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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

DAVID J. ANDERSON CHARITABLE FOUNDATION

A Employer identification number

36-4332919

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☐ Initial return of a former public charity☐ Final return☐ Amended return☐ Address change☐ Name changeD 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 foundationE 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

J Accounting method: ☒ Cash ☐ Accrual

(from Part II, col. (c), line 16)

☐ Other (specify) _____F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

\$ 2,358,560. (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).)

(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

21,587.

21,587.

STATEMENT 1

4 Dividends and interest from securities

5.

5.

STATEMENT 2

5a Gross rents

b Net rental income or (loss)

5.

145,692.

6a Net gain or (loss) from sale of assets not on line 10

b Gross sales price for all assets on line 6a 145,692.

145,692.

7 Capital gain net income (from Part IV, line 2)

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

3,600.

3,600.

STATEMENT 3

12 Total Add lines 1 through 11

170,884.

170,884.

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

STMT 4

900.

0.

0.

c Other professional fees

17 Interest

1,451.

1,365.

0.

18 Taxes

2,304.

694.

0.

19 Depreciation and depletion

20 Occupancy

21 Travel, conferences, and meetings

22 Printing and publications

23 Other expenses

STMT 6

14,844.

14,801.

0.

24 Total operating and administrative expenses. Add lines 13 through 23

19,499.

16,860.

0.

25 Contributions, gifts, grants paid

113,335.

113,335.

26 Total expenses and disbursements.

Add lines 24 and 25

132,834.

16,860.

113,335.

27 Subtract line 26 from line 12:

a Excess of revenue over expenses and disbursements

38,050.

b Net investment income (if negative, enter -0-)

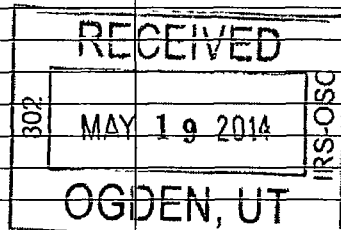
154,024.

c Adjusted net income (if negative, enter -0-)

N/A

SCANNED MAY 28 2014

Operating and Administrative Expenses



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	<744.>	1,937.	1,937.
	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			
Liabilities	11	Investments - land, buildings, and equipment basis ▶			
		Less: accumulated depreciation ▶			
	12	Investments - mortgage loans			
	13	Investments - other STMT 7	2,129,847.	2,165,216.	2,356,623.
	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)	2,129,103.	2,167,153.	2,358,560.
	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.	
		Foundations that follow SFAS 117, check here ▶ ☐			
	24	Unrestricted			
	25	Temporarily restricted			
	26	Permanently restricted			
		Foundations that do not follow SFAS 117, check here ▶ ☒			
	27	Capital stock, trust principal, or current funds	2,129,103.	2,167,153.	
	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	2,129,103.	2,167,153.	
	31	Total liabilities and net assets/fund balances	2,129,103.	2,167,153.	

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	2,129,103.
2	Enter amount from Part I, line 27a	2	38,050.
3	Other increases not included in line 2 (itemize) ▶	3	0.
4	Add lines 1, 2, and 3	4	2,167,153.
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	2,167,153.

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 GAINS THRU ANDERSON FUND LLC	P	VARIOUS	VARIOUS
b LONG-TERM GAINS 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 22,861.			22,861.
b 114,130.			114,130.
c 8,518.			8,518.
d 183.			183.
e			

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			22,861.
b			114,130.
c			8,518.
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	145,692.
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	101,382.	2,166,789.	.046789
2011	110,498.	2,182,290.	.050634
2010	97,130.	2,213,483.	.043881
2009	122,106.	2,063,598.	.059171
2008	87,574.	2,360,374.	.037102

2 Total of line 1, column (d)	2	.237577
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	.047515
4 Enter the net value of noncharitable-use assets for 2013 from Part X, line 5	4	2,232,630.
5 Multiply line 4 by line 3	5	106,083.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	1,540.
7 Add lines 5 and 6	7	107,623.
8 Enter qualifying distributions from Part XII, line 4	8	113,335.

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 ☐ and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)		1	1,540.
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☒ and enter 1% of Part I, line 27b			
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b).			
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		2	0.
3 Add lines 1 and 2		3	1,540.
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	1,540.
6 Credits/Payments:			
a 2013 estimated tax payments and 2012 overpayment credited to 2013	6a	954.	
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	954.	
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	586.	
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

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for the definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. ☐ \$ 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.		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) ☐ 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	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 ► DUANE R. BACH, TREASURER 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? 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 ► _____, _____, _____ ☐ 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? 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?

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

7b

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

N/A

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors

1 List all officers, directors, trustees, foundation managers and their compensation.

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
DAVID J. ANDERSON 330 SPRING CREEK ROAD ROCKFORD, IL 61107	PRESIDENT & DIRECTOR 0.00	0.	0.	0.
JOHN R. ANDERSON 4151 GULF SHORE BLVD N, UNIT 404 NAPLES, FL 34103	VICE PRES., SEC & DIRECTOR 0.00	0.	0.	0.
DUANE R. BACH 330 SPRING CREEK ROAD ROCKFORD, IL 61107	TREASURER & DIRECTOR 0.00	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 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	
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 0.
b	Average of monthly cash balances	1b 1,187.
c	Fair market value of all other assets	1c 2,265,442.
d	Total (add lines 1a, b, and c)	1d 2,266,629.
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 2,266,629.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4 33,999.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5 2,232,630.
6	Minimum investment return. Enter 5% of line 5	6 111,632.

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	1 111,632.
2a	Tax on investment income for 2013 from Part VI, line 5	2a 1,540.
b	Income tax for 2013. (This does not include the tax from Part VI.)	2b
c	Add lines 2a and 2b	2c 1,540.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3 110,092.
4	Recoveries of amounts treated as qualifying distributions	4 0.
5	Add lines 3 and 4	5 110,092.
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	7 110,092.

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 113,335.
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	4 113,335.
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 1,540.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6 111,795.

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				110,092.
2 Undistributed income, if any, as of the end of 2013				
a Enter amount for 2012 only			107,433.	
b Total for prior years:				
2011, _____, _____		5,368.		
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: ► \$ 113,335.				
a Applied to 2012, but not more than line 2a			107,433.	
b Applied to undistributed income of prior years (Election required - see instructions) *		5,368.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2013 distributable amount				534.
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				109,558.
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 8

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)

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				
ALIGNMENT ROCKFORD NFP 330 SPRING CREEK ROAD ROCKFORD, IL 61107	NONE	PUBLIC	EDUCATION	4,000.
ANDERSON JAPANESE GARDENS 330 SPRING CREEK ROAD ROCKFORD, IL 61107	NONE	PUBLIC	SOCIAL WELFARE	5,000.
BARBARA OLSON CENTER OF HOPE 3206 N CENTRAL AVE ROCKFORD, IL 61101	NONE	PUBLIC	EDUCATION	500.
BENEDICTINE UNIVERSITY 5700 COLLEGE RD LISLE, IL 60532	NONE	PUBLIC	EDUCATION	1,000.
BLACKHAWK AREA COUNCIL OF BOY SCOUTS OF AMERICA 1800 7TH AVE. ROCKFORD, IL 61104	NONE	PUBLIC	SOCIAL WELFARE	2,500.
Total SEE CONTINUATION SHEET(S) 3a				113,335.
b Approved for future payment				
NONE				
Total 3b				0.

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
BOYLAN HIGH SCHOOL 4000 SAINT FRANCIS DRIVE ROCKFORD, IL 61103	NONE	PUBLIC	EDUCATION	3,000.
BRIDGE MINISTRIES 407 S HIGHLAND AVE ROCKFORD, IL 61104	NONE	PUBLIC	RELIGIOUS	750.
BURPEE MUSEUM OF NATURAL HISTORY 737 N MAIN ST ROCKFORD, IL 61103	NONE	PUBLIC	EDUCATION	500.
CALVARY COMMUNITY CHURCH WISCONSIN 50 WILLIAMS BAY, WI 53191	NONE	PUBLIC	RELIGIOUS	750.
CARPENTER'S PLACE 1149 RAILROAD AVE. ROCKFORD, IL 61104	NONE	PUBLIC	SOCIAL WELFARE	2,000.
WINNEBAGO COUNTY CASA PROGRAM 403 ELM ST ROCKFORD, IL 61101	NONE	PUBLIC	SOCIAL WELFARE - CHILDREN	1,000.
CHILDREN'S HOME & AID SOCIETY 125 S WACKER DR CHICAGO, IL 60606	NONE	PUBLIC	SOCIAL WELFARE	2,000.
CONSERVATION INTERNATIONAL 2011 CRYSTAL DR STE 500 ARLINGTON, VA 22202	NONE	PUBLIC	CONSERVATION	1,000.
COVENANT HARBOR FOUNDATION 1724 W MAIN ST LAKE GENEVA, WI 53147	NONE	PUBLIC	RELIGIOUS	1,000.
CRUSADER HEALTH FOUNDATION 1200 WEST STATE STREET ROCKFORD, IL 61102	NONE	PUBLIC	MEDICAL WELFARE	2,000.
Total from continuation sheets				100,335.

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
DENISON UNIVERSITY 100 W COLLEGE ST GRANVILLE, OH 43023	NONE	PUBLIC	EDUCATION	2,000.
DISCOVERY CENTER MUSEUM 711 N. MAIN ROCKFORD, IL 61103	NONE	PUBLIC	EDUCATION	2,000.
EASTER SEALS 815 N CHURCH ST ROCKFORD, IL 61103	NONE	PUBLIC	MEDICAL WELFARE	10,000.
FRIENDS OF KISHWAUKETOE PO BOX 580 WILLIAMS BAY, WI 53191	NONE	PUBLIC	CONSERVATION	500.
GENEVA LAKES CONSERVANCY 390 MILL ST FONTANA-ON-GENEVA LAKE, WI 53125	NONE	PUBLIC	CONSERVATION	1,000.
HOLIDAY HOME CAMP N LAKE SHORE DR FONTANA-ON-GENEVA LAKE, WI 53125	NONE	PUBLIC	SOCIAL WELFARE	500.
ILLINOIS FOUNDATION FFA 3221 NORTHFIELD DR SPRINGFIELD, IL 62702	NONE	PUBLIC	SOCIAL WELFARE	1,000.
LIFESCAPE COMMUNITY SERVICES 705 KILBURN AVE ROCKFORD, IL 61101	NONE	PUBLIC	SOCIAL WELFARE	2,000.
LINN TOWNSHIP FIRE DEPARTMENT PO BOX 130 ZENDA, WI 53195	NONE	PUBLIC	PUBLIC SAFETY	1,000.
LITERACY COUNCIL 982 N. MAIN ROCKFORD, IL 61103	NONE	PUBLIC	SOCIAL WELFARE	2,350.
Total from continuation sheets				

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
MELD 620 KISHWAUKEE ST ROCKFORD, IL 61104	NONE	PUBLIC	SOCIAL WELFARE	1,500.
MENDELSSOHN CLUB 415 N CHURCH ST ROCKFORD, IL 61103	NONE	PUBLIC	PERFORMING ARTS	500.
NATURE CONSERVANCY IN ILLINOIS 301 SW ADAMS ST PEORIA, IL 61602	NONE	PUBLIC	CONSERVATION	2,000.
NORTHERN ILLINOIS FOOD BANK 6315 N 2ND ST LOVES PARK, IL 61111	NONE	PUBLIC	SOCIAL WELFARE	2,000.
NORTHERN ILLINOIS HOSPICE ASSOCIATION 4215 NEWBURG ROAD ROCKFORD, IL 61108	NONE	PUBLIC	MEDICAL WELFARE	600.
OPEN ARMS FREE CLINIC 797 EAST GENEVA ST ELKHORN, WI 53121	NONE	PUBLIC	MEDICAL WELFARE	7,500.
PRISON FELLOWSHIP MINISTRIES 44180 RIVERSIDE PKWY LEESBURG, VA 20176	NONE	PUBLIC	RELIGIOUS	1,000.
RAMP 202 MARKET ST ROCKFORD, IL 61107	NONE	PUBLIC	SOCIAL WELFARE	750.
ROCK RIVER VALLEY FOOD PANTRY 421 S ROCKTON AVE ROCKFORD, IL 61102	NONE	PUBLIC	SOCIAL WELFARE	1,500.
ROCKFORD ART MUSEUM 711 N MAIN ST ROCKFORD, IL 61103	NONE	PUBLIC	FINE ARTS	500.
Total from continuation sheets				

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
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	4,000.
SAMARITAN'S PURSE 801 BAMBOO RD BOONE, NC 28607	NONE	PUBLIC	SOCIAL WELFARE	2,000.
SPECIAL OLYMPICS OF ILLINOIS 904 MYRTLE AVE. DIXON, IL 61021	NONE	PUBLIC	SOCIAL WELFARE	1,000.
ST. PATRICK COMMUNITY FOOD PANTRY 32 N JONES ST AMBOY, IL 61310	NONE	PUBLIC	SOCIAL WELFARE	1,000.
THE SALVATION ARMY 4401 CHARLES ST ROCKFORD, IL 61108	NONE	PUBLIC	SOCIAL WELFARE	13,432.
UNITED WAY OF ROCK RIVER VALLEY 612 N MAIN ST, STE 300 ROCKFORD, IL 61103	NONE	PUBLIC	SOCIAL WELFARE	2,000.
WATER SAFETY PATROL 451 OUTING WILLIAMS BAY, WI 53191	NONE	PUBLIC	EDUCATION	500.
WOUNDED WARRIOR PROJECT 4899 BELFORT ROAD JACKSONVILLE, FL 32256	NONE	PUBLIC	SOCIAL WELFARE	500.
YMCA OF ROCK RIVER VALLEY 200 Y BLVD ROCKFORD, IL 61107	NONE	PUBLIC	RECREATION	4,453.
Total from continuation sheets				

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
MAKE A WISH FOUNDATION 640 N LASALLE ST #280 CHICAGO, IL 60654	NONE	PUBLIC	SOCIAL WELFARE	1,000.
STATELINE YOUTH FOR CHRIST 316 WOOD ROAD ROCKFORD, IL 61107	NONE	PUBLIC	RELIGIOUS	750.
BOYS AND GIRLS CLUB OF ROCKFORD 1040 N 2ND ST #1 ROCKFORD, IL 61107	NONE	PUBLIC	RECREATION - CHILDREN	1,500.
BOYS AND GIRLS CLUB OF WALWORTH PO BOX 158 DELAVER, WI 53115	NONE	PUBLIC	RECREATION - CHILDREN	500.
CARRIE LYNN CHILDREN'S FOUNDATION 826 N MAIN ST ROCKFORD, IL 61103	NONE	PUBLIC	SOCIAL WELFARE - CHILDREN	1,000.
100 CLUB OF ARIZONA 5033 N 19TH AVE STE 123 PHOENIX, AZ 85015	NONE	PUBLIC	SOCIAL WELFARE	500.
FREEDOM ALLIANCE 22570 MARKEY CT STE 240 DULLES, VA 20166	NONE	PUBLIC	SOCIAL WELFARE	3,000.
WALWORTH COUNTY ALLIANCE FOR CHILDREN W4063 COUNTY TK NN ELKHORN, WI 53121	NONE	PUBLIC	SOCIAL WELFARE - CHILDREN	500.
KIDS AROUND THE WORLD 2424 CHARLES ST ROCKFORD, IL 61108	NONE	PUBLIC	SOCIAL WELFARE - CHILDREN	1,000.
NATURAL LAND INSTITUTE 320 S 3RD ST ROCKFORD, IL 61104	NONE	PUBLIC	CONSERVATION	2,000.
Total from continuation sheets				

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
HEALING PATHWAYS CANCER RESOURCE CENTER 3921 E STATE ST, STE D ROCKFORD, IL 61108	NONE	PUBLIC	MEDICAL WELFARE	1,000.
HONOR FLIGHT PO BOX 636 FORT WASHINGTON, WI 53074	NONE	PUBLIC	SOCIAL WELFARE	500.
LA VOZ LATINA 730 N CHURCH ST. ROCKFORD, IL 61103	NONE	PUBLIC	SOCIAL WELFARE	500.
PEGGY NOTEBAERT NATURE MUSEUM 2430 N CANNON DR CHICAGO, IL 60614	NONE	PUBLIC	NATURE & CONSERVATION	1,000.
PROJECT UNDERSHARE 6364 SEBRING WAY LOVES PARK, IL 61111	NONE	PUBLIC	SOCIAL WELFARE - CHILDREN	500.
Total from continuation sheets				

FORM 990-PF	DIVIDENDS AND INTEREST FROM SECURITIES	STATEMENT	1
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SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
ANDERSON FUND LLC	21,587.	0.	21,587.	21,587.	
TO PART I, LINE 4	21,587.	0.	21,587.	21,587.	

FORM 990-PF	RENTAL INCOME	STATEMENT	2
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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	3
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DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
ROYALTY INCOME	235.	235.	
ORDINARY BUSINESS INCOME/(LOSS) THRU ANDERSON LLC	3,283.	3,283.	
OTHER INVESTMENT INCOME	82.	82.	
TOTAL TO FORM 990-PF, PART I, LINE 11	3,600.	3,600.	

FORM 990-PF	ACCOUNTING FEES	STATEMENT	4
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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	5
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FOREIGN TAXES	694.	694.		0.
FEDERAL EXCISE TAX	1,610.	0.		0.
TO FORM 990-PF, PG 1, LN 18	2,304.	694.		0.

FORM 990-PF	OTHER EXPENSES	STATEMENT	6
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ANNUAL FILING FEE	25.	0.		0.
PORTFOLIO DEDUCTIONS	7,342.	7,342.		0.
NONDEDUCTIBLE EXPENSES	18.	0.		0.
OTHER INVESTMENT DEDUCTIONS	7,276.	7,276.		0.
SECTION 59(E)(2) EXPENSES	183.	183.		0.
TO FORM 990-PF, PG 1, LN 23	14,844.	14,801.		0.

FORM 990-PF	OTHER INVESTMENTS	STATEMENT	7
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DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
ANDERSON FUND LLC	COST	2,165,216.	2,356,623.
TOTAL TO FORM 990-PF, PART II, LINE 13		2,165,216.	2,356,623.

FORM 990-PF

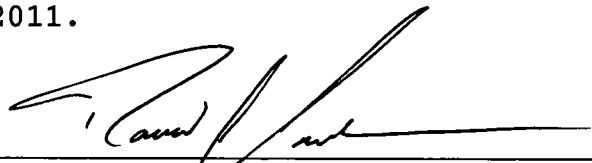
ELECTION UNDER REGULATIONS SECTION

STATEMENT 8

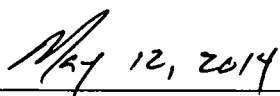
53.4942(A)-3(D)(2) TO APPLY

EXCESS QUALIFYING DISTRIBUTIONS
TO PRIOR YEAR'S UNDISTRIBUTED INCOME

PURSUANT TO IRS REGULATION 53.4942(A)-3(D)(2), I, DAVID A. ANDERSON, A FOUNDATION MANAGER WITHIN THE MEANING OF IRC SECTION 4946(B)(1), HEREBY ELECTS TO TREAT \$5,368 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.



DAVID J. ANDERSON, FOUNDATION MANAGER



DATE

FORM 990-PF

PART XV - LINE 1A
LIST OF FOUNDATION MANAGERS

STATEMENT 9

NAME OF MANAGER

DAVID J. ANDERSON
JOHN R. ANDERSON