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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 09-01-2013 , and ending 08-31-2014

Name of foundation RAMESH K & HEM P MOHINDRA FOUNDATION		A Employer identification number 38-2554784	
Number and street (or P O box number if mail is not delivered to street address) 4403 LANDING DRIVE		B Telephone number (see instructions) (734) 779-2123	
City or town, state or province, country, and ZIP or foreign postal code WEST BLOOMFIELD, MI 48323		C If exemption application is pending, check here ☐	
G Check all that apply ☐ Initial return ☐ Final return ☐ Address change ☐ Initial return of a former public charity ☐ Amended return ☐ Name change		D 1. Foreign organizations, check here ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ☐	
H Check type of organization ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here ☐	
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ☒ \$ 1,522,696		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐	
J Accounting method ☒ Cash ☐ Accrual ☐ Other (specify) _____ (Part I, column (d) must be on cash basis.)			

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (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	7	7	7	
	4 Dividends and interest from securities.	42,379	42,379	42,379	
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	32,466			
	b Gross sales price for all assets on line 6a 1,420,539				
	7 Capital gain net income (from Part IV , line 2) . . .		32,466		
	8 Net short-term capital gain			3,968	
	9 Income modifications				
	10a Gross sales less returns and allowances				
	b Less Cost of goods sold				
Operating and Administrative Expenses	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)				
	12 Total. Add lines 1 through 11	74,852	74,852	46,354	
	13 Compensation of officers, directors, trustees, etc				
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)	565			
	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)	14,249	14,249		
	24 Total operating and administrative expenses.				
	Add lines 13 through 23	14,814	14,249		0
	25 Contributions, gifts, grants paid	10,333			10,333
	26 Total expenses and disbursements. Add lines 24 and 25	25,147	14,249		10,333
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	49,705			
	b Net investment income (if negative, enter -0-)		60,603		
	c Adjusted net income (if negative, enter -0-)			46,354	

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	4,300	11,300	11,300
	2	Savings and temporary cash investments	3,745	14,215	14,215
	3	Accounts receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	4	Pledges receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7	Other notes and loans receivable (attach schedule) ▶ _____ Less allowance for doubtful accounts ▶ _____			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10a	Investments—U S and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)	1,388,210	1,419,693	1,497,181
	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)	1,396,255	1,445,208	1,522,696
Liabilities	17	Accounts payable and accrued expenses			
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons	3,700	3,700	
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶ _____)			
	23	Total liabilities (add lines 17 through 22)	3,700	3,700	
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			
	28	Paid-in or capital surplus, or land, bldg , and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds	1,392,555	1,441,508	
	30	Total net assets or fund balances (see page 17 of the instructions)	1,392,555	1,441,508	
	31	Total liabilities and net assets/fund balances (see page 17 of the instructions)	1,396,255	1,445,208	

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	1,392,555
2	Enter amount from Part I, line 27a	2	49,705
3	Other increases not included in line 2 (itemize) ▶ _____	3	
4	Add lines 1, 2, and 3	4	1,442,260
5	Decreases not included in line 2 (itemize) ▶ _____	5	752
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	1,441,508

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	See Additional Data Table			
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 See Additional Data Table			
b			
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(I) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
a See Additional Data Table			
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	32,466
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	3,968

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			
2011			
2010			
2009			
2008			

2	Total of line 1, column (d).	2	
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	Enter the net value of noncharitable-use assets for 2013 from Part X, line 5.	4	
5	Multiply line 4 by line 3.	5	
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	
7	Add lines 5 and 6.	7	
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	

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		1	1,212		
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		2	1,231		
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-)				3	1,212
3 Add lines 1 and 2.				4	
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		5	1,212		
5 Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0-		6			
6 Credits/Payments					
a	2013 estimated tax payments and 2012 overpayment credited to 2013			6a	
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			
8 Enter any penalty for underpayment of estimated tax Check here ☒ if Form 2220 is attached		8	19		
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed		9	1,231		
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?		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 \$ (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?		2	No
If "Yes," attach a detailed description of the activities.			
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?		5	No
If "Yes," attach the statement required by General Instruction T.			
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either		6	Yes
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?		7	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)			
MI			
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? 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)?		9	No
If "Yes," complete Part XIV			
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 ▶N/A				
14	The books are in care of ▶RAMESH MOHINDRA Telephone no ▶(734) 779-2123 Located at ▶4403 LANDING DR WEST BLOOMFIELD MI ZIP +4 ▶48323			
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		
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
RAMESH K MOHINDRA 4403 LANDING DRIVE WEST BLOOMFIELD, MI 48323	PRESIDENT 1 00	0	0	0
HEM P MOHINDRA 4403 LANDING DRIVE WEST BLOOMFIELD, MI 48323	VICE PRESIDE 1 00	0	0	0
2 Compensation of five highest-paid employees (other than those included on line 1—see instructions). If none, enter "NONE."				
(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				
Total number of other employees paid over \$50,000.				

Part VIII

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	
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 N/A	
2	
All other program-related investments. See page 24 of the instructions.	
3	
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	0
b	Average of monthly cash balances.	1b	0
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	0
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	0
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	0
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	0
6	Minimum investment return. Enter 5% of line 5.	6	0

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	
2a	Tax on investment income for 2013 from Part VI, line 5.	2a	1,212
b	Income tax for 2013 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	1,212
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	
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	0

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	10,333
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	10,333
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	
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	10,333
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				0
2 Undistributed income, if any, as of the end of 2013				
a Enter amount for 2012 only.				
b Total for prior years 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2013				
a From 2008.	20,533			
b From 2009.	9,956			
c From 2010.	36,395			
d From 2011.	7,120			
e From 2012.	7,420			
f Total of lines 3a through e.	81,424			
4 Qualifying distributions for 2013 from Part XII, line 4 ▶ \$ 10,333				
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.				
e Remaining amount distributed out of corpus	10,333			
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	91,757			
b Prior years' undistributed income Subtract line 4b from line 2b.				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.				
d Subtract line 6c from line 6b Taxable amount—see instructions				
e Undistributed income for 2012 Subtract line 4a from line 2a Taxable amount—see instructions				
f Undistributed income for 2013 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2014				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions).				
8 Excess distributions carryover from 2008 not applied on line 5 or line 7 (see instructions). . . .	20,533			
9 Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a	71,224			
10 Analysis of line 9				
a Excess from 2009. . . .	9,956			
b Excess from 2010. . . .	36,395			
c Excess from 2011. . . .	7,120			
d Excess from 2012. . . .	7,420			
e Excess from 2013. . . .	10,333			

Part XIV

4942(j)(3) or 4942(j)(5)

3 Complete 3a, b, or c for the alternative test relied upon

1 Information Regarding Foundation Managers:

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

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.

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

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

Part XV

Supplementary Information (continued)

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year See Additional Data Table				
Total			3a	10,333
b Approved for future payment				
Total			3b	

Enter gross amounts unless otherwise indicated

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

Form **990-PF** (2013)

Part XVII

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

1

Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?

a

Transfers from the reporting foundation to a noncharitable exempt organization of

1

Cash.

1a(1)

No

2

Other assets.

1a(2)

No

b

Other transactions

1

Sales of assets to a noncharitable exempt organization.

1b(1)

No

2

Purchases of assets from a noncharitable exempt organization.

1b(2)

No

3

Rental of facilities, equipment, or other assets.

1b(3)

No

4

Reimbursement arrangements.

1b(4)

No

5

Loans or loan guarantees.

1b(5)

No

6

Performance of services or membership or fundraising solicitations.

1b(6)

No

c

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

1c

No

d

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

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

2a

Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527?

☐

Yes

☒

No

b

If "Yes," complete the following schedule.

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

Sign Here

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

Signature of officer or trustee

2014-10-28

Date

Title

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

☐

Yes

☒

No

Paid Preparer Use Only

Print/Type preparer's name

DONALD J BLUNDEN JR

Preparer's Signature

Date

2014-11-04

Check if self-employed

☐

PTIN

P01397316

Firm's name

BLUNDEN & ASSOCIATES PC

Firm's EIN

38-2688483

Firm's address

14700 FARMINGTON RD STE 107 LIVONIA, MI 481545431

Phone no

(734) 293-0055

Form 990-PF (2013)

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(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)
606 741 SH PIMCO REAL RET	P	2013-08-31	2013-11-06
2162 081 SH PIMCO GNMA	P	2013-08-31	2014-01-08
174 SH EXELON	P	2013-08-31	2014-06-16
564 825 SH YACKTMAN FOCUSES	P	2013-08-31	2013-11-06
1780 489 SH PIMCO INV GR CORP BD	P	2013-08-31	2014-01-08
1785 SH APPLE INC	P	2013-08-31	2014-06-27
14783 580 SH PIMCO REAL ESTATE	P	2013-08-31	2013-11-06
4297 144 SH TEMPLETON GL BD	P	2013-08-31	2014-01-09
357 186 SH ARTISAN MID CAP VAL	P	2013-08-31	2014-07-02
1031 098 SH PIMCO EM MRKT BD FDF	P	2013-08-31	2013-11-06
1285 408 SH PIMCO EM MRKT BD FD	P	2013-08-31	2014-01-10
602 759 SH PIMCO EM FD INDEX STRAT	P	2013-08-31	2014-07-02
2783 356 SH PIMCO INTL STK STRAT	P	2013-08-31	2013-11-06
1277 994 SH WELLS FARGO DISC	P	2013-08-31	2014-02-07
25 ISHS MORNINGSTAR SMALL CAP VAL	P	2013-08-31	2014-07-07
7063 562 SH PIMCO SMALL CAP STK PLUS	P	2013-08-31	2013-11-06
888 883 SH FID NEW MRKTS	P	2013-08-31	2014-02-13
143 SH MARKET VECTORS ETF	P	2013-08-31	2014-07-07
22348 731 SH PIMCO FUND INDEXPLUS	P	2013-08-31	2013-11-06
21231 169 SH JANUS ST BD FD	P	2013-08-31	2014-02-13
31 SH VANGUARD SMALL CAP	P	2013-08-31	2014-07-07
3060 633 SH PIMCO EM FD INDEX PLUS	P	2013-08-31	2013-11-06
2130 043 SH PIMCO TOTAL RET	P	2013-08-31	2014-02-13
155 SH KINDER MORGAN ENERGY LP	P	2013-08-31	2014-08-14
4382 88 SH SCOUT MID CAP FD	P	2013-08-31	2013-11-06
4998 533 SH PIMCO REAL RETURN	P	2013-08-31	2014-02-13
1058 192 SH SCOUT MID CAP FD	P	2013-08-31	2014-08-28
389 683 SH WASATCH INTL OPP	P	2013-08-31	2013-11-06
6377 411 SH PIMCO LONG DURATION TOTA	P	2013-08-31	2014-02-13
SCOUT MID CAP FD	P	2013-08-31	2014-08-28

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(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)
794 SH ISHARES GOLD TYR	P	2013-08-31	2013-11-08
3930 520 SH PIMCO CREDIT ABSOLUTE RE	P	2013-08-31	2014-02-13
VARIOUS WASH SALES	P	2013-08-31	2014-08-31
13856 809 SH WASATCH INTL OPP	P	2013-08-31	2013-12-05
3135 143 SH TEMPLETON GL TOT RET	P	2013-08-31	2014-02-13
1785 834 SH YACKTMAN FOCUSED	P	2013-08-31	2014-01-03
1402 SH ISHARES GOLD TR	P	2013-08-31	2014-02-18
607 SH PIMCO ETF TR 25+	P	2013-08-31	2014-01-03
600 SH VANGUARD BD FD	P	2013-08-31	2014-02-18
910 480 SH FIRST EAGLE	P	2013-08-31	2014-01-06
208 SH VANGUARD BD FD	P	2013-08-31	2014-02-18

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
6,819		7,364	-545
23,826		24,910	-1,084
6,267		5,085	1,182
14,396		12,876	1,520
18,321		20,112	-1,791
161,182		149,381	11,801
59,429		71,111	-11,682
56,293		57,973	-1,680
10,130		9,557	573
11,620		12,700	-1,080
13,754		15,756	-2,002
6,377		6,243	134
20,235		18,457	1,778
42,366		44,637	-2,271
3,236		2,876	360
71,625		60,792	10,833
13,632		13,830	-198
4,414		4,087	327
155,547		145,439	10,108
65,180		65,391	-211
3,989		3,663	326
30,208		31,708	-1,500
23,026		23,430	-404
14,238		12,428	1,810
79,199		69,916	9,283
55,784		60,634	-4,850
19,035		17,711	1,324
1,181		1,052	129
69,004		67,570	1,434
1,039			1,039

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
10,096		12,673	-2,577
41,664		41,406	258
24			24
41,848		37,418	4,430
41,541		42,136	-595
44,592		40,849	3,743
17,587		22,377	-4,790
50,659		62,054	-11,395
48,110		48,306	-196
32,959		27,419	5,540
16,678		16,746	-68

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			-545
			-1,084
			1,182
			1,520
			-1,791
			11,801
			-11,682
			-1,680
			573
			-1,080
			-2,002
			134
			1,778
			-2,271
			360
			10,833
			-198
			327
			10,108
			-211
			326
			-1,500
			-404
			1,810
			9,283
			-4,850
			1,324
			129
			1,434
			1,039

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			-2,577
			258
			24
			4,430
			-595
			3,743
			-4,790
			-11,395
			-196
			5,540
			-68

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				
BHARATIYA TEMPLE 6850 ADAMS TROY,MI 48098			BUILDING FUND	195
UNIVERSITY OF MICHIGAN 1500 E MEDICAL CENTER DR ANN ARBOR,MI 48109			LIVER RESEARCH FD	21
AIM FOR SEVA PO BOX 639 SAYLORSBURG,PA 18353			RURAL EDUCATION IN INDIA	1,400
ST MARY HOSPITAL 36475 FIVE MILE RD LIVONIA,MI 48154			CANCER WALKATHON	2,000
MICHIGAN ASSN OF INDIAN PHYSICIANS 28235 SOUTHFIELD RD LATHRUP VILLAGE,MI 48071			FREE MEDICAL CLINIC	600
PENDRICKSON CTR FOR BLIND 26530 EUREKA RD TAYLOR,MI 48180			BLIND CHILDREN ADVISORS AND SUPPORT	500
MICHIGAN HUMANE SOCIETY 30300 TELEGRAPH STE 220 BINGHAM FARMS,MI 48025			END COMPANION ANIMAL HOMELESSNESS	100
DETROIT NW DIALYSIS 25664 LAHSER RD SOUTHFIELD,MI 48034			DIALYSIS CLINC SUPPORT	200
HENRY FORD HOSPITAL 2799 W GRAND BLVD DETRTOIT,MI 48202			SUPPORT INDIGENT CARE	3,000
CHILDRENS CANCER FD 2317 W EMORY POWEEL,TN 37849			RELIEVE STRESS AND SUFFERING OF CHI	20
AVON WALK FOR BREAST CANCER 777 3RD AVE 6TH FLOOR NEWYORK,NY 10017			SUPPORT WALK FOR BREAST CANCER RESEA	100
OAKWOOD FD 15500 LUNDY PARKWAY DEARBORN,MI 48126			SUPPORT HEALTH CARE NEEDS OF PATIENT	1,667
UNICEF 125 MAIDEN LN 11TH FLOOR NEWYORK,NY 10038			EMERGENCY RELIEF FOR CHILDREN	180
YMCA EAST VALLEY 1975 S WHITE SAN JOSE,CA 95148			SUPPORT PROGRAMS	100
ATHRITIS FD 1330 W PEACHTREE STE 100 ATLANTA,GA 30309			SUPPORT ARTHRITIS RESEARCH	100
Total  3a				10,333

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>				
COMMIT TO CHANGE 12 COMMUNITY PLACE MORRISTOWN,NJ 07960			RESCUE & REHABILITATE AT-RISK GIRLS	100
SE MI RED CROSS 100 MACK DETROIT,MI 48201			SUPPORT BLOOD BANK	50
Total  3a				10,333

TY 2013 Accounting Fees Schedule

Name: RAMESH K & HEM P MOHINDRA
FOUNDATION
EIN: 38-2554784

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INDIRECT ACCOUNTING FEES	565			

TY 2013 Compensation Explanation

Name: RAMESH K & HEM P MOHINDRA
FOUNDATION

EIN: 38-2554784

Person Name	Explanation
RAMESH K MOHINDRA	
HEM P MOHINDRA	

TY 2013 Investments Corporate
Stock Schedule

Name: RAMESH K & HEM P MOHINDRA
FOUNDATION
EIN: 38-2554784

Name of Stock	End of Year Book Value	End of Year Fair Market Value
255 SH APPLE		
ENERGY TRANSFER PARTNERS	18,126	25,048
ISHARES GOLD TR	48	37
KINDER MORGAN ENERGY TRANSFER		
607 SH PIMCO ETF TR +25		
359.808.SH SARTAN EXTENDED MKT INDEX	20,084	20,142
1122.949 SH SPARTAN EXT MRKT INDEX A	55,399	62,863
894.892 SHFIRST EAGLE FD OF AMERICA		
2288.126 SH YACKTMAN FOCUS		
1943.362 SH AMG YACKTMAN FD	44,784	48,623
1913.366SH PIMCO TOT RET	21,034	21,028
5557.019 SH PIMCO REAL RET		
8351.619 SH PIMCO RE REAL RET	37,059	39,336
2132.690 SH PIMCO GNMA D		
9240.559SH PIMCO COMM. REAL RET	56,131	51,470
2232.368 SH PIMCO EM MRKT		
1708.717 SH PIMCO INV GRADE CORP BD		
10618.633SH PIMCO INTL STK	70,814	73,056
5267.794 SH PIMCO SMALL CAP STK	46,772	51,835
19430.717SH PIMCO FUND. INDEX	127,468	141,067
6405.357 SH PIMCO EM FD INDEX	66,339	70,779
483.647 SH PIMCO COMM PLUS STRAT	5,025	5,272
767.687 SH PIMCO FUND INDEX PLUS STR	6,948	8,429
2218.178 SH PIMCO MTGE OPP D	24,317	24,711
4975.640 SH SCOUT MID CAP		
4041.579 SH TEMPLETON GL BD		
14246.492 SH WASATCH INTL OPP		
100 SH BADGER METER INC	5,151	5,208
84 SH CREE INC	4,997	3,827
534 ISHS MORNINGSTAR SMALL CAP VAL	62,059	68,138

Name of Stock	End of Year Book Value	End of Year Fair Market Value
2114 SH MRKT. VECTORS ETF	60,549	67,056
1778 SH GUGGENHEIM S&P 500	138,951	141,244
140 SH SPECTRA ENERGY	5,159	5,832
200 SH 3D SYSTEMS	9,802	10,703
256 SH VANGUARD SMALL CAP GR	30,674	32,366
1144.184 ARTISIAN MID CAP	54,508	56,706
3656.143 SH ARTISIAN MID CAP VALUE	97,825	103,688
2742.390 SH ARTISIAN INTL SMALL CAP	72,123	70,836
2315.723 SH ARTISIAN INTL VAL FD	86,059	88,275
529.345 OAKMARK INTL	13,869	13,789
2318.277 SH OPP INTL GR	86,239	87,955
234.852 SH PUTNAM EQ SPECTRUM	10,000	10,336
1088.055 SH TEMPLETON GL TOT RET	14,625	14,787
895.522 SH WASATCH FRONTIER EM SM	3,000	2,982
22156.743 SH WASATCH EM MRKT SMALL C	57,280	62,925
250 SH ARCAM AB	6,475	6,832

TY 2013 Loans from Officers Schedule

Name: RAMESH K & HEM P MOHINDRA
FOUNDATION

EIN: 38-2554784

Item No.	1
Lender's Name	RAMESH K MOHINDRA MD PC
Lender's Title	
Original Amount of Loan	3700
Balance Due	3700
Date of Note	
Maturity Date	
Repayment Terms	
Interest Rate	
Security Provided by Borrower	
Purpose of Loan	
Description of Lender Consideration	
Consideration FMV	

TY 2013 Other Decreases Schedule

Name: RAMESH K & HEM P MOHINDRA
FOUNDATION
EIN: 38-2554784

Description	Amount
FORM 990-PF TAX 8-31-13	752

TY 2013 Other Expenses Schedule

Name: RAMESH K & HEM P MOHINDRA
FOUNDATION

EIN: 38-2554784

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
EXPENSES				
BANK SERVICE CHARGE	7	7		
FINANCIAL ADVISOR FEES	14,242	14,242		

TY 2013 IRS Payment

Name: RAMESH K & HEM P MOHINDRA
FOUNDATION

EIN: 38-2554784

Routing Transit Number: 072000096

Bank Account Number: 1850911254

Type of Account: Checking

Payment Amount in Dollars and Cents: 1,231

Requested Payment Date: 2014-11-06

Taxpayer's Daytime Phone Number: (734) 779-2123