Form **990-PF**

Department of the Treasury
Internal Revenue Service

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

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

OMB No 1545-0052

2013

Open to Public Inspection

For calendar year 2013 or tax year beginning , 2013, and ending , 20

Name of foundation CUNA MUTUAL GROUP FOUNDATION, INC.	**A** Employer identification number 39-6105418
Number and street (or P O box number if mail is not delivered to street address) 5910 MINERAL POINT ROAD — Room/suite	**B** Telephone number (see instructions) (608) 665-7755
City or town, state or province, country, and ZIP or foreign postal code MADISON, WI 53705	**C** If exemption application is pending, check here ▶ ☐

G Check all that apply ☐ Initial return ☐ Initial return of a former public charity ☐ Final return ☐ Amended return ☐ Address change ☐ Name change

H Check type of organization ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation

I Fair market value of all assets at end of year *(from Part II, col (c), line 16)* ▶ $ 178,144.

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

D 1 Foreign organizations, check here ▶ ☐
2 Foreign organizations meeting the 85% test, check here and attach computation ▶ ☐

E If private foundation status was terminated under section 507(b)(1)(A), check here ▶ ☐

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)	859,801.			
	2 Check ▶ ☐ if the foundation is **not** required to attach Sch B				
	3 Interest on savings and temporary cash investments	848.	848.		
	4 Dividends and interest from securities				
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10				
	b Gross sales price for all assets on line 6a				
	7 Capital gain net income (from Part IV, line 2)				
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)				
	12 **Total.** Add lines 1 through 11	860,649.	848.		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	0			
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)				
	c Other professional fees (attach schedule)				
	17 Interest				
	18 Taxes (attach schedule) (see instructions)				
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	50.			
	24 **Total operating and administrative expenses.** Add lines 13 through 23	50.			
	25 Contributions, gifts, grants paid	741,022.			741,022.
	26 **Total expenses and disbursements.** Add lines 24 and 25	741,072.			741,022.
	27 Subtract line 26 from line 12				
	a **Excess of revenue over expenses and disbursements**	119,577.			
	b **Net investment income** (if negative, enter -0-)		848.		
	c **Adjusted net income** (if negative, enter -0-)				

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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	58,567.	178,144.	178,144.
2	Savings and temporary cash investments			
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			
10 a	Investments - U S and state government obligations (attach schedule)			
b	Investments - corporate stock (attach schedule)			
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)	58,567.	178,144.	178,144.
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	0	
Net Assets or Fund Balances	**Foundations that follow SFAS 117, check here ▶ ☐ and complete lines 24 through 26 and lines 30 and 31.**			
24	Unrestricted			
25	Temporarily restricted			
26	Permanently restricted			
	Foundations that do not follow SFAS 117, ▶ ☒ check here and complete lines 27 through 31.			
27	Capital stock, trust principal, or current funds	58,567.	178,144.	
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 instructions)	58,567.	178,144.	
31	**Total liabilities and net assets/fund balances** (see instructions)	58,567.	178,144.	

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	58,567.
2	Enter amount from Part I, line 27a	2	119,577.
3	Other increases not included in line 2 (itemize) ▶	3	
4	Add lines 1, 2, and 3	4	178,144.
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	178,144.

Part IV Capital Gains and Losses for Tax on Investment Income

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

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

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

	(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				
b				
c				
d				
e				

2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7; If (loss), enter -0- in Part I, line 7 }	2	
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (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 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	708,455.	152,295.	4.651860
2011	643,950.	206,833.	3.113381
2010	668,427.	188,116.	3.553270
2009	884,664.	220,295.	4.015815
2008	1,020,828.	206,660.	4.939650

2	**Total** of line 1, column (d)	2	20.273976
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	4.054795
4	Enter the net value of noncharitable-use assets for 2013 from Part X, line 5	4	301,726.
5	Multiply line 4 by line 3	5	1,223,437.
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	8.
7	Add lines 5 and 6	7	1,223,445.
8	Enter qualifying distributions from Part XII, line 4	8	741,022.

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate See the Part VI instructions

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see instructions)

1a	Exempt operating foundations described in section 4940(d)(2), check here ▶ ☐ and enter "N/A" on line 1 . . . Date of ruling or determination letter ________________ (attach copy of letter if necessary - see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ▶ ☐ and enter 1% of Part I, line 27b	1	17.
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	17.
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	17.
6	Credits/Payments		
a	2013 estimated tax payments and 2012 overpayment credited to 2013 — 6a: 284.		
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	284.
8	Enter any **penalty** for underpayment of estimated tax. Check here ☐ if Form 2220 is attached	8	
9	**Tax due.** If the total of lines 5 and 8 is more than line 7, enter **amount owed** ▶	9	
10	**Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶	10	267.
11	Enter the amount of line 10 to be **Credited to 2014 estimated tax** ▶ 267. **Refunded** ▶	11	

Part VII-A Statements Regarding Activities

			Yes	No
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a		X
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes (see Instructions for the definition)?	1b		X
	If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities			
c	Did the foundation file **Form 1120-POL** for this year?	1c		X
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation ▶ $ ______ (2) On foundation managers ▶ $ ______			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ▶ $ ______			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? *If "Yes," attach a detailed description of the activities*	2		X
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? *If "Yes," attach a conformed copy of the changes*	3		X
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		X
b	If "Yes," has it filed a tax return on **Form 990-T** for this year?	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? *If "Yes," attach the statement required by General Instruction T*	5		X
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	X	
7	Did the foundation have at least $5,000 in assets at any time during the year? *If "Yes," complete Part II, col (c), and Part XV*	7	X	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ WI,			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by *General Instruction G? If "No," attach explanation*	8b	X	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2013 or the taxable year beginning in 2013 (see instructions for Part XIV)? *If "Yes," complete Part XIV*	9		X
10	Did any persons become substantial contributors during the tax year? *If "Yes," attach a schedule listing their names and addresses*	10		X

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

			Yes	No
11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	

Website address ▶ N/A

14 The books are in care of ▶ STEVEN GOLDBERG Telephone no ▶ 608-665-7755

Located at ▶ 5910 MINERAL POINT ROAD MADISON, WI ZIP+4 ▶ 53705

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 |

			Yes	No
16	At any time during calendar year 2013, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?	16		X
	See the instructions for exceptions and filing requirements for Form TD F 90-22 1 If "Yes," enter the name of the foreign country ▶			

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required

			Yes	No
	File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			
1a	During the year did the foundation (either directly or indirectly)			
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☒ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☒ Yes ☐ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☒ No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☒ No			
	(6) Agree to pay money or property to a government official? (**Exception.** Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days) ☐ Yes ☒ No			
b	If any answer is "Yes" to 1a(1)-(6), did **any** of the acts fail to qualify under the exceptions described in Regulations section 53 4941(d)-3 or in a current notice regarding disaster assistance (see instructions)?	1b		X
	Organizations relying on a current notice regarding disaster assistance check here ▶ ☐			
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2013?	1c		X
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2013, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2013? ☐ Yes ☒ No			
	If "Yes," list the years ▶ ____, ____, ____, ____			
b	Are there any years listed in 2a for which the foundation is **not** applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to **all** years listed, answer "No" and attach statement - see instructions)	2b		
c	If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here ▶ ____, ____, ____, ____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☒ No			
b	If "Yes," did it have excess business holdings in 2013 as a result of **(1)** any purchase by the foundation or disqualified persons after May 26, 1969, **(2)** the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or **(3)** the lapse of the 10-, 15-, or 20-year first phase holding period? *(Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2013)*	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		X
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2013?	4b		X

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required *(continued)*

5a During the year did the foundation pay or incur any amount to				
(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	[ ] Yes [X] 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 [X] No			
(3) Provide a grant to an individual for travel, study, or other similar purposes?	[ ] Yes [X] 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 [X] 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 [X] 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 [X] No			
b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?		**6b**		X
If "Yes" to 6b, file Form 8870				
7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	[ ] Yes [X] 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 ATTACHED STATEMENT		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 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 ▶		

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 NONE	
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 NONE	
2	
All other program-related investments See instructions 3 NONE	
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	
b	Average of monthly cash balances	1b	306,321.
c	Fair market value of all other assets (see instructions)	1c	
d	**Total** (add lines 1a, b, and c)	1d	306,321.
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	306,321.
4	Cash deemed held for charitable activities Enter 1 1/2 % of line 3 (for greater amount, see instructions)	4	4,595.
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3 Enter here and on Part V, line 4	5	301,726.
6	**Minimum investment return.** Enter 5% of line 5	6	15,086.

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	15,086.
2a	Tax on investment income for 2013 from Part VI, line 5	2a	17.		
b	Income tax for 2013 (This does not include the tax from Part VI)	2b			
c	Add lines 2a and 2b			2c	17.
3	Distributable amount before adjustments Subtract line 2c from line 1			3	15,069.
4	Recoveries of amounts treated as qualifying distributions			4	
5	Add lines 3 and 4			5	15,069.
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	15,069.

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	741,022.
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	741,022.
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	741,022.

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				15,069.
2	Undistributed income, if any, as of the end of 2013				
a	Enter amount for 2012 only				
b	Total for prior years 20 11 ,20 10 ,20 09				
3	Excess distributions carryover, if any, to 2013				
a	From 2008 . . . . . . 1,014,893.				
b	From 2009 . . . . . . 873,721.				
c	From 2010 . . . . . . 659,067.				
d	From 2011 . . . . . . 633,646.				
e	From 2012 . . . . . . 700,860.				
f	**Total** of lines 3a through e	3,882,187.			
4	Qualifying distributions for 2013 from Part XII, line 4 ▶ $ 741,022.				
a	Applied to 2012, but not more than line 2a				
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				15,069.
e	Remaining amount distributed out of corpus	725,953.			
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	4,608,140.			
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				
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)	1,014,893.			
9	**Excess distributions carryover to 2014.** Subtract lines 7 and 8 from line 6a	3,593,247.			
10	Analysis of line 9				
a	Excess from 2009 . . . 873,721.				
b	Excess from 2010 . . . 659,067.				
c	Excess from 2011 . . . 633,646.				
d	Excess from 2012 . . . 700,860.				
e	Excess from 2013 . . . 725,953.				

Part XIV Private Operating Foundations (see instructions and Part VII-A, question 9) NOT APPLICABLE

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

	Tax year	Prior 3 years			
	(a) 2013	(b) 2012	(c) 2011	(d) 2010	(e) Total
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon					
a "Assets" alternative test - enter					
(1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test-enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed					
c "Support" alternative test - enter					
(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942 (j)(3)(B)(iii)					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

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

1 Information Regarding Foundation Managers:

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

N/A

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

N/A

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

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

SEE ATTACHED

Part XV Supplementary Information (continued)

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
SEE ATTACHED STATEMENT	N/A	PC	CHARITABLE	741,022.
Total . . . . ▶ **3a**				741,022.
b *Approved for future payment*				
SEE ATTACHED STATEMENT	N/A	PC	CHARITABLE	245,000.
Total . . . . ▶ **3b**				245,000.

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments			14	848.	
4 Dividends and interest from securities					
5 Net rental income or (loss) from real estate					
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal property					
7 Other investment income					
8 Gain or (loss) from sales of assets other than inventory					
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue a					
b					
c					
d					
e					
12 Subtotal Add columns (b), (d), and (e)				848.	

13 **Total.** Add line 12, columns (b), (d), and (e) . . . . . 13 848.

(See worksheet in line 13 instructions to verify calculations)

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

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

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

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

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

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

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

b If "Yes," complete the following schedule

(a) Name of organization	(b) Type of organization	(c) Description of relationship

Sign Here

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

▶ Carrie Douglass | 8/28/14 | ▶ VP CORPORATE TAX

Signature of officer or trustee | Date | Title

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

Paid Preparer Use Only

Print/Type preparer's name	Preparer's signature	Date	Check ☐ if self-employed	PTIN
Firm's name ▶			Firm's EIN ▶	
Firm's address ▶			Phone no	

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

Schedule of Contributors

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

OMB No 1545-0047

2013

Name of the organization
CUNA MUTUAL GROUP FOUNDATION, INC.

Employer identification number
39-6105418

Organization type (check one)

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

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

General Rule

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

Special Rules

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

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

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

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

Name of organization CUNA MUTUAL GROUP FOUNDATION, INC.

Employer identification number 39-6105418

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

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	CMFG LIFE INSURANCE COMPANY 5910 MINERAL POINT ROAD MADISON, WI 53705	$ 835,500.	Person [X] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.)
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.)
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.)
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.)
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.)
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.)

Name of organization CUNA MUTUAL GROUP FOUNDATION, INC.

Employer identification number 39-6105418

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

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

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

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

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

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

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

Name of organization CUNA MUTUAL GROUP FOUNDATION, INC.

Employer identification number 39-6105418

Part III ***Exclusively*** **religious, charitable, etc., individual contributions to section 501(c)(7), (8), or (10) organizations that total more than $1,000 for the year.** Complete columns **(a)** through **(e)** and the following line entry

For organizations completing Part III, enter the total of *exclusively* religious, charitable, etc., contributions of **$1,000 or less** for the year (Enter this information once See instructions) ▶ $

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

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

(e) Transfer of gift

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

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

(e) Transfer of gift

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

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

(e) Transfer of gift

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

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

(e) Transfer of gift

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

CUNA MUTUAL GROUP FOUNDATION, INC. 39-6105418
SCHEDULE OF DONATIONS
For the Period Ending December 31, 2013

Part XV, Item 3a, Grants and Contributions paid During the Year

Donee	Date	Amount
100 Black Men Of Madison Inc	8/20/2013	2,000 00
Access Community Health Centers	11/21/2013	20,000 00
Adult Christian Education Foundation	10/4/2013	250 00
Affinity Rescue, Inc	2/11/2013	250 00
Alamo Colleges Foundation	5/2/2013	250 00
Aldo Leopold Nature Center	9/9/2013	3,000 00
American Heart Association	7/30/2013	250 00
American Red Cross	4/2/2013	5,000 00
Angel's Wish, Inc	2/7/2013	250 00
Angel's Wish, Inc	2/11/2013	250 00
Aspire Therapeutic Riding Program	12/4/2013	4,000 00
Association of Fundraising Professionals	10/7/2013	5,000 00
Autism Society Southern Wisconsin	3/26/2013	500 00
Avon Lake City Schools- Redwood Elem	4/8/2013	250 00
Bar Buddies	2/7/2013	250 00
Bartels Retirement Community	2/28/2013	13,750 00
Big Brothers Big Sisters Dane County	3/26/2013	15,000 00
Big Brothers Big Sisters N E Iowa	12/4/2013	5,000 00
Boys & Girls Club Dane County	4/17/2013	12,000 00
Boys And Girls Club Of Bartlesville	10/16/2013	250 00
Breast Cancer Recovery	10/24/2013	500 00
Camp Randall Rowing Club	2/7/2013	250 00
Care Net Pregnancy Center Of Dane County	11/20/2013	250 00
Cedar Valley Friends Of The Family	12/4/2013	7,500 00
Centra Foundation	2/25/2013	2,500 00
Centro Hispano	5/13/2013	1,000 00
Centro Hispano Of Dane County	8/20/2013	5,000 00
Children's Service Society Of Wis	2/27/2013	78,000 00
Children's Service Society Of Wis	2/27/2013	20,000 00
Clean Lakes Alliance	4/17/2013	25,000 00
Commonwealth Development	7/15/2013	10,000 00
Community Groundworks	5/29/2013	2,000 00
Concord Chamber Orchestra	5/1/2013	250 00
Crohn's And Colitis Foundation Of America	4/5/2013	250 00
Cross Community Players, Inc	2/7/2013	250 00
Cystic Fibrosis Foundation	6/4/2013	250 00
Dane County Humane Society	2/8/2013	250 00
Dane County Humane Society	11/17/2013	500 00
Domestic Abuse Intervention Services	11/27/2013	20,000 00
Donors Forum Of Wisconsin	12/2/2013	1,000 00
Down Syndrome Information Network	4/8/2013	250 00
Dream Bikes	10/31/2013	2,000 00
Duanesberg Elementary School	4/8/2013	250 00
East Madison Community Center	11/26/2013	3,000 00
Edgewood College	12/11/2013	3,000 00
Falk Elementary School	6/6/2013	300 00
First Unitarian Society Of Madison	11/27/2013	250 00
Forward Community Investments	6/20/2013	5,000 00
Foundation For Madison's Public Schools	10/24/2013	5,000 00
Gay Straight Alliance For Safe Schools	6/10/2013	5,000 00
GFWC Root River Junior Women's Club	2/11/2013	250 00
Girl Scout Troop 2006	2/7/2013	250 00
Girl Scouts - Troop 2537	10/24/2013	250 00
Glaciers Edge Council, Inc	4/16/2013	250 00
Goodman Community Center	7/15/2013	5,000 00
Grand Prairie Youth Football Assn	3/28/2013	250 00
Great Bend Foundation	7/15/2013	33,000 00
Greater Bucky Open	2/7/2013	250 00
Greater Cedar Valley Alliance Foundation	7/30/2013	25,000 00
Green County 4-H Adult Leaders	4/11/2013	250 00
Green County 4-H Adult Leaders	11/7/2013	250 00
Growing Pwer, Inc	7/15/2013	5,000 00
Habitat For Humanity Of Dane County	3/26/2013	15,000 00
Habitat For Humanity Of Dane County	10/14/2013	869 00
Henry Vilas Zoo	7/15/2013	10,000 00
High Point Church	2/7/2013	250 00
Hillsboro School Foundation	4/24/2013	250 00
Hudson Mohawk Figure Skating Club	3/28/2013	250 00

CUNA MUTUAL GROUP FOUNDATION, INC 39-6105418
SCHEDULE OF DONATIONS
For the Period Ending December 31, 2013

Part XV, Item 3a, Grants and Contributions paid During the Year

Donee	Date	Amount
Ice Age Trail Alliance	6/4/2013	250 00
Iowa Heartland Habitat for Humanity	7/30/2013	250 00
Irving Elementary School	4/22/2013	500 00
JDRF-Western Wisconsin Chapter	9/5/2013	3,568 00
Journey Mental Health Center	8/6/2013	3,000 00
Larabee Center	12/4/2013	3,250 00
Leadership Greater Madison / Civitas	10/7/2013	5,000 00
Lexington Humane Society	2/6/2013	250 00
Lexington Humane Society	10/24/2013	250 00
Literacy Network	5/6/2013	3,000 00
Little Free Library	4/24/2013	250 00
Lodi Area Middle School	2/11/2013	250 00
Lodi Elementary School	4/8/2013	250 00
Lussier Community Education Center	12/11/2013	5,000 00
Mad-City Ski Team	3/28/2013	250 00
Madison Community Foundation	10/18/2013	2,941 62
Madison Community Foundation	10/18/2013	2,500 00
Madison Metropolitan School District	1/31/2013	500 00
Madison Metropolitan School District	2/25/2013	500 00
Madison Metropolitan School District	3/18/2013	500 00
Madison Metropolitan School District	10/23/2013	500 00
Madison Museum Of Contemporary Art	2/28/2013	3,200 00
Madison Public Library Foundation	11/27/2013	10,000 00
Madison Symphony Orchestra Inc	5/9/2013	2,500 00
Madison West Athletic Boosters Assn	3/28/2013	250 00
Magic Soccer Club	4/11/2013	250 00
Malcolm Shabazz City High School	2/6/2013	3,000 00
McFarland Youth Hockey Association	3/28/2013	250 00
MCM Foundation Inc	5/9/2013	25,000 00
MCM Foundation Inc	4/3/2013	5,500 00
Media-Upper Providence Free Library	5/21/2013	250 00
Mentoring Positives Inc	10/7/2013	1,000 00
Michigan State University Alumni Assoc	4/24/2013	250 00
Mid-Minnesota Women's Center, Inc	10/31/2013	250 00
Mission Central	10/29/2013	10,000 00
New Century School	5/21/2013	250 00
New El Bethel Baptist Church	2/11/2013	250 00
No Stomach For Cancer Inc	12/13/2013	250 00
No Stomach For Cancer, Inc	3/25/2013	250 00
North American Police Ski Championships	2/7/2013	250 00
North Dakota State Univ Devel Fndn	6/19/2013	250 00
Northeast Iowa Food Bank	12/4/2013	5,000 00
Northside Planning Council	7/15/2013	5,000 00
Oakwood Lutheran Senior Ministries	12/2/2013	250 00
Oakwood Terrace Elementary School	1/21/2013	500 00
Operation Fresh Start	2/13/2013	10,000 00
Operation Fresh Start	8/20/2013	3,000 00
Orchard Ridge Nursery School	3/28/2013	250 00
Ouisconsing School Of Collaboration	11/6/2013	125 00
Overture Center Foundation Inc	5/29/2013	20,000 00
Pecatonica Area Food Pantry	11/19/2013	250 00
Pets Are For Life	12/10/2013	250 00
Project Backpack	2/7/2013	250 00
Rape Crisis Center Inc	5/23/2013	250 00
Rape Crisis Center, Inc	12/2/2013	2,500 00
Red Caboose Day Care Center Inc	4/2/2013	500 00
Redeemer Lutheran Church	2/7/2013	250 00
Rock County 4 H "Heatwave"	6/11/2013	250 00
Second Harvest Foodbank Of Southern Wis	12/2/2013	377 01
Shabazz City High School	4/8/2013	250 00
Sigma Chi Foundation	4/24/2013	250 00
Simpson Street Free Press	7/15/2013	5,000 00
Southwestern Community Action Program	2/7/2013	250 00
Special Olympics Wisconsin, Inc	7/30/2013	250 00
St Ambrose Academy Inc	11/19/2013	250 00
St John Congregation	2/11/2013	250 00
St John Evangelical Lutheran Church	4/8/2013	250 00
St John Lutheran Church	4/8/2013	250 00

CUNA MUTUAL GROUP FOUNDATION, INC. 39-6105418
SCHEDULE OF DONATIONS
For the Period Ending December 31, 2013

Part XV, Item 3a, Grants and Contributions paid During the Year

Donee	Date	Amount
St Paul's Lutheran Church	2/7/2013	250 00
The American Cancer Society	6/18/2013	250 00
The First Tee Of South Central WI	11/19/2013	250 00
The Prairie Enthusiasts, Inc	4/11/2013	250 00
The Prairie Enthusiasts, Inc	4/24/2013	250 00
The Road Home	5/14/2013	10,000 00
Tripoli Sweet Water Trail	12/5/2013	1,500 00
Twin Valley 4-H Club	4/11/2013	125 00
United Way Of Dane County	2/27/2013	76,000 00
United Way Of Dane County	3/26/2013	25,000 00
United Way Of Dane County	11/1/2013	14,378 00
United Way Of Tarrant County	10/29/2013	5,000 00
United Way Of Tarrant County	11/1/2013	140 00
Urban League Of Greater Madison Inc	4/2/2013	1,000 00
Urban League Of Greater Madison Inc	8/15/2013	500 00
Urban League Of Greater Madison Inc	10/29/2013	10,000 00
UW Foundation	6/6/2013	500 00
Vera Court Neighborhood Center	4/11/2013	500 00
Verona Area School District	11/19/2013	250 00
VSA Wisconsin	11/24/2013	3,500 00
Waterloo Swim Club	7/8/2013	250 00
Waunakee Touchdown Club, Inc	4/2/2013	250 00
Waunakee Touchdown Club, Inc	4/11/2013	250 00
Waunakee Touchdown Club, Inc	4/24/2013	250 00
Waunakee Whirlwinds 4-H Club	11/14/2013	250 00
Waverly Area Development Fund	12/2/2013	250 00
Waverly Exchange Club	10/3/2013	250 00
Waverly-Shell Rock Area United Way	11/1/2013	2,498 00
Waverly-Shell Rock United Way	10/29/2013	20,000 00
WI Higher Education Business Roundtable	8/13/2013	5,000 00
Wingra School	1/31/2013	250 00
Wingra School Inc	4/8/2013	250 00
Wis Alzheimers Disease Research Cntr	5/9/2013	1,000 00
Wisconsin Heights Educational Foundation	10/4/2013	250 00
Wisconsin Heights High School	2/6/2013	250 00
Wisconsin Heights Middle School	3/28/2013	250 00
Wisconsin Heights Middle School	4/24/2013	250 00
W-SR Dollars For Scholars	9/17/2013	2,000 00
YMCA Of Dane County Inc	5/15/2013	2,500 00
Young Leaders Academy Of Baton Rouge	3/28/2013	250 00
YWCA Madison	3/26/2013	10,000 00
YWCA Of Madison Inc	4/15/2013	10,000 00
		741,022

CUNA Mutual Group Foundation, Inc.
Form 990-PF
FEIN: 39-6105418
For the Year Ended December 31, 2013

Part XV, Item 3b, Grants and Contributions Approved for Future Payment:

Multi-Year Commitments (as of 12/31/13)

	2014	2015	2016	2017
Overture Center Community Access Fund	$20,000	0		
Central Madison Library	20,000	0		
Habitat for Humanity Dane County	15,000	15,000	0	
Clean Lakes Alliance	25,000	25,000	25,000	0
Theresa Terrace Community Center	25,000	25,000	0	0
Cedar Valley Alliance Foundation (Iowa)	25,000	25,000	0	
TOTAL	**130,000**	**90,000**	**25,000**	

CUNA Mutual Group Foundation, Inc.

Cash-Basis Financial Statements As of and for the Years Ended December 31, 2013 and 2012 And Independent Auditors' Report

Deloitte.

Deloitte & Touche LLP
111 S Wacker Drive
Chicago, IL 60606-4301
USA

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INDEPENDENT AUDITORS' REPORT

To the Board of Directors of
CUNA Mutual Group Foundation, Inc.
Madison, WI

We have audited the accompanying financial statements of CUNA Mutual Group Foundation, Inc. (the "Foundation"), which comprise the statements of financial position arising from cash transactions as of December 31, 2013 and 2012, and the related statements of activities and changes in net assets arising from cash transactions for the years then ended, and the related notes to the financial statements.

Management's Responsibility for the Financial Statements

Management is responsible for the preparation and fair presentation of these financial statements in accordance with the cash basis of accounting described in Note 2 to the financial statements; this includes determining that the cash basis of accounting is an acceptable basis for the preparation of the financial statements in the circumstances. Management is also responsible for the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

Auditors' Responsibility

Our responsibility is to express an opinion on these financial statements based on our audits. We conducted our audits in accordance with auditing standards generally accepted in the United States of America. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the financial statements are free from material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the financial statements. The procedures selected depend on the auditor's judgment, including the assessment of the risks of material misstatement of the financial statements, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the Foundation's preparation and fair presentation of the financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the Foundation's internal control. Accordingly, we express no such opinion. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the financial statements.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

Opinion

In our opinion, the financial statements referred to above present fairly, in all material respects, the financial position arising from cash transactions of CUNA Mutual Group Foundation as of December 31, 2013 and 2012 and its activities and changes in its net assets arising from cash transactions during the years then ended in accordance with the cash basis of accounting described in Note 2 to the financial statements.

Basis of Accounting

We draw attention to Note 2 of the financial statements, which describes the basis of accounting. The financial statements are prepared on the cash basis of accounting, which is a basis of accounting other than accounting principles generally accepted in the United States of America. Our opinion is not modified with respect to this matter.

Deloitte & Touche LLP

April 30, 2014

Statements of Financial Position Arising from Cash Transactions

	2013	2012
Cash	$ 178,144	$ 58,567
Total assets	$ 178,144	$ 58,567
Total unrestricted net assets	$ 178,144	$ 58,567

Statements of Activities and Changes in Net Assets Arising from Cash Transactions

	2013	2012
Contributions - CMFG Life Insurance Company	$ 833,000	$ 700,000
Contributions - other	26,801	37,425
Interest and dividend income	848	993
Total cash receipts	860,649	738,418
Donations	741,022	708,465
Other expenses	50	75
Total cash disbursements	741,072	708,540
Increase in unrestricted net assets	119,577	29,878
Unrestricted net assets, beginning of year	58,567	28,689
Unrestricted net assets, end of year	$ 178,144	$ 58,567

Note 1: Organization and Income Tax Status

The CUNA Mutual and CUMIS Charitable Foundation, Inc was organized in 1967 under the laws of Wisconsin as a non-stock, nonprofit organization. The name was later changed to the CUNA Mutual Group Foundation, Inc (the "Foundation")

The Foundation makes donations to charitable and community activities as approved by its Board of Directors It is primarily funded by contributions from CMFG Life Insurance Company ("CMFG Life"), an Iowa insurer organized for the purpose of serving the insurance needs of credit unions and their members.

The Foundation is exempt from federal income taxes under Section 501(c)(3) of the Internal Revenue Code The Foundation is, however, subject to an excise tax on its net investment income. The excise tax is generally 2%, but is reduced to 1% if qualifying distributions exceed a certain level

The results of the Foundation are affected by its transactions and relationship with CMFG Life See Note 3 for a discussion of related-party transactions. The results of the Foundation's operations may have materially differed from the results recorded if the Foundation did not have this relationship

Note 2: Basis of Presentation and Accounting Policies

The accompanying financial statements have been prepared on the basis of cash receipts and disbursements (cash basis). Accordingly, revenues and expenses are recognized when received and paid, respectively, and accrued income and expenses have not been recorded This basis of accounting varies from accounting principles generally accepted in the United States of America, the aggregate effect of which has not been determined.

All contributions are considered to be available for unrestricted use unless specifically restricted by the donor However, if a restriction is fulfilled in the same time period in which the contribution is received, the organization reports the support as unrestricted. No restricted contributions were outstanding at December 31, 2013 or 2012

Note 3: Contributions and Administrative Expenses

The CMFG Life Board of Directors approves annual contributions to the Foundation to be paid by CMFG Life.

Contributions are recorded when received and donations are recorded when paid. Contributions made by CMFG Life consisted of cash contributions in the amount of $833,000 and $700,000 in 2013 and 2012, respectively.

CMFG Life provides office space, equipment and staff to the Foundation, which does not have any employees or fixed assets The estimated value of such contributed services and assets was $106,000 and $98,000 for 2013 and 2012, respectively. These non-cash amounts are not reflected in the accompanying statements of activities and changes in net assets arising from cash transactions.

Note 4: Commitments

The Foundation has made future financial commitments to make donations to various organizations. These commitments, totaling $245,000 and $363,750 as of December 31, 2013 and 2012, respectively, are not recognized in the financial statements. In certain circumstances, recipient organizations may change the plans which led to the Foundation's commitment to make future donations. If this occurs, the Foundation may reduce or eliminate its commitment

The commitments at December 31, 2013 are due as follows:

Year	Amount
2014	$ 130,000
2015	90,000
2016	25,000
	$ 245,000

Note 5: Subsequent Events

The Foundation evaluated subsequent events through April 30, 2014, the date the financial statements were available for issuance During this period, $245,000 of additional commitments were made, consisting of $84,000 for 2014, $68,000 for 2015, $68,000 for 2016, and $25,000 for 2017.

CUNA Mutual Group Foundation, Inc.
EIN: 39-6105418
Form 990-PF
12/31/2013

Part VIII, Line 1 - List of Officers, Directors, Trustees, and Foundation Managers

Name and Address	Title and Avg. Hrs per Week Devoted to Position	Compensation	Contributions to Employee Benefit Plans and Deferred Compensation	Expense Account and Other Allowances
Faye A. Patzner 5910 Mineral Point Road Madison, WI 53705	President Less than 1 hr /wk.	None	None	None
James H. Metz 5910 Mineral Point Road Madison, WI 53705	Vice President Less than 1 hr./wk.	None	None	None
Steven A. Goldberg 5910 Mineral Point Road Madison, WI 53705	Secretary - Treasurer 32 hrs /wk.	None	None	None
Todd M. Dunning 5910 Mineral Point Road Madison, WI 53705	Assistant Treasurer Less than 1 hr /wk.	None	None	None
Brian J Borakove 5910 Mineral Point Road Madison, WI 53705	Assistant Treasurer Less than 1 hr./wk.	None	None	None
Kristine M. Conway 5910 Mineral Point Road Madison, WI 53705	Assistant Treasurer Less than 1 hr./wk.	None	None	None
Karen M. Peterson 5910 Mineral Point Road Madison, WI 53705	Assistant Secretary Less than 1 hr./wk	None	None	None
Angela K. Campbell 5910 Mineral Point Road Madison, WI 53705	Assistant Secretary Less than 1 hr /wk.	None	None	None
David C. Sargent 5910 Mineral Point Road Madison, WI 53705	Director Less than 1 hr./wk.	None	None	None
James M Power 5910 Mineral Point Road Madison, WI 53705	Director Less than 1 hr./wk.	None	None	None
Steven R. Suleski 5910 Mineral Point Road Madison, WI 53705	Director Less than 1 hr./wk.	None	None	None

CUNA Mutual Group Foundation, Inc.
Form 990-PF
FEIN: 39-6105418
For the Year Ended December 31, 2013

Part XV, Item 2d, Restrictions or Limitations on Awards:

Eligible Organizations:

- Federal tax-exempt 501(c)(3) nonprofit organizations in the United States.

Ineligible Organizations:

- Organizations without IRS 501(c)(3) nonprofit status.
- Individuals
- Political parties, candidates and partisan political campaigns.
- Professional associations.
- Organizations for religious activities.
- Labor unions.
- Organizations that conflict with the company's goals or general policyowner or community interests.
- Tickets or items for fundraising events.
- Endowment funds.

Form **8868**
(Rev January 2014)
Department of the Treasury
Internal Revenue Service

Application for Extension of Time To File an Exempt Organization Return

▶ File a separate application for each return.
▶ Information about Form 8868 and its instructions is at www.irs.gov/form8868.

OMB No 1545-1709

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

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

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

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

A corporation required to file Form 990-T and requesting an automatic 6-month extension - check this box and complete Part I only . . . . ▶ [ ]

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

Enter filer's identifying number, see instructions

Type or print File by the due date for filing your return See instructions	Name of exempt organization or other filer, see instructions CUNA MUTUAL GROUP FOUNDATION, INC.	Employer identification number (EIN) or 39-6105418
	Number, street, and room or suite no If a P O box, see instructions 5910 MINERAL POINT ROAD	Social security number (SSN)
	City, town or post office, state, and ZIP code For a foreign address, see instructions. MADISON, WI 53705	

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

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

- The books are in the care of ▶ STEVEN GOLDBERG

Telephone No ▶ 608 665-7755 FAX No. ▶

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

1 I request an automatic 3-month (6 months for a corporation required to file Form 990-T) extension of time until 08/15, 20 14, to file the exempt organization return for the organization named above The extension is for the organization's return for
▶ [X] calendar year 20 13 or
▶ [ ] tax year beginning ______, 20__, and ending ______, 20__.

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

3a	If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions	3a	$ 10.
b	If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made Include any prior year overpayment allowed as a credit.	3b	$ 284.
c	**Balance due.** Subtract line 3b from line 3a Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System) See instructions	3c	$ 0

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

5/13/14 DC 29

7010 0780 0001 5022 0506

7010 0780 0001 5022 0506

- If you are filing for an Additional (Not Automatic) 3-Month Extension, complete only Part II and check this box . . . . ▶ [X]

Note. Only complete Part II if you have already been granted an automatic 3-month extension on a previously filed Form 8868.

- If you are filing for an Automatic 3-Month Extension, complete only Part I (on page 1)

Part II **Additional (Not Automatic) 3-Month Extension of Time.** Only file the original (no copies needed).

FILE COPY

Enter filer's identifying number, see instructions

Type or print	Name of exempt organization or other filer, see instructions.	Employer identification number (EIN) or
	CUNA MUTUAL GROUP FOUNDATION, INC.	39-6105418
File by the due date for filing your return. See instructions	Number, street, and room or suite no. If a P O box, see instructions.	Social security number (SSN)
	5910 MINERAL POINT ROAD	
	City, town or post office, state, and ZIP code For a foreign address, see instructions.	
	MADISON, WI 53705	

Enter the Return code for the return that this application is for (file a separate application for each return) 04

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

STOP! Do not complete Part II if you were not already granted an automatic 3-month extension on a previously filed Form 8868.

- The books are in the care of ▶ STEVEN GOLDBERG, 5910 MINERAL POINT ROAD MADISON, WI 53705
  Telephone No. ▶ 608 665-7755 Fax No. ▶
- If the organization does not have an office or place of business in the United States, check this box . . . . ▶ [ ]
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) ______ . If this is for the whole group, check this box . . . . . . ▶ [ ] . If it is for part of the group, check this box . . . . ▶ [ ] and attach a list with the names and EINs of all members the extension is for.

4 I request an additional 3-month extension of time until 11/15 , 20 14 .

5 For calendar year 2013 , or other tax year beginning ______ , 20 ___ , and ending ______ , 20 ___ .

6 If the tax year entered in line 5 is for less than 12 months, check reason: [ ] Initial return [ ] Final return [ ] Change in accounting period

7 State in detail why you need the extension ADDITIONAL TIME IS NEEDED TO GATHER THE INFORMATION NECESSARY TO FILE A COMPLETE AND ACCURATE TAX RETURN.

8a	If this application is for Forms 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	8a	$ 10.
b	If this application is for Forms 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit and any amount paid previously with Form 8868.	8b	$ 284.
c	**Balance Due.** Subtract line 8b from line 8a Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	8c	$ 0

Signature and Verification must be completed for Part II only.

Under penalties of perjury, I declare that I have examined this form, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete, and that I am authorized to prepare this form.

Signature ▶ Cami Douglas Title ▶ VP CORPORATE TAX Date ▶ 8/8/14

8/12/14 JS 29

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