Form **990-PF**

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

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

▶ Do 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.*

OMB No 1545-0052

2013

Open to Public Inspection

For calendar year 2013 or tax year beginning , and ending

Name of foundation: SAMERIAN FOUNDATION, INC.

A Employer identification number: 37-1439047

Number and street (or P O box number if mail is not delivered to street address): 9650 COMMERCE DRIVE

Room/suite: 532

B Telephone number: (317) 802-9220

City or town, state or province, country, and ZIP or foreign postal code: CARMEL, IN 46032

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 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)* ▶$ 5,986,433.

J Accounting method: ☒ Cash ☐ Accrual
☐ Other (specify)
(Part I, column (d) must be on cash basis.)

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)
Revenue	1	Contributions, gifts, grants, etc, received	6,350,000.		N/A	
	2	Check ▶ ☐ if the foundation is not required to attach Sch B				
	3	Interest on savings and temporary cash investments	325.	325.		STATEMENT 1
	4	Dividends and interest from securities				
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10				
	b	Gross sales price for all assets on line 6a				
	7	Capital gain net income (from Part IV, line 2)		0.		
	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				
	12	Total Add lines 1 through 11	6,350,325.	325.		
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc	0.	0.		0.
	14	Other employee salaries and wages				
	15	Pension plans, employee benefits				
	16a	Legal fees STMT 2	27,924.	0.		0.
	b	Accounting fees STMT 3	10,000.	0.		0.
	c	Other professional fees				
	17	Interest				
	18	Taxes				
	19	Depreciation and depletion				
	20	Occupancy				
	21	Travel, conferences, and meetings				
	22	Printing and publications				
	23	Other expenses STMT 4	45.	0.		0.
	24	**Total operating and administrative expenses.** Add lines 13 through 23	37,969.	0.		0.
	25	Contributions, gifts, grants paid	892,583.			892,583.
	26	**Total expenses and disbursements.** Add lines 24 and 25	930,552.	0.		892,583.
	27	Subtract line 26 from line 12:				
	a	Excess of revenue over expenses and disbursements	5,419,773.			
	b	**Net investment income** (if negative, enter -0-)		325.		
	c	**Adjusted net income** (if negative, enter -0-)			N/A	

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10-10-13 LHA For Paperwork Reduction Act Notice, see instructions.

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Part II **Balance Sheets** Attached schedules and amounts in the description column should be for end-of-year amounts only

			Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash - non-interest-bearing	564,460.	5,986,233.	5,986,233.
	2	Savings and temporary cash investments	200.	200.	200.
	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			
	14	Land, buildings, and equipment: basis ▶			
		Less accumulated depreciation ▶			
	15	Other assets (describe ▶ STATEMENT 5)	2,000.	0.	0.
	16	**Total assets** (to be completed by all filers - see the instructions. Also, see page 1, item I)	566,660.	5,986,433.	5,986,433.
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	0.	0.	
	28	Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
	29	Retained earnings, accumulated income, endowment, or other funds	566,660.	5,986,433.	
	30	**Total net assets or fund balances**	566,660.	5,986,433.	
	31	**Total liabilities and net assets/fund balances**	566,660.	5,986,433.	

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	566,660.
2	Enter amount from Part I, line 27a	2	5,419,773.
3	Other increases not included in line 2 (itemize) ▶	3	0.
4	Add lines 1, 2, and 3	4	5,986,433.
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	5,986,433.

Part IV Capital Gains and Losses for Tax on Investment Income

	(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a				
b	NONE			
c				
d				
e				

	(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a				
b				
c				
d				
e				

	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				
b				
c				
d				
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

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

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	297,635.	312,664.	.951932
2011	433,468.	155,704.	2.783923
2010	374,856.	165,435.	2.265881
2009	312,110.	171,255.	1.822487
2008	729,274.	203,487.	3.583885

2	Total of line 1, column (d)	2	11.408108
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	2.281622
4	Enter the net value of noncharitable-use assets for 2013 from Part X, line 5	4	696,581.
5	Multiply line 4 by line 3	5	1,589,335.
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	3.
7	Add lines 5 and 6	7	1,589,338.
8	Enter qualifying distributions from Part XII, line 4	8	892,583.

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)** **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).			1	7.
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	7.
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	7.
6 Credits/Payments:				
a 2013 estimated tax payments and 2012 overpayment credited to 2013	6a	205.		
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	205.
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	
10 **Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶			10	198.
11 Enter the amount of line 10 to be: **Credited to 2014 estimated tax** ▶	198.	**Refunded** ▶	11	0.

Part VII-A Statements Regarding Activities

		Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a		X
b Did it spend more than $100 during the year (either directly or indirectly) for political purposes (see instructions for the definition)?	1b		X
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.			
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? N/A	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) ▶ IN			
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by *General Instruction G? If "No," attach explanation*	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 STMT 6	10	X	

Part VII-A Statements Regarding Activities *(continued)*

		Yes	No
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?	13	X	

Website address ▶ N/A

14 The books are in care of ▶ CYNTHIA SIMON SKJODT Telephone no. ▶ (317) 802-9220

Located at ▶ 9650 COMMERCE DRIVE, SUITE 532, CARMEL, IN ZIP+4 ▶ 46032

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

		Yes	No
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?	16		X
See the instructions for exceptions and filing requirements for Form TD F 90-22.1. If "Yes," enter the name of the foreign country ▶			

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)? N/A	1b		
Organizations relying on a current notice regarding disaster assistance check here ▶ ☐			
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? ☐ Yes ☒ No			
If "Yes," list the years ▶ ____, ____, ____, ____			
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)*

		Yes	No
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		
b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?		**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?	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
SEE STATEMENT 7		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

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

3 Five highest-paid independent contractors for professional services. If none, enter "NONE."

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

Total number of others receiving over $50,000 for professional services ▶ 0

Part IX-A **Summary of Direct Charitable Activities**

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1 N/A	
2	
3	
4	

Part IX-B **Summary of Program-Related Investments**

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.	Amount
1 N/A	
2	
All other program-related investments. See instructions. 3	
Total. Add lines 1 through 3 ▶	0.

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	707,189.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	707,189.
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	707,189.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	10,608.
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3. Enter here and on Part V, line 4	5	696,581.
6	**Minimum investment return.** Enter 5% of line 5	6	34,829.

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	34,829.
2a	Tax on investment income for 2013 from Part VI, line 5 — 2a: 7.		
b	Income tax for 2013. (This does not include the tax from Part VI.) — 2b:		
c	Add lines 2a and 2b	2c	7.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	34,822.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	34,822.
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	34,822.

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	892,583.
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	892,583.
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	0.
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	892,583.

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					34,822.
2 Undistributed income, if any, as of the end of 2013					
a Enter amount for 2012 only				0.	
b Total for prior years: _____, _____, _____			0.		
3 Excess distributions carryover, if any, to 2013:					
a From 2008	719,140.				
b From 2009	303,548.				
c From 2010	366,584.				
d From 2011	425,683.				
e From 2012	282,002.				
f **Total** of lines 3a through e		2,096,957.			
4 Qualifying distributions for 2013 from Part XII, line 4: ▶ $	892,583.				
a Applied to 2012, but not more than line 2a				0.	
b Applied to undistributed income of prior years (Election required - see instructions)			0.		
c Treated as distributions out of corpus (Election required - see instructions)		0.			
d Applied to 2013 distributable amount					34,822.
e Remaining amount distributed out of corpus		857,761.			
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		2,954,718.			
b Prior years' undistributed income. Subtract line 4b from line 2b			0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed			0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions			0.		
e Undistributed income for 2012. Subtract line 4a from line 2a. Taxable amount - see instr.				0.	
f Undistributed income for 2013. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2014					0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)		0.			
8 Excess distributions carryover from 2008 not applied on line 5 or line 7		719,140.			
9 **Excess distributions carryover to 2014.** Subtract lines 7 and 8 from line 6a		2,235,578.			
10 Analysis of line 9:					
a Excess from 2009	303,548.				
b Excess from 2010	366,584.				
c Excess from 2011	425,683.				
d Excess from 2012	282,002.				
e Excess from 2013	857,761.				

Part XIV Private Operating Foundations (see instructions and Part VII-A, question 9) N/A

1 a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2013, enter the date of the ruling ▶

b Check box to indicate whether the foundation is a private operating foundation described in section ☐ 4942(j)(3) or ☐ 4942(j)(5)

	Tax year	Prior 3 years			
	(a) 2013	(b) 2012	(c) 2011	(d) 2010	(e) Total
2 a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					
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					

Part XV Supplementary Information (Complete this part only if the foundation had $5,000 or more in assets at any time during the year-see instructions.)

1 **Information Regarding Foundation Managers:**

a List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than $5,000). (See section 507(d)(2).)

CYNTHIA SIMON SKJODT

b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest

NONE

2 **Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:**

Check here ▶ ☐ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. (see instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d.

a The name, address, and telephone number or e-mail address of the person to whom applications should be addressed:

MS. FONDA CRANDALL, 317-802-9220
9650 COMMERCE DRIVE, SUITE 532, CARMEL, IN 46032

b The form in which applications should be submitted and information and materials they should include:

WRITTEN APPLICATIONS SHOULD INCLUDE PURPOSE OF GRANT AND AMOUNT REQUESTED

c Any submission deadlines:

N/A

d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors:

N/A

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*				
SEE ATTACHED STATEMENT		PC	VARIOUS	892,583.
Total			▷ 3a	892,583.
b *Approved for future payment*				
YMCA (HEART OF CITY) 615 N. ALABAMA ST., SUITE 200 INDIANAPOLIS, IN 46204		PC	GENERAL FUND	2,000,000.
RILEY CHILDREN'S FOUNDATION 30 S. MERIDIAN STREET, SUITE 250 INDIANAPOLIS, IN 46204		PC	GENERAL FUND	573,524.
HELENE SIMON HILLEL CENTER 730 E. THIRD STREET BLOOMINGTON, IN 47401		PC	GENERAL FUND	20,000.
Total	SEE CONTINUATION SHEET(S)		▷ 3b	56,742,824.

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue:					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments			14	325.	
4 Dividends and interest from securities					
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					
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.		325.	0.

13 **Total.** Add line 12, columns (b), (d), and (e) 13 325.

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

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

Line No ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes).

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

			Yes	No
1	Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?			
a	Transfers from the reporting foundation to a noncharitable exempt organization of:			
	(1) Cash	1a(1)		X
	(2) Other assets	1a(2)		X
b	Other transactions:			
	(1) Sales of assets to a noncharitable exempt organization	1b(1)		X
	(2) Purchases of assets from a noncharitable exempt organization	1b(2)		X
	(3) Rental of facilities, equipment, or other assets	1b(3)		X
	(4) Reimbursement arrangements	1b(4)		X
	(5) Loans or loan guarantees	1b(5)		X
	(6) Performance of services or membership or fundraising solicitations	1b(6)		X
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c		X

d If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received.

(a) Line no	(b) Amount involved	(c) Name of noncharitable exempt organization	(d) Description of transfers, transactions, and sharing arrangements
		N/A	

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? ☐ Yes ☒ No

b If "Yes," complete the following schedule.

(a) Name of organization	(b) Type of organization	(c) Description of relationship
N/A		

Sign Here

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge

May the IRS discuss this return with the preparer shown below (see instr)? ☒ Yes ☐ No

Signature of officer or trustee

Date 8-13-14

Title ▶ PRESIDENT

Paid Preparer Use Only

Print/Type preparer's name EDWARD R. MARCUM, CPA	Preparer's signature	Date 8-12-14	Check ☐ if self- employed	PTIN P00558199
Firm's name ▶ CLIFTONLARSONALLEN LLP			Firm's EIN ▶ 41-0746749	
Firm's address ▶ 9339 PRIORITY WAY W DR #200 INDIANAPOLIS, IN 46240			Phone no. (317) 574-9100	

Schedule B
(Form 990, 990-EZ, or 990-PF)
Department of the Treasury
Internal Revenue Service

Schedule of Contributors

▶ Attach to Form 990, Form 990-EZ, or Form 990-PF.
▶ Information about Schedule B (Form 990, 990-EZ, or 990-PF) and its instructions is at *www.irs.gov/form990*.

OMB No 1545-0047

2013

Name of the organization: SAMERIAN FOUNDATION, INC.

Employer identification number: 37-1439047

Organization type (check one)

Filers of:	**Section:**
Form 990 or 990-EZ	☐ 501(c)( ) (enter number) organization
	☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation
	☐ 527 political organization
Form 990-PF	☒ 501(c)(3) exempt private foundation
	☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation
	☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule.**
Note. Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule See instructions

General Rule

☒ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, $5,000 or more (in money or property) from any one contributor. Complete Parts I and II.

Special Rules

☐ For a section 501(c)(3) organization filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi) and received from any one contributor, during the year, a contribution of the greater of **(1)** $5,000 or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.

☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than $1,000 for use *exclusively* for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals Complete Parts I, II, and III

☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions for use *exclusively* for religious, charitable, etc , purposes, but these contributions did not total to more than $1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc , purpose Do not complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc , contributions of $5,000 or more during the year . . . . ▶ $ ____________

Caution. An organization that is not covered by the General Rule and/or the Special Rules does not file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2, of its Form 990, or check the box on line H of its Form 990-EZ or on its Form 990-PF, Part I, line 2, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF)

LHA **For Paperwork Reduction Act Notice, see the Instructions for Form 990, 990-EZ, or 990-PF.** **Schedule B (Form 990, 990-EZ, or 990-PF) (2013)**

Name of organization	Employer identification number
SAMERIAN FOUNDATION, INC.	37-1439047

Part I **Contributors** (see instructions) Use duplicate copies of Part I if additional space is needed

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	CYNTHIA SIMON SKJODT 9910 TOWNE ROAD CARMEL, IN 46032	$ 2,250,000.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
2	SIMON 5 YEAR CHARITABLE LEAD ANNUITY TRUST C/O MCGUIRE WOODS LLP, P.O. BOX 397 RICHMOND, VA 23218-0397	$ 700,000.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
3	SIMON 10 YEAR CHARITABLE LEAD ANNUITY TRUST C/O MCGUIRE WOODS LLP, P.O. BOX 397 RICHMOND, VA 23218-0397	$ 700,000.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
4	SIMON 12 YEAR CHARITABLE LEAD ANNUITY TRUST C/O MCGUIRE WOODS LLP, P.O. BOX 397 RICHMOND, VA 23218-0397	$ 2,000,000.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
5	SIMON 15 YEAR CHARITABLE LEAD ANNUITY TRUST C/O MCGUIRE WOODS LLP, P.O. BOX 397 RICHMOND, VA 23218-0397	$ 700,000.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)

Name of organization	Employer identification number
SAMERIAN FOUNDATION, INC.	37-1439047

Part II **Noncash Property** (see instructions). Use duplicate copies of Part II if additional space is needed

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		$	

Name of organization	Employer identification number
SAMERIAN FOUNDATION, INC.	37-1439047

Part III *Exclusively* religious, charitable, etc , individual contributions to section 501(c)(7), (8), or (10) organizations that total more than $1,000 for the year. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of *exclusively* religious, charitable, etc., contributions of **$1,000 or less** for the year. (Enter this information once) ▶ $________

Use duplicate copies of Part III if additional space is needed.

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

Part XV Supplementary Information

3 Grants and Contributions Approved for Future Payment (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
PARK TUDOR EMPOWERING LEARNERS 7200 N. COLLEGE AVENUE INDIANAPOLIS, IN 46240		PC	GENERAL FUND	150,000.
SHAMROCK FOUNDATION - CATHEDRAL HIGH SCHOOL 5225 E. 56TH STREET INDIANAPOLIS, IN 46226		PC	GENERAL FUND	12,300.
GLEANERS FOOD BANK 3737 WALDEMERE AVENUE INDIANAPOLIS, IN 46241		PC	GENERAL FUND	20,000.
INDIANAPOLIS PUBLIC LIBRARY FOUNDATION 2450 N. MERIDIAN STREET INDIANAPOLIS, IN 46204		PC	GENERAL FUND	2,000.
IU BASKETBALL ATHLETIC FUND 1001 E. 17TH STREET BLOOMINGTON, IN 46408		PC	GENERAL FUND	150,000.
INDIANA UNIVERSITY VARSITY FUND 1001 E. 17TH STREET BLOOMINGTON, IN 46408		PC	GENERAL FUND	200,000.
INDIANA UNIVERSITY FOUNDATION 340 W. MICHIGAN ST. INDIANAPOLIS, IN 46202		PC	MELVIN SIMON CHAIR IN PHILANTHROPY	1,500,000.
HERRON SCHOOL OF ART AND DESIGN 735 W. NEW YORK ST. INDIANAPOLIS, IN 46202		PC	CHAIR IN ART THERAPY	2,000,000.
HERRON SCHOOL OF ART AND DESIGN 735 W. NEW YORK ST. INDIANAPOLIS, IN 46202		PC	VETERANS ART THERAPY	15,000.
METHODIST HEALTH FOUNDATION 1800 N. CAPITOL AVENUE INDIANAPOLIS, IN 46207		PC	BEHAVORIAL HEALTH CENTER	2,100,000.
Total from continuation sheets				54,149,300.

Part XV Supplementary Information

3 Grants and Contributions Approved for Future Payment (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
INDIANA UNIVERSITY FOUNDATION 340 W. MICHIGAN ST. INDIANAPOLIS, IN 46202		PC	ASSEMBLY HALL RENOVATIONS	40,000,000.
INDIANAPOLIS ZOOLOGICAL SOCIETY 1200 W. WASHINGTON ST. INDIANAPOLIS, IN 46222		PC	INTERNATIONAL ORANGUTAN CENTER	5,000,000.
CENTRAL INDIANA COMMUNITY FOUNDATION 615 N. ALABAMA ST., SUITE 119 INDIANAPOLIS, IN 46204		PC	DONOR ADVISED FUND	2,000,000.
CHILD ADVOCATES 8200 HAVERSTICK ROAD, SUITE 240 INDIANAPOLIS, IN 46240		PC	GENERAL FUND	1,000,000.
Total from continuation sheets				

Samerian Foundation
Grants and Contributions Paid During the Year
For the Year Ended December 31, 2013

Date of Contribution	Grant/Contribution Recipient	If recipient is an individual relationship to foundation	Foundation status of recipient	Purpose of grant or contribution	Amount
December 27, 2013	Alzheimers Disease Research 22512 Gateway Center Drive Clarksburg, MD 20871	n/a	PC	Annual Fund Campaign	$250 00
January 14, 2013	American Red Cross 441 East 10th Street Indianapolis, IN 46202	n/a	PC	General Fund	$500 00
November 22, 2013	American Red Cross 441 East 10th Street Indianapolis, IN 46202	n/a	PC	Disaster Relief Fund	$1,000 00
December 27, 2013	American for African Adoptions 8910 Timberwood Drive Indianapolis, IN 46234	n/a	PC	Africa's Angels	$2,500 00
December 27, 2013	ASK - About Special Kids 7172 Graham Rd, Suite 100 Indianapolis, IN 46250	n/a	PC	General Fund	$250 00
November 1, 2013	Assistance League of Indianapolis 1475 W 86th Street Indianapolis, IN 46260	n/a	PC	Operation School Bell	$1,500 00
February 1, 2013	Big Foot Foundation 201 S Capitol Avenue, Ste 430 Indianapolis, IN 46225	n/a	PF	Youth Sports Programs	$10,000 00
January 4, 2013	Birthright Israel 33 East 33rd Street 7th Floor New York, NY 10016	n/a	PC	Student Sponsor	$1,000 00
January 4, 2013	Boys & Girls Club of Indianapolis 3530 S Keystone Avenue, Ste 200 Indianapolis, IN 46227	n/a	PC	General Operating Fund	$500 00
July 26 2013	Boys & Girls Club of Indianapolis 3530 S Keystone Avenue, Ste 200 Indianapolis, IN 46227	n/a	PC	Afterschool Program	$5,000 00
August 7, 2013	Cancer Support Community 5150 W 71st Street Indianapolis IN 46268	n/a	PC	Cancer Survivorship Programs	$5,000 00
December 27, 2013	Cancer Support Community 5150 W 71st Street Indianapolis, IN 46268	n/a	PC	Cancer Survivorship Programs	$50,000 00
May 10, 2013	Cathedral High School 5225 E 56th Street Indianapolis, IN 46226	n/a	PC	Scholarship Fund	$12,300 00
May 10, 2013	Center for Leadership Development 2425 Dr ML King Jr Street Indianapolis, IN 46208	n/a	PC	College Prep Conference and College Fair	$5,000 00
July 26, 2013	CHIP Indy (aka) Coalition of Homelessness Intervention & Prevention 3737 N Meridian St., Ste 504 Indianapolis, IN 46208	n/a	PC	Blueprint 2 0 Campaign Drive	$30,000 00
December 20, 2013	CHIP Indy (aka) Coalition of Homelessness Intervention & Prevention 3737 N Meridian St., Ste 504 Indianapolis, IN 46208	n/a	PC	General Fund	$15,000 00
July 12, 2013	Child Advocates / CASA 8200 Haverstick Road, Ste 240 Indianapolis, IN 46240	n/a	PC	General Fund	$15 000 00
January 4, 2013	Clinton Foundation Ambassadors William Jefferson Clinton Foundation 610 President Clinton Avenue Little Rock, AK	n/a	PC	Global Health Campaign	$10,000 00
September 13, 2013	Central Indiana Community Foundation 615 N Alabama St, Ste 119 Indianapolis, IN 46204	n/a	PC	General Fund	$20,000 00
May 17, 2013	Central Indiana Community Foundation 615 N Alabama St., Ste 119	n/a	PC	37 Place Capital Improvements Fund	$33,333 00

Samenan Foundation
Grants and Contributions Paid During the Year
For the Year Ended December 31, 2013

Date of Contribution	Grant/Contribution Recipient	If recipient is an individual relationship to foundation	Foundation status of recipient	Purpose of grant or contribution	Amount
	Indianapolis, IN 46204				
January 4, 2013	College Mentors for Kids 212 W 10th Street, Ste B260 Indianapolis, IN 46202	n/a	PC	General Fund	$500 00
November 22, 2013	College Mentors for Kids 212 W 10th Street, Suite B260 Indianapolis, IN 46202	n/a	PC	General Fund	$100 00
January 4, 2013	Damien Center 26 N Arsenal Avenue Indianapolis, IN 46201	n/a	PC	General Fund	$3,000 00
January 4, 2013	Doctors Without Borders 333 Seventh Avenue, Floor 2 New York, NY 10001	n/a	PC	General Fund	$1,000 00
March 22, 2013	Doctors Without Borders 333 Seventh Avenue, Floor 2 New York, NY 10001	n/a	PC	General Fund	$1,500 00
July 26, 2013	Doctors Without Borders 333 Seventh Avenue, Floor 2 New York, NY 10001	n/a	PC	General Fund	$2,500 00
October 10, 2013	Doctors Without Borders 222 Seventh Avenue, Floor 2 New York, NY 10001	n/a	PC	General Fund	$5,000 00
January 4, 2013	Even Start Literacy of IPS 5427 E Washington St Indianapolis, IN 46219	n/a	PC	IPS Even Start Family Literacy Program	$6,000 00
June 14, 2013	Families First Indiana 615 N Alabama St, Ste 320 Indianapolis, IN 46204	n/a	PC	General Operating Fund	$10,000 00
October 10, 2013	Gleaners Food Bank of Indiana 3737 Waldemere Avenue Indianapolis, IN 46241	n/a	PC	General Fund	$40,000 00
December 27, 2013	Gleaners Food Bank of Indiana 3737 Waldemere Avenue Indianapolis IN 46241	n/a	PC	General Fund	$5,000 00
January 4, 2013	Global Green USA 2218 Main Street, 2nd Floor Santa Monica, CA 90405	n/a	PC	Hurricane Sandy Relief	$500 00
July 19, 2013	Hamilton County 4H Fair 2003 Pleasant St Noblesville, IN 46060	n/a	PC	Demo Derby Trophy Sponsorship	$150 00
May 10, 2013	Happy Hollow Children's Camp 615 N Alabama St, Ste 228 Indianapolis, IN 46204	n/a	PC	Happy Hollow Children's Summer Camp	$3,000 00
November 1, 2013	Hamson Center for Performing Arts 1505 N Delaware Indianapolis, IN 46202	n/a	PC	General Fund	$1,000 00
February 1, 2013	Helene G Simon Hillel Center @ IU 730 East Third St Bloomington, IN 47401	n/a	PC	Pledge Payment	$20,000 00
March 15, 2013	Helene G Simon Hillel Center @ IU 730 East Third St Bloomington, IN 47401	n/a	PC	Pledge Payment	$20,000 00

Samerian Foundation
Grants and Contributions Paid During the Year
For the Year Ended December 31, 2013

Date of Contribution	Grant/Contribution Recipient	If recipient is an individual relationship to foundation	Foundation status of recipient	Purpose of grant or contribution	Amount
June 14, 2013	Helene G Simon Hillel Center @ IU 730 East Third St Bloomington, IN 47401	n/a	PC	Pledge Payment	$10,000 00
January 4, 2013	Herron School of Art @ Indiana University 735 W New York St., HR2248 Indianapolis, IN 46202	n/a	PC	Veterans Art Therapy - Pledge Payment	$15,000 00
October 10, 2013	Indiana Children's Wish Fund 6436 Castleway West Dr, Ste 130 Indianapolis, IN 46250	n/a	PC	General Fund	$500 00
January 4, 2013	Indiana Plan for Equal Employment 3530 S Rural Street Indianapolis, IN 46237	n/a	PC	2013 Summer Camp	$250 00
December 27, 2013	Indiana Plan for Equal Employment 3530 S Rural Street Indianapolis, IN 46237	n/a	PC	2014 Summer Camp	$500 00
March 1, 2013	Indiana Sports Corp 201 S Capitol Avenue, Ste 1200 Indianapolis, IN 46225	n/a	PC	CHAMPS Grant Program	$12,000 00
March 1, 2013	Indiana Sports Corp 201 S Capitol Avenue, Ste 1200 Indianapolis IN 46225	n/a	PC	2013 Youthlinks Indiana Charity Golf Tournament	$3,000 00
February 1, 2013	Indpls Marion Co Public Library Foundation 2450 N Meridian Street Indianapolis, IN 46206	n/a	PC	Pledge Payment	$2,000 00
July 12, 2013	IN University Foundation 1001 E 17th Street Bloomington, IN 47408	n/a	PC	Basketball Athletic Fund Pledge Payment	$50,000 00
September 27, 2013	IU Hockey Club 1965 S Henderson St. Bloomington, IN 47401	n/a	PC	IU Hockey Golf Fundraiser Event	$500 00
November 1, 2013	IN University Foundation Scholarships & Grants Department 107 S Indiana Avenue, Bryon Hall 200 Bloomington, IN 47405	n/a	PC	Study Abroad Scholarship	$50,000 00
December 27, 2013	IU Foundation SG Komen Tissue Bank PO Box 660245 Indianapolis, IN 46266	n/a	PC	Komen Tissue Bank	$500 00
July 26, 2013	Indianapolis Zoological Society 1200 W Washington St. Indianapolis, IN 46222	n/a	PC	General Fund	$5,000 00
March 22, 2013	Indiana Aids Fund HealthFoundation of Greater Indpls 429 E Vermont Street, Ste 300 Indianapolis, IN 46202	n/a	PC	General Fund	$3,500 00
July 26, 2013	Indiana Latino Scholarship Fund PO Box 6028 Indianapolis, IN 46206	n/a	PC	Indiana Latino Scholarship Fund	$1,500 00
November 22, 2013	Jewish Federation of Greater Indpls 6705 Hoover Road Indianapolis, IN 46260	n/a	PC	General Fund	$15,000 00
November 22, 2013	Julian Center 2011 N Meridian St. Indianapolis, IN 46202	n/a	PC	General Fund	$2,500 00
January 4, 2013	Julian Center 2011 N Meridian St. Indianapolis, IN 46202	n/a	PC	General Fund	$1,000 00
July 26, 2013	Julian Center 2011 N Meridian St. Indianapolis, IN 46202	n/a	PC	General Fund	$1,000 00
October 10, 2013	Legacy Fund Community Foundation 515 Main Street, Suite 100 Carmel, IN	n/a	PC	General Fund	$1,000 00
August 16, 2013	Masquerade Pacers Foundation & Simon Youth Foundation	n/a	PC	The Masquerade - Sponsorship Pledge	$100,000 00

Samerian Foundation
Grants and Contributions Paid During the Year
For the Year Ended December 31 2013

Date of Contribution	Grant/Contribution Recipient	If recipient is an individual relationship to foundation	Foundation status of recipient	Purpose of grant or contribution	Amount
	225 W Washington St Indianapolis, IN 46204				
October 10, 2013	Meals on Wheels PO Box 40969 Indianapolis, IN 46240	n/a	PC	General Fund	$1,000 00
December 27, 2013	Meals on Wheels PO Box 40969 Indianapolis, IN 46240	n/a	PC	General Fund	$250 00
January 4, 2013	Methodist Health Foundation 1800 N Capitol Avenue Noyes Pavilion Indianapolis, IN 46207	n/a	PC	General Fund	$1,000 00
October 10, 2013	NCMEC Natl Center for Missing & Exploited Children 699 Prince Street Alexandria, VA 22314	n/a	PC	General Fund	$1,000 00
January 4, 2013	Park Tudor Annual Fund 7200 N College Avenue Indianapolis, IN 46240	n/a	PC	General Fund	$2,500 00
December 27, 2013	Park Tudor Annual Fund 7200 N College Avenue Indianapolis, IN 46240	n/a	PC	Empowering Learners Pledge Payment	$50,000 00
November 22, 2013	Patachou Foundation 4923 N College Ave Suite 25 Indianapolis, IN 46205	n/a	PC	After School Meal Program	$5,000 00
June 14, 2013	Peace Learning Center 6040 DeLong Road Indianapolis, IN 46254	n/a	PC	General Fund	$30,000 00
December 27, 2013	Peace Learning Center 6040 DeLong Road Indianapolis, IN 46254	n/a	PC	General Fund	$50 000 00
December 27, 2013	Pink Ribbon Connection 1139 Shelby St Indianapolis, IN 46203	n/a	PC	General Fund	$500 00
October 10, 2013	Purdue Univ of Veterinary Medicine c/o Lynn Hall, Room 1177A West Lafayette, IN 47907	n/a	PC	College of Veterinary Medicine	$1,000 00
October 10, 2013	Riley Children's Foundation 30 S Meridian St., Ste 200 Indianapolis, IN 46204	n/a	PC	General Fund	$400 00
December 27, 2013	Save The Chimps PO Box 12220 Fort Pierce, FL 34979	n/a	PC	General Fund	$300 00
December 27, 2013	School on Wheels 2605 E 62nd St , Suite 2005 Indianapolis, IN 46220	n/a	PC	Tutors in Action Program	$25,000 00
March 22, 2013	St Joseph Institute for the Deaf 9192 Waldemar Road Indianapolis, IN 46268	n/a	PC	Summer Camp	$2,500 00
September 6, 2013	Sierra Club - Hoosier Chapter 1100 W 42nd Street, Ste 140 Indianapolis, IN 46208	n/a	PC	Protecting Indiana Waters Campaign	$10,000 00

Samenan Foundation
Grants and Contributions Paid During the Year
For the Year Ended December 31 2013

Date of Contribution	Grant/Contribution Recipient	If recipient is an individual relationship to foundation	Foundation status of recipient	Purpose of grant or contribution	Amount
October 10, 2013	Southern Poverty Law Center 400 Washington Avenue Montgomery, AL 36104	n/a	PC	Stop Bullying in Our Schools Campaign	$900 00
March 1, 2013	Think Forward Foundation 1150 West 116th Street Carmel, IN 46032	n/a	PC	Lemondate Day Sponsorship	$10,000 00
December 27, 2013	UNICEF US Fund 125 Maiden Lane New York, NY 10038	n/a	PC	General Fund	$500 00
January 4, 2013	US Holocaust Memorial Museum 100 Raoul Wallenburg Place SW Washington, DC 20024	n/a	PC	General Fund	$10,000 00
October 10, 2013	US Holocaust Memorial Museum 100 Raoul Wallenburg Place SW Washington, DC 20024	n/a	PC	Wings of Memory Society	$10,000 00
September 6, 2013	United Way of Central Indiana 3901 N Meridian St. Indianapolis, IN 46208	n/a	PC	General Fund	$5,000 00
June 14, 2013	Walter Blackburn Scholarship Fund 3388 Founders Road Indianapolis, IN 46268	n/a	PC	General Fund	$500 00
November 22, 2013	Wheeler Mission 205 E New York St Indianapolis, IN 46204	n/a	PC	General Fund	$250 00
June 14, 2013	World Food Program USA 1725 I Street NW, Ste 510 Washington, DC 20006	n/a	PC	General Fund	$10,000 00
October 10, 2013	World Union of Progressive Judaism 633 Third Avenue New York, NY 10017	n/a	PC	General Fund	$2,500 00
July 26, 2013	Wounded Warrior Project PO Box 758540 Topeka, KA 66675	n/a	PC	General Fund	$100 00
November 22, 2013	Wounded Warrior Project PO Box 758540 Topeka, KA 66675	n/a	PC	General Fund	$250 00
June 14, 2013	WFYI Public Television Station P B S 1630 N Meridian St. Indianapolis, IN 46202	n/a	PC	Slick Leonard Documentary	$50,000 00
				Total Contributions Paid During the Year	$892,583 00

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
BMO HARRIS	325.	325.	
TOTAL TO PART I, LINE 3	325.	325.	

FORM 990-PF LEGAL FEES STATEMENT 2

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
LEGAL FEES	27,924.	0.		0.
TO FM 990-PF, PG 1, LN 16A	27,924.	0.		0.

FORM 990-PF ACCOUNTING FEES STATEMENT 3

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING FEES	10,000.	0.		0.
TO FORM 990-PF, PG 1, LN 16B	10,000.	0.		0.

FORM 990-PF OTHER EXPENSES STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
BANK FEES	45.	0.		0.
TO FORM 990-PF, PG 1, LN 23	45.	0.		0.

FORM 990-PF OTHER ASSETS STATEMENT 5

DESCRIPTION	BEGINNING OF YR BOOK VALUE	END OF YEAR BOOK VALUE	FAIR MARKET VALUE
A/R RELATED TO PAYMENT INADVERTENTLY MADE FROM WRONG ACCOUNT AND CORRECTED	2,000.	0.	0.
TO FORM 990-PF, PART II, LINE 15	2,000.	0.	0.

FORM 990-PF LIST OF SUBSTANTIAL CONTRIBUTORS PART VII-A, LINE 10 STATEMENT 6

NAME OF CONTRIBUTOR	ADDRESS
SIMON 5 YEAR CHARITABLE LEAD ANNUITY TRUST	C/O MCGUIRE WOODS LLP, P.O. BOX 397 RICHMOND, VA 23218-0397
SIMON 10 YEAR CHARITABLE LEAD ANNUITY TRUST	C/O MCGUIRE WOODS LLP, P.O. BOX 397 RICHMOND, VA 23218-0397
SIMON 12 YEAR CHARITABLE LEAD ANNUITY TRUST	C/O MCGUIRE WOODS LLP, P.O. BOX 397 RICHMOND, VA 23218-0397
SIMON 15 YEAR CHARITABLE LEAD ANNUITY TRUST	C/O MCGUIRE WOODS LLP, P.O. BOX 397 RICHMOND, VA 23218-0397

FORM 990-PF PART VIII - LIST OF OFFICERS, DIRECTORS TRUSTEES AND FOUNDATION MANAGERS STATEMENT 7

NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN CONTRIB	EXPENSE ACCOUNT
CYNTHIA SIMON SKJODT 9650 COMMERCE DRIVE, SUITE 532 CARMEL, IN 46032	PRESIDENT 2.00	0.	0.	0.
PAUL SKJODT 9650 COMMERCE DRIVE, SUITE 532 CARMEL, IN 46032	CHAIRMAN 4.00	0.	0.	0.
FONDA CRANDALL 9650 COMMERCE DRIVE, SUITE 532 CARMEL, IN 46032	SECRETARY/TREASURER 2.00	0.	0.	0.
ERIK SKJODT 9650 COMMERCE DRIVE, SUITE 532 CARMEL, IN 46032	DIRECTOR 0.50	0.	0.	0.
SAMANTHA SKJODT 9650 COMMERCE DRIVE, SUITE 532 CARMEL, IN 46032	DIRECTOR 0.50	0.	0.	0.
IAN SKJODT 9650 COMMERCE DRIVE, SUITE 532 CARMEL, IN 46032	DIRECTOR 0.50	0.	0.	0.
TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII		0.	0.	0.

Form **8868**
(Rev. January 2014)

Department of the Treasury
Internal Revenue Service

Application for Extension of Time To File an Exempt Organization Return

▷ **File a separate application for each return.**

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

OMB No. 1545-1709

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

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

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

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

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

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

Type or print File by the due date for filing your return See instructions	Name of exempt organization or other filer, see instructions. SAMERIAN FOUNDATION, INC.	**Enter filer's identifying number** Employer identification number (EIN) or 37-1439047
	Number, street, and room or suite no. If a P O. box, see instructions. 9910 TOWNE ROAD	Social security number (SSN)
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. CARMEL, IN 46032	

Enter the Return code for the return that this application is for (file a separate application for each return) 0 4

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

- The books are in the care of ▷ CYNTHIA SIMON SKJODT 9910 TOWNE ROAD - CARMEL, IN 46032

Telephone No. ▷ (317) 875-3391 Fax No. ▷

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

1 I request an automatic 3-month (6 months for a corporation required to file Form 990-T) extension of time until AUGUST 15, 2014, to file the exempt organization return for the organization named above. The extension is for the organization's return for

▷ ☒ calendar year 2013 or

▷ ☐ tax year beginning ______, and ending ______.

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

3a	If this application is for Forms 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions	3a	$ 0.
b	If this application is for Forms 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made Include any prior year overpayment allowed as a credit.	3b	$ 205.
c	**Balance due.** Subtract line 3b from line 3a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	3c	$ 0.

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

LHA **For Privacy Act and Paperwork Reduction Act Notice, see instructions.** Form **8868** (Rev 1-2014)

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12-31-13