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Form **990-PF**

Return of Private Foundation

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

OMB No 1545-0052

2014Department of the Treasury
Internal Revenue Service

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

Open to Public Inspection

For calendar year 2014 or tax year beginning , and ending

Name of foundation PETER V. WESTHAYSEN MEDICAL EDUCATI TRUST		A Employer identification number 31-6290396
Number and street (or P O box number if mail is not delivered to street address) 10322 INDIANAPOLIS BLVD	Room/suite	B Telephone number (see instructions) 219-853-3532
City or town, state or province, country, and ZIP or foreign postal code HIGHLAND IN 46322		C If exemption application is pending, check here <input type="checkbox"/>
G Check all that apply <input type="checkbox"/> Initial return <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Final return <input type="checkbox"/> Amended return <input type="checkbox"/> Address change <input type="checkbox"/> Name change		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
H Check type of organization: <input type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input checked="" type="checkbox"/> Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col (c), line 16) ► \$ 1,338,602	J Accounting method <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify)	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1	Contributions, gifts, grants, etc., received (attach schedule)				
2	Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B				
3	Interest on savings and temporary cash investments	11,734	11,734		
4	Dividends and interest from securities	24,614	24,614		
5a	Gross rents				
b	Net rental income or (loss)				
6a	Net gain or (loss) from sale of assets not on line 10 Stmt 1	51,745			
b	Gross sales price for all assets on line 6a 139,752				
7	Capital gain net income (from Part IV, line 2)		0		
8	Net short-term capital gain			0	
9	Income modifications				
10a	Gross sales less returns and allowances				
b	Less: Cost of goods sold				
c	Gross profit or (loss) (attach schedule)				
11	Other income (attach schedule)				
12	Total. Add lines 1 through 11	88,093	36,348	0	
13	Compensation of officers, directors, trustees, etc	0			
14	Other employee salaries and wages	15,007	15,007		
15	Pension plans, employee benefits				
16a	Legal fees (attach schedule) See Stmt 2	813	813		
b	Accounting fees (attach schedule) Stmt 3	775	775		
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 (att. sch)				
24	Total operating and administrative expenses. Add lines 13 through 23	16,595	16,595	0	0
25	Contributions, gifts, grants paid	58,650			58,650
26	Total expenses and disbursements. Add lines 24 and 25	75,245	16,595	0	58,650
27	Subtract line 26 from line 12.				
a	Excess of revenue over expenses and disbursements	12,848			
b	Net investment income (if negative, enter -0-)		19,753		
c	Adjusted net income (if negative, enter -0-)			0	

For Paperwork Reduction Act Notice, see instructions.

Form **990-PF** (2014)

SCANNED MAY 01 2015

Operating and Administrative Expenses

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Part II Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash – non-interest-bearing			
	2 Savings and temporary cash investments			
	3 Accounts receivable ▶ Less allowance for doubtful accounts ▶			
	4 Pledges receivable ▶ Less allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7 Other notes and loans receivable (att. schedule) ▶ Less allowance for doubtful accounts ▶	0		
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments – U S and state government obligations (attach schedule) Stmt 4	32,736	34,797	34,797
	b Investments – corporate stock (attach schedule) See Stmt 5	1,034,532	1,042,196	1,303,805
	c Investments – corporate bonds (attach schedule)			
	11 Investments – land, buildings, and equipment, basis ▶ Less accumulated depreciation (attach sch) ▶			
	12 Investments – mortgage loans			
	13 Investments – other (attach schedule)			
	14 Land, buildings, and equipment, basis ▶ Less accumulated depreciation (attach sch) ▶			
	15 Other assets (describe ▶)			
	16 Total assets (to be completed by all filers – see the instructions Also, see page 1, item I)	1,067,268	1,076,993	1,338,602
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. ▶ <input type="checkbox"/>			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. ▶ <input checked="" type="checkbox"/>			
	27 Capital stock, trust principal, or current funds	907,849		
	28 Paid-in or capital surplus, or land, bldg, and equipment fund			
	29 Retained earnings, accumulated income, endowment, or other funds	159,419	1,076,993	
	30 Total net assets or fund balances (see instructions)	1,067,268	1,076,993	
	31 Total liabilities and net assets/fund balances (see instructions)	1,067,268	1,076,993	

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	1,067,268
2 Enter amount from Part I, line 27a	2	12,848
3 Other increases not included in line 2 (itemize) ▶ See Statement 6	3	412
4 Add lines 1, 2, and 3	4	1,080,528
5 Decreases not included in line 2 (itemize) ▶ See Statement 7	5	3,535
6 Total net assets or fund balances at end of year (line 4 minus line 5) – Part II, column (b), line 30	6	1,076,993

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 N/A				
b				
c				
d				
e				

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

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

(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
a			
b			
c			
d			
e			

2 Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8		3	

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?

☒ Yes ☐ No

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2013			
2012			
2011			
2010			
2009			

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 2014 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 instructions)

1a	Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1 Date of ruling or determination letter (attach copy of letter if necessary—see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b	1	395
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	2	0
3	Add lines 1 and 2	3	395
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	0
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5	395
6	Credits/Payments		
a	2014 estimated tax payments and 2013 overpayment credited to 2014	6a	2,600
b	Exempt foreign organizations – tax withheld at source	6b	
c	Tax paid with application for extension of time to file (Form 8868)	6c	
d	Backup withholding erroneously withheld	6d	
7	Total credits and payments. Add lines 6a through 6d	7	2,600
8	Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8	
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	2,205
11	Enter the amount of line 10 to be Credited to 2015 estimated tax 400 Refunded	11	1,805

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for the 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		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. \$ (2) On foundation managers \$		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers \$		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) None		
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	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2014 or the taxable year beginning in 2014 (see instructions for Part XIV)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

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		X
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► N/A	13	X	
14	The books are in care of ► FIRST MIDWEST BANK 2801 WEST JEFFERSON STREET Located at ► JOLIET IL ZIP+4 ► 60435-5352 Telephone no ► 219-853-3734			
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		<input type="checkbox"/>
16	At any time during calendar year 2014, 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? See the instructions for exceptions and filing requirements for FinCEN Form 114, (formerly TD F 90-22.1) If "Yes," enter the name of the foreign country ►	16	Yes	No X

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

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.

		Yes	No
1a	During the year did the foundation (either directly or indirectly)		
(1)	Engage in the sale or exchange, or leasing of property with a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(2)	Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(3)	Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(4)	Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(5)	Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(6)	Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here N/A <input type="checkbox"/>	1b	
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2014? N/A	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 2014, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2014? If "Yes," list the years ► 20 , 20 , 20 , 20 <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
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) N/A	2b	
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ► 20 , 20 , 20 , 20		
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b	If "Yes," did it have excess business holdings in 2014 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 2014.) N/A	3b	
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	X
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2014?	4b	X

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

5a During the year did the foundation pay or incur any amount to:

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☒ 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 4945(d)(4)(A)? (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)? **N/A** ☐ **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? **N/A** ☐ 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** ☒

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? **N/A** **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
FIRST MIDWEST BANK 10322 INDIANAPOLIS BLVD HIGHLAND IN 46322	TRUSTEE	0.00	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

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 ▶**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	
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 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	1,294,085
b	Average of monthly cash balances	1b	33,767
c	Fair market value of all other assets (see instructions)	1c	0
d	Total (add lines 1a, b, and c)	1d	1,327,852
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	1,327,852
4	Cash deemed held for charitable activities. Enter 1½% of line 3 (for greater amount, see instructions)	4	19,918
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	1,307,934
6	Minimum investment return. Enter 5% of line 5	6	65,397

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	65,397
2a	Tax on investment income for 2014 from Part VI, line 5	2a	395
b	Income tax for 2014 (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	395
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	65,002
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	65,002
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	65,002

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	58,650
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	58,650
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	58,650

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 2013	(c) 2013	(d) 2014
1 Distributable amount for 2014 from Part XI, line 7				65,002
2 Undistributed income, if any, as of the end of 2014				
a Enter amount for 2013 only				
b Total for prior years 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2014				
a From 2009				
b From 2010				
c From 2011				
d From 2012				
e From 2013				
f Total of lines 3a through e				
4 Qualifying distributions for 2014 from Part XII, line 4 ▶ \$ 58,650				
a Applied to 2013, 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 2014 distributable amount				58,650
e Remaining amount distributed out of corpus				
5 Excess distributions carryover applied to 2014 (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				
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 2013 Subtract line 4a from line 2a Taxable amount – see instructions				
f Undistributed income for 2014 Subtract lines 4d and 5 from line 1. This amount must be distributed in 2015				6,352
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required—see instructions)				
8 Excess distributions carryover from 2009 not applied on line 5 or line 7 (see instructions)				
9 Excess distributions carryover to 2015. Subtract lines 7 and 8 from line 6a				
10 Analysis of line 9				
a Excess from 2010				
b Excess from 2011				
c Excess from 2012				
d Excess from 2013				
e Excess from 2014				

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

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2014, enter the date of the ruling ▶

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

	Tax year	Prior 3 years			(e) Total
	(a) 2014	(b) 2013	(c) 2012	(d) 2011	
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon					
a "Assets" alternative test – enter					
(1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test – enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed					
c "Support" alternative test – enter					
(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

Part XV Supplementary Information (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year – see instructions.)**1 Information Regarding Foundation Managers:**

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

N/A

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

N/A

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

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

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

FIRST MIDWEST BANK TRUSTEE , 10322

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

SEE ATTACHED APPLICATION FORM

c Any submission deadlines:

SEE ATTACHED APPLICATION FORM

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

See Statement 8

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 ATTACHED SCHEDULE	NONE			58,650
Total			▶ 3a	58,650
b Approved for future payment N/A				
Total			▶ 3b	

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated

Enter gross amounts unless otherwise indicated		Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions)
		(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1	Program service revenue					
a						
b						
c						
d						
e						
f						
g	Fees and contracts from government agencies					
2	Membership dues and assessments					
3	Interest on savings and temporary cash investments					11,734
4	Dividends and interest from securities					24,614
5	Net rental income or (loss) from real estate:					
a	Debt-financed property					
b	Not debt-financed property					
6	Net rental income or (loss) from personal property					
7	Other investment income					
8	Gain or (loss) from sales of assets other than inventory					51,745
9	Net income or (loss) from special events					
10	Gross profit or (loss) from sales of inventory					
11	Other revenue a					
b						
c						
d						
e						
12	Subtotal. Add columns (b), (d), and (e)		0		0	88,093
13	Total. Add line 12, columns (b), (d), and (e)				13	88,093

(See worksheet in line 13 instructions to verify calculations)

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

[illegible]

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

- 1** Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?
- a** Transfers from the reporting foundation to a noncharitable exempt organization of
- (1) Cash
- (2) Other assets
- b** Other transactions
- (1) Sales of assets to a noncharitable exempt organization
- (2) Purchases of assets from a noncharitable exempt organization
- (3) Rental of facilities, equipment, or other assets
- (4) Reimbursement arrangements
- (5) Loans or loan guarantees
- (6) Performance of services or membership or fundraising solicitations
- c** Sharing of facilities, equipment, mailing lists, other assets, or paid employees
- 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

	Yes	No
1a(1)		X
1a(2)		X
1b(1)		X
1b(2)		X
1b(3)		X
1b(4)		X
1b(5)		X
1b(6)		X
1c		X

[illegible]

- 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
N/A		

**Sign
Here**

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

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

Signature of officer or trustee First Midwest Bank as Trustee by ~~Representative~~ Date 4-9-15

(see instructions)? ☐
Wealth mgmt officer
 Title

**Paid
Preparer
Use Only**

Print/Type preparer's name

Preparer's signature

Date _____

Check ☐ if self-employed

04/02/15

Firm's name ▶ **Steiber, Rueth & Shuman, PC**

PTIN

Firm's address ► 9335 Calumet Ave Suite B
Munster, IN 46321-4176

Firm's EIN ▶ 35-1834348

Phone no **219-836-0077**

2014 WESTHAYSEN MEDICAL SCHOLARSHIP APPLICANTS

Revised 7/16/14

\$50,000.00 - \$55,000.00

Proposed

MEDICAL STUDENTS	SCHOOL	YR OF GRAD	PRIOR RECP	2014 AWARD	COMMENTS/GPA/COSTS
1. Aleksandar Alavanja 942 Cooke Court Crown Point, IN 46307 SSN: 315-06-8610	Indiana University School of Medicine 635 Barnhill Drive, MS158 *P.O Box 7059, 46207-7059 mail checks to Indianapolis, IN 46202-5120	2016	2012-\$2,000 2013-\$2,600	\$2,800	Costs-\$44,301 Documented need-\$47,486. GPA 3.95 Earned B.A in Chemistry- IU Bloomington 2012. Receiving some funds from parents.- \$24,000.Has \$91k in educational loans. FAFSA completed - not eligible for Pell Grant b/c of Bachelor's degree.
2. Siddharth S. Bangar 7819 Linden Street Dyer, IN 46311 SSN: 313-15-9738	Indiana University School of Medicine 635 Barnhill Drive, MS158 *P.O Box 7059, 46207-7059 mail checks to Indianapolis, IN 46202-5120	2016	2012-\$2,000 2013-\$2,600	\$2,800	3rd year student- Medical Earned B.S in Biology -IUN 2011 GPA 3.74 Costs-\$49,301 Documented need-not listed. FAFSA- not eligible for Pell Grant b/c of Bachelor's degree. Has student loans in the amount of \$91,000.00. Has financial assistance from IUSM-NW \$5,000.00.
MEDICAL STUDENTS	SCHOOL	YR OF GRAD	PRIOR RECP	2014 AWARD	COMMENTS/GPA/COSTS

3.	Katie Nichole Byrd 941 Stone Bridge Drive Schererville, IN 46375 SSN:314-08-6722	Indiana University School of Medicine 635 Barnhill Drive, MS158 *P.O Box 7059, 46207-7059 mail checks to Indianapolis, IN 46202-5120	2016	2012-\$2,000 2013-\$2,600	\$2,800	Earned B.A.in Biology from IU-2012. GPA 3.95 Costs-\$43,919. Documented need-\$47,486 Receiving \$15,000.00 from LaPorte Hospital Award. & \$6,000.00 from parents. Receiving \$1,500 from IU SOM. FAFSA completed but not eligible for Pell Grant b/c of Bachelor's degree. Has \$60k in educational loans
4.	Dakota Lee Casey 3806 Gill Street Hobart, IN 46342 SSN:256-83-6009	Indiana University NW 3400 Broadway HH111 Gary, IN 46408		No	None Area of study- Pre-Pharmacy/Chemistry	Financial aid not finalized yet. Costs- \$18,842.00. Documented need-\$15,058. Has \$8,219.49 in student loans. Receiving \$600 from parents and possible scholarships that he may win. Studied at Georgia southern University. GPA-3.32 FAFSA completed
5.	Aaditya G. Chandramouli 221 Norwich Court Munster, IN 46321 SSN: 404-69-7411	Indiana University School of Medicine 635 Barnhill Drive, MS158 *P.O Box 7059, 46207-7059 mail checks to Indianapolis, IN 46202-5120	2018	No	\$2,400	Earned Biomedical engineering degree in 2013 from Purdue University. GPA-3.85. Receiving \$6,000 from parents and Loan from DOED in the approximate amount of \$40,500. FAFSA completed. Costs-\$40,267 Documented need-\$56,926
	MEDICAL STUDENTS	SCHOOL	YR OF GRAD	PRIOR RECP	2014 AWARD	COMMENTS/GPA/COSTS

6.	Yena Choi 208 Leicester Road Munster, IN 46321 SSN:317-11-3506	Indiana University School of Medicine 635 Barnhill Drive, MS158 *P.O Box 7059, 46207-7059 mail checks to Indianapolis, IN 46202-5120	2018	No	\$2,400	1 st year student. Loans-Fed. Stafford Unsub. -\$20,500.00; fed. Direct Add Uns loan-H-\$20,000.00; parents-\$10,000.00. Received Bachelors in Biology from University of Southern Indiana-2013. FAFSA- not eligible for Pell Grant b/c of Bachelor's degree.GPA-3.66. Cost-\$42,390.00. Documented Need-\$56,926.00
7.	Anthony R. Ferrantella 427 E. Joliet, PO Box 322 Schererville, IN 46375 SSN: 305-04-5857	Indiana University School of Medicine 635 Barnhill Drive, MS158 *P.O Box 7059, 46207-7059 mail checks to Indianapolis, IN 46202-5120	2015	2011-\$2,000.00 2012-\$2,200 2013-did not apply	\$2,800	2010-Earned B.A. in Biology-IU & 2011-M.S. in Biology-Purdue. Has \$200,000 in outstanding educational loans and receiving \$65,000 more in fed student loans. Did not file tax return. FAFSA completed. Not eligible for Pell grant b/c has Bachelors. Costs-\$43,920 Documented need-\$64,616
8.	Megan Christine Feustel 109 Mulberry Lane Schererville, IN 46375 SSN: 311-08-9978	Indiana University School of Medicine 635 Barnhill Drive, MS158 *P.O Box 7059, 46207-7059 mail checks to Indianapolis, IN 46202-5120	2016	2012-\$2,000	\$2,600	3 rd year student Medical Earned B.A. in Spanish and Biology from IUPUI 2012 Costs-\$42,389. FAFSA completed. Documented need-\$65,617. Receiving Bepko Scholarship-\$5,000.00/year for 4 years & VA Benefits -CVO Fee remission-\$7,750. plus Chapter 35 benefits-\$20,000 total/year x 4 years. Has \$78,393 in educational loans
	MEDICAL STUDENTS	SCHOOL	YR OF GRAD	PRIOR RECP	2014 AWARD	COMMENTS/GPA/COSTS

9.	Jeffrey Byron Florek 8706 Madison Avenue Munster, IN 46321 SSN: 313-069-2100	Indiana University School of Medicine 635 Barnhill Drive, MS158 *P.O Box 7059, 46207-7059 mail checks to Indianapolis, IN 46202-5120	2016	2012-\$2,000 2013-\$2,600	\$2,800	Earned B.S in Biology from IU 2012. Costs \$44,321 documented need-\$27,287. FAFSA- not eligible for Pell Grant b/c of Bachelor's degree. Receiving IUSM Medical Student Scholar-\$20,000 GPA 3.94
10	Nhila Jagadeesan 6916 W. 73 rd Avenue Schererville, IN 46375 SSN: 303-25-3354	Washington University SOM Office of Financial Aid 660 S. Euclid Ave. St. Louis, MO 63110-1093	2015	2011 \$2,000 2012-\$2,200 2013-\$2,800	\$3,000	IUPUI GPA 3.834 Honors College Scholar BS Biology and BA in Chemistry 2011. Has \$ 50,458 in outstanding educational loans. Costs \$55,070 *Documented need-\$330. Receiving Washington U loan- \$15,000 & scholarship- \$27,500 or \$27,989. FAFSA completed -not eligible for Fed Pell grant B/c has Bachelor's
11	Saida Kent PA	?	?	No	None	PA resident. DISQUALIFIED. No application completed. Sent letter requesting assistance from scholarship fund.
12	Luke N. Lauridsen 4835 Marquette Road Lake Station, IN 46405	Indiana University School of Medicine 635 Barnhill Drive, MS158 *P.O Box 7059, 46207-7059 mail checks to Indianapolis, IN 46202-5120	2018	No	\$2,400	Has outstanding educational loans in the amount of \$29,000. Receiving \$20,000/year from IUSM Scholars program. Earned BS in Neuroscience from IU- Bloomington 2014.GPA-3.70. FAFSA completed. Not eligible for pell grant. Cost- \$40,297. Documented Need-

							\$56,926	
	MEDICAL STUDENTS	SCHOOL	YR OF GRAD	PRIOR RECP	2014 AWARD	COMMENTS/GPA/COSTS		
13	Viraj Maniar 8844 Oakwood Avenue Munster, IN 46321 SSN:091-78-6560	Indiana University School of Medicine 635 Barnhill Drive, MS158 *P.O Box 7059, 46207-7059 mail checks to Indianapolis, IN 46202-5120	2017	No	None. No way to determine need	Earned BA in International studies from IU Bloomington 2013. GPA-3.59Has \$35k in outstanding educational loans. And receiving another \$35k this year? FAFSA not completed 2014. (Sent in 2013 FAFSA)		
14	Cicely L. Moreno 2378 Jennings Street Gary, IN 46404 SSN: 287-86-7005	Indiana University School of Medicine 635 Barnhill Drive, MS158 *P.O Box 7059, 46207-7059 mail checks to Indianapolis, IN 46202-5120	2015	2011-\$2,000 2012-\$2,200 2013-\$2,800	\$3,000	IUN BA-Spanish/Min-2011 Chemistry GPA 3.701 Costs \$43,919 documented need-\$45,862. Receiving \$10,000 -Scholarship from IUSOM. Has \$180k in educational loans. FAFSA-not eligible for Fed Pell grant b/c has Bachelor's. Notes on Part B-student is from an economically disadvantaged background.		
15	Murad M. Omery 9906 Tanglewood Court Munster, IN 46321 SSN:305-02-2199	Indiana University School of Medicine 635 Barnhill Drive, MS158 *P.O Box 7059, 46207-7059 mail checks to Indianapolis, IN 46202-5120	2015	2010-\$1,600 2011-2,200 2013-\$2,800	\$3,000	Rec'd BS in Biology & Chemistry U of Illinois - Chicago in 2009. GPA 3.88 Costs-\$43,921 documented need-\$64,689. FAFSA-not eligible for Fed Pell grant b/c has Bachelor's. Receiving		

						\$12,000 in Federal Aid & \$20,000 from parents. Has \$45,000 in educational loans	
	MEDICAL STUDENTS	SCHOOL	YR OF GRAD	PRIOR RECP	2014 AWARD	COMMENTS/GPA/COSTS	
16	Kevin Amrish Parikh 2636 Harvest Court Crown Point, IN 46307 SSN: 311-08-5583	Indiana University School of Medicine 635 Barnhill Drive, MS 158 *P.O Box 7059, 46207-7059 mail checks to Indianapolis, IN 46202-5120	2016	2012-\$2,000 2013-\$2,600	\$2,800	3rd year student-Medical Earned Entrepreneurship & Corporate Innovation Degree from IU in 2012 Costs \$43,301 Documented need-\$18,131. Receiving \$15,000 from parents and & approx. \$43,000 in Fed direct unsub. loans FAFSA completed. GPA 3.87. has \$15,604 in outstanding educational loans.	
17	Ambika B. Rao 10145 Idlewild lane Highland, IN 46322 SSN: 060-80-9968	Indiana University School of Medicine 635 Barnhill Drive, MS158 *P.O Box 7059, 46207-7059 mail checks to Indianapolis, IN 46202-5120	2017	2013-\$2,400	\$2,600	Earned B.S in Biology & B.A. in Psychology from IU- 2013. Has outstanding educational loans-\$36,000. FAFSA completed. Costs \$39,622 Documented Need-\$56,240. FAFSA-not eligible for Fed Pell grant b/c has Bachelor's. GPA 3.75	

	MEDICAL STUDENTS	SCHOOL	YR OF GRAD	PRIOR RECP	2014 AWARD	COMMENTS/GPA/COSTS
18	Annemarie Rompca 3048 Brampton Lane Dyer, IN 46311 SSN: 333-86-6918	Indiana University School of Medicine 635 Barnhill Drive, MS 158 *P.O Box 7059, 46207-7059 mail checks to Indianapolis, IN 46202-5120	2018	No	\$2,400	Earned BS in Human Biology from IU in 2013 & MS in Biology from IU/Purdue U – Indianapolis-2014 Costs-\$40,297. Documented need-\$ 56,926 says FAFSA completed. Has Fed. Stafford unsubs loan-\$20,500 and Fed direct add uns. Loan-\$20,500. Smart 529-\$22,383.06 GPA 4.0
19	Akash Rusia 9905 Sequoia Court Munster, IN 46321 SSN: 312-06-6350	Indiana University School of Medicine 635 Barnhill Drive, MS158 *P.O Box 7059, 46207-7059 mail checks to Indianapolis, IN 46202-5120	2015	2011 \$2,000 2012 -\$2,200 2013 -did not apply	\$2,800 Maybe \$2,400? Or \$2,600	Brother Deepak Rusia rec'd 4 years Med Scholarships IU GPA 3.712 Earned BS Neuroscience from IU – 2011. Has Stafford loan-\$40,500 and \$93,697 in outstanding educational loans. Costs-\$44,301. Documented Need-\$47,287. FAFSA completed.
20	Nathan S. Timm 3018 100 th Pl Highland, IN 46322 SSN: 317-11-1137	Indiana University School of Medicine 635 Barnhill Drive, MS158 *P.O Box 7059, 46207-7059 mail checks to Indianapolis, IN 46202-5120	2018	No	\$2,400	1 st year student. Earned BS in Biology from Indiana Wesleyan University in 2014. GPA-3.85. Costs-\$40,307.00 FAFSA completed - not eligible for Pell Grant b/c of Bachelor's degree. Unconfirmed loans- DL Fed. Unsubs. Stafford-\$20,500; DI Fed add'l Unsubs. Stafford

				2013-\$1,800		FAFSA completed-may be eligible for Fed Pell grant as well for other aid Receiving \$3,500 from parents & \$7,000 in student loans & \$5,000 in grant. Has \$38,000 in outstanding educational loans
3.	Lauren A. Corning 23305 Whitcomb Street Lowell, IN 46356 SSN:315-11-8000	Purdue University Calumet 2200 169th Street Hammond, IN 46323	2015	No	\$1,450	GPA-3.44. Costs \$10,948. Documented need-\$0. FAFSA completed-not eligible for Pell grant.
4	Nicolette L. Hahn 11642 Upper Peninsula Place St. John, IN 46373 SSN:315-15-6469	Purdue University West Lafayette 610 Purdue Mall West Lafayette, IN 47907	2017	No	\$1,450	Received approx. \$20k in grants and aid last year. Expected to receive the same this year? Costs-\$11,422 Documented need \$22,328. FAFSA completed.GPA-3.0
5.	Desiree C. Purnick 2820 James Drive Dyer, IN 46311 SSN:305-08-3147	Purdue University Calumet 2200 169th Street Hammond, IN 46323	2015	No	\$1,450	Costs-\$10,948. documented need-\$8,662. FAFSA completed. Receiving Direct Stafford loans subsidized-\$5,500 &Direct Stafford Loan Unsub-\$7,000. Earned BS in Biology in 2013 from PUC.- GPA-3.53. IU & Prairie state College GPAs-4.0

6.	Judith A. Ross 1743 W. Ash Street Griffith, IN 46312 SSN:342-56-2880	Purdue University Calumet 2200 169th Street Hammond, IN 46323	2014	No	\$1,450	Has approx. \$30k in outstanding educational loans. Earned BA from Depaul in 2005 studied banking and finance. GPA-3.94. PUC GPA- 3.96. Costs-\$5,474/semester - \$10,948.Documented need- \$2,155. FAFSA completed- not eligible for pell grant.			
7.	Kristina L. Scalzitti 6909 Colorado St. Merrillville, IN 46410 SSN: 305-88-9890	Valparaiso University 1700 Chapel Drive Valparaiso, IN 46383	2015	No	\$1,450	Grad student pursuing Doctorates of Nursing. Earned ASN from Purdue North Central in 2004 and BSN and MSN in 2009 from PUC. Has student loans in the amount of \$40,000.00, GPA 3.233. Costs-\$10,822 Documented need-\$7,646. FAFSA completed-not eligible for Fed Pell grant but may be eligible for other aid			
8.	Ronina N. Sims 7603 Linden Avenue Hammond, IN 46324 Use *P.O. Box 1325 Hammond, IN 46325 SSN: 354-68-0449	Purdue University Calumet 2200 169 th Street Hammond, IN 46323	2015	No	\$1,450	Costs-\$12,062.00 Documented need-\$0. FAFSA completed. Not eligible for pell grant. Earned Assoc. in General studies in 1999 from Kennedy King college GPA-3.10 & Bachelors of Business Admin in 2003 from Robert Morris college GPA-3.42. Wabash-			

						GPA 3.42	
9.	Stephanie Jean Sknerski 8015 Duluth Street Highland, IN 46322 SSN: 315-13-8912	Valparaiso University 1700 Chapel Drive Valparaiso, IN 46383	2015	2012 - \$1,450.00 2013- \$1,750.00	\$2,050	Father was unemployed for 10 months in 2012. Costs \$36,710. Documented Need-EFC \$19,703. Has student loans in the amount of \$39,000.00. GPA 3.35 FAFSA-not eligible for Fed Pell grant but may be eligible for other aid. FAFSA completed.	
	Total Nursing Applicants: 9						
	Total Awards:				\$12,850		

TOTAL STUDENTS 2014	TOTAL SCHOLARSHIP AWARDS	MEDICAL SCHOOLS	NURSING SCHOOLS	
MEDICAL STUDENTS 20	17	IUSOM - Indianapolis	17	Purdue Calumet 5
NURSING STUDENTS 9	8			Valparaiso 2
Non Med./Nursing Students 0	0	Washington University SOM	1	University of Indianapolis 1
Incomplete Apps. 1	0	Purdue West Lafayette	1	
Non Lake Co. Resident 2	0	IUN	1	
GRAND TOTAL AWARDS:	\$58,650			
Maximum Distribution:	\$55,000			

8111 PETER V. WESTHAYSEN MEDICAL EDUCATI
31-6290396
FYE: 12/31/2014

Federal Statements

Statement 1 - Form 990-PF, Part I, Line 6a - Sale of Assets

Whom Sold	Description	Date Acquired	Date Sold	How Received		Cost	Expense	Depreciation	Net Gain / Loss
				Sale Price	Purchase				
COMMON TRUST FUND		1/01/14	12/31/14	\$ 6,249	Purchase	\$	\$	\$	6,249
COMMON TRUST FUND		1/01/12	12/31/14	44,590	Purchase				44,590
944.14 FIRST MIDWEST SMALL CAP		11/30/09	7/15/14	24,000	Purchase				4,960
1301.665 FN GEMS FUND		3/15/08	7/15/14	20,000	Purchase	17,503			2,497
658.948 FIRST MIDWEST LARGE CAP		2/01/03	10/15/14	25,000	Purchase	31,048			-6,048
938.772 FIRST MIDWEST FIXED INCOME		10/31/06	7/15/14	10,000	Purchase	10,230			-230
884.339 PIMCO REAL RETURN		4/11/11	2/04/14	9,913	Purchase	10,186			-273
Total				\$ 139,752	\$ 88,007	\$ 0	\$ 0	\$ 0	\$ 51,745

Statement 2 - Form 990-PF, Part I, Line 16a - Legal Fees

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
LEGAL FEES	\$ 813	\$ 813	\$	\$
Total	\$ 813	\$ 813	\$ 0	\$ 0

Federal Statements

31-6290396

FYE: 12/31/2014

Statement 3 - Form 990-PF, Part I, Line 16b - Accounting Fees

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
ACCOUNTING FEES	\$ 775	\$ 775	\$	\$
Total	\$ 775	\$ 775	\$ 0	\$ 0

Statement 4 - Form 990-PF, Part II, Line 10a - US and State Government Investments

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
GOVERNMENT OBLIGATIONS TAX MANAGED F	\$ 32,736	\$ 34,797	Cost	\$ 34,797
Total	\$ 32,736	\$ 34,797		\$ 34,797

8111 PETER V. WESTHAYSEN MEDICAL EDUCATI
31-6290396
FYE: 12/31/2014

Federal Statements

Statement 5 - Form 990-PF, Part II, Line 10b - Corporate Stock Investments

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
690 SH EXXON MOBIL	\$ 4,517	\$ 4,517	Cost	\$ 63,791
550 SH SOUTHERN CORP	3,957	3,957	Cost	27,011
1400 INTEL CORP	9,902	9,902	Cost	50,806
530 JOHNSON & JOHNSON	11,940	11,940	Cost	55,422
335 PEPSICO INC	8,623	8,623	Cost	31,678
884 SH AT&T INC	12,508	12,508	Cost	29,694
6916.234 SH FM LARGE CAP EQUITY	269,083	279,683	Cost	293,778
38886.379 SH FIRST MIDWEST FIXED INC	435,228	423,316	Cost	413,962
2476.693 SH FM SMALL CAP EQUITY	63,135	50,426	Cost	67,558
3178.61 SH FM GEMS FUND	59,910	47,184	Cost	48,946
165 SH NEXTERA ENERGY	3,155	3,155	Cost	17,538
1495.418 FIDELITY RF ADVISOR	14,435	14,435	Cost	14,386
3447.701 TEMPLETON INCOME TR	45,000	45,000	Cost	42,786
1162.791 FEDERATED RF INST	12,000	12,000	Cost	11,488
4094.236 VANGUARD FIXED INCOME		44,000	Cost	43,645
2397.808 FM MID CAP	54,278	54,885	Cost	68,872
95.932 MFS INTL VALUE	2,500	2,500	Cost	3,313
587.021 SCOUT INTERNATIONAL	14,165	14,165	Cost	
884.339 PIMCO REAL RETURN	10,196		Cost	19,131
Total	\$ 1,034,532	\$ 1,042,196		\$ 1,303,805

Statement 6 - Form 990-PF, Part III, Line 3 - Other Increases

Description	Amount
ADJUSTMENT FOR 2013 ACTIVITY INCLUDED IN 2014	\$ 412
Total	\$ 412

Statement 7 - Form 990-PF, Part III, Line 5 - Other Decreases

Description	Amount
ADJUSTMENT FOR 2012 ACTIVITY INCLUDED IN 2013 ACTI ESTIMATED TAX PAYMENTS	\$ 3,535
Total	\$ 3,535

Form 990-PF, Part XV, Line 2b - Application Format and Required Contents

Description
SEE ATTACHED APPLICATION FORM

Form 990-PF, Part XV, Line 2c - Submission Deadlines

Description
SEE ATTACHED APPLICATION FORM

Statement 8 - Form 990-PF, Part XV, Line 2d - Award Restrictions or Limitations

Description
SCHOLARSHIPS FOR MEDICAL AND/OR NURSING EDUCATION PROGRAMS AT ACCREDITED COLLEGES AND UNIVERSITIES