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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>THE MACDOUGAL FAMILY FOUNDATION</b>		A Employer identification number <b>36-4145290</b>
Number and street (or P O box number if mail is not delivered to street address) <b>505 N LAKE SHORE DRIVE</b>		B Telephone number (see instructions) <b>312-822-0365</b>
City or town, state or province, country, and ZIP or foreign postal code <b>CHICAGO IL 60611</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"/> 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) ► \$ <b>1,554,425</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, column (d) must be on cash basis)		

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
<b>Revenue</b>	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 Dividends and interest from securities	27,749	27,749		
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	13,649			
	b Gross sales price for all assets on line 6a <b>62,883</b>				
	7 Capital gain net income (from Part IV, line 2)		13,649		
	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	41,398	41,398	0		
<b>Operating and Administrative Expenses</b>	13 Compensation of officers, directors, trustees, etc	0			
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule) <b>STMT 1</b>	975	975		
	c Other professional fees (attach schedule)				
	17 Interest				
	18 Taxes (attach schedule) (see instructions) <b>STMT 2</b>	298	298		
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (att. sch) <b>STMT 3</b>	45	20		
	24 Total operating and administrative expenses. Add lines 13 through 23	1,318	1,293	0	0
	25 Contributions, gifts, grants paid	68,259			68,259
26 Total expenses and disbursements. Add lines 24 and 25	69,577	1,293	0	68,259	
27 Subtract line 26 from line 12					
a Excess of revenue over expenses and disbursements	-28,179				
b Net investment income (if negative, enter -0-)		40,105			
c Adjusted net income (if negative, enter -0-)			0		

For Paperwork Reduction Act Notice, see instructions.

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<b>Part II Balance Sheets</b>		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value		
<b>Assets</b>	1 Cash – non-interest-bearing			32,512	25,833	25,833
	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)					
	b Investments – corporate stock (attach schedule) <b>SEE STMT 4</b>			1,060,609	1,039,113	1,528,592
	c Investments – corporate bonds (attach schedule)					
	11 Investments – land, buildings, and equipment basis ▶ Less accumulated depreciation (attach sch) ▶					
	12 Investments – mortgage loans					
	13 Investments – other (attach schedule)					
	14 Land, buildings, and equipment basis ▶ Less accumulated depreciation (attach sch) ▶					
	15 Other assets (describe ▶)	)				
	16 <b>Total assets</b> (to be completed by all filers – see the instructions Also, see page 1, item I)			1,093,121	1,064,946	1,554,425
<b>Liabilities</b>	17 Accounts payable and accrued expenses					
	18 Grants payable					
	19 Deferred revenue					
	20 Loans from officers, directors, trustees, and other disqualified persons					
	21 Mortgages and other notes payable (attach schedule)					
	22 Other liabilities (describe ▶)	)				
	23 <b>Total liabilities</b> (add lines 17 through 22)			0	0	
<b>Net Assets or Fund Balances</b>	<b>Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31.</b> ▶ <input checked="" type="checkbox"/>					
	24 Unrestricted			1,093,121	1,064,946	
	25 Temporarily restricted					
	26 Permanently restricted					
	<b>Foundations that do not follow SFAS 117, check here and complete lines 27 through 31.</b> ▶ <input type="checkbox"/>					
	27 Capital stock, trust principal, or current funds					
	28 Paid-in or capital surplus, or land, bldg, and equipment fund					
	29 Retained earnings, accumulated income, endowment, or other funds					
	30 <b>Total net assets or fund balances</b> (see instructions)			1,093,121	1,064,946	
	31 <b>Total liabilities and net assets/fund balances</b> (see instructions)			1,093,121	1,064,946	

**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	1,093,121
2 Enter amount from Part I, line 27a	2	-28,179
3 Other increases not included in line 2 (itemize) ▶ <b>SEE STATEMENT 5</b>	3	4
4 Add lines 1, 2, and 3	4	1,064,946
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	1,064,946

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**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</b>	<b>345 SHARES VANGUARD 500 INDEX FUND</b>	<b>P</b>	<b>10/27/06</b>	<b>08/05/13</b>
<b>b</b>	<b>50 SHARES SPDR S&amp;P 500</b>	<b>P</b>	<b>06/13/05</b>	<b>08/05/13</b>
<b>c</b>				
<b>d</b>				
<b>e</b>				

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
<b>a</b> 54,362		43,202	11,160
<b>b</b> 8,521		6,032	2,489
<b>c</b>			
<b>d</b>			
<b>e</b>			

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

(i) 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>			11,160
<b>b</b>			2,489
<b>c</b>			
<b>d</b>			
<b>e</b>			

**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****13,649****3** Net short-term capital gain or (loss) as defined in sections 1222(5) and (6)

If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in  
Part I, line 8

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

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

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

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

☐ Yes ☒ No

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

**1** Enter the appropriate amount in each column for each year, see 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	71,171	1,213,724	0.058639
2011	57,332	1,180,695	0.048558
2010	58,006	1,076,143	0.053902
2009	49,640	1,213,566	0.040904
2008	69,228	1,248,724	0.055439

**2** Total of line 1, column (d)**2****0.257442****3** Average distribution ratio for the 5-year base period – divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years**3****0.051488****4** Enter the net value of noncharitable-use assets for 2013 from Part X, line 5**4****1,394,433****5** Multiply line 4 by line 3**5****71,797****6** Enter 1% of net investment income (1% of Part I, line 27b)**6****401****7** Add lines 5 and 6**7****72,198****8** Enter qualifying distributions from Part XII, line 4**8****68,259**

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)**

<b>1a</b>	Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1 Date of ruling or determination letter (attach copy of letter if necessary—see instructions)		
<b>b</b>	Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b	<b>1</b>	<b>802</b>
<b>c</b>	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col (b)		
<b>2</b>	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	<b>2</b>	<b>0</b>
<b>3</b>	Add lines 1 and 2	<b>3</b>	<b>802</b>
<b>4</b>	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	<b>4</b>	<b>0</b>
<b>5</b>	<b>Tax based on investment income.</b> Subtract line 4 from line 3. If zero or less, enter -0-	<b>5</b>	<b>802</b>
<b>6</b>	<b>Credits/Payments</b>		
<b>a</b>	2013 estimated tax payments and 2012 overpayment credited to 2013	<b>6a</b>	
<b>b</b>	Exempt foreign organizations – tax withheld at source	<b>6b</b>	
<b>c</b>	Tax paid with application for extension of time to file (Form 8868)	<b>6c</b>	
<b>d</b>	Backup withholding erroneously withheld	<b>6d</b>	
<b>7</b>	Total credits and payments. Add lines 6a through 6d	<b>7</b>	
<b>8</b>	Enter any <b>penalty</b> for underpayment of estimated tax. Check here <input checked="" type="checkbox"/> if Form 2220 is attached	<b>8</b>	<b>6</b>
<b>9</b>	<b>Tax due.</b> If the total of lines 5 and 8 is more than line 7, enter <b>amount owed</b>	<b>9</b>	<b>808</b>
<b>10</b>	<b>Overpayment.</b> If line 7 is more than the total of lines 5 and 8, enter the <b>amount overpaid</b>	<b>10</b>	
<b>11</b>	Enter the amount of line 10 to be <b>Credited to 2014 estimated tax</b> <input type="checkbox"/> <b>Refunded</b> <input type="checkbox"/>	<b>11</b>	

**Part VII-A Statements Regarding Activities**

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

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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>CHARLENE GEHM MACDOUGAL</b> <b>505 N LAKE SHORE DRIVE</b> Located at ► <b>CHICAGO</b> IL ZIP+4 ► <b>60611</b> Telephone no ► <b>312-822-0365</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 ► <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? <b>X</b>	4a	
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2013? <b>N/A</b>	4b	

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**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)? **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

**b** Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? **6b** ☒

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 (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
CHARLENE GEHM MACDOUGAL 505 N LAKE SHORE DRIVE, APT 3611 CHICAGO IL 60611	PRESIDENT 1.00	0	0	0
GARY MACDOUGAL 505 N LAKE SHORE DRIVE, APT 3611 CHICAGO IL 60611	CHAIRMAN 0.50	0	0	0
GARY MACDOUGAL, JR 268 LAUREL AVENUE HIGHLAND PARK IL 60035	VP-SECRETARY 0.50	0	0	0
MICHAEL MACDOUGAL 951 OAK KNOLL DRIVE LAKE FOREST IL 60045	VP-TREASURER 0.50	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**

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(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 N/A</b>	
<b>2</b>	
<b>3</b>	
<b>4</b>	

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

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

	Amount
<b>1 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>	

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

<b>1</b>	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
<b>a</b>	Average monthly fair market value of securities	<b>1a</b>	<b>1,389,748</b>
<b>b</b>	Average of monthly cash balances	<b>1b</b>	<b>25,920</b>
<b>c</b>	Fair market value of all other assets (see instructions)	<b>1c</b>	<b>0</b>
<b>d</b>	<b>Total</b> (add lines 1a, b, and c)	<b>1d</b>	<b>1,415,668</b>
<b>e</b>	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	<b>1e</b>	<b>0</b>
<b>2</b>	Acquisition indebtedness applicable to line 1 assets	<b>2</b>	<b>0</b>
<b>3</b>	Subtract line 2 from line 1d	<b>3</b>	<b>1,415,668</b>
<b>4</b>	Cash deemed held for charitable activities. Enter 1½% of line 3 (for greater amount, see instructions)	<b>4</b>	<b>21,235</b>
<b>5</b>	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. Enter here and on Part V, line 4	<b>5</b>	<b>1,394,433</b>
<b>6</b>	<b>Minimum investment return.</b> Enter 5% of line 5	<b>6</b>	<b>69,722</b>

**Part XI Distributable Amount** (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ☐ and do not complete this part.)

<b>1</b>	Minimum investment return from Part X, line 6	<b>1</b>	<b>69,722</b>
<b>2a</b>	Tax on investment income for 2013 from Part VI, line 5	<b>2a</b>	<b>802</b>
<b>b</b>	Income tax for 2013 (This does not include the tax from Part VI)	<b>2b</b>	
<b>c</b>	Add lines 2a and 2b	<b>2c</b>	<b>802</b>
<b>3</b>	Distributable amount before adjustments. Subtract line 2c from line 1	<b>3</b>	<b>68,920</b>
<b>4</b>	Recoveries of amounts treated as qualifying distributions	<b>4</b>	
<b>5</b>	Add lines 3 and 4	<b>5</b>	<b>68,920</b>
<b>6</b>	Deduction from distributable amount (see instructions)	<b>6</b>	
<b>7</b>	<b>Distributable amount as adjusted.</b> Subtract line 6 from line 5. Enter here and on Part XIII, line 1	<b>7</b>	<b>68,920</b>

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

<b>1</b>	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
<b>a</b>	Expenses, contributions, gifts, etc. – total from Part I, column (d), line 26	<b>1a</b>	<b>68,259</b>
<b>b</b>	Program-related investments – total from Part IX-B	<b>1b</b>	
<b>2</b>	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	<b>2</b>	
<b>3</b>	Amounts set aside for specific charitable projects that satisfy the:		
<b>a</b>	Suitability test (prior IRS approval required)	<b>3a</b>	
<b>b</b>	Cash distribution test (attach the required schedule)	<b>3b</b>	
<b>4</b>	<b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	<b>4</b>	<b>68,259</b>
<b>5</b>	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b (see instructions)	<b>5</b>	<b>0</b>
<b>6</b>	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4	<b>6</b>	<b>68,259</b>

**Note.** The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years.

**Part XIII Undistributed Income** (see instructions)

	(a) Corpus	(b) Years prior to 2012	(c) 2012	(d) 2013
<b>1</b> Distributable amount for 2013 from Part XI, line 7				<b>68,920</b>
<b>2</b> Undistributed income, if any, as of the end of 2013				
<b>a</b> Enter amount for 2012 only				
<b>b</b> Total for prior years 20____, 20____, 20____				
<b>3</b> Excess distributions carryover, if any, to 2013				
<b>a</b> From 2008				<b>7,446</b>
<b>b</b> From 2009				<b>1,138</b>
<b>c</b> From 2010				
<b>d</b> From 2011				
<b>e</b> From 2012				<b>11,081</b>
<b>f</b> Total of lines 3a through e	<b>19,665</b>			
<b>4</b> Qualifying distributions for 2013 from Part XII, line 4 ▶ \$ <b>68,259</b>				
<b>a</b> Applied to 2012, but not more than line 2a				
<b>b</b> Applied to undistributed income of prior years (Election required – see instructions)				
<b>c</b> Treated as distributions out of corpus (Election required – see instructions)				
<b>d</b> Applied to 2013 distributable amount				<b>68,259</b>
<b>e</b> Remaining amount distributed out of corpus				
<b>5</b> Excess distributions carryover applied to 2013 (If an amount appears in column (d), the same amount must be shown in column (a) )	<b>661</b>			<b>661</b>
<b>6</b> Enter the net total of each column as indicated below:				
<b>a</b> Corpus Add lines 3f, 4c, and 4e Subtract line 5	<b>19,004</b>			
<b>b</b> Prior years' undistributed income Subtract line 4b from line 2b				
<b>c</b> Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed				
<b>d</b> Subtract line 6c from line 6b Taxable amount – see instructions				
<b>e</b> Undistributed income for 2012 Subtract line 4a from line 2a Taxable amount – see instructions				
<b>f</b> Undistributed income for 2013 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2014				<b>0</b>
<b>7</b> Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions)				
<b>8</b> Excess distributions carryover from 2008 not applied on line 5 or line 7 (see instructions)	<b>6,785</b>			
<b>9</b> Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a	<b>12,219</b>			
<b>10</b> Analysis of line 9				
<b>a</b> Excess from 2009				<b>1,138</b>
<b>b</b> Excess from 2010				
<b>c</b> Excess from 2011				
<b>d</b> Excess from 2012				<b>11,081</b>
<b>e</b> Excess from 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)				
<b>a</b> Paid during the year <b>SEE STATEMENT 6</b>				<b>68,259</b>
<b>Total</b>			<b>▶ 3a</b>	<b>68,259</b>
<b>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					
4	Dividends and interest from securities			14	27,749	
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			18	13,649	
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		41,398	0
13	Total. Add line 12, columns (b), (d), and (e)				13 41,398	41,398

(See worksheet in line 13 instructions to verify calculations )

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

[illegible]

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## Federal Statements

Statement 1 - Form 990-PF, Part I, Line 16b - Accounting Fees

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
ACCOUNTING	\$ 975	\$ 975	\$	\$
TOTAL	\$ 975	\$ 975	\$ 0	\$ 0

Statement 2 - Form 990-PF, Part I, Line 18 - Taxes

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
FEDERAL EXCISE TAX	\$ 298	\$ 298	\$	\$
TOTAL	\$ 298	\$ 298	\$ 0	\$ 0

Statement 3 - Form 990-PF, Part I, Line 23 - Other Expenses

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
EXPENSES	\$	\$	\$	\$
ANNUAL REPORT FEE	10			
IL FILING FEE	15			
BANK FEE - EARLY WITHDRAWAL	20	20		
TOTAL	\$ 45	\$ 20	\$ 0	\$ 0

## Federal Statements

### Statement 4 - Form 990-PF, Part II, Line 10b - Corporate Stock Investments

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
SCHWAB S&P 500	\$ 181,720	\$ 186,027	COST	\$ 115,551
SPDR TRUST	752,652	767,619	COST	1,150,744
VANGUARD 500 INDEX FUND	126,237	85,467	COST	262,297
TOTAL	\$ 1,060,609	\$ 1,039,113		\$ 1,528,592



**Statement 5 - Form 990-PF, Part III, Line 3 - Other Increases**

Description	Amount
ROUNDING	\$ 4
TOTAL	\$ 4

## Federal Statements

**Statement 6 - Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the Year**

Name		Address			Purpose	Amount
Address	Relationship	Status				
ABRAHAM LINCOLN PRESIDENTIAL LIBRARY	500 E MADISON ST., STE 20	GENERAL	OPERATION	SUPPORT	1,000	
SPRINGFIELD IL 62701	NONE	501C3				
ALEX FUND	211 W 106 ST, #4A	GENERAL	OPERATION	SUPPORT	5,000	
NEW YORK NY 10025	NONE	501C3				
AMERICAN BALLET THEATRE	50 E CONGRESS PKWY	GENERAL	OPERATION	SUPPORT	300	
CHICAGO IL 60605	NONE	501C3				
AMERICAN ENTERPRISE INSTITUTE	1150 SEVENTEENTH STREET	GENERAL	OPERATION	SUPPORT	1,000	
WASHINGTON DC 20036	NONE	501C3				
AMERICAN MUSEUM OF NATURAL HISTORY	79TH CENTRAL PARK WEST	GENERAL	OPERATION	SUPPORT	125	
NEW YORK NY 10024	NONE	501C3				
BETTER GOVERNMENT ASSOCIATION	223 W JACKSON BLVD, #900	GENERAL	OPERATION	SUPPORT	1,300	
CHICAGO IL 60606	NONE	501C3				
CENTRAL PARK CONSERVANCY	14 E 60TH STREET	GENERAL	OPERATION	SUPPORT	7,500	
NEW YORK NY 10022	NONE	501C3				
CHICAGO LYRIC OPERA	20 N WACKER DRIVE	GENERAL	OPERATION	SUPPORT	1,000	
CHICAGO IL 60606	NONE	501C3				
CHICAGO SHAKESPEARE	800 E GRAND AVENUE	GENERAL	OPERATION	SUPPORT	1,000	
CHICAGO IL 60611	NONE	501C3				
CHICAGO SYMPHONY ORCHESTRA	220 S MICHIGAN AVE	GENERAL	OPERATION	SUPPORT	1,000	
CHICAGO IL 60604	NONE	501C3				
CHURCH OF THE ASCENSION - CHICAGO	1133 N LASALLE BLVD	GENERAL	OPERATION	SUPPORT	1,000	
CHICAGO IL 60610	NONE	501C3				
COUNCIL ON FOREIGN RELATIONS	58 EAST 68TH STREET	GENERAL	OPERATION	SUPPORT	1,000	
NEW YORK NY 10065	NONE	501C3				
COURT THEATRE	5535 S ELLIS AVE	GENERAL	OPERATION	SUPPORT	3,000	
CHICAGO IL 60637	NONE	501C3				
E.G.R NEW	2915 HALL STREET SE	GENERAL	OPERATION	SUPPORT	500	
EAST GRAND RAPIDS MI 4950	NONE	501C3				
EDUCATION THRU MUSIC	122 EAST 42ND STREET, #15	GENERAL	OPERATION	SUPPORT	250	
NEW YORK NY 10168	NONE	501C3				
FAMILY FUTURES	678 FRONT AVE NW #210	GENERAL	OPERATION	SUPPORT	500	
GRAND RAPIDS MI 49504	NONE	501C3				
FIRST PRESBYTERIAN CHURCH OF LAKE F	700 N SHERIDAN ROAD	GENERAL	OPERATION	SUPPORT	500	
LAKE FOREST IL 60045	NONE	501C3				

## Federal Statements

**Statement 6 - Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the  
Year (continued)**

Name		Address		Relationship	Status	Purpose	Amount
Address							
FRIENDS OF ST BARTH'S CHURCH FAIR HAVEN NJ 07704	NONE	PO BOX 6199	501C3			GENERAL OPERATION SUPPORT	300
FRIENDS OF THE PARKS CHICAGO CHICAGO IL 60602	NONE	17 N STATE STREET # 1450	501C3			GENERAL OPERATION SUPPORT	200
GABRIEL NETWORK BOWIE MD 20718	NONE	PO BOX 2116	501C3			GENERAL OPERATION SUPPORT	1,000
GORTON COMMUNITY CENTER LAKE FOREST IL 60045	NONE	400 E ILLINOIS ROAD	501C3			GENERAL OPERATION SUPPORT	500
GRANT PARK MUSIC FEST CHICAGO IL 60601	NONE	205 EAST RANDOLPH ST	501C3			GENERAL OPERATION SUPPORT	75
HARVARD CLUB OF CHICAGO KENILWORTH IL 60043	NONE	PO BOX 350	501C3			GENERAL OPERATION SUPPORT	275
HEARTLAND INSTITUTE CHICAGO IL 60606	NONE	ONE S WACKER DRIVE	501C3			GENERAL OPERATION SUPPORT	5,000
HILLSDALE COLLEGE HILLSIDE MI 49242	NONE	33 E COLLEGE ST	501C3			GENERAL OPERATION SUPPORT	250
ILLINOIS POLICY INSTITUTE CHICAGO IL 60603	NONE	190 S LASALLE ST	501C3			GENERAL OPERATION SUPPORT	10,000
IRISH REPERTORY THEATRE NEW YORK NY 10011	NONE	132 W 22ND ST #2	501C3			GENERAL OPERATION SUPPORT	1,000
JESUIT INTERNATIONAL MISSIONS CHICAGO IL 60614	NONE	2050 N CLARK STREET	501C3			GENERAL OPERATION SUPPORT	2,500
LAKE FOREST OPEN LAND LAKE FOREST IL 60045	NONE	350 N WAUKEGAN ROAD	501C3			GENERAL OPERATION SUPPORT	535
LANDMARK WEST NEW YORK NY 10023	NONE	45 W 67TH ST #1	501C3			GENERAL OPERATION SUPPORT	75
LINCOLN PARK ZOO CHICAGO IL 60614	NONE	2001 N CLARK ST	501C3			GENERAL OPERATION SUPPORT	175
LONDON CENTER FOR PUBLIC POLICY NEW YORK NY 10004	NONE	10 WEST STREET	501C3			GENERAL OPERATION SUPPORT	2,500
MANHATTAN INSTITUTE NEW YORK NY 10017	NONE	52 VANDERBILT AVE #201	501C3			GENERAL OPERATION SUPPORT	1,000
MINT THEATRE CO. NEW YORK NY 10036	NONE	311 W 43RD STREET	501C3			GENERAL OPERATION SUPPORT	1,000

## Federal Statements

## Statement 6 - Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the Year (continued)

Name		Address		Relationship	Status	Purpose		Amount
Address								
MUSEUM OF SCIENCE AND INDUSTRY CHICAGO IL 60637	NONE	5700 S LAKE SHORE DRIVE 501C3	GENERAL OPERATION SUPPORT				250	
NATIONAL APHASIA ASSOCIATION NEW YORK NY 10001	NONE	350 SEVENTH AVENUE, STE 9 501C3	GENERAL OPERATION SUPPORT				250	
NEW ALTERNATIVES FOR CHILDREN NEW YORK NY 10010	NONE	37 W 26TH ST #6 501C3	GENERAL OPERATION SUPPORT				1,000	
NEW YORK CITY BALLET NEW YORK NY 10023	NONE	20 LINCOLN CENTER 501C3	GENERAL OPERATION SUPPORT				1,000	
NEW YORK PHILHARMONIC ORCHESTRA NEW YORK NY 10023	NONE	10 LINCOLN CENTER PLAZA 501C3	GENERAL OPERATION SUPPORT				450	
NEW YORK PUBLIC RADIO NEW YORK NY 10013	NONE	160 VARICK ST 501C3	GENERAL OPERATION SUPPORT				500	
SAGAMORE INSTITUTE INDIANAPOLIS IN 46205	NONE	2902 N MERIDIAN ST 501C3	GENERAL OPERATION SUPPORT				500	
SALVATION ARMY ALEXANDRIA VA 22313	NONE	615 SLATERS LANE 501C3	GENERAL OPERATION SUPPORT				250	
SHEDD AQUARIAN CHICAGO IL 60605	NONE	1200 S LAKE SHORE DR 501C3	GENERAL OPERATION SUPPORT				149	
SOAR CHICAGO IL 60611	NONE	244 EAST PEARSON ST #102 501C3	GENERAL OPERATION SUPPORT				150	
SPIRIT OF '67 FOUNDATION LAKE FOREST IL 60045	NONE	300 S WAUKEGAN RD 501C3	GENERAL OPERATION SUPPORT				1,000	
ST THOMAS CHURCH NEW YORK NY 10019	NONE	1 WEST 53RD STREET 501C3	GENERAL OPERATION SUPPORT				600	
TEXAS BALLET THEATRE FT. WORTH TX 76116	NONE	1540 MALL CIRCLE 501C3	GENERAL OPERATION SUPPORT				250	
THE AUTHOR'S GUILD FOUNDATION NEW YORK NY 10016	NONE	31 EAST 32ND STREET, 7TH 501C3	GENERAL OPERATION SUPPORT				500	
THE CHICAGO COUNCIL ON GLOBAL AFFAIR CHICAGO IL 60604	NONE	332 S MICHIGAN AVE #1100 501C3	GENERAL OPERATION SUPPORT				1,500	
THE CLAREMONT INSTITUTE CLAREMONT CA 91711	NONE	937 W FOOTHILL BLVD 501C3	GENERAL OPERATION SUPPORT				250	
THE FIELD MUSEUM CHICAGO IL 60605	NONE	1410 S MUSEUM CAMPUS DR 501C3	GENERAL OPERATION SUPPORT				500	

## Federal Statements

**Statement 6 - Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the**  
**Year (continued)**

Name		Address		Relationship	Status	Purpose	Amount
THE FORTUNE SOCIETY		29-76 NORTHERN BLVD		NONE	501C3	GENERAL OPERATION SUPPORT	250
NEW YORK NY 11101		1 EAST 70TH STREET		NONE	501C3	GENERAL OPERATION SUPPORT	200
THE FRICK COLLECTION		1300 W FULTON ST		NONE	501C3	GENERAL OPERATION SUPPORT	500
NEW YORK NY 10021		51 WEST 81ST STREET		NONE	501C3	GENERAL OPERATION SUPPORT	1,000
THE JOHN BALL ZOO SCHOOL		2011 PENNSYLVANIA AVE NW		NONE	501C3	GENERAL OPERATION SUPPORT	250
GRAND RAPIDS MI 49504		10920 WILSHIRE BLVD		NONE	501C3	GENERAL OPERATION SUPPORT	100
TOM GOLD DANCE COMPANY		7400 BOELTER HALL		NONE	501C3	GENERAL OPERATION SUPPORT	1,000
NEW YORK NY 10024		2345 BROADWAY		NONE	501C3	GENERAL OPERATION SUPPORT	1,000
TRINITY FORUM		1961 LAKE DRIVE, SE		NONE	501C3	GENERAL OPERATION SUPPORT	500
WASHINGTON DC 20006		376 PARK AVE		NONE	501C3	GENERAL OPERATION SUPPORT	500
UCLA FOUNDATION		223 W JACKSON BLVD, #400		NONE	501C3	GENERAL OPERATION SUPPORT	1,000
LOS ANGELES CA 90024		475 LAKE MICHIGAN DR NW		NONE	501C3	GENERAL OPERATION SUPPORT	500
UCLA SCHOOL OF ENGINEERING							
LOS ANGELES CA 90095							
VISITING NURSES NY							
NEW YORK NY 10024							
WEALTHY ELEMENTARY SCHOOL							
GRAND RAPIDS MI 49506							
WRITER'S THEATRE							
GLENCOE IL 60022							
YEAR-UP CHICAGO							
CHICAGO IL 60606							
YMCA GREATER GRAND RAPIDS							
GRAND RAPIDS MI 49504							
TOTAL							68,259