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Form

990-PF

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

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

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

OMB No 1545-0052

2013

Open to Public Inspection

For calendar year 2013, or tax year beginning 01-01-2013 , and ending 12-31-2013

Name of foundation BAIARDI FAMILY FOUNDATION INC		A Employer identification number 38-3430867	
Number and street (or P O box number if mail is not delivered to street address) 2328 PINECREST ST		B Telephone number (see instructions) (231) 526-8395	
City or town, state or province, country, and ZIP or foreign postal code HARBOR SPRINGS, MI 497409261		C If exemption application is pending, check here <input type="checkbox"/>	
G Check all that apply <input type="checkbox"/> Initial return <input type="checkbox"/> Final return <input type="checkbox"/> Address change <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Amended return <input type="checkbox"/> Name change		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>	
H Check type of organization <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>	
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 7,982,863	J Accounting method <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> 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 <input type="checkbox"/>	

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))		(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 (attach schedule)				
	2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	58	58		
	4 Dividends and interest from securities.	163,153	163,153		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	116,224			
	b Gross sales price for all assets on line 6a 439,549				
	7 Capital gain net income (from Part IV, line 2)		39,549		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
	b Less Cost of goods sold				
Operating and Administrative Expenses	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)				
	12 Total. Add lines 1 through 11	279,435	202,760		
	13 Compensation of officers, directors, trustees, etc				
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)	2,785			
	c Other professional fees (attach schedule)				
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	2,111			
	19 Depreciation (attach schedule) and depletion . . .				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications	231			231
	23 Other expenses (attach schedule)	1,091			
	24 Total operating and administrative expenses.				
	Add lines 13 through 23	6,218	0		231
	25 Contributions, gifts, grants paid	377,377			377,377
	26 Total expenses and disbursements. Add lines 24 and 25	383,595	0		377,608
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	-104,160			
	b Net investment income (if negative, enter -0-)		202,760		
	c Adjusted net income (if negative, enter -0-)				

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)	Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing	2,385	1,564	1,564
	2	Savings and temporary cash investments	372,326	391,367	391,367
	3	Accounts receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	4	Pledges receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7	Other notes and loans receivable (attach schedule) ▶ _____ 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 (attach schedule)	30,686	30,686	30,686
	b	Investments—corporate stock (attach schedule)	6,276,067	6,153,687	7,559,246
	c	Investments—corporate bonds (attach schedule).			
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)			
	14	Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
15	Other assets (describe ▶ _____)				
16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	6,681,464	6,577,304	7,982,863	
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 (attach schedule)			
	22	Other liabilities (describe ▶ _____)			
	23	Total liabilities (add lines 17 through 22)		0	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/> 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 ▶ <input checked="" type="checkbox"/> and complete lines 27 through 31.				
	27	Capital stock, trust principal, or current funds			
	28	Paid-in or capital surplus, or land, bldg , and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds	6,681,464	6,577,304	
	30	Total net assets or fund balances (see page 17 of the instructions)	6,681,464	6,577,304	
	31	Total liabilities and net assets/fund balances (see page 17 of the instructions)	6,681,464	6,577,304	

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	6,681,464
2	Enter amount from Part I, line 27a	2	-104,160
3	Other increases not included in line 2 (itemize) ▶ _____	3	
4	Add lines 1, 2, and 3	4	6,577,304
5	Decreases not included in line 2 (itemize) ▶ _____	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	6,577,304

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				
(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			(i) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))	
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any		
a				
b				
c				
d				
e				
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	39,549
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8 }		3	

Part V

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☒ No
If "Yes," the foundation does not qualify under section 4940(e) Do not complete this part

1 Enter the appropriate amount in each column for each year, see page 18 of 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	362,395	6,860,121	0 052826
2011	318,939	6,802,411	0 046886
2010	157,199	5,990,524	0 026241
2009	135,296	5,618,087	0 024082
2008	179,673	5,746,179	0 031268
2	Total of line 1, column (d).		2 0 181303
3	Average distribution ratio for the 5-year base period—divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years		3 0 036261
4	Enter the net value of noncharitable-use assets for 2013 from Part X, line 5.		4 7,326,435
5	Multiply line 4 by line 3.		5 265,664
6	Enter 1% of net investment income (1% of Part I, line 27b).		6 2,028
7	Add lines 5 and 6.		7 267,692
8	Enter qualifying distributions from Part XII, line 4.		8 377,608
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 page 18 of the instructions)		
1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1		
Date of ruling or determination letter _____ (attach copy of letter if necessary—see instructions)		
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b	1	2,028
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	
3 Add lines 1 and 2.	3	2,028
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5	2,028
6 Credits/Payments		
a 2013 estimated tax payments and 2012 overpayment credited to 2013	6a	2,500
b Exempt foreign organizations—tax withheld at source	6b	
c Tax paid with application for extension of time to file (Form 8868)	6c	
d Backup withholding erroneously withheld	6d	
7 Total credits and payments. Add lines 6a through 6d.	7	2,500
8 Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached.	8	
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	472
11 Enter the amount of line 10 to be Credited to 2014 estimated tax 472 Refunded	11	

Part VII-A Statements Regarding Activities			
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a	Yes	No
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)? <i>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.</i>	1b		No
c Did the foundation file Form 1120-POL for this year?.	1c		
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation <input type="checkbox"/> \$ _____ (2) On foundation managers <input type="checkbox"/> \$ _____			
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input type="checkbox"/> \$ _____			
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If "Yes," attach a detailed description of the activities.</i>	2		No
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? <i>If "Yes," attach a conformed copy of the changes</i>	3		No
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?.	4a		No
b If "Yes," has it filed a tax return on Form 990-T for this year?.	4b		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If "Yes," attach the statement required by General Instruction T.</i>	5		No
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	Yes	
7 Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col. (c), and Part XV.</i>	7	Yes	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) <input type="checkbox"/> MI _____			
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? <i>If "No," attach explanation.</i>	8b	Yes	
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)? <i>If "Yes," complete Part XIV</i>	9		No
10 Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses.</i>	10		No

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		No
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		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Yes	
Website address ► WWW.BAIARDIFOUNDATION.ORG				
14	The books are in care of ► CHRIS BAIARDI Telephone no ► (231) 526-8395 Located at ► 2328 PINECREST ST HARBOR SPRINGS MI ZIP +4 ► 49740			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here ► <input type="checkbox"/> and enter the amount of tax-exempt interest received or accrued during the year ► 15			
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	Yes	No
See 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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?. <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?. <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days). <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)?. . . Organizations relying on a current notice regarding disaster assistance check here. ► <input type="checkbox"/>	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		
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?. <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years ► 20____, 20____, 20____, 20____			
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).	2b		
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ► 20____, 20____, 20____, 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?. <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
b	If "Yes," did it have excess business holdings in 2013 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (<i>Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2013.</i>).	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
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		No

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))?

YesNo

(2)

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

YesNo

(3)

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

YesNo

(4)

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

YesNo

(5)

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

YesNo

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)?

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?

YesNo

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?

YesNo

b

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

6b

No

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?

YesNo

b

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

7b

Part VIII

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

1

List all officers, directors, trustees, foundation managers and their compensation (see instructions).

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
CHRIS A BAIARDI 2328 PINECREST ST HARBOR SPRINGS, MI 49740	PRESIDENT 10 00	0	0	0
CINDY J BAIARDI 2328 PINECREST ST HARBOR SPRINGS, MI 49740	SEC, TREAS 10 00	0	0	0
SUZANNE M BAIARDI 7330 CRACKLING CREEK CIRCLE WEST BLOOMFIELD, MI 48322	VICE PRES 2 00	0	0	0
KRISTEN L BAIARDI 2152 MANCHESTER BIRMINGHAM, MI 48009	VICE PRES 2 00	0	0	0

2

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

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

Total

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

Part VIII

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

NONE

Total number of others receiving over \$50,000 for professional services. 1

Part IX-A

Expenses

1

Part IX-B

Amount

1 N/A

Total. Add lines 1 through 3

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	7,110,437
b	Average of monthly cash balances.	1b	327,568
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	7,438,005
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	
2	Acquisition indebtedness applicable to line 1 assets.	2	
3	Subtract line 2 from line 1d.	3	7,438,005
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	111,570
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	7,326,435
6	Minimum investment return. Enter 5% of line 5.	6	366,322

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	366,322
2a	Tax on investment income for 2013 from Part VI, line 5.	2a	2,028
b	Income tax for 2013 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	2,028
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	364,294
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	364,294
6	Deduction from distributable amount (see instructions).	6	
7	Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1.	7	364,294

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	377,608
b	Program-related investments—total from Part IX-B.	1b	
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	377,608
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 (see instructions).	5	2,028
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	375,580
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				364,294
2 Undistributed income, if any, as of the end of 2013				
a Enter amount for 2012 only.			8,536	
b Total for prior years 20____, 20____, 20____				
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.				
4 Qualifying distributions for 2013 from Part XII, line 4 ▶ \$ 377,608				
a Applied to 2012, but not more than line 2a			8,536	
b Applied to undistributed income of prior years (Election required—see instructions).				
c Treated as distributions out of corpus (Election required—see instructions).				
d Applied to 2013 distributable amount.				364,294
e Remaining amount distributed out of corpus	4,778			
5 Excess distributions carryover applied to 2013 (If an amount appears in column (d), the same amount must be shown in column (a).)				
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	4,778			
b Prior years' undistributed income Subtract line 4b from line 2b.				
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.				
d Subtract line 6c from line 6b Taxable amount—see instructions.				
e Undistributed income for 2012 Subtract line 4a from line 2a Taxable amount—see instructions.				
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) (see instructions).				
8 Excess distributions carryover from 2008 not applied on line 5 or line 7 (see instructions).				
9 Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a.	4,778			
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.	4,778			

Part XIV

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

1a

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 organization is a private operating foundation described in section 4942(j)(3) or 4942(j)(5)

☐ 4942(j)(3) or ☐ 4942(j)(5)

2a

Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed.

Tax year	Prior 3 years				(e) Total
(a) 2013	(b) 2012	(c) 2011	(d) 2010		
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 organization 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))

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

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

BAIARDI FAMILY FOUNDATION
2328 PINECREST
HARBOR SPRINGS, MI 49740
(231) 526-8395
CJBAIARDI@BAIARDIFOUNDATION.ORG

b

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

c

Any submission deadlines

d

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

Form 990-PF (2013)

Part XV

Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year See Additional Data Table				
Total			3a	377,377
b Approved for future payment				
Total			3b	

Enter gross amounts unless otherwise indicated

Enter gross amounts unless otherwise indicated		Unrelated business income		Excluded by section 512, 513, or 514		(e)
		(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	Related or exempt function income (See instructions)
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	58	
4	Dividends and interest from securities.			14	163,153	
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			25	39,549	76,675
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).				202,760	76,675
13	Total. Add line 12, columns (b), (d), and (e). (See worksheet in line 13 instructions to verify calculations)			13		279,435

[illegible]

Part XVII

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

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)

No

2

Other assets.

1a(2)

No

b

Other transactions

1

Sales of assets to a noncharitable exempt organization.

1b(1)

No

2

Purchases of assets from a noncharitable exempt organization.

1b(2)

No

3

Rental of facilities, equipment, or other assets.

1b(3)

No

4

Reimbursement arrangements.

1b(4)

No

5

Loans or loan guarantees.

1b(5)

No

6

Performance of services or membership or fundraising solicitations.

1b(6)

No

c

Sharing of facilities, equipment, mailing lists, other assets, or paid employees.

1c

No

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

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

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

Signature of officer or trustee

2014-05-14

Date

Title

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

☒

Yes


☐

No


Paid Preparer Use Only

Print/Type preparer's name PAULA R YOUNG-KOZLOWSKI	Preparer's Signature	Date 2014-05-14	Check if self-employed <input type="checkbox"/>	PTIN P00507353
Firm's name <input type="checkbox"/>	PR YOUNG CPA PC			Firm's EIN <input type="checkbox"/>
Firm's address <input type="checkbox"/>	8585 P G A DR STE 205 WALLED LAKE, MI 483901604			Phone no (248) 668-1500


Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
ALANSON AREA PUBLIC LIBRARY ALANSON AREA PUBLIC LIBRARY 7631 BURR AVE 7631 BURR AVE ALANSON, MI 49706	N/A	PUBLIC	PURCHASE OF BOOKS	1,000
AL LITZENBURGER RUFFED GROUSE SCTY AL LITZENBURGER RUFFED GROUSE SCTY 3844 LORRAINE DR 3844 LORRAINE DR PETOSKEY, MI 49770	N/A	PRIVATE ORG	YOUTH ACTIVITIES	2,500
ALLIED EMS SYSTEMS INC ALLIED EMS SYSTEMS INC 3407 M-119 3407 M-119 HARBOR SPRINGS, MI 49740	N/A	PUBLIC	UPGRADE CURRENT A E D PER REQUEST	2,140
AMERICAN LEGION AUXILLARY AMERICAN LEGION AUXILLARY 3025 S PLEASANTVIEW RD 3025 S PLEASANT VIEW RD HARBOR SPRINGS, MI 49740	N/A	PUBLIC	FAMILY ASSISTANCE & MILK PROGRAM	5,000
AUBURN HILLS COMMUNITY FOUNDATIONS AUBURN HILLS COMMUNITY FOUNDATION 1827 NORTH SQUIRREL RD 1827 NORTH SQUIRREL RD AUBURN HILLS, MI 48326	N/A	PUBLIC	MATCHING FUND/CHALLENGE GRANT	15,000
BARAGA BROADCASTING INC BARAGA BROADCASTING INC PO BOX 1109 PO BOX 1109 INDIAN RIVER, MI 49749	N/A	PUBLIC	GNERAL SUPPORT	1,000
BLUMS LANDING BLUMS LANDING 7460 OCQUEOC LAKE RD 7460 OCQUEOC LAKE RD MILLERSBURG, MI 49759	N/A	PUBLIC	GENERAL SUPPORT	2,500
BOTTOMLESS TOY CHEST BOTTOMLESS TOY CHEST PO BOX 623 PO BOX 623 BLOOMFIELD HILLS, MI 48303	N/A	PUBLIC	PURCHASE TOYS	2,500
BOY SCOUTS OF AMERICA TROOP 55 BOYS SCOUTS OF AMERICA TROOP 55 343 EAST MAIN ST 343 EAST MAIN ST HARBOR SPRINGS, MI 49740	N/A	PUBLIC	ACTIVITIES	5,100
BROTHER DAN'S FOOD PANTRY BROTHER DAN'S FOOD PANTRY 415 STATE ST 415 STATE ST PETOSKEY, MI 49770	N/A	PUBLIC	FOOD PURCHASE	1,000
CHRIST CHILD SOCIETY CHRIST CHILD SOCIETY OF NORTHERN MICHIGAN PO BOX 132 PO BOX 132 HARBOR SPRINGS, MI 49740	N/A	RELIGIOUS	LAYETTE PROGRAM	2,500
CHRIST CHILD SOCIETY CHRIST CHILD SOCITY OF NORTHERN MICHIGAN PO BOX 132 PO BOX 132 HARBOR SPRINGS, MI 49740	N/A	RELIGIOUS	CHRISTMAS FAMILY PROGRAM	2,500
CONSERVATION RESOURCE ALLIANCE CONSERVATION RESOURCE ALLIANCE 10850 TRAVERSE HIGHWAY 10850 TRAVERSE HIGHWAY TRAVERSE CITY, MI 49684	N/A	PUBLIC	MAPLE RIVER RESTORATION PROJECT	5,000
COUNCIL OF MI FOUNDATIONS COUNCIL OF MICHIGAN FOUNDATION 333 WEST FORT ST STE 2010 333 WEST FORT ST STE 2010 DETROIT, MI 48226	N/A	PUBLIC	2012 MEMBERSHIP RENEWAL	2,000
CROSS VILLAGE TOWNSHIP CROSS VILLAGE TOWNSHIP PO BOX 182 PO BOX 182 CROSS VILLAGE, MI 49723	N/A	PUBLIC	COMMUNITY PAVILLION	5,000
Total  3a				377,377


Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
DIOCESE OF GAYLORD DIOCESE OF GAYLORD 611 WEST NORTH ST 611 WEST NORTH ST GAYLORD,MI 49735	N/A	RELIGIOUS	DIOCESAN SEMINARIAN EDUCATION FUND	1,000
ELKS NATIONAL FOUNDATION ELKS NATIONAL FOUNDATION 5365 AINTREE 5365 AINTREE OAKLAND TOWNSHIP,MI 48306	N/A	PUBLIC	HEALTHY MINDS & BODIES PROGRAM	2,000
EMMET CONSERVATION DISTRICT EMMET CONSERVATION DISTRICT 3434 M-119 3434 M-119 HARBOR SPRINGS,MI 49740	N/A	PUBLIC	WATER RESOURCE EDUCATION PRG	5,000
EMMET COUNTY 4-H EMMET COUNTY 4-H 3434 HARBOR-PETOSKEY RD 3434 HARBOR-PETOSKEY RD HARBOR SPRINGS,MI 49740	N/A	PUBLIC	ACTIVITIES	3,286
EMMET CHARLEVOIX 4-H EMMET CHARLEVOIX 4-H 4583 LINTLONG RD 4583 LINTLONG RD PETOSKEY,MI 49770	N/A	PUBLIC	LIVESTOCK AUCTION	2,750
EMMET CHARLEVOIX COUNTY FAIR EMMET CHARLEVOIX COUNTY FAIR 1129 CHARLEVOIX AVE 1129 CHARLEVOIX AVE PETOSKEY,MI 49770	N/A	PUBLIC	COUNTY FAIR	5,320
FATHER FRED FOUNDATION INC FATHER FRED FOUNDATION INC PO BOX 2260 PO BOX 2260 TRAVERSE CITY,MI 496852260	N/A	PUBLIC	FOOD PURCHASE	1,000
HARBOR INC HARBOR INC PO BOX 112 PO BOX 112 HARBOR SPRINGS,MI 49740	N/A	PUBLIC	GENERAL OPERATIONS	1,000
HARBOR HALL FOUNDATION HARBOR HALL FOUNDATION PO BOX 376 PO BOX 376 HARBOR SPRINGS,MI 49740	N/A	PUBLIC	GENERAL SUPPORT	5,000
HARBOR SPRINGS AREA AIRPORT AUTHORI HARBOR SPRINGS AREA AIRPORT AUTHORITY 8350 M-119 8350 M-119 HARBOR SPRINGS,MI 49740	N/A	PUBLIC	GENERAL OPERATION	10,000
HARBOR SPRINGS COMMUNITY FOOD PANTR HARBOR SPRNGS FOOD PANTRY PO BOX 23 PO BOX 23 HARBOR SPRINGS,MI 49740	N/A	PUBLIC	FOOD PURCHASE	4,500
HARBOR SPRINGS COMMUNITY FOOD PANTR HARBOR SPRNGS FOOD PANTRY PO BOX 23 PO BOX 23 HARBOR SPRINGS,MI 49740	N/A	PUBLIC	GENERAL MAINT AND SUPPLIES	1,000
HARBOR SPRINGS COMMUNITY FOOD PANTR HARBOR SPRINGS FOOD PANTRY PO BOX 23 PO BOX 23 HARBOR SPRINGS,MI 49740	N/A	PUBLIC	BOOK FUND FOR CHILDREN	500
HARBOR SPRINGS EDUCATION FOUNDATION HARBOR SPRINGS EDUCATION FOUNDATION PO BOX 561 PO BOX 561 HARBOR SPRINGS,MI 49740	N/A	PUBLIC	MATCHING FUNDS PAYMENT	3,860
HARBOR SPRINGS HISTORICAL HARBOR SPRINGS HISTORICAL SOCIETY 349 E MAIN ST 349 E MAIN ST HARBOR SPRINGS,MI 49740	N/A	PUBLIC	GENERAL OPERATIONS	1,500
Total  3a				377,377


Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
HARBOR SPRINGS POLICE DEPT HARBOR SPRINGS POLICE DEPARTMENT 170 ZOLL ST 170 ZOLL ST HARBOR SPRINGS, MI 49740	N/A	PUBLIC	PURCHASE EQUIPMENT & SOFTWARE	25,000
HOLY CHILDHOOD OF JESUS CHURCH HOLY CHILDHOOD OF JESUS CHURCH 150 W MAIN ST 150 W MAIN ST HARBOR SPRINGS, MI 49740	N/A	PRIVATE ORG	GENERAL OPERATIONS	5,000
HOLY CHILDHOOD OF JESUS CHURCH HOLY CHILDHOOD OF JESUS CHURC 150 W MAIN ST 150 W MAIN ST HARBOR SPRINGS, MI 49740	N/A	PRIVATE ORG	CARE AND MAINTENANCE DR FOR CEMETERY	1,000
ICEBREAKER MACKINAW MARITIME MUSEUM ICEBREAKER MACKINAW MARITIME MUSEUM 131 S HURON AVE 131 S HURON AVE MACKINAW CITY, MI 49701	N/A	PUBLIC	GENERAL OPERATIONS	1,000
LITTLE TRAVERSE CONSERVANCY LITTLE TRAVERSE CONSERVANCY 3264 POWELL ROAD 3264 POWELL ROAD HARBOR SPRINGS, MI 49740	N/A	PUBLIC	SAVE THE TREES FUNDRAISER	5,000
LITTLE TRAVERS CONSERVANCY LITTLE TRAVERSE CONSERVANCY 3264 POWELL ROAD 3264 POWELL ROAD HARBOR SPRINGS, MI 49740	N/A	PUBLIC	FUND PLATFORM REBUILD THORNE SWIFT	10,000
LITTLE TRAVESE CONSERVANCY LITTLE TRAVERSE CONSERVANCY 3264 POWELL ROAD 3264 POWELL ROAD HARBOR SPRINGS, MI 49740	N/A	PUBLIC	JOHN FISCHER MEMORIAL PRSERVE	5,000
MAKE-A-WISH FOUNDATION OF MICHIGAN MAKE-A-WISH FOUNDATION OF MICHIGAN 2300 GENOA BUSINESS PARK 2300 GENOA BUSINESS PARK BRIGHTON, MI 481147369	N/A	PUBLIC	SUPPORT WISH-GRANTING PROGRAM	3,000
MANNA FOOD PROJECT MANNA FOOD PROJECT 8791 MCBRIDE PARK COURT 8791MCBRIDE PARK COURT HARBOR SPRINGS, MI 49740	N/A	PUBLIC	FOOD PURCHASE	3,000
MANNA FOOD PROJECT MANNA FOOD PROJECT 8791 MCBRIDE PARK COURT 8791 MCBRIDE PARK COURT HARBOR SPRINGS, MI 49740	N/A	PUBLIC	HARBOR SPRINGS COMM FOOD PANTRY	2,000
MANNA FOOD PROJECT MANNA FOOD PROJECT 8791 MCBRIDE PARK COURT 8791 MCBRIDE PARK COURT HARBOR SPRINGS, MI 49740	N/A	PUBLIC	FOOD 4 KIDS BACKPACK PROGRAM	1,500
MCLAREN NORTHERN MICHIGAN FOUNDATIO MCLAREN NORTHERN MICHIGAN FOUNDATION 360 CONNABLE AVE 360 CONNABLE AVE PETOSKEY, MI 49770	N/A	PUBLIC	HEART ARRHYTHMIA CLINIC	30,000
MCLAREN NORTHERN MICHIGAN FOUNDATIO MCLAREN NORTHERN MICHIGAN FOUNDATION 360 CONNABLE AVE 360 CONNABLE AVE PETOSKEY, MI 49770	N/A	PUBLIC	NURSING SCHOLARSHIPS	4,500
MCLAREN NORTHERN MICHIGAN FOUNDATIO MCLAREN NORTHERN MICHIGAN FOUNDATION 360 CONNABLE AVE 360 CONNABLE AVE PETOSKEY, MI 49770	N/A	PUBLIC	DIABETIC SUPPLIES - FREE CLINIC	10,000
MIM SCHOLARSHIP FUND MIM SCHOLARSHIP FUND 24725 W 12 MILE RD ST388 24725 W 12 MILE RD STE388 SOUTHFIELD, MI 48034	N/A	PUBLIC	SCHOLARSHIP SUPPORT	2,000
Total  3a				377,377

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
NO FENCE TOO HIGH MINISTRIES INC NO FENCE TOO HIGH MINISTRIES INC 4505 S STATE RD 4505 S STATE RD HARBOR SPRINGS,MI 49740	N/A	PUBLIC	PURCHASE BOOKS AND BIBLES	900
NORTH CENTRAL MICHIGAN NORTH CENTRAL MICHIGAN COLLEGE FOUNDATION 1515 HOWARD STREET 1515 HOWARD STREET PETOSKEY,MI 49770	N/A	PUBLIC	SCHOLARSHIP PROGRAM	6,500
PELLSTON PUBLIC SCHOOLS PELLSTON PUBLIC SCHOOLS 172 N PARK ST 172 N PARK ST PELLSTON,MI 49769	N/A	PUBLIC	UPGRADE CAMERAS AND CD EQUIPMENT	5,126
PETOSKEY-HARBOR SPRINGS PETOSKEY-HARBOR SPRINGS COMMUNITY FOUNDATION 616 PETOSKEY STREET 616 PETOSKEY STREET PETOSKEY,MI 49770	N/A	PUBLIC	SCHOLARSHIPS	13,000
PETOSKEY-HARBOR SPRINGS PETOSKEY-HARBOR SPRINGS COMMUNITY FOUNDATION 616 PETOSKEY STREET 616 PETOSKEY STREET PETOSKEY,MI 49770	N/A	PUBLIC	EMMET COUNTY SHERIFF	700
PETOSKEY-HARBOR SPRINGS PETOSKEY-HARBOR SPRINGS COMMUNITY FOUNDATION 616 PETOSKEY STREET 616 PETOSKEY STREET PETOSKEY,MI 49770	N/A	PUBLIC	GRANTS	11,500
PETOSKEY-HARBOR SPRINGS PETOSKEY-HARBOR SPRINGS COMMUNITY FOUNDATION 616 PETOSKEY STREET 616 PETOSKEY STREET PETOSKEY,MI 49770	N/A	PUBLIC	FALL CYCLE	7,691
PETOSKEY PUBLIC LIBRARY PETOSKEY PUBLIC LIBRARY 500 E MITCHELL ST 500 E MITCHELL ST PETOSKEY,MI 49770	N/A	PUBLIC	PURCHASE OF BOOKS	1,000
PREGNANCY CARE CENTER OF PETOSKEY PREGNANCY CARE CENTER OF PETOSKEY 2206 MITCHELL PARK DR 2206 MITCHELL PARK DR PETOSKEY,MI 49770	N/A	PULBIC	CURRICULM FUNDING AND FURNITURE	5,000
RFC FIRERESCUE RFC FIRE/RESCUE 8338 W ROBINSON RD 8338 W ROBINSON RD HARBOR SPRINGS,MI 49740	N/A	PUBLIC	PURCHASE RADIOS, LIFEPAK	10,644
RAVEN HILL DISCOVERY CENTER RAVEN HILL DISCOVERY CENTER 4737 FULLER RD 4737 FULLER RD EAST JORDAN,MI 49727	N/A	PUBLIC	STORAGE/DISPLAY CABINETS	5,000
RISING HOPE RIDING CENTER RISING HOPE RIDING CENTER 2787 QUICK RD 2787 QUICK RD HARBOR SPRINGS,MI 49740	N/A	PUBLIC	GRANTS	10,000
SALVATION ARMY SALVATION ARMY 712 PLEASANT ST 712 PLEASANT ST PETOSKEY,MI 49770	N/A	PUBLIC	AFTER SCHOOL ARTS PROGRAM	5,900
ST FRANCIS XAVIER SCHOOL ST FRANCIS XAVIER SCHOOL 414 MICHIGAN 414 MICHIGAN PETOSKEY,MI 49770	N/A	PRIVATE ORG	POJECTORS,CAMERAS,CARTS	6,460
ST SCHOLASTICA PRIORY ST SCHOLASTICA PRIORY 271 N MAIN ST PO BOX 606 271 N MAIN ST PO BOX 606 PETERSHAM,MA 01366	N/A	PUBLIC	GENERAL OPERATIONS	2,500
Total  3a				377,377

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
TIP OF THE MITT WATERSHED TIP OF THE MITT WATERSHED COUNCIL 426 BAY STREET 426 BAY STREET PETOSKEY,MI 49770	N/A	PUBLIC	GENERAL SUPPORT	2,500
UNIV OF MICH MEDICAL SCHO UNIVERSITY OF MICH MEDICAL SCHOOL 2110 TAUBMAN CENTER 2110 TAUBMAN CENTER ANN ARBOR,MI 48109	N/A	HOSPITAL	GRANT ENDOWMENT FUND	15,000
VOICES WITHOUT BORDERS INC VOICES WITHOUT BORDERS INC 507 ALCAN RD 507 ALCAN RD PETOSKEY,MI 49770	N/A	PUBLIC	PURCHASE MUSIC AND FESTIVAL FUNDING	2,500
WAYNE STATE UNIVERSITY WAYNE STATE UNIVERSITY 5475 WOODWARD AVE 5475 WOODWARD AVE DETROIT,MI 48202	N/A	PRIVATE ORG	SCHOLARSHIP FUND	55,000
Total  3a				377,377

TY 2013 Accounting Fees Schedule

Name: BAIARDI FAMILY FOUNDATION INC

EIN: 38-3430867

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
TAX RETURN FEES	2,785			

TY 2013 Compensation Explanation**Name:** BAIARDI FAMILY FOUNDATION INC**EIN:** 38-3430867

Person Name	Explanation
CHRIS A BAIARDI	
CINDY J BAIARDI	
SUZANNE M BAIARDI	
KRISTEN L BAIARDI	

Note: To capture the full content of this document, please select landscape mode (11" x 8.5") when printing.

TY 2013 Gain/Loss from Sale of Other Assets Schedule

Name: BAIARDI FAMILY FOUNDATION INC

EIN: 38-3430867

Name	Date Acquired	How Acquired	Date Sold	Purchaser Name	Gross Sales Price	Basis	Basis Method	Sales Expenses	Total (net)	Accumulated Depreciation
4063 389 SHS BALANCED INDEX FUND	2008-01	PURCHASE	2013-02		100,000	86,057			13,943	
6603 081 SHS BALANCED INDEX FUND	2008-01	PURCHASE	2013-11		180,000	139,845			40,155	
2088 555 SHS STAR FUND	2008-01	PURCHASE	2013-11		50,000	40,879			9,121	
322 945 SHS WELLESLEY INCOME FUND	2010-08	PURCHASE	2013-11		20,000	16,652			3,348	
737 898 SHS WELLINGTON FUND	2008-01	PURCHASE	2013-11		50,000	39,892			10,108	

**TY 2013 Investments Corporate
Stock Schedule****Name:** BAIARDI FAMILY FOUNDATION INC**EIN:** 38-3430867

Name of Stock	End of Year Book Value	End of Year Fair Market Value
VANGUARD-BAL INDEX FD ADMIRAL	3,843,855	4,960,439
VANGUARD-WELLINGTON FD ADMIRAL	704,414	840,700
VANGUARD-STAR FUND	679,107	824,336
VANGUARD-WELLESLEY	250,681	288,306
VANGUARD-TOTAL INTL STK IDX ADMIRAL	675,630	645,465

**TY 2013 Investments Government
Obligations Schedule****Name:** BAIARDI FAMILY FOUNDATION INC**EIN:** 38-3430867**US Government Securities - End of
Year Book Value:**

30,686

**US Government Securities - End of
Year Fair Market Value:**

30,686

**State & Local Government
Securities - End of Year Book
Value:****State & Local Government
Securities - End of Year Fair
Market Value:**

TY 2013 Other Expenses Schedule

Name: BAIARDI FAMILY FOUNDATION INC

EIN: 38-3430867

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
EXPENSES				
INSURANCE	1,091			

TY 2013 Taxes Schedule**Name:** BAIARDI FAMILY FOUNDATION INC**EIN:** 38-3430867

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FEDERAL INCOME TAX PAID	965			
FOREIGN TAXES	1,146			