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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 Patrick and Anna M Cudahy Fund		A Employer identification number 39-0991972	
Number and street (or P O box number if mail is not delivered to street address) 333 N Michigan Ave No 510		Room/suite	
City or town, state or province, country, and ZIP or foreign postal code Chicago, IL 60601		B Telephone number (see instructions) (312) 641-5776	
G Check all that apply ☐ Initial return ☐ Initial return of a former public charity ☐ Final return ☐ Amended return ☐ Address change ☐ Name change		C If exemption application is pending, check here ☐	
H Check type of organization ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		D 1. Foreign organizations, check here ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ☐	
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ☒ \$ 14,823,153		E If private foundation status was terminated under section 507(b)(1)(A), check here ☐	
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) (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 ☒ if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities.	355,058	355,058		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	399,624			
	b Gross sales price for all assets on line 6a 2,387,314				
	7 Capital gain net income (from Part IV, line 2) . . .		399,624		
	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)	2,970	2,970		
	12 Total. Add lines 1 through 11	757,652	757,652		
	13 Compensation of officers, directors, trustees, etc	0	0		0
	14 Other employee salaries and wages	10,340	0		0
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)	18,633	0		0
	c Other professional fees (attach schedule)	66,667	0		0
	17 Interest				
	18 Taxes (attach schedule) (see instructions)				
	19 Depreciation (attach schedule) and depletion . . .				
	20 Occupancy				
	21 Travel, conferences, and meetings	2,299	0		0
	22 Printing and publications				
	23 Other expenses (attach schedule)	38,580	0		0
	24 Total operating and administrative expenses. Add lines 13 through 23	136,519	0		0
	25 Contributions, gifts, grants paid	734,750			734,750
	26 Total expenses and disbursements. Add lines 24 and 25	871,269	0		734,750
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	-113,617			
	b Net investment income (if negative, enter -0-)		757,652		
	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	15,724	12,988	12,988
	2	Savings and temporary cash investments	91,642	113,852	113,852
	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		13,600	13,600
	10a	Investments—U S and state government obligations (attach schedule)	797,835	 715,138	715,138
	b	Investments—corporate stock (attach schedule)	4,059,655	 4,946,541	4,946,541
	c	Investments—corporate bonds (attach schedule).	1,187,785	 1,111,058	1,111,058
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)	7,434,050	 7,909,976	7,909,976
	14	Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
Liabilities	15	Other assets (describe ▶ _____)			
	16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	13,586,691	14,823,153	14,823,153
	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)			
Net Assets or Fund Balances	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	13,586,691	14,823,153	
	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			
	28	Paid-in or capital surplus, or land, bldg , and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds			
	30	Total net assets or fund balances (see page 17 of the instructions)	13,586,691	14,823,153	
Net Assets or Fund Balances	31	Total liabilities and net assets/fund balances (see page 17 of the instructions)	13,586,691	14,823,153	

Part III Analysis of Changes in Net Assets or Fund Balances

1	Total net assets or fund balances at beginning of year—Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year’s return)	1	13,586,691
2	Enter amount from Part I, line 27a	2	-113,617
3	Other increases not included in line 2 (itemize) ▶ _____ 	3	1,350,079
4	Add lines 1, 2, and 3	4	14,823,153
5	Decreases not included in line 2 (itemize) ▶ _____	5	0
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30 .	6	14,823,153

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)		(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
1 a	Capital Gain	P		
b				
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 2,387,314		1,987,690	399,624
b			
c			
d			
e			

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

(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
a			399,624
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	399,624
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	669,750	13,217,108	0 050673
2011	4,250	13,023,014	0 000326
2010	1,225,409	12,767,224	0 095981
2009	1,121,561	13,123,102	0 085465
2008	1,489,535	17,456,733	0 085327

2 Total of line 1, column (d).	2	0 317772
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 063554
4 Enter the net value of noncharitable-use assets for 2013 from Part X, line 5.	4	13,985,150
5 Multiply line 4 by line 3.	5	888,812
6 Enter 1% of net investment income (1% of Part I, line 27b).	6	7,577
7 Add lines 5 and 6.	7	896,389
8 Enter qualifying distributions from Part XII, line 4. 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	8	734,750

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 ☐ and enter "N/A" on line 1		
	Date of ruling or determination letter _____ (attach copy of letter if necessary—see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☐ and enter 1% of Part I, line 27b	1	15,153
c	All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	2	0
3	Add lines 1 and 2.	3	15,153
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	15,153
6	Credits/Payments		
a	2013 estimated tax payments and 2012 overpayment credited to 2013	6a	13,600
b	Exempt foreign organizations—tax withheld at source	6b	
c	Tax paid with application for extension of time to file (Form 8868)	6c	304
d	Backup withholding erroneously withheld	6d	
7	Total credits and payments Add lines 6a through 6d.	7	13,904
8	Enter any penalty for underpayment of estimated tax Check here ☐ if Form 2220 is attached	8	154
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	1,403
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid.	10	
11	Enter the amount of line 10 to be Credited to 2014 estimated tax Refunded	11	

Part VII-A Statements Regarding Activities

1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		Yes	No
		1a		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)?	1b		No
	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		No
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		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? If "Yes," attach a conformed copy of the changes	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? If "Yes," attach the statement required by General Instruction T.	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? If "Yes," complete Part II, col. (c), and Part XV.	7	Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) WI, IL			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation.	8b	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)? If "Yes," complete Part XIV	9		No
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses.	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.CUDAHYFUND.ORG				
14	The books are in care of ▶ Iris Krieg Associates Inc Telephone no ▶ (312) 641-5776 Located at ▶ 333 N Michigan Avenue Suite 510 Chicago IL ZIP +4 ▶ 60601			
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		
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? ☐ 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 page 20 of the instructions)? . . . Organizations relying on a current notice regarding disaster assistance check here. ▶ ☐	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		No
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 ▶ 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? ☐ 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? (<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))?

Yes

No

(2)

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

Yes

No

(3)

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

Yes

No

(4)

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

Yes

No

(5)

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

Yes

No

b

If any answer is "Yes" to 5a(1)–(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?

5b

Organizations relying on a current notice regarding disaster assistance check here.

c

If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?

Yes

No

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

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?

Yes

No

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
See Additional Data Table				

2

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

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

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

0

Part VIII

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

3 Five highest-paid independent contractors for professional services (see instructions). 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	
2	
3	
4	

Part IX-B

Summary of Program-Related Investments (see instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1	
2	
All other program-related investments. See page 24 of the 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	14,081,019
b	Average of monthly cash balances.	1b	117,103
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	14,198,122
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	14,198,122
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	212,972
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	13,985,150
6	Minimum investment return. Enter 5% of line 5.	6	699,258

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	699,258
2a	Tax on investment income for 2013 from Part VI, line 5.	2a	15,153
b	Income tax for 2013 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	15,153
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	684,105
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	684,105
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	684,105

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	734,750
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	734,750
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	0
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	734,750
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				684,105
2 Undistributed income, if any, as of the end of 2013				
a Enter amount for 2012 only.			0	
b Total for prior years 20____, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2013				
a From 2008.	645,842			
b From 2009.	473,678			
c From 2010.	593,886			
d From 2011.	550,286			
e From 2012.	22,422			
f Total of lines 3a through e.	2,286,114			
4 Qualifying distributions for 2013 from Part XII, line 4 ▶ \$ 734,750				
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.				684,105
e Remaining amount distributed out of corpus	50,645			
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	2,336,759			
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 instructions			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) (see instructions).	0			
8 Excess distributions carryover from 2008 not applied on line 5 or line 7 (see instructions). . . .	645,842			
9 Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a	1,690,917			
10 Analysis of line 9				
a Excess from 2009. . . .	473,678			
b Excess from 2010. . . .	593,886			
c Excess from 2011. . . .	550,286			
d Excess from 2012. . . .	22,422			
e Excess from 2013. . . .	50,645			

Part XIVPrivate 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 XVSupplementary 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 of the person to whom applications should be addressed

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 <i>Paid during the year</i> See Additional Data Table				
Total			3a	734,750
b <i>Approved for future payment</i>				
Total			3b	0

Enter gross amounts unless otherwise indicated

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

Form **990-PF** (2013)

Form 990PF Part VIII Line 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
JANET S CUDAHY	PRESIDENT/DIRECTOR 0 00	0	0	0
608 ARBOR VITAE WINNETKA,IL 60093				
RICHARD D CUDAHY	CHAIRMAN/DIRECTOR 0 00	0	0	0
608 ARBOR VITAE WINNETKA,IL 60093				
JAMES BAILEY	DIRECTOR 0 00	0	0	0
4303 OAK HILL DR ANNANDALE,VA 22003				
MARGUERITE L CUDAHY	DIRECTOR 0 00	0	0	0
410 ARTHURS ROUND TABLE WYNNEWODD,PA 19086				
ANNETTE STODDARD FREEMAN	DIRECTOR 0 00	0	0	0
1840 N PROSPECT AVE APT 415 MILWAUKEE,WI 53202				
PATRICK G CUDAHY	DIRECTOR 0 00	0	0	0
101 MAPLE APT 2204 REDWOOD CITY,CA 94063				
RICHARD D CUDAHY JR	SECRETARY/TREASURER/DIRECTOR 0 00	0	0	0
4400 LAKE DR SHOREWOOD,WI 53211				
BARBARA HOLTZ	DIRECTOR 0 00	0	0	0
W3 34 S7825 HWY E MUKWONAGO,WI 53149				
KRISTI E LESWING	DIRECTOR 0 00	0	0	0
780 N WATER ST MILWAUKEE,WI 53202				
NORMA K CUDAHY	DIRECTOR 0 00	0	0	0
7241 36TH AVE SW SEATTLE,WA 98126				

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>				
ACCESS LIVING 115 W CHICAGO AVE CHICAGO,IL 60654			GENERAL-UNRESTRICTED	7,500
AGAPE COMMUNITY CENTER MINISTRY HEALTH CARE 11925 WEST LAKE PARK DRIVE SUITE 100 MILWAUKEE,WI 53224			GENERAL-UNRESTRICTED	7,500
ALDO LEOPOLD FOUNDATION E13701 LEVEE RD BARABOO,WI 53913			GENERAL-UNRESTRICTED	7,500
ART INSTITUTE OF CHICAGO 111 S MICHIGAN AVE CHICAGO,IL 60603			GENERAL-UNRESTRICTED	7,500
BETHANY APARTMENTS 806 WISCONSIN AVE RACINE,WI 53403			GENERAL-UNRESTRICTED	10,000
BOYS AND GIRLS CLUB OF GREATER WASHINGTON 1000 12TH ST SE WASHINGTON,DC 20003			GENERAL-UNRESTRICTED	10,000
CHILDREN'S OUTREACH & COMMUNITY EMPOWERMENT PO BOX 206 WINNETKA,IL 60093			GENERAL-UNRESTRICTED	2,000
COA YOUTH AND FAMILY CENTER 909 E NORTH AVE MILWAUKEE,WI 53212			GENERAL-UNRESTRICTED	4,000
CUDAHY FAMILY LIBRARY 3500 LIBRARY AVE CUDAHY,WI 53110			GENERAL-UNRESTRICTED	25,000
DENTAL LIFELINE NETWORK ILLINOIS PO BOX 211 NORTHBROOK,IL 60065			GENERAL-UNRESTRICTED	7,500
DEPAUL UNIVERSITY COLLEGE OF LAW 25 E JACKSON BLVD CHICAGO,IL 60604			GENERAL-UNRESTRICTED	30,000
DOUGLAS FMCKEY CHRISTMAS CLUB 411 E WISCONSIN AVENUE MILWAUKEE,WI 53202			GENERAL-UNRESTRICTED	2,500
ENVIRONMENTAL LAW & POLICY CENTER 222 S HAMILTON ST SUITE 14 MADISON,WI 53703			GENERAL-UNRESTRICTED	20,000
FIGHT FOR CHILDREN 1726 M STREET NW SUITE 202 WASHINGTON,DC 20036			GENERAL-UNRESTRICTED	1,000
FRANCISCAN OUTREACH ASSOCIATION 1645 WLE MOYNE ST CHICAGO,IL 60622			GENERAL-UNRESTRICTED	7,000
Total  3a				734,750

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				
GRACE HOUSE 1801 WADAMS ST CHICAGO,IL 60612			GENERAL-UNRESTRICTED	7,500
HOWARD AREA COMMUNITY CENTER 7648 N PAULINA ST CHICAGO,IL 60626			GENERAL-UNRESTRICTED	15,000
INTERFAITH OLDER ADULTS PROGRAM 600 W VIRGINIA ST MILWAUKEE,WI 53204			GENERAL-UNRESTRICTED	15,000
INTERNATIONAL CRANE FOUNDATION E11376 SHADY LANE ROAD BARABOO,WI 53913			GENERAL-UNRESTRICTED	5,000
KEYSTONE FOUNDATION 3660 COMMERCIAL AVENUE NORTHBROOK,IL 60062			GENERAL-UNRESTRICTED	7,500
MARTHA'S TABLE 2114 14TH STREET NW WASHINGTON,DC 20009			GENERAL-UNRESTRICTED	5,000
MARYKNOLL SISTERS 10 PINESBRIDGE RD OSSINING,NY 10562			GENERAL-UNRESTRICTED	73,500
MILWAUKEE HOMELESS VETERANS INITIATIVE PO BOX 18441 MILWAUKEE,WI 53218			GENERAL-UNRESTRICTED	15,000
MISERICORDIA HOMEHEART OF MERCY 6300 N RIDGE AVE CHICAGO,IL 60660			GENERAL-UNRESTRICTED	20,000
MORTON ARBORETUM 4100 ILLINOIS ROUTE 53 LISLE,IL 60532			GENERAL-UNRESTRICTED	4,000
MPTV FRIENDS INC 1036 NORTH 8TH STREET MILWAUKEE,WI 53233			GENERAL-UNRESTRICTED	8,000
MUSEUM OF SCIENCE AND INDUSTRY 5700 S LAKE SHORE DR CHICAGO,IL 60637			GENERAL-UNRESTRICTED	5,000
NEW FOUNDATION 444 W FRONTAGE ROAD NORTHFIELD,IL 60093			GENERAL-UNRESTRICTED	7,500
NEW MOMS 2845 W MCLEAN AVE CHICAGO,IL 60647			GENERAL-UNRESTRICTED	10,000
NIGHT MINISTRY 4711 N RAVENWOOD AVE CHICAGO,IL 60642			GENERAL-UNRESTRICTED	5,000
Total  3a				734,750

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>				
NORTHWESTERN UNIVERSITY SETTLEMENT 1400 WAUGUSTA BLVD CHICAGO,IL 60642			GENERAL-UNRESTRICTED	7,500
PENFIELD CHILDREN'S CENTER 833 N 26TH ST MILWAUKEE,WI 53233			GENERAL-UNRESTRICTED	5,000
PLANNED PARENTHOOD OF WISCONSIN 302 N JACKSON STREET MILWAUKEE,WI 53202			GENERAL-UNRESTRICTED	3,500
SHOREWOOD HIGH SCHOOL 1701 E CAPITOL DR SHOREWOOD,WI 53211			GENERAL-UNRESTRICTED	750
TEEN LIVING PROGRAMS 3739 S INDIANA AVE CHICAGO,IL 60653			GENERAL-UNRESTRICTED	7,500
THRESHOLDS 4101 N RAVENSWOOD AVE CHICAGO,IL 60613			GENERAL-UNRESTRICTED	10,000
UNIVERSITY OF CHICAGO DIVINITY SCHOOL SWIFT HALL 1025 E 58TH ST CHICAGO,IL 60637			GENERAL-UNRESTRICTED	10,000
URBAN DAY SCHOOL 1248 W 69TH ST CHICAGO,IL 60636			GENERAL-UNRESTRICTED	7,500
VITAL VOICES GLOBAL PARTNERSHIP 1625 MASSACHUSETTS AVE NW SUITE 300 WASHINGTON,DC 20036			GENERAL-UNRESTRICTED	5,000
WEST POINT ASSOCIATION OF GRADUATES 698 MILLS RD WEST POINT,NY 10996			GENERAL-UNRESTRICTED	15,000
WISCONSIN CONSERVATORY OF MUSIC 1584 N PROSPECT AVE MILWAUKEE,WI 53202			GENERAL-UNRESTRICTED	3,000
WTTW CHANNEL 11 5400 N SAINT LOUIS AVENUE CHICAGO,IL 60625			GENERAL-UNRESTRICTED	8,000
YOUTH JOB CENTER OF EVANSTON INC 1114 CHURCH ST EVANSTON,IL 60201			GENERAL-UNRESTRICTED	7,500
ALBANY PARK THEATER PROJECT 5100 RIDGEWAY CHICAGO,IL 60625			GENERAL-UNRESTRICTED	5,000
AUTISM SPEAKS 2700 S RIVER ROAD 203 DES PLAINES,IL 60018			GENERAL-UNRESTRICTED	8,000
Total  3a				734,750

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				
BIKES FOR THE WORLD 3108 17th Street North ARLINGTON,VA 22201			GENERAL-UNRESTRICTED	1,000
CHICAGO COALITION FOR THE HOMELESS 70 E Lake St 720 CHICAGO,IL 60601			GENERAL-UNRESTRICTED	7,500
CHICAGO HUMANITIES FESTIVAL 500 N DEARBORN STREET SUITE 825 CHICAGO,IL 60654			GENERAL-UNRESTRICTED	5,000
CHILDREN'S HOME & AID SOCIETY OF ILLINOIS 125 S WACKER DRIVE 14TH FLOOR CHICAGO,IL 60606			GENERAL-UNRESTRICTED	7,500
CHRISTOPHER HOUSE 2507 NORTH GREENVIEW AVENUE CHICAGO,IL 60614			GENERAL-UNRESTRICTED	15,000
COMMUNITY CLOTHES CLOSET 1465 OPPORTUNITY WAY MENASHA,WI 54952			GENERAL-UNRESTRICTED	2,500
COMMUNITY OF HOPE 1717 MASSACHUSETTS AVE 805 WASHINGTON,DC 20036			GENERAL-UNRESTRICTED	4,000
DOMINICAN CENTER FOR WOMEN 2470 W LOCUST ST MILWAUKEE,WI 53206			GENERAL-UNRESTRICTED	10,000
FIELD MUSEUM OF NATURAL HISTORY 1400 S LAKE SHORE DR CHICAGO,IL 60605			GENERAL-UNRESTRICTED	5,000
GREATER CHICAGO FOOD DEPOSITORY 4100 W 42nd PL CHICAGO,IL 60632			GENERAL-UNRESTRICTED	10,000
NATIONAL IMMIGRANT JUSTICE CENTERHEARTLAND ALLIANCE 208 S LASALLE SUITE 1818 CHICAGO,IL 60604			GENERAL-UNRESTRICTED	8,000
HOUSING OPTIONS FOR THE MENTALLY ILL 1132 FLORENCE AVENUE EVANSTON,IL 60202			GENERAL-UNRESTRICTED	10,000
HUNGER TASK FORCE 201 S HAWLEY CT MILWAUKEE,WI 53214			GENERAL-UNRESTRICTED	25,000
LINCOLN PARK ZOOLOGICAL SOCIETY 2001 N CLARK ST CHICAGO,IL 60614			GENERAL-UNRESTRICTED	5,000
LITTLE BROTHERS - FRIENDS OF THE ELDERLY 355 N ASHLAND CHICAGO,IL 60607			GENERAL-UNRESTRICTED	5,000
Total  3a				734,750

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>				
MARQUETTE UNIVERSITY PO BOX 1881 MILWAUKEE, WI 53201			GENERAL-UNRESTRICTED	50,000
MARYVILLE ACADEMY 1150 NORTH RIVER ROAD DES PLAINES, IL 60016			GENERAL-UNRESTRICTED	7,500
MERCY HOME FOR BOYS AND GIRLS 1140 W JACKSON BLVD CHICAGO, IL 60607			GENERAL-UNRESTRICTED	3,000
MILWAUKEE ART MUSEUM 700 N ART MUSEUM DR MILWAUKEE, WI 53202			GENERAL-UNRESTRICTED	5,000
MILWAUKEE BAR ASSOCIATION FOUNDATION 424 E WELLS ST MILWAUKEE, WI 53202			GENERAL-UNRESTRICTED	10,000
MILWAUKEE HABITAT FOR HUMANITY 3726 N BOOTH ST MILWAUKEE, WI 53212			GENERAL-UNRESTRICTED	5,000
NORTHWESTERN LAW 375 E CHICAGO AVENUE CHICAGO, IL 60611			GENERAL-UNRESTRICTED	5,000
OPENLANDS 25 E WASHINGTON ST CHICAGO, IL 60602			GENERAL-UNRESTRICTED	5,000
ORGANIZATION FOR AUTISM RESEARCH 2000 NORTH 14TH STREET SUITE 240 ARLINGTON, VA 22201			GENERAL-UNRESTRICTED	11,000
SAFE PLACE 2710 17TH ST ZION, IL 60099			GENERAL-UNRESTRICTED	7,500
SALVATION ARMY 11315 W WATERTOWN PLANK ROAD PO BOX 26019 WAUWATOSA, WI 53226			GENERAL-UNRESTRICTED	10,000
UNITED CEREBRAL PALSY OF SE WISCONSIN 6102 WEST LAYTON AVENUE GREENFIELD, WI 53220			GENERAL-UNRESTRICTED	15,000
WESTSIDE BABY 10032 15TH AVENUE SW SEATTLE, WA 98146			GENERAL-UNRESTRICTED	25,000
Total  3a				734,750

TY 2013 Accounting Fees Schedule

Name: Patrick and Anna M Cudahy Fund

EIN: 39-0991972

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Accounting Fees	18,633	0		0

**TY 2013 Investments Corporate
Bonds Schedule**

Name: Patrick and Anna M Cudahy Fund
EIN: 39-0991972

Name of Bond	End of Year Book Value	End of Year Fair Market Value
CORPORATE BONDS	1,111,058	1,111,058

**TY 2013 Investments Corporate
Stock Schedule**

Name: Patrick and Anna M Cudahy Fund
EIN: 39-0991972

Name of Stock	End of Year Book Value	End of Year Fair Market Value
CORPORATE STOCK	4,946,541	4,946,541

TY 2013 Investments Government Obligations Schedule

Name: Patrick and Anna M Cudahy Fund

EIN: 39-0991972

**US Government Securities - End of
Year Book Value:**

715,138

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

715,138

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

0

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

0

TY 2013 Investments - Other Schedule

Name: Patrick and Anna M Cudahy Fund

EIN: 39-0991972

Category / Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
OTHER INVESTMENTS	FMV	7,909,976	7,909,976

TY 2013 Other Expenses Schedule

Name: Patrick and Anna M Cudahy Fund

EIN: 39-0991972

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Office Expense	15	0		0
Investment Fees	34,043	0		0
Payroll Expenses	3,150	0		0
Operation Costs	1,372	0		0

TY 2013 Other Income Schedule

Name: Patrick and Anna M Cudahy Fund

EIN: 39-0991972

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
Miscellaneous	2,970	2,970	2,970

TY 2013 Other Increases Schedule

Name: Patrick and Anna M Cudahy Fund

EIN: 39-0991972

Description	Amount
Unrealized Gain/Loss	1,350,079

TY 2013 Other Professional Fees Schedule

Name: Patrick and Anna M Cudahy Fund

EIN: 39-0991972

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Management Fee	66,667	0		0