/CITY GOVERNMENT OBLIGATIONS | STATEMENT 10 |
|-------------|--|--------------|

| DESCRIPTION | U.S. GOV'T | OTHER GOV'T | BOOK VALUE | FAIR MARKET VALUE |
|--|---------------|----------------|------------|----------------------|
| U.S. AND STATE OBLIGATIONS | X | | 2,533,890. | 2,739,601. |
| TOTAL U.S. GOVERNMENT OBLIGATIONS | | | 2,533,890. | 2,739,601. |
| TOTAL STATE AND MUNICIPAL GOVERNMENT OBLIGATIONS | | | | |
| TOTAL TO FORM 990-PF, PART II, LINE 10A | | | 2,533,890. | 2,739,601. |

| | | |
|-------------|-----------------|--------------|
| FORM 990-PF | CORPORATE STOCK | STATEMENT 11 |
|-------------|-----------------|--------------|

| DESCRIPTION | BOOK VALUE | FAIR MARKET VALUE |
|---|------------|----------------------|
| CORPORATE STOCK | 701,641. | 1,130,285. |
| TOTAL TO FORM 990-PF, PART II, LINE 10B | 701,641. | 1,130,285. |

| | | |
|-------------|-------------------|--------------|
| FORM 990-PF | OTHER INVESTMENTS | STATEMENT 12 |
|-------------|-------------------|--------------|

| DESCRIPTION | VALUATION METHOD | BOOK VALUE | FAIR MARKET VALUE |
|--|---------------------|------------|----------------------|
| INV. IN GS PRIVATE EQUITY PARTNERS III, LP | COST | 8,944. | 9,084. |
| INV. IN POWERSHARES DB COMMODITY INDEX TRACKING | COST | 0. | 0. |
| TOTAL TO FORM 990-PF, PART II, LINE 13 | | 8,944. | 9,084. |

ADL Charitable Trust -- 2013

| <u>Recipient</u> | <u>Amount</u> | <u>Purpose</u> |
|---|---------------|-------------------------|
| A2 Missionary Fund 1541 Washtenau Avenue Ann Arbor, MI 48104 | \$ 7,000 | General Fund |
| Campus Crusade for Christ International (Keynote) 100 Lake Hart Drive Orlando, FL 32832 | \$ 16,000 | General Fund |
| College Park Church 2606 W. 96th Street Indianapolis, IN 46268 | \$ 50,000 | General Fund |
| Crossroads of America--Boy Scouts of America P. O. Box 1966 Indianapolis, IN 46206-1966 | \$ 108,050 | Eagle Challenge |
| Gleaners Food Bank of Indiana, Inc. 1102 East 16th Street Indianapolis, IN 46202-1944 | \$ 500 | General Fund |
| Habitat For Humanity of Boone Co 3220 S 875 E Zionsville, IN 46077 | \$ 5,100 | Building Project |
| Indianapolis Symphony Orchestra 45 Monument Circle Indianapolis, IN 46204 | \$ 10,000 | General Fund |
| Inner Peace Yoga Center 5038 East 56th Street Indianapolis, IN 46226 | \$ 250 | General Fund |
| Knights of Columbus #12510 c/o Jack Evans 53 Balmoral Court Zionsville, IN 46077 | \$ 100 | General Fund |
| Outreach 2822 E. New York Street Indianapolis, IN 46201 | \$ 12,000 | General Fund |
| Pike Alumni Association 5401 West 71st Street Indianapolis, IN 46268 | \$ 250 | General Fund |
| Riley Children's Foundation 30 S. Meridian Street, Suite 200 Indianapolis, IN 46204-3509 | \$ 1,000 | General Fund |
| Salvation Army PO Box 984 Indianapolis, IN 46206-1966 | \$ 500 | General Fund |
| Shepherd Community Center 4107 East Washington Indianapolis, IN 46201 | \$ 15,000 | General Fund |
| St. Jude Children's Research Hospital PO Box 167 Memphis, TN 38101 | \$ 100 | General Fund |
| St Vincent Foundation 8402 Harcourt Road, Suite 210 Indianapolis, IN 46260 | \$ 2,500 | Philippines Relief Fund |

| | | |
|---|------------|--------------|
| Sycamore School 1750 West 64th Street Indianapolis, IN 46260 | \$ 5,000 | General Fund |
| Telluride Medical Center Foundation P. O. Box 1229 Telluride, CO 81435 | \$ 250 | General Fund |
| Telluride Volunteer Fire Dept P. O. Box 1602 Telluride, CO 81435 | \$ 250 | General Fund |
| Think Forward Foundation 1150 West 116th Street Carmel, IN 46032 | \$ 7,500 | General Fund |
| United Christmas Service P. O. Box 663753 Indianapolis, IN 46266 | \$ 2,500 | General Fund |
| University of San Diego Degheri Alumni Center, Ste 214 5998 Alcala Park San Diego, CA 92110 | \$ 2,500 | General Fund |
| University High School of Indiana, Inc. 2825 West 116th Street Carmel, IN 46032 | \$ 208,500 | Annual Fund |
| Wheeler Mission P. O. Box 817 Indianapolis, IN 46206-0817 | \$ 5,500 | General Fund |

| | |
|--------------|-------------------|
| Total | \$ 460,350 |
|--------------|-------------------|

Recipient's Name and Address:

ADL CHARITABLE TRUST
UAD 12/22/97

Account Number: 2N6-005704

Recipient's Identification
Number: 35-2033079

**2013 TAX and
YEAR-END STATEMENT**
Revised Statement as of 03/14/2014

2013 Form 1099-B

Proceeds From Broker and Barter Exchange Transactions

OMB No. 1545-0715

(For individuals report details on Form 1040 Schedule D Line 1b, 2, 8b or 9)

This is important tax information and is being furnished to the Internal Revenue Service (except as indicated). If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported.

| Disposition Transaction | Disposition Method | Quantity (Box 1e) | Date of Acquisition (Box 1b) | Date of Sale or Exchange (Box 1a) | Gross Proceeds Less Commissions and Option Premiums (Box 2a) | Cost or Other Basis (Box 3) | Adjustments W=Wash Sale Loss (Box 5) O=Option Premium | Realized Gain or (Loss) |
|----------------------------|--------------------|----------------------|------------------------------------|--|---|--------------------------------------|--|-------------------------------|
|----------------------------|--------------------|----------------------|------------------------------------|--|---|--------------------------------------|--|-------------------------------|

Short-Term Transactions for Which Basis Is Reported to the IRS - Report on Form 8949, Part I, with Box A checked.

Covered (Box 6b)

| | | | | | | | | |
|---|--------------------|-----|------------|------------|-----------|-----------|--|------------|
| Description (Box 8): EATON CORP PLC SHS I SIN#IE00B8KQ827 CUSIP: G29183103 | | | | | | | | |
| SELL | VERSUS PURCHASE | 235 | 12/03/2012 | 05/29/2013 | 15,937.81 | 12,134.46 | | 3,803.35 |
| Description (Box 8): ABBOTT LABS COM CUSIP: 002824100 | | | | | | | | |
| SELL | FIRST IN FIRST OUT | 293 | 05/24/2012 | 02/22/2013 | 10,010.96 | 8,770.43 | | 1,240.53 |
| Description (Box 8): CISCO SYSTEMS INC CUSIP: 17275R102 | | | | | | | | |
| SELL | FIRST IN FIRST OUT | 554 | 05/29/2013 | 12/18/2013 | 11,404.53 | 13,290.46 | | (1,885.93) |
| Description (Box 8): VODAFONE GROUP PLC S PON ADR NEW ISIN#US9 2857W2098 CUSIP: 92857W209 | | | | | | | | |
| SELL | FIRST IN FIRST OUT | 672 | 05/29/2013 | 09/19/2013 | 22,584.17 | 19,629.12 | | 2,955.05 |
| Short-Term Covered Total | | | | | 59,937.47 | 53,824.47 | | 6,113.00 |

Reg. # (2N6 4511)

**2013 TAX and
YEAR-END STATEMENT**
Revised Statement as of 03/14/2014

Account Number: 2NG-005704

Recipient's Identification
Number: 35-2033079

Recipient's Name and Address:

ADL CHARITABLE TRUST
UAD 12/22/97

2013 Form 1099-B Proceeds From Broker and Barter Exchange Transactions OMB No. 1545-0715 (Continued)

(For individuals report details on Form 1040 Schedule D Line 1b, 2, 8b or 9)

| Disposition Transaction | Disposition Method | Quantity (Box 1e) | Date of Acquisition (Box 1b) | Date of Sale or Exchange (Box 1a) | Gross Proceeds Less Commissions and Option Premiums (Box 2a) | Cost or Other Basis (Box 3) | Adjustments W=Wash Sale Loss (Box 5) O=Option Premium | Realized Gain or Loss (Loss) |
|----------------------------|--------------------|----------------------|------------------------------------|--|---|--------------------------------------|--|---------------------------------------|
|----------------------------|--------------------|----------------------|------------------------------------|--|---|--------------------------------------|--|---------------------------------------|

Long-Term Transactions for Which Basis Is Reported to the IRS - Report on Form 8949, Part II, with Box D checked.

Covered (Box 6b)

Description (Box 8): OSRAM LIGHT AG NAMEN S AKTIEN O N ISIN#DE 000LED4000 CUSIP: D5963B113

| | | | | | | | | |
|------------------------|--------------------|---------------|----------------|-------------------|---------------|-----------------|--|-----------------|
| REDEMPTION | FIRST IN FIRST OUT | 29.500 | 08/18/2011 | 07/25/2013 | 901.52 | 1,041.87 | | (140.35) |
| REDEMPTION | FIRST IN FIRST OUT | .300 | 01/19/2012 | 07/25/2013 | 9.17 | 10.84 | | (1.47) |
| REDEMPTION | FIRST IN FIRST OUT | 1.100 | 05/24/2012 | 07/25/2013 | 33.61 | 32.57 | | 1.04 |
| SALE DATE TOTAL | | 30.900 | VARIOUS | 07/25/2013 | 944.30 | 1,085.08 | | (140.78) |

Description (Box 8): ABBVIE INC COM CUSIP: 00287Y109

| | | | | | | | | |
|------|--------------------|-----|------------|------------|-----------|----------|--|----------|
| SELL | FIRST IN FIRST OUT | 293 | 05/24/2012 | 05/29/2013 | 13,029.12 | 9,510.77 | | 3,518.35 |
|------|--------------------|-----|------------|------------|-----------|----------|--|----------|

Description (Box 8): ALTRIA GROUP INC COM CUSIP: 02209S103

| | | | | | | | | |
|------|--------------------|-----|------------|------------|-----------|-----------|--|----------|
| SELL | FIRST IN FIRST OUT | 395 | 05/24/2012 | 05/29/2013 | 14,427.57 | 12,690.80 | | 1,736.77 |
|------|--------------------|-----|------------|------------|-----------|-----------|--|----------|

Description (Box 8): BEMIS CO INC COM CUSIP: 081437105

| | | | | | | | | |
|------|--------------------|-----|------------|------------|-----------|----------|--|----------|
| SELL | FIRST IN FIRST OUT | 277 | 05/19/2011 | 05/29/2013 | 10,946.87 | 9,220.56 | | 1,726.31 |
|------|--------------------|-----|------------|------------|-----------|----------|--|----------|

Description (Box 8): CA INC COM CUSIP: 12673P105

| | | | | | | | | |
|------|--------------------|-----|------------|------------|----------|----------|--|--------|
| SELL | FIRST IN FIRST OUT | 219 | 05/24/2012 | 05/29/2013 | 5,976.26 | 5,516.21 | | 460.05 |
|------|--------------------|-----|------------|------------|----------|----------|--|--------|

SELL FIRST IN FIRST OUT

| | | | | | | | | |
|--|--|-----|------------|------------|-----------|----------|--|----------|
| | | 357 | 05/24/2012 | 12/18/2013 | 11,825.32 | 9,244.07 | | 2,581.25 |
|--|--|-----|------------|------------|-----------|----------|--|----------|

SECURITY TOTAL

17,801.58

14,760.28

3,041.30

**2013 TAX and
YEAR-END STATEMENT**
Revised Statement as of 03/14/2014

Account Number: 2N6-005704

Recipient's Identification
Number: 35-2033079

Recipient's Name and Address:

ADL CHARITABLE TRUST
UAD 12/22/97

2013 Form 1099-B Proceeds From Broker and Barter Exchange Transactions OMB No. 1545-0745 (Continued)

(For individuals report details on Form 1040 Schedule D Line 1b; 2, 8b or 9)

| Disposition Transaction | Disposition Method | Quantity (Box 1e) | Date of Acquisition (Box 1b) | Date of Sale or Exchange (Box 1a) | Gross Proceeds Less Commissions and Option Premiums (Box 2a) | Cost or Other Basis (Box 3) | Adjustments W=Wash Sale Loss (Box 5) 0=Option Premium | Realized Gain or Loss |
|----------------------------|--------------------|----------------------|------------------------------------|--|---|--------------------------------------|--|-----------------------------|
|----------------------------|--------------------|----------------------|------------------------------------|--|---|--------------------------------------|--|-----------------------------|

Long-Term Transactions for Which Basis Is Reported to the IRS - Report on Form 8949, Part II, with Box D checked.

Covered (Box 6b) (continued)

| | | | | | | | | |
|--|--------------------|-----|------------|------------|-----------|-----------|--|----------|
| Description (Box 8): CHEVRON CORP NEW COM CUSIP: 166764100 | | | | | | | | |
| SELL | FIRST IN FIRST OUT | 56 | 02/18/2011 | 05/29/2013 | 7,055.33 | 5,484.64 | | 1,570.69 |
| SELL | FIRST IN FIRST OUT | 5 | 05/19/2011 | 05/29/2013 | 629.94 | 515.55 | | 114.39 |
| SELL | FIRST IN FIRST OUT | 70 | 05/24/2012 | 05/29/2013 | 8,819.17 | 6,962.83 | | 1,856.34 |
| SALE DATE TOTAL | | 131 | VARIOUS | 05/29/2013 | 16,504.44 | 12,963.02 | | 3,541.42 |

| | | | | | | | | |
|---|--------------------|-----|------------|------------|-----------|----------|--|----------|
| Description (Box 8): DIAGEO PLC SPONSORED ADR NEW ISIN#US2524 3Q2057 CUSIP: 25243Q205 | | | | | | | | |
| SELL | FIRST IN FIRST OUT | 63 | 02/18/2011 | 05/29/2013 | 7,618.22 | 4,900.02 | | 2,718.20 |
| SELL | FIRST IN FIRST OUT | 48 | 05/24/2012 | 05/29/2013 | 5,804.35 | 4,509.88 | | 1,294.47 |
| SALE DATE TOTAL | | 111 | VARIOUS | 05/29/2013 | 13,422.57 | 9,409.90 | | 4,012.67 |

| | | | | | | | | |
|---|--------------------|-----|------------|------------|----------|----------|--|----------|
| Description (Box 8): ECOPEPETROL S A SPONSO RED ADS ISIN#US27915 81091 CUSIP: 279158109 | | | | | | | | |
| SELL | FIRST IN FIRST OUT | 226 | 05/19/2011 | 12/18/2013 | 8,835.13 | 9,695.40 | | (860.27) |

| | | | | | | | | |
|---|--------------------|-----|------------|------------|-----------|-----------|--|----------|
| Description (Box 8): EMERSON ELEC CO COM CUSIP: 291011104 | | | | | | | | |
| SELL | FIRST IN FIRST OUT | 215 | 01/19/2012 | 05/29/2013 | 12,340.41 | 10,673.69 | | 1,666.72 |
| SELL | FIRST IN FIRST OUT | 1 | 05/24/2012 | 05/29/2013 | 57.40 | 49.79 | | 7.61 |
| Wash sale: 126 day(s) added to holding period | | | | | | | | |
| SALE DATE TOTAL | | 216 | VARIOUS | 05/29/2013 | 12,397.81 | 10,723.48 | | 1,674.33 |

**2013 TAX and
YEAR-END STATEMENT**
Revised Statement as of 03/14/2014

Account Number: 2N6-005704

Recipient's Identification
Number: 35-2033079

Recipient's Name and Address:

ADL CHARITABLE TRUST
UAD 12/22/97

2013 Form 1099-B **Proceeds From Broker and Barter Exchange Transactions** **OMB No. 1545-0715 (Continued)**

(For individuals report details on Form 1040 Schedule D Line 1b, 2, 8b or 9)

| Disposition Transaction | Disposition Method | Quantity (Box 1e) | Date of Acquisition (Box 1b) | Date of Sale or Exchange (Box 1a) | Gross Proceeds Less Commissions and Option Premiums (Box 2a) | Cost or Other Basis (Box 3) | Adjustments W=Wash Sale Loss (Box 5) O=Option Premium (Loss) | Realized Gain or (Loss) |
|----------------------------|--------------------|----------------------|------------------------------------|--|---|--------------------------------------|--|-------------------------------|
|----------------------------|--------------------|----------------------|------------------------------------|--|---|--------------------------------------|--|-------------------------------|

Long-Term Transactions for Which Basis Is Reported to the IRS - Report on Form 8949, Part II, with Box D checked.

Covered (Box 6b) (continued)

| | | | | | | | | |
|--|--------------------|-----|------------|------------|-----------|-----------|--|------------|
| Description (Box 8): GENUINE PARTS CO | | | | | | | | |
| SELL | FIRST IN FIRST OUT | 92 | 05/19/2011 | 05/29/2013 | 7,405.12 | 5,018.44 | | 2,386.68 |
| Description (Box 8): GLAXOSMITHKLINE PLC SPONS ADR | | | | | | | | |
| SELL | FIRST IN FIRST OUT | 447 | 02/18/2011 | 05/29/2013 | 23,459.40 | 17,410.25 | | 6,049.15 |
| SELL | FIRST IN FIRST OUT | 146 | 05/19/2011 | 05/29/2013 | 7,662.36 | 6,330.05 | | 1,332.30 |
| SALE DATE TOTAL | | 593 | VARIOUS | 05/28/2013 | 31,121.76 | 23,740.31 | | 7,381.45 |
| Description (Box 8): HASBRO INC COM | | | | | | | | |
| SELL | FIRST IN FIRST OUT | 453 | 05/24/2012 | 05/29/2013 | 20,781.55 | 15,715.79 | | 5,065.76 |
| Description (Box 8): KIMBERLY CLARK CORP | | | | | | | | |
| SELL | FIRST IN FIRST OUT | 244 | 02/18/2011 | 05/29/2013 | 24,883.14 | 15,986.42 | | 8,896.72 |
| SELL | FIRST IN FIRST OUT | 5 | 05/24/2012 | 05/29/2013 | 509.90 | 395.65 | | 114.25 |
| SALE DATE TOTAL | | 249 | VARIOUS | 05/29/2013 | 25,393.04 | 16,382.07 | | 9,010.97 |
| Description (Box 8): MATTEL INC COM | | | | | | | | |
| SELL | VERSUS PURCHASE | 129 | 02/18/2011 | 05/29/2013 | 5,833.43 | 3,226.12 | | 2,607.31 |
| Description (Box 8): PETROCHINA CO LTD SPONS ADR ISIN#US71646 E1001 | | | | | | | | |
| SELL | FIRST IN FIRST OUT | 50 | 02/18/2011 | 09/19/2013 | 5,742.80 | 6,801.91 | | (1,059.11) |
| SELL | FIRST IN FIRST OUT | 30 | 05/24/2012 | 09/19/2013 | 3,445.68 | 3,894.77 | | (449.09) |

**2013 TAX and
YEAR-END STATEMENT
Revised Statement as of 03/14/2014**

Account Number: 2N6-005704

Recipient's Identification
Number: 35-2033079

Recipient's Name and Address:

ADL CHARITABLE TRUST
UAD 12/22/97

2013 Form 1099-B Proceeds From Broker and Barter Exchange Transactions OMB No. 1545-0715 (Continued)
(For individuals report details on Form 1040 Schedule D Line 1b, 2, 8b or 9)

| Disposition Transaction | Quantity (Box 1e) | Date of Acquisition (Box 1b) | Date of Sale or Exchange (Box 1a) | Gross Proceeds Less Commissions and Option Premiums (Box 2a) | Cost or Other Basis (Box 3) | Adjustments W=Wash Sale Loss (Box 5) 0=Option Premium (Loss) | Realized Gain or (Loss) |
|----------------------------|----------------------|------------------------------------|--|---|--------------------------------------|--|-------------------------------|
|----------------------------|----------------------|------------------------------------|--|---|--------------------------------------|--|-------------------------------|

Long-Term Transactions for Which Basis Is Reported to the IRS - Report on Form 8949, Part II, with Box D checked.

Covered (Box 6b) (continued)

| | | | | | | | |
|--|------------------------------|---------|------------|------------|------------|--|------------|
| Description (Box 8): PETROCHINA CO LTD SPONS ADR ISIN#US1646 E1001 | CUSIP: 71646E100 (continued) | | | | | | |
| SALE DATE TOTAL | 80 | VARIOUS | 09/19/2013 | 9,188.48 | 10,696.68 | | (1,508.20) |
| Long-Term Covered Total | | | | 208,032.77 | 164,838.70 | | 43,194.07 |
| Covered Total | | | | 267,970.24 | 218,663.17 | | 49,307.07 |
| Total | | | | 267,970.24 | 218,663.17 | | 49,307.07 |

IRS Form 1099-B - Proceeds from Broker and Barter Exchange Transactions

The amounts in this section of your tax information statement reflect proceeds from securities transactions such as sales, redemptions, tender offers, return of principal distributions, the option premium portion of reverse convertibles and bond maturities. Short-term and long-term transactions are segregated in your 1099-B form in a format comparable to IRS Form 8949, for dispositions of covered and noncovered securities. Since your financial organization subscribes to our premium tax and Year-End Statement, the date of acquisition, cost or other basis, type of gain or loss (long-term or short-term) and whether any loss is disallowed due to a wash sale for both covered and noncovered securities transactions will be displayed when available. Please note that such detail for noncovered transactions is not reported to the IRS.

Type of Gain or Loss (Box 1a). The section headings within the 1099-B indicate the type of gain or (loss) for the transactions: short-term or long-term.

Covered (b) or Noncovered (a) Security (Box 6b). The section headings within the 1099-B indicate whether your security transaction is or is not a covered security under the IRS cost basis reporting program.

CUSIP. Broker transactions may show the Committee on Uniform Security Identification Procedures (CUSIP) number of the item reported.

Disposition Method. This column will denote the type of transaction, for example "SELL."

Disposition Method. The method used to select the lot will be displayed as, for example, first-in first-out (FIFO). Please refer to the Client Service Information Section in your brokerage account statement for your account's existing tax-lot disposition method.

Quantity (Box 1e). The number of shares included in the sale or exchange for the lot reported. If fractional shares are part of the disposition, those shares will be displayed to three decimal places.

Date of Acquisition (Box 1b). This box represents the date you acquired the security or, for short sales, the date you opened the short sale. You may see the word "VARIOUS" displayed in this column if the disposition transaction includes multiple lots with various acquisition dates.

Date of Sale or Exchange (Box 1a). This box shows the trade date of the sale or exchange. For short sales, the date shown is the date you closed the short sale.

Gross Proceeds (Less Commissions and Option Premiums) (Box 2a). Gross proceeds from transactions involving stocks, bonds and other debt obligations are reported in Box 2a. These amounts do not reflect net profits and are net of transaction costs (for instance, commissions and option premiums). Report the gross proceeds from each transaction separately on IRS Form 8949 (Sales and Other Dispositions of Capital Assets) and IRS Form 7040, Schedule D (Capital Gains and Losses). See the Instructions for Form 8949 for exceptions to reporting each transaction on a separate row. This box does not include proceeds from regulated futures or foreign currency forward contracts.

Cost or Other Basis (Box 3). This box shows the original cost, adjusted cost basis due to a corporate action or gifted or inherited cost basis. The IRS provides a detailed description of cost or other basis reporting in the 2013 Instructions for Form 1099-B available at irs.gov. For additional information about cost basis and its use during your tax preparation, please refer to the following IRS publications: IRS Instructions for Schedule D and Form 8949, IRS Pub. 550 (Investment Income and Expenses (Including Capital Gains and Losses)) and IRS Pub. 551 (Basis of Assets). Average cost is segregated between covered, non-covered and gifted (see the Tax Guide at mytaxhandbook.com for more specific details).

Adjustments: This column may display the following:

W=Wash Sale Loss Disallowed (Box 5). An adjustment code (W) will be displayed next to an amount for a disallowed wash sale loss within the Adjustments column. This loss is being reported as disallowed because the sale of the covered security has been treated as a broker wash sale. This occurs when you re-purchase the identical security, as determined by CUSIP number, in the same brokerage account within the 30-day period preceding or following the date of the original loss. The wash sale loss is reported as a positive amount as required by the IRS.

Application for Extension of Time To File an Exempt Organization Return

OMB No. 1545-1709

Department of the Treasury
Internal Revenue Service

► File a separate application for each return.

► Information about Form 8868 and its instructions is at www.irs.gov/form8868.

- If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** and check this box ☒
- If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only **Part II** (on page 2 of this form).

Do not complete Part II unless you have already been granted an automatic 3-month extension on a previously filed Form 8868.

Electronic filing (e-file). You can electronically file Form 8868 if you need a 3-month automatic extension of time to file (6 months for a corporation required to file Form 990-T), or an additional (not automatic) 3-month extension of time. You can electronically file Form 8868 to request an extension of time to file any of the forms listed in Part I or Part II with the exception of Form 8870, Information Return for Transfers Associated With Certain Personal Benefit Contracts, which must be sent to the IRS in paper format (see instructions). For more details on the electronic filing of this form, visit www.irs.gov/efile and click on *e-file for Charities & Nonprofits*.

Part I Automatic 3-Month Extension of Time. Only submit original (no copies needed).

A corporation required to file Form 990-T and requesting an automatic 6-month extension - check this box and complete

Part I only ☐

All other corporations (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns.

| Type or print | Name of exempt organization or other filer, see instructions. | Enter filer's identifying number |
|--|--|---|
| | ADL CHARITABLE TRUST | Employer identification number (EIN) or |
| | | 35-2033079 |
| File by the due date for filing your return. See instructions. | Number, street, and room or suite no. If a P.O. box, see instructions. | Social security number (SSN) |
| | 9400 HUNT CLUB ROAD | |
| | City, town or post office, state, and ZIP code. For a foreign address, see instructions. | |
| | ZIONSVILLE, IN 46077 | |

Enter the Return code for the return that this application is for (file a separate application for each return)

| Application Is For | Return Code | Application Is For | Return Code |
|--|-------------|-----------------------------------|-------------|
| Form 990 or Form 990-EZ | 01 | Form 990-T (corporation) | 07 |
| Form 990-BL | 02 | Form 1041-A | 08 |
| Form 4720 (individual) | 03 | Form 4720 (other than individual) | 09 |
| Form 990-PF | 04 | Form 5227 | 10 |
| Form 990-T (sec. 401(a) or 408(a) trust) | 05 | Form 6069 | 11 |
| Form 990-T (trust other than above) | 06 | Form 8870 | 12 |

ALEXANDER C. LANGE

- The books are in the care of ► **9400 HUNT CLUB ROAD - ZIONSVILLE, IN 46077**

Telephone No. ► **(317) 870-2425**

Fax No. ►

- If the organization does not have an office or place of business in the United States, check this box ☐

- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) . If this is for the whole group, check this box ☐. If it is for part of the group, check this box ☐ and attach a list with the names and EINs of all members the extension is for.

- 1 I request an automatic 3-month (6 months for a corporation required to file Form 990-T) extension of time until **AUGUST 15, 2014**, to file the exempt organization return for the organization named above. The extension is for the organization's return for
- ☒ calendar year **2013** or
- ☐ tax year beginning _____, and ending _____

- 2 If the tax year entered in line 1 is for less than 12 months, check reason: ☐ Initial return ☐ Final return
- ☐ Change in accounting period

| | | | |
|--|----|----|---------------|
| 3a If this application is for Forms 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions. | 3a | \$ | 4,632. |
| b If this application is for Forms 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit. | 3b | \$ | 2,632. |
| c Balance due. Subtract line 3b from line 3a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions. | 3c | \$ | 2,000. |

Caution. If you are going to make an electronic funds withdrawal (direct debit) with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions.

- If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only Part II and check this box ☒ **X**
- Note. Only complete Part II if you have already been granted an automatic 3-month extension on a previously filed Form 8868.
- If you are filing for an **Automatic 3-Month Extension**, complete only Part I (on page 1).

Part II Additional (Not Automatic) 3-Month Extension of Time. Only file the original (no copies needed).

| Enter filer's identifying number, see instructions | |
|--|---|
| Type or print Name of exempt organization or other filer, see instructions | Employer identification number (EIN) or |
| ADL CHARITABLE TRUST | 35-2033079 |
| File by the due date for filing your return. See instructions. Number, street, and room or suite no. If a P.O. box, see instructions. | Social security number (SSN) |
| 9400 HUNT CLUB ROAD | |
| City, town or post office, state, and ZIP code. For a foreign address, see instructions. | |
| ZIONSVILLE, IN 46077 | |

Enter the Return code for the return that this application is for (file a separate application for each return)

| Application Is For | Return Code | Application Is For | Return Code |
|--|-------------|-----------------------------------|-------------|
| Form 990 or Form 990-EZ | 01 | | |
| Form 990-BL | 02 | Form 1041-A | 08 |
| Form 4720 (individual) | 03 | Form 4720 (other than individual) | 09 |
| Form 990-PF | 04 | Form 5227 | 10 |
| Form 990-T (sec. 401(a) or 408(a) trust) | 05 | Form 6069 | 11 |
| Form 990-T (trust other than above) | 06 | Form 8870 | 12 |

STOP! Do not complete Part II if you were not already granted an automatic 3-month extension on a previously filed Form 8868.

ALEXANDER C. LANGE

- The books are in the care of ☒ 9400 HUNT CLUB ROAD - ZIONSVILLE, IN 46077

Telephone No. ☒ (317) 870-2425Fax No. ☐

- If the organization does not have an office or place of business in the United States, check this box ☐
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) . If this is for the whole group, check this box ☐. If it is for part of the group, check this box ☐ and attach a list with the names and EINs of all members the extension is for

4 I request an additional 3-month extension of time until NOVEMBER 15, 2014.5 For calendar year 2013, or other tax year beginning , and ending .6 If the tax year entered in line 5 is for less than 12 months, check reason: ☐ Initial return ☐ Final return
☐ Change in accounting period

7 State in detail why you need the extension

ADDITIONAL TIME IS NEEDED TO GATHER THE INFORMATION NECESSARY TO FILE A COMPLETE AND ACCURATE RETURN.

| | | | |
|--|----|----|--------|
| 8a If this application is for Forms 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions. | 8a | \$ | 2,632. |
| b If this application is for Forms 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit and any amount paid previously with Form 8868. | 8b | \$ | 2,632. |
| c Balance due. Subtract line 8b from line 8a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions. | 8c | \$ | 0. |

Signature and Verification must be completed for Part II only.

Under penalties of perjury, I declare that I have examined this form, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete, and that I am authorized to prepare this form.

Signature ☒ Kathleen Howard Title ☒ CPA Date ☒ 8/14/14

Form 8868 (Rev. 1-2014)