



See a Social Security Number? Say Something!
Report Privacy Problems to <https://public.resource.org/privacy>
Or call the IRS Identity Theft Hotline at 1-800-908-4490



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 ServiceDo not enter Social Security numbers on this form as it may be made public.
Information about Form 990-PF and its separate instructions is at www.irs.gov/form990pf.

Open to Public Inspection

For calendar year 2013 or tax year beginning

, and ending

Name of foundation JEFFREY R. ANDERSON CHARITABLE FOUNDATION		A Employer identification number 36-4332915
Number and street (or P.O. box number if mail is not delivered to street address) 330 SPRING CREEK ROAD	Room/suite	B Telephone number 815-637-7619
City or town, state or province, country, and ZIP or foreign postal code ROCKFORD, IL 61107		C If exemption application is pending, check here ☐
G Check all that apply: ☐ Initial return ☐ Final return ☐ Address change ☐ Initial return of a former public charity ☐ Amended return ☐ Name change		D 1. Foreign organizations, check here ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ☐
H Check type of organization: ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here ☐
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 2,348,250.	J Accounting method: ☒ Cash ☐ Accrual ☐ Other (specify) _____	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

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 ☒ if the foundation is not required to attach Sch. B					
3 Interest on savings and temporary cash investments		4,118.	4,118.		STATEMENT 1
4 Dividends and interest from securities		17,410.	17,410.		STATEMENT 2
5a Gross rents		5.	5.		STATEMENT 3
b Net rental income or (loss)		5.			
6a Net gain or (loss) from sale of assets not on line 10		145,296.			
b Gross sales price for all assets on line 6a		145,296.			
7 Capital gain net income (from Part IV, line 2)			145,296.		
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		3,588.	3,588.		STATEMENT 4
12 Total. Add lines 1 through 11		170,417.	170,417.		
13 Compensation of officers, directors, trustees, etc.		0.	0.		0.
14 Other employee salaries and wages					
15 Pension plans, employee benefits					
16a Legal fees					
b Accounting fees		900.	0.		0.
c Other professional fees					
17 Interest		1,467.	1,362.		0.
18 Taxes		1,270.	692.		0.
19 Depreciation and depletion					
20 Occupancy					
21 Travel, conferences, and meetings					
22 Printing and publications					
23 Other expenses		14,806.	14,763.		0.
24 Total operating and administrative expenses. Add lines 13 through 23		18,443.	16,817.		0.
25 Contributions, gifts, grants paid		111,872.			111,872.
26 Total expenses and disbursements. Add lines 24 and 25		130,315.	16,817.		111,872.
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements		40,102.			
b Net investment income (if negative, enter -0-)			153,600.		
c Adjusted net income (if negative, enter -0-)				N/A	

SCANNED MAY 27 2014
SCANNED MAY 27 2014

P 14

**JEFFREY R. ANDERSON CHARITABLE
FOUNDATION**

Form 990-PF (2013)

36-4332915 Page **2**

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			
	2 Savings and temporary cash investments	<3,611.>	<1,992.>	<1,992.>
	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			
	b Investments - corporate stock			
	c Investments - corporate bonds			
	11 Investments - land, buildings, and equipment basis ▶ Less: accumulated depreciation ▶			
	12 Investments - mortgage loans			
	13 Investments - other STMT 8	2,123,039.	2,161,522.	2,350,242.
	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)	2,119,428.	2,159,530.	2,348,250.
Liabilities	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	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.			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ ☒ and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds	2,119,428.	2,159,530.	
	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	2,119,428.	2,159,530.	
	31 Total liabilities and net assets/fund balances	2,119,428.	2,159,530.	

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	2,119,428.
2 Enter amount from Part I, line 27a	2	40,102.
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	2,159,530.
5 Decreases not included in line 2 (itemize) ▶	5	0.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	2,159,530.

**JEFFREY R. ANDERSON CHARITABLE
FOUNDATION**

Form 990-PF (2013)

36-4332915 Page 3

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 SHORT-TERM GAIN THRU ANDERSON FUND LLC	P	VARIOUS	VARIOUS
b LONG-TERM GAIN THRU ANDERSON FUND LLC	P	VARIOUS	VARIOUS
c SEC 1231 GAIN THRU ANDERSON FUND LLC	P	VARIOUS	VARIOUS
d SEC 1256 GAIN THRU ANDERSON FUND LLC	P	VARIOUS	VARIOUS
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 22,799.			22,799.
b 113,820.			113,820.
c 8,494.			8,494.
d 183.			183.
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a			22,799.
b			113,820.
c			8,494.
d			183.
e			

2 Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	145,296.
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

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	106,033.	2,167,652.	.048916
2011	108,028.	2,184,329.	.049456
2010	104,485.	2,220,331.	.047058
2009	114,413.	2,072,439.	.055207
2008	82,115.	2,350,599.	.034934

2 Total of line 1, column (d)	2	.235571
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	.047114
4 Enter the net value of noncharitable-use assets for 2013 from Part X, line 5	4	2,233,400.
5 Multiply line 4 by line 3	5	105,224.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	1,536.
7 Add lines 5 and 6	7	106,760.
8 Enter qualifying distributions from Part XII, line 4	8	111,872.

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.

**JEFFREY R. ANDERSON CHARITABLE
FOUNDATION**

Form 990-PF (2013)

36-4332915 Page 4

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 ☐ 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 ☒ and enter 1% of Part I, line 27b		1	1,536.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b).			
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		2	0.
3 Add lines 1 and 2		3	1,536.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		4	0.
5 Tax based on investment income Subtract line 4 from line 3. If zero or less, enter -0-		5	1,536.
6 Credits/Payments:			
a 2013 estimated tax payments and 2012 overpayment credited to 2013	6a	957.	
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	957.	
8 Enter any penalty for underpayment of estimated tax. Check here ☐ 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	579.	
10 Overpayment If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10		
11 Enter the amount of line 10 to be: Credited to 2014 estimated tax ☐ Refunded ☐	11		

Part VII-A Statements Regarding Activities

1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		Yes	No
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
c Did the foundation file Form 1120-POL for this year?	1c		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. ☐ \$ 0. (2) On foundation managers. ☐ \$ 0.			
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ☐ \$ 0.			
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities	2		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	3		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a		X
b If "Yes," has it filed a tax return on Form 990-T for this year?	4b		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T	5		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?	6	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	7	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ☐ IL			
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	8b	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	9		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10		X

N/A

Form 990-PF (2013)

**JEFFREY R. ANDERSON CHARITABLE
FOUNDATION**

Form 990-PF (2013)

36-4332915

Page 5

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 ► DUANE R. BACH Telephone no. ► 815-637-7627 Located at ► 330 SPRING CREEK ROAD, ROCKFORD, IL ZIP+4 ► 61107			
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?	☐ Yes ☒ No		
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	☐ Yes ☒ No		
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	☐ Yes ☒ No		
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	☐ Yes ☒ No		
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	☐ Yes ☒ No		
(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)	☐ Yes ☒ No		
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see 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?			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 ►	☐ Yes ☒ 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?	☐ Yes ☒ No		
b If "Yes," did it have excess business holdings in 2013 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2013)	N/A	3b	
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?			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?			X

Form **990-PF** (2013)

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)? ☐ Yes ☒ No **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? ☐ Yes ☒ No **N/A**

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? ☐ Yes ☒ No **6b** **X**

If "Yes" to 6b, file Form 8870

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☒ No

b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction? ☐ Yes ☒ No **N/A** **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
JEFFREY R. ANDERSON	PRESIDENT & DIRECTOR			
330 SPRING CREEK ROAD		0.00	0.	0.
ROCKFORD, IL 61107				
JOHN R. ANDERSON	VICE PRES, SECRETARY, DIR			
4151 GULF SHORE BLVD N, UNIT 404		0.00	0.	0.
NAPLES, FL 34103				
DUANE R. BACH	TREASURER & DIRECTOR			
330 SPRING CREEK ROAD		0.00	0.	0.
ROCKFORD, IL 61107				

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**

**JEFFREY R. ANDERSON CHARITABLE
FOUNDATION**

Form 990-PF (2013)

36-4332915 Page 7

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

3 Five highest-paid independent contractors for professional services. 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 SEE PART XV-3A	
	0.
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	
<i>All other program-related investments. See instructions.</i>	
3	
Total. Add lines 1 through 3 0.	

Form **990-PF** (2013)

JEFFREY R. ANDERSON CHARITABLE
FOUNDATION

36-4332915

Page 8

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	0.
b	Average of monthly cash balances	1b	8,102.
c	Fair market value of all other assets	1c	2,259,309.
d	Total (add lines 1a, b, and c)	1d	2,267,411.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	2,267,411.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	34,011.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	2,233,400.
6	Minimum investment return. Enter 5% of line 5	6	111,670.

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	111,670.
2a	Tax on investment income for 2013 from Part VI, line 5	2a	1,536.
b	Income tax for 2013. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	1,536.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	110,134.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	110,134.
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	110,134.

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	111,872.
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	111,872.
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	1,536.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	110,336.

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.

**JEFFREY R. ANDERSON CHARITABLE
FOUNDATION**

Form 990-PF (2013)

36-4332915 Page 9

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				110,134.
2 Undistributed income, if any, as of the end of 2013				
a Enter amount for 2012 only			107,478.	
b Total for prior years:				
2011 , _____, _____		1,926.		
3 Excess distributions carryover, if any, to 2013:				
a From 2008				
b From 2009				
c From 2010				
d From 2011				
e From 2012				
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2013 from Part XII, line 4: ► \$ 111,872.				
a Applied to 2012, but not more than line 2a			107,478.	
b Applied to undistributed income of prior years (Election required - see instructions) *		1,926.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2013 distributable amount				2,468.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2013 (If an amount appears in column (d), the same amount must be shown in column (a))	0.			0.
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	0.			
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				107,666.
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	0.			
9 Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a	0.			
10 Analysis of line 9:				
a Excess from 2009				
b Excess from 2010				
c Excess from 2011				
d Excess from 2012				
e Excess from 2013				

* SEE STATEMENT 9

Form 990-PF (2013)

N/A

- ▶

☐ 4942(j)(3) or ☐ 4942(j)(5)

- 3 Complete 3a, b, or c for the alternative test relied upon:
 - a "Assets" alternative test - enter:
 - (1) Value of all assets
 - (2) Value of assets qualifying under section 4942(j)(3)(B)(i)
 - b "Endowment" alternative test - enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed
 - c "Support" alternative test - enter:
 - (1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)
 - (2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)
 - (3) Largest amount of support from an exempt organization
 - (4) Gross investment income

Form **990-PF** (2013)

JEFFREY R. ANDERSON CHARITABLE
FOUNDATION**Part XV** Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year				
ROCKFORD CHRISTIAN SCHOOLS 1401 N BELL SCHOOL RD ROCKFORD, IL 61107	NONE	PUBLIC	EDUCATIONAL	3,940.
ALIGNMENT ROCKFORD NFP 330 SPRING CREEK ROAD ROCKFORD, IL 61107	NONE	PUBLIC	EDUCATIONAL	4,000.
HEALING PATHWAYS CANCER RESOURCE CENTER 3921 E STATE ST STE D ROCKFORD, IL 61108	NONE	PUBLIC	MEDICAL WELFARE	1,000.
BLACKHAWK AREA BOY SCOUTS 1800 7TH AVE ROCKFORD, IL 61104	NONE	PUBLIC	RECREATION	5,000.
BOYS AND GIRLS CLUB OF ROCKFORD 1040 N SECOND ST ROCKFORD, IL 61107	NONE	PUBLIC	RECREATION & SOCIAL WELFARE	2,500.
Total	SEE CONTINUATION SHEET(S)			111,872.
b Approved for future payment				
NONE				
Total				0.

Enter gross amounts unless otherwise indicated.

(See worksheet in line 13 instructions to verify calculations.)

Form **990-PF** (2013)

**JEFFREY R. ANDERSON CHARITABLE
FOUNDATION**

36-4332915

Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
BRIDGE MINISTRIES 407 S HIGHLAND AVE ROCKFORD, IL 61104	NONE	PUBLIC	RELIGIOUS	2,000.
BURPEE MUSEUM OF NATURAL HISTORY 737 N MAIN ST ROCKFORD, IL 61103	NONE	PUBLIC	EDUCATIONAL	500.
CARPENTER'S PLACE 1149 RAILROAD AVE ROCKFORD, IL 61104	NONE	PUBLIC	SOCIAL WELFARE	2,000.
CHILDREN'S HOME & AID SOCIETY 910 2ND AVE STE 103 ROCKFORD, IL 61104	NONE	PUBLIC	SOCIAL WELFARE	2,000.
100 CLUB OF ARIZONA 5033 N 19TH AVE STE 123 PHOENIX, AZ 85015	NONE	PUBLIC	MEDICAL & SOCIAL WELFARE	500.
CONSERVATION INTERNATIONAL 2011 CRYSTAL DR, STE 500 ARLINGTON, VA 22202	NONE	PUBLIC	CONSERVATION	1,000.
CRUSADER HEALTH FOUNDATION 1200 W STATE ST ROCKFORD, IL 61102	NONE	PUBLIC	MEDICAL WELFARE	2,000.
DISCOVERY CENTER 711 N MAIN ST ROCKFORD, IL 61103	NONE	PUBLIC	EDUCATIONAL	2,000.
EASTER SEALS 815 N CHURCH ST ROCKFORD, IL 61103	NONE	PUBLIC	MEDICAL WELFARE	10,000.
FREE SPIRIT SIBERIAN RESCUE PO BOX 626 HARVARD, IL 60033	NONE	PUBLIC	CONSERVATION	2,000.
Total from continuation sheets				95,432.

**JEFFREY R. ANDERSON CHARITABLE
FOUNDATION**

36-4332915

Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
FREEDOM ALLIANCE 22570 MARKEY CT STE 240 DULLES, VA 20166	NONE	PUBLIC	SOCIAL WELFARE	2,000.
HEARTLAND COMMUNITY CHURCH 1280 S ALPINE RD ROCKFORD, IL 61108	NONE	PUBLIC	RELIGIOUS	15,000.
LIFESCAPE COMMUNITY SERVICES 705 KILBURN AVE ROCKFORD, IL 61107	NONE	PUBLIC	SOCIAL WELFARE	2,000.
MELD 716 N CHURCH ST ROCKFORD, IL 61103	NONE	PUBLIC	SOCIAL WELFARE	3,000.
NATURAL LAND INSTITUTE 320 S 3RD ST ROCKFORD, IL 61104	NONE	PUBLIC	CONSERVATION	2,000.
NATURE CONSERVANCY OF ILLINOIS 8 S MICHIGAN AVE, STE 900 CHICAGO, IL 60603	NONE	PUBLIC	SOCIAL WELFARE	2,000.
NORTHERN ILLINOIS FOOD BANK 273 DEARBORN COURT GENEVA, IL 60134	NONE	PUBLIC	SOCIAL WELFARE	2,000.
OPEN ARMS FREE CLINIC 797 EAST GENEVA ST ELKHORN, WI 53121	NONE	PUBLIC	SOCIAL WELFARE	2,000.
PRISON FELLOWSHIP MINISTRIES 44180 RIVERSIDE PKWY LEESBURG, VA 20176	NONE	PUBLIC	RELIGIOUS	1,000.
HONOR FLIGHT PO BOX 636 PORT WASHINGTON, WI 53074	NONE	PUBLIC	SOCIAL WELFARE	500.
Total from continuation sheets				

**JEFFREY R. ANDERSON CHARITABLE
FOUNDATION**

36-4332915

Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
ROCK RIVER VALLEY FOOD PANTRY 421 S ROCKTON AVE ROCKFORD, IL 61102	NONE	PUBLIC	SOCIAL WELFARE	1,500.
LITERACY COUNCIL 982 N MAIN ST ROCKFORD, IL 61103	NONE	PUBLIC	EDUCATIONAL	500.
ROCKFORD DAY NURSERY 2323 S 6TH ST ROCKFORD, IL 61104	NONE	PUBLIC	SOCIAL WELFARE	2,000.
ROCKFORD RESCUE MISSION 715 W STATE ST ROCKFORD, IL 61102	NONE	PUBLIC	SOCIAL WELFARE	3,000.
SAMARITAN'S PURSE 801 BAMBOO RD BOONE, NC 28607	NONE	PUBLIC	SOCIAL WELFARE	2,000.
SPECIAL OLYMPICS OF ILLINOIS 605 E WILLOW ST NORMAL, IL 61761	NONE	PUBLIC	SOCIAL WELFARE	1,000.
THE SALVATION ARMY 4401 CHARLES ST ROCKFORD, IL 61108	NONE	PUBLIC	SOCIAL WELFARE	12,432.
KIDS AROUND THE WORLD 2424 CHARLES ST ROCKFORD, IL 61108	NONE	PUBLIC	SOCIAL WELFARE	1,000.
YMCA OF ROCK RIVER VALLEY 200 Y BLVD ROCKFORD, IL 61107	NONE	PUBLIC	SOCIAL WELFARE	2,000.
UNITED WAY 612 N MAIN ST STE 300 ROCKFORD, IL 61103	NONE	PUBLIC	SOCIAL WELFARE	2,000.
Total from continuation sheets				

**JEFFREY R. ANDERSON CHARITABLE
FOUNDATION**

36-4332915

Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
COVENANT HARBOR FOUNDATION 1724 W MAIN ST LAKE GENEVA, WI 53147	NONE	PUBLIC	SOCIAL WELFARE	3,000.
WOUNDED WARRIOR PROJECT 230 W MONROE ST STE 200 CHICAGO, IL 60606	NONE	PUBLIC	SOCIAL WELFARE - VETERANS	500.
MAKE A WISH FOUNDATION 4742 N 24TH ST STE 400 PHOENIX, AZ 85016	NONE	PUBLIC	SOCIAL WELFARE	500.
WATER SAFETY PATROL 451 OUTING WILLIAMS BAY, WI 53191	NONE	PUBLIC	SEA SERVICE SUPPORT & EDUCATION	500.
K-LOVE PO BOX 2098 OMAHA, NE 68103	NONE	PUBLIC	RELIGIOUS MEDIA	1,000.
CARRIE LYNN CHILDREN'S CENTER 826 N MAIN ST ROCKFORD, IL 61103	NONE	PUBLIC	SOCIAL WELFARE	1,000.
CHARITY:WATER 200 VARICK ST STE 201 NEW YORK, NY 10014	NONE	PUBLIC	SOCIAL WELFARE	1,000.
ST. JUDE CHILDREN'S RESEARCH HOSPITAL 14 PENN PLZ 1615 NEW YORK, NY 10122	NONE	PUBLIC	MEDICAL RESEARCH	500.
CALVARY COMMUNITY CHURCH WISCONSIN 50 WILLIAMS BAY, WI 53191	NONE	PUBLIC	RELIGIOUS	1,500.
BOONE COUNTY FOOD PANTRY 200 S 5TH ST CAPRON, IL 61012	NONE	PUBLIC	SOCIAL WELFARE	1,500.
Total from continuation sheets				

36-4332915

3 Grants and Contributions Paid During the Year (Continuation)

Total from continuation sheets

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
ANDERSON FUND LLC	4,118.	4,118.	
TOTAL TO PART I, LINE 3	4,118.	4,118.	

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
ANDERSON FUND LLC	17,410.	0.	17,410.	17,410.	
TO PART I, LINE 4	17,410.	0.	17,410.	17,410.	

FORM 990-PF RENTAL INCOME STATEMENT 3

KIND AND LOCATION OF PROPERTY	ACTIVITY NUMBER	GROSS RENTAL INCOME
ANDERSON FUND LLC	1	5.
TOTAL TO FORM 990-PF, PART I, LINE 5A		5.

FORM 990-PF OTHER INCOME STATEMENT 4

DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
ROYALTY INCOME	234.	234.	
ORDINARY BUSINESS INCOME/(LOSS)	3,274.	3,274.	
OTHER INCOME	80.	80.	
TOTAL TO FORM 990-PF, PART I, LINE 11	3,588.	3,588.	

FORM 990-PF	ACCOUNTING FEES		STATEMENT	5
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
TAX PREPARATION	900.	0.		0.
TO FORM 990-PF, PG 1, LN 16B	900.	0.		0.

FORM 990-PF	TAXES		STATEMENT	6
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FOREIGN TAXES	692.	692.		0.
FEDERAL EXCISE TAX	578.	0.		0.
TO FORM 990-PF, PG 1, LN 18	1,270.	692.		0.

FORM 990-PF	OTHER EXPENSES		STATEMENT	7
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
PORTFOLIO DEDUCTIONS	7,325.	7,325.		0.
ANNUAL FILING FEE	25.	0.		0.
NONDEDUCTIBLE EXPENSES	18.	0.		0.
OTHER INVESTMENT DEDUCTIONS	7,256.	7,256.		0.
SECTION 59(E)(2) EXPENSES	182.	182.		0.
TO FORM 990-PF, PG 1, LN 23	14,806.	14,763.		0.

FORM 990-PF	OTHER INVESTMENTS	STATEMENT	8
-------------	-------------------	-----------	---

DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
ANDERSON FUND LLC	COST	2,161,522.	2,350,242.
TOTAL TO FORM 990-PF, PART II, LINE 13		2,161,522.	2,350,242.

FORM 990-PF

ELECTION UNDER REGULATIONS SECTION
53.4942(A)-3(D)(2) TO APPLY
EXCESS QUALIFYING DISTRIBUTIONS
TO PRIOR YEAR'S UNDISTRIBUTED INCOME

STATEMENT 9

PURSUANT TO IRS REGULATION 53.4942(A)-3(D)(2), I, JEFFREY R. ANDERSON, A FOUNDATION MANAGER WITHIN THE MEANING OF IRC SECTION 4946(B)(1), HEREBY ELECTS TO TREAT \$1,926 OF THE REMAINING QUALIFYING DISTRIBUTIONS WHICH ARE NOT DEEMED MADE OUT OF THE UNDISTRIBUTED INCOME OF THE IMMEDIATE PRECEDING TAXABLE YEAR AS MADE OUT OF THE UNDISTRBUTED INCOME FOR THE PRIOR TAXABLE YEAR ENDING DECEMBER 31, 2011.



JEFFREY R. ANDERSON, FOUNDATION MANAGER

May 13, 2014

DATE

FORM 990-PF

PART XV - LINE 1A
LIST OF FOUNDATION MANAGERS

STATEMENT 10

NAME OF MANAGER

JEFFREY R. ANDERSON

JOHN R. ANDERSON