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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 11-01-2013 , and ending 10-31-2014

Name of foundation WILLIAM P ANDERSON FOUNDATION CENTRAL TRUST CO AGENT		A Employer identification number 31-6034059	
Number and street (or P O box number if mail is not delivered to street address) PNC BANK 620 LIBERTY AVENUE NO 10 FL		Room/suite	B Telephone number (see instructions) (412) 762-2950
City or town, state or province, country, and ZIP or foreign postal code PITTSBURGH, PA 152222705		C If exemption application is pending, check here ▶ ☐	
G Check all that apply ☐ Initial return ☐ Initial return of a former public charity ☐ Final return ☐ Amended return ☐ Address change ☐ Name change		D 1. Foreign organizations, check here ▶ ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ▶ ☐	
H Check type of organization ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here ▶ ☐	
I Fair market value of all assets at end of year (from Part II, col. (c), line 16)▶\$ 6,865,726	J Accounting method ☒ Cash ☐ Accrual ☐ Other (specify) _____ (Part I, column (d) must be on cash basis.)		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ▶ ☐

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)				
	2 Check ▶ ☒ if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities.	141,682	141,682		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	257,766			
	b Gross sales price for all assets on line 6a 890,771				
	7 Capital gain net income (from Part IV, line 2) . . .		245,910		
	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)	144	0		
	12 Total. Add lines 1 through 11	399,592	387,592		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	0	0		0
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule).	2,615	0		2,615
	b Accounting fees (attach schedule).				
	c Other professional fees (attach schedule)	32,808	32,808		0
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	16,410	1,248		0
	19 Depreciation (attach schedule) and depletion . . .				
	20 Occupancy				
	21 Travel, conferences, and meetings	1,219	0		1,219
	22 Printing and publications				
	23 Other expenses (attach schedule).	19,069	6,314		12,755
	24 Total operating and administrative expenses. Add lines 13 through 23	72,121	40,370		16,589
	25 Contributions, gifts, grants paid	302,648			302,648
	26 Total expenses and disbursements. Add lines 24 and 25	374,769	40,370		319,237
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	24,823			
	b Net investment income (if negative, enter -0-)		347,222		
	c Adjusted net income (if negative, enter -0-)				

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)	Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing			
	2	Savings and temporary cash investments	113,748	359,655	359,655
	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)	640,563	 541,363	527,686
	b	Investments—corporate stock (attach schedule)	2,668,318	 2,512,530	4,407,553
	c	Investments—corporate bonds (attach schedule).	361,263	 395,167	426,323
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)	935,571	 935,571	1,144,509
	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)	4,719,463	4,744,286	6,865,726
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	4,718,492	4,743,315	
	28	Paid-in or capital surplus, or land, bldg , and equipment fund	0	0	
	29	Retained earnings, accumulated income, endowment, or other funds	971	971	
	30	Total net assets or fund balances (see page 17 of the instructions)	4,719,463	4,744,286	
	31	Total liabilities and net assets/fund balances (see page 17 of the instructions)	4,719,463	4,744,286	

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	4,719,463
2	Enter amount from Part I, line 27a	2	24,823
3	Other increases not included in line 2 (itemize) ▶ _____	3	0
4	Add lines 1, 2, and 3	4	4,744,286
5	Decreases not included in line 2 (itemize) ▶ _____	5	0
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	4,744,286

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)		(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
1 a	SALES OF PUBLICLY TRADED SECURITIES			
b	CLASS ACTION SETTLEMENTS		P	
c	CAPITAL GAINS DIVIDENDS		P	
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 890,705		645,005	245,700
b 169		25	144
c 66			66
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			245,700
b			144
c			66
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	245,910
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8		3	

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☒ No

If "Yes," the foundation does not qualify under section 4940(e) Do not complete this part

1 Enter the appropriate amount in each column for each year, see page 18 of the instructions before making any entries

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2012	308,492	6,037,870	0 051093
2011	301,679	5,872,725	0 051370
2010	292,358	6,060,546	0 048240
2009	297,525	5,601,857	0 053112
2008	342,045	4,957,188	0 069000

2 Total of line 1, column (d).	2	0 272815
3 Average distribution ratio for the 5-year base period—divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	0 054563
4 Enter the net value of noncharitable-use assets for 2013 from Part X, line 5.	4	6,429,722
5 Multiply line 4 by line 3.	5	350,825
6 Enter 1% of net investment income (1% of Part I, line 27b).	6	3,472
7 Add lines 5 and 6.	7	354,297
8 Enter qualifying distributions from Part XII, line 4.	8	319,237

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

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the instructions)					
1a Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1		1	6,944		
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	0		
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	6,944
3 Add lines 1 and 2.				4	0
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		5	6,944		
5 Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0-		6a	8,240		
6 Credits/Payments					
a 2013 estimated tax payments and 2012 overpayment credited to 2013					
b Exempt foreign organizations—tax withheld at source					
c Tax paid with application for extension of time to file (Form 8868)					
d Backup withholding erroneously withheld		6b			
		6c			
		6d			
7 Total credits and payments Add lines 6a through 6d.		7	8,240		
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	1,296		
11 Enter the amount of line 10 to be Credited to 2014 estimated tax 1,296 Refunded		11	0		

Part VII-A Statements Regarding Activities				
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		Yes	No
		1a		No
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)? 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.	1b		No
c	Did the foundation file Form 1120-POL for this year?.	1c		No
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation \$ 0 (2) On foundation managers \$ 0			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers \$ 0			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.	2		No
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes	3		No
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?.	4a		No
b	If "Yes," has it filed a tax return on Form 990-T for this year?.	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.	5		No
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	Yes	
7	Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV.	7	Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) OH			
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		No
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2013 or the taxable year beginning in 2013 (see instructions for Part XIV)? If "Yes," complete Part XIV	9		No
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses.	10		No

Part VII-A

Statements Regarding Activities *(continued)*

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions).	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Yes	
Website address N/A				
14	The books are in care of PNC BANK Telephone no (412) 762-2950 Located at 620 LIBERTY AVE 10TH FLOOR PITTSBURGH PA ZIP +4 15222			
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		No
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2013?.	1c		No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2013, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2013?. 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? (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		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2013?	4b		No

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required (continued)

5a

During the year did the foundation pay or incur any amount to

(1)

Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?

Yes

No

(2)

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

Yes

No

(3)

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

Yes

No

(4)

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

Yes

No

(5)

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

Yes

No

b

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

5b

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

c

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

Yes

No

If "Yes," attach the statement required by Regulations section 53.4945–5(d).

6a

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

Yes

No

b

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

6b

No

If "Yes" to 6b, file Form 8870.

7a

At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?

Yes

No

b

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

7b

Part VIII

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

1

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

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
See Additional Data Table				

2

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

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

Total

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

0

Part VIII

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

3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE".		
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
Total number of others receiving over \$50,000 for professional services.		0

Part IX-A

Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1 N/A	0
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	0
2	
All other program-related investments. See page 24 of the instructions.	
3	0
Total. Add lines 1 through 3.	0

Part X

Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see instructions.)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes		
a	Average monthly fair market value of securities.	1a	6,527,637
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	6,527,637
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	0
2	Acquisition indebtedness applicable to line 1 assets.	2	0
3	Subtract line 2 from line 1d.	3	6,527,637
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	97,915
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	6,429,722
6	Minimum investment return. Enter 5% of line 5.	6	321,486

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	321,486
2a	Tax on investment income for 2013 from Part VI, line 5.	2a	6,944
b	Income tax for 2013 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	6,944
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	314,542
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	314,542
6	Deduction from distributable amount (see instructions).	6	0
7	Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1.	7	314,542

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	319,237
b	Program-related investments—total from Part IX-B.	1b	0
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes.	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required).	3a	
b	Cash distribution test (attach the required schedule).	3b	
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	319,237
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	319,237
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				314,542
2 Undistributed income, if any, as of the end of 2013				
a Enter amount for 2012 only.			80,907	
b Total for prior years 20____, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2013				
a From 2008.				
b From 2009.				
c From 2010.				
d From 2011.				
e From 2012.				
f Total of lines 3a through e.	0			
4 Qualifying distributions for 2013 from Part XII, line 4 ▶ \$ 319,237				
a Applied to 2012, but not more than line 2a			80,907	
b Applied to undistributed income of prior years (Election required—see instructions).		0		
c Treated as distributions out of corpus (Election required—see instructions).	0			
d Applied to 2013 distributable amount.				238,330
e Remaining amount distributed out of corpus	0			
5 Excess distributions carryover applied to 2013 (If an amount appears in column (d), the same amount must be shown in column (a).)	0			0
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	0			
b Prior years' undistributed income Subtract line 4b from line 2b.		0		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.			0	
d Subtract line 6c from line 6b Taxable amount—see instructions		0		
e Undistributed income for 2012 Subtract line 4a from line 2a Taxable amount—see instructions			0	
f Undistributed income for 2013 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2014				76,212
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions).	0			
8 Excess distributions carryover from 2008 not applied on line 5 or line 7 (see instructions). . . .	0			
9 Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a	0			
10 Analysis of line 9				
a Excess from 2009.				
b Excess from 2010.				
c Excess from 2011.				
d Excess from 2012.				
e Excess from 2013.				

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

1a

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

b

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

☐ 4942(j)(3) or ☐ 4942(j)(5)

2a

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

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

Part XVSupplementary Information (Complete this part only if the organization had \$5,000 or more in assets at any time during the year—see instructions.)

1

Information Regarding Foundation Managers:

a

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

b

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

2

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

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

a

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

WILLIAM P ANDERSON FOUNDATION ATTN
1900 E 9TH STREET
CLEVELAND, OH 44114
(216) 222-2700

b

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

APPLICANT MUST SUBMIT COMPLETED WILLIAM P ANDERSON FOUNDATION GRANT APPLICATION AND A COPY OF APPLICANT'S IRS 501(C)(3) TAX EXEMPTION LETTER. SEE APPLICATION GUIDELINES.

c

Any submission deadlines

OCTOBER 1 OF EACH YEAR

d

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

SEE APPLICATION GUIDELINES

Form 990-PF (2013)

Part XV

Supplementary Information (continued)

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year See Additional Data Table				
Total			3a	302,648
b Approved for future payment				
Total			3b	0

Enter gross amounts unless otherwise indicated

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

Form **990-PF** (2013)

Part XVII

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
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(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?

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.

*****	2015-01-15	*****	
Signature of officer or trustee	Date	Title	

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

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

**Paid
Preparer
Use Only**

	Print/Type preparer's name	Preparer's Signature	Date	Check if self-	PTIN
--	----------------------------	----------------------	------	----------------	------

Print/Type preparer's name	Preparer's Signature	Date	Check if self-employed ☒	PTIN
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[illegible]

Preparer				
				DATE: 03/01/2024

Use Only	Firm's name	Firm's EIN

Firm's address	Phone no
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Form 990PF Part VIII Line 1 - List all officers, directors, trustees, foundation managers and their compensation

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
JOHN L CAMPBELL	TRUSTEE 1 00	0	0	0
201 EAST 5TH STREET SUITE 800 CINCINNATI, OH 45202				
HARRY W WHITTAKER	TRUSTEE 1 00	0	0	0
3939 ERIE AVENUE APT 212 CINCINNATI, OH 45208				
GRENVILLE ANDERSON	TREASURER 1 00	0	0	0
148 COMMONWEALTH AVE UNIT 201 BOSTON, MA 02116				
MICHAEL A COOMBE	VICE PRESIDENT 1 00	0	0	0
2600 HANDASYDE AVE CINCINNATI, OH 45208				
JAMES A MYERS	TRUSTEE 1 00	0	0	0
5324 ADVANCE MILLS ROAD EARLYSVILLE, VA 22936				
WILLIAM P ANDERSON	PRESIDENT 1 00	0	0	0
6 BARAKET LANE SHERBORN, MA 01770				
POLLY W WHITTAKER	TRUSTEE 1 00	0	0	0
2497 GRANDIN ROAD CINCINNATI, OH 45208				
NICHOLAS R ANDERSON	TRUSTEE 1 00	0	0	0
4175 CESAR CHAVEZ SAN FRANCISCO, CA 94131				
TUCKER J COOMBE	TRUSTEE 1 00	0	0	0
2600 HANDASYDE AVE CINCINNATI, OH 45208				
WILLIAM CLAFIN	TRUSTEE 1 00	0	0	0
11 KINGSBORO PARK JAMAICA PLAIN, MA 02130				
DAVID WHITTAKER	TRUSTEE 1 00	0	0	0
9305 OLD INDIAN HILL ROAD CINCINNATI, OH 45243				
PHYLLIS C WAHL	SECRETARY 1 00	0	0	0
11520 SYMMES GATE LANE CINCINNATI, OH 45249				

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				
ALCOHOLISM COUNCIL OF THE CINCINNATI AREA 2828 VERNON PLACE CINCINNATI,OH 45219	NONE	PC	CONTINUING PROFESSIONAL EDUCATION	6,000
ART WORKS 20 EAST CENTRAL PARKWAY CINCINNATI,OH 45202	NONE	PC	2014 YOUTH EMPLOYMENT PROGRAM	5,000
BEACON ACADEMY 477 LONGWOOD AVENUE BOSTON,MA 02215	NONE	PC	BOOKS FOR ENGLISH CLASS	3,200
BIG BROTHERS BIG SISTERS OF GREATER CINCINNATI 2400 READING ROAD CINCINNATI,OH 45202	NONE	PC	MENTORING CHILDREN OF PRISONERS	5,000
CAMP JOY 10117 OLD 3-C HIGHWAY CLARKSVILLE,OH 45113	NONE	PC	FOSTERING SUCCESS PROGRAM	10,000
CANCER SUPPORT COMMUNITY 4918 COOPER ROAD CINCINNATI,OH 45242	NONE	PC	SURVIVING AND THRIVING PROGRAM	5,000
CENTER FOR THE CHEMICAL ADDICTIONS 840 EZZARD CHARLES DRIVE CINCINNATI,OH 45214	NONE	PC	HELPING OUR TINIEST ADDICTS	5,000
CHATFIELD COLLEGE 20918 STATE ROUTE 251 FAYETTEVILLE,OH 45118	NONE	PC	OVER-THE-RHINE CAMPUS PROJECT	7,000
CHILDREN'S HOME OF CINCINNATI 5050 MADISON RD CINCINNATI,OH 45227	NONE	PC	CAMP-I-CAN	10,000
CHRIST CHURCH CATHEDRAL 318 EAST FOURTH STREET CINCINNATI,OH 45202	NONE	PC	UNRESTRICTED GRANT	1,000
CHRISTIAN OUTREACH & WELLNESS 3710 EASTERN AVENUE CINCINNATI,OH 45226	NONE	PC	CHOICE & DIABETIC FOOD PANTRIES	5,000
CINCINNATI ASSOCIATION FOR THE BLIND 2045 GILBERT AVE CINCINNATI,OH 45202	NONE	PC	RADIO READING SERVICES	2,000
CINCINNATI NATURE CENTER 4949 TEALTOWN ROAD MILFORD,OH 45150	NONE	PC	SCHOOL PROGRAM	5,000
CINCINNATI OBSERVATORY 3489 OBSERVATORY PLACE CINCINNATI,OH 45208	NONE	PC	ASTRONOMY IN ACTION	3,000
CINCINNATI SHAKESPEARE COMPANY 719 RACE STREET CINCINNATI,OH 45202	NONE	PC	EDUCATION & OUTREACH PROGRAM	3,500
Total  3a				302,648

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				
CINCINNATI THERAPEUTIC RIDING & HORSEMANSHIP 1342 STATE ROUTE 50 MILFORD, OH 45051	NONE	PC	RIDERSHIPS FOR CHILDREN WITH DISABILITIES	3,500
CINCINNATI WORKS 708 WALNUT STREET FLOOR 2 CINCINNATI, OH 45202	NONE	PC	JOB READINESS	5,000
CONNECTIONS A SAFE PLACE PO BOX 9972 CINCINNATI, OH 45209	NONE	PC	RESTORATION FOR VICTIMS OF SEX ABUSE	2,148
CONSTELLA FESTIVAL 1201 EDGECLIFF PLACE 1103 CINCINNATI, OH 45206	NONE	PC	2014 MUSIC EDUCATION PROGRAM	5,000
COVINGTON LADIES HOME 702 GARRARD STREET COVINGTON, KY 41011	NONE	PC	BRIDGE-THE-GAP FUND	3,000
DEPAUL CRISTO REY HIGH SCHOOL 1133 CLIFTON HILLS AVENUE CINCINNATI, OH 45220	NONE	PC	TORCH PREP ACT PREP PROGRAM	3,000
DRESS FOR SUCCESS 205 WEST FOURTH STREET SUITE 900 CINCINNATI, OH 45202	NONE	PC	MOBILE CAREER TRANSFORMATION CENTER	3,000
DROP INN CENTER 217 WEST 12TH STREET CINCINNATI, OH 45202	NONE	PC	EMERGENCY SHELTER PROGRAM	5,500
EAST END ADULT EDUCATION CENTER 4015 EASTERN AVE - PO BOX 26095 CINCINNATI, OH 45226	NONE	PC	UNRESTRICTED GRANT	5,000
ELEMENTZ 1100 RACE STREET CINCINNATI, OH 45202	NONE	PC	DEVELOP EDUCATIONAL MUSIC FOR 5TH-6TH GRADERS	2,000
EMAMUEL SQUASH 1995 MADISON ROAD CINCINNATI, OH 45208	NONE	PC	UNRESTRICTED GRANT	6,000
ENSEMBLE THEATRE OF CINCINNATI 1127 VINE ST CINCINNATI, OH 45202	NONE	PC	EDUCATIONAL OUTREACH PROGRAM	5,000
FERNSIDE 4360 COOPER ROAD CINCINNATI, OH 45242	NONE	PC	GRIEF SUPPORT GROUPS & ACTIVITIES	5,500
FREESTORE FOODBANK 1141 CENTRAL PARKWAY CINCINNATI, OH 45202	NONE	PC	POWER PACK PROGRAM	10,000
HEARING SPEECH AND DEAF CENTER OF GREATER CINCINNATI 2825 BURNET AVENUE CINCINNATI, OH 45219	NONE	PC	CHARITY AUDIOLOGY SERVICES	4,000
Total  3a				302,648

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				
HULL LIFESAVING MUSEUM 1117 NANTASKET AVE - PO BOX 221 HULL,MA 02045	NONE	PC	MARITIME APPRENTICESHIP PROGRAM	2,000
IMAGO FOR THE EARTH 700 ENRIGHT AVENUE CINCINNATI,OH 45205	NONE	PC	CONNECTING URBAN YOUTH TO NATURE	5,000
INTER PARISH MINISTRY 3509 DEBOLT ROAD CINCINNATI,OH 45244	NONE	PC	CHOICE FOOD & CLOTHING PANTRY	6,000
INTERFAITH HOSPITALITY NETWORK 990 NASSAU STREET CINCINNATI,OH 45206	NONE	PC	EMERGENCY SHELTER PROGRAM	5,000
JOBS PLUS EMPLOYMENT NETWORK 1625 VINE STREET CINCINNATI,OH 45202	NONE	PC	JOB READINESS PROGRAM	5,000
LEARNING THROUGH ART INC 1420 SYCAMORE STREET F50 CINCINNATI,OH 45202	NONE	PC	BOOKS ALIVE FOR KIDS	5,000
LEGAL AID SOCIETY OF GREATER CINCINNATI 215 E NINTH STREET SUITE 200 CINCINNATI,OH 45202	NONE	PC	CHILD HELP MEDICAL-LEGAL PARTNERSHIP	7,500
LITERACY NETWORK OF GTR CINCI 635 WEST 7TH STREET SUITE 300 CINCINNATI,OH 45203	NONE	PC	WINNERS READ PROGRAM	2,000
LOWER PRICE HILL COMMUNITY 2104 SAINT MICHAEL STREET CINCINNATI,OH 45204	NONE	PC	COLLEGE BRIDGE PROGRAM	5,000
MAINE AUDUBON SOCIETY 20 GILSLAND FARM ROAD FALMOUTH,ME 04105	NONE	PC	UNRESTRICTED GRANT	1,000
MASS AUDUBON SOCIETY 208 SOUTH GREAT ROAD LINCOLN,MA 01773	NONE	PC	BROADMOOR WILDLIFE SANCTUARY	1,000
MEAC 4600 ERIE AVE CINCINNATI,OH 45227	NONE	PC	UNRESTRICTED GRANT	5,500
MERCY NEIGHBORHOOD MINISTRIES INC 1602 MADISON ROAD CINCINNATI,OH 45206	NONE	PC	LOW INCOME SENIORS-LIVING INDEPENDENT & WELL	6,000
NEW LIFE FURNITURE 11431 WILLIAMSON ROAD UNIT D CINCINNATI,OH 45241	NONE	PC	UNRESTRICTED GRANT	3,500
OHIO VALLEY VOICES 6642 BRANCH HILL-GUINEA PIKE LOVELAND,OH 45140	NONE	PC	UNRESTRICTED GRANT	3,000
Total  3a				302,648

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				
ONE WAY FARM PO BOX 18637 FAIRFIELD,OH 45018	NONE	PC	UNRESTRICTED GRANT	5,000
OUR DAILY BREAD 1730 RACE STREET CINCINNATI,OH 45202	NONE	PC	KIDS CLUB PROGRAM	6,000
OVER-THE-RHINE KITCHEN WALNUT HILLS KITCHEN & PANTRY PO BOX 6045 CINCINNATI,OH 45206	NONE	PC	AGENCY IMPROVEMENTS & MAINTENANCE	5,000
PEASLEE NEIGHBORHOOD CENTER 215 EAST 14TH STREET CINCINNATI,OH 45202	NONE	PC	EARLY LEARNING CENTER	3,000
PROJECT PLACE 1145 WASHINGTON STREET BOSTON,MA 02118	NONE	PC	CLEAN CORNERS BRIGHT HOPES	2,000
PROKIDS 2605 BURNET AVENUE CINCINNATI,OH 45219	NONE	PC	BUILDING BLOCKS PROGRAM	8,000
PURCELL MARIAN HIGH SCHOOL 2935 HACKBERRY ST CINCINNATI,OH 45206	NONE	PC	LAVATIUS POWELL URBAN STUDENTS PROGRAM	7,300
SAMARITANS INC 41 WEST STREET 4TH FLOOR BOSTON,MA 02111	NONE	PC	YOUTH SUICIDE PREVENTION SERVICES	2,000
STEPPING STONES CENTER 5650 GIVEN ROAD CINCINNATI,OH 45243	NONE	PC	SATURDAY KIDS CLUB	3,000
STRATEGIES TO END HOMELESSNESS 2368 VICTORY PARKWAY SUITE 600 CINCINNATI,OH 45206	NONE	PC	CENTRAL ACCESS POINT	3,000
SUMMER STARS CAMP FOR THE PERFORMING ARTS 132 HIGH STREET NORWELL,MA 02061	NONE	PC	UNRESTRICTED GRANT	12,000
THE HILLSIDE TRUST 710 TUSCULUM AVENUE CINCINNATI,OH 45226	NONE	PC	LANDSLIDE BROCHURE MAILING	2,000
THE ITALIAN HOME FOR CHILDREN 1125 CENTRE STREET JAMAICA PLAIN,MA 02130	NONE	PC	LAPTOPS AND TABLETS FOR CLASSROOMS	5,000
THE JETT FOUNDATION 68 EVERGREEN STREET SUITE 1 KINGSTON,MA 02364	NONE	PC	DUCHENNE ALLIANCE	3,000
TRI-STATE BLEEDING DISORDER FOUNDATION 635 WEST 7TH STREET SUITE 407 CINCINNATI,OH 45203	NONE	PC	CAMP NJOYITALL	4,000
Total  3a				302,648

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>				
VISIONARIES & VOICES 3841 SPRING GROVE AVENUE CINCINNATI, OH 45223	NONE	PC	OPERATION TECHNOLOGY UPGRADE	2,000
VISITING NURSE ASSOCIATION 2400 READING ROAD CINCINNATI, OH 45202	NONE	PC	TELEHEALTH MONITORING PROGRAM	2,500
WELCOME HOUSE OF N KY INC 205 W PIKE ST COVINGTON, KY 41011	NONE	PC	EMERGENCY SHELTER FOR WOMEN & CHILDREN	4,000
WESLEY COMMUNITY SERVICES 2091 RADCLIFF DRIVE CINCINNATI, OH 45204	NONE	PC	OUTPOST REFRIGERATOR/FREEZER	8,000
WHOLE AGAIN 4222 HAMILTON AVENUE CINCINNATI, OH 45223	NONE	PC	SUMMER FOOD & ENRICHMENT PROGRAMS	5,000
YWCA OF GREATER CINCINNATI 898 WALNUT STREET CINCINNATI, OH 45202	NONE	PC	EMPLOYMENT & LITERACY SERVICES PROGRAM	5,000
Total  3a				302,648

TY 2013 All Other Program

Related Investments Schedule

Name: WILLIAM P ANDERSON FOUNDATION CENTRAL
TRUST CO AGENT

EIN: 31-6034059

Category	Amount
N/A	0

**TY 2013 Explanation of Non-Filing
with Attorney General Statement**

Name: WILLIAM P ANDERSON FOUNDATION CENTRAL
TRUST CO AGENT

EIN: 31-6034059

Statement: THIS TRUST DOES NOT PROVIDE A COPY OF FORM 990-PF TO THE
OHIO ATTORNEY GENERAL BECAUSE, IN LIEU THEREOF, IT IS
REQUIRED TO FILE AN ON-LINE ANNUAL REPORT WITH THE OHIO
ATTORNEY GENERAL'S OFFICE AT
WWW.OHIOATTORNEYGENERAL.GOV.

**TY 2013 Investments Corporate
Bonds Schedule**

Name: WILLIAM P ANDERSON FOUNDATION CENTRAL
TRUST CO AGENT
EIN: 31-6034059

Name of Bond	End of Year Book Value	End of Year Fair Market Value
CORPORATE BONDS	395,167	426,323

**TY 2013 Investments Corporate
Stock Schedule**

Name: WILLIAM P ANDERSON FOUNDATION CENTRAL
TRUST CO AGENT

EIN: 31-6034059

Name of Stock	End of Year Book Value	End of Year Fair Market Value
CORPORATE STOCKS	2,512,530	4,407,553

TY 2013 Investments Government Obligations Schedule

Name: WILLIAM P ANDERSON FOUNDATION CENTRAL
TRUST CO AGENT

EIN: 31-6034059

US Government Securities - End of Year Book Value:	541,363
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US Government Securities - End of Year Fair Market Value:	527,686
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State & Local Government Securities - End of Year Book Value:	0
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State & Local Government Securities - End of Year Fair Market Value:	0
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TY 2013 Investments - Other Schedule

Name: WILLIAM P ANDERSON FOUNDATION CENTRAL
TRUST CO AGENT

EIN: 31-6034059

Category / Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
WARRANTS & ASSIGNMENT INTERESTS	AT COST	1,935	1,935
MUTUAL FUNDS - EQUITY	AT COST	629,918	815,375
MUTUAL FUNDS - FIXED	AT COST	303,718	327,199

TY 2013 Legal Fees Schedule

Name: WILLIAM P ANDERSON FOUNDATION CENTRAL
TRUST CO AGENT

EIN: 31-6034059

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ATTORNEY FEES	2,615	0		2,615

TY 2013 Other Expenses Schedule

Name: WILLIAM P ANDERSON FOUNDATION CENTRAL
TRUST CO AGENT

EIN: 31-6034059

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
POSTAGE/STATIONARY	286	0		286
AGENT FOR TRUSTEE FEES	6,389	5,750		639
INVESTMENT TRANSACTION CHARGES	480	480		0
PROCESSING FEES	84	84		0
SECRETARIAL SERVICES	1,130	0		1,130
OHIO FILING FEE	200	0		200
HONORARIUMS	10,500	0		10,500

TY 2013 Other Income Schedule

Name: WILLIAM P ANDERSON FOUNDATION CENTRAL
TRUST CO AGENT

EIN: 31-6034059

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
CLASS ACTION SETTLEMENT	144		144

TY 2013 Other Professional Fees Schedule

Name: WILLIAM P ANDERSON FOUNDATION CENTRAL
TRUST CO AGENT
EIN: 31-6034059

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT MANAGEMENT FEES	32,808	32,808		0

TY 2013 Taxes Schedule

Name: WILLIAM P ANDERSON FOUNDATION CENTRAL
TRUST CO AGENT

EIN: 31-6034059

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOREIGN DIVIDEND TAX	1,248	1,248		0
ESTIMATED EXCISE TAX PAID Y/E 10/31/2014	8,240	0		0
EXCISE TAX PAID Y/E 10/31/2013	6,922	0		0