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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 separate instructions is at [www.irs.gov/form990pf](http://www.irs.gov/form990pf).

OMB No 1545-0052

**2014**

Open to Public Inspection

For calendar year 2014 or tax year beginning

, 2014, and ending

, 20

Name of foundation <b>Anderson Foundation</b>		<b>A</b> Employer identification number <b>34-6528868</b>
Number and street (or P.O. box number if mail is not delivered to street address) <b>P.O. Box 119</b>		<b>B</b> Telephone number (see instructions) <b>419-893-5050</b>
City or town, state or province, country, and ZIP or foreign postal code <b>Maumee, OH 43537-0119</b>		<b>C</b> If exemption application is pending, check here <input type="checkbox"/>
<b>G</b> Check all that apply	<input type="checkbox"/> Initial return <input type="checkbox"/> Final return <input type="checkbox"/> Address change	<input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Amended return <input type="checkbox"/> Name change
<b>H</b> Check type of organization <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation		<b>D</b> 1 Foreign organizations, check here <input type="checkbox"/>
<input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		2 Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
<b>I</b> Fair market value of all assets at end of year (from Part II, col (c), line 16) ▶ \$ <b>11,361,897.00</b>		<b>E</b> If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
<b>J</b> Accounting method <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____		<b>F</b> 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)
<b>1</b> Contributions, gifts, grants, etc., received (attach schedule)	0.00			
<b>2</b> Check <input type="checkbox"/> if the foundation is not required to attach Sch. B				
<b>3</b> Interest on savings and temporary cash investments	109,147.00	109,147.00		
<b>4</b> Dividends and interest from securities	168,503.00	168,503.00		
<b>5a</b> Gross rents				
<b>b</b> Net rental income or (loss)				
<b>6a</b> Net gain or (loss) from sale of assets not on line 10	1,133,967.00			
<b>b</b> Gross sales price for all assets on line 6a <b>5,623,963.45</b>				
<b>7</b> Capital gain net income (from Part IV, line 2)		1,133,967.00		
<b>8</b> Net short-term capital gain				
<b>9</b> Income modifications				
<b>10a</b> Gross sales less returns and allowances				
<b>b</b> Less Cost of goods sold				
<b>c</b> Gross profit or (loss) (attach schedule)				
<b>11</b> Other income (attach schedule)	0.00	0.00		
<b>12</b> Total. Add lines 1 through 11	1,411,617.00	1,411,617.00		
<b>13</b> Compensation of officers, directors, trustees, etc.				
<b>14</b> Other employee salaries and wages				
<b>15</b> Pension plans, employee benefits				
<b>16a</b> Legal fees (attach schedule)				
<b>b</b> Accounting fees (attach schedule)				
<b>c</b> Other professional fees (attach schedule)	120,637.00	114,466.00		2,400.00
<b>17</b> Interest				
<b>18</b> Taxes (attach schedule) (see instructions)	18,788.00	18,788.00		
<b>19</b> Depreciation (attach schedule) and depletion				
<b>20</b> Occupancy				
<b>21</b> Travel, conferences, and meetings				
<b>22</b> Printing and publications				
<b>23</b> Other expenses (attach schedule)	200.00	200.00		
<b>24</b> Total operating and administrative expenses. Add lines 13 through 23	139,625.00	133,454.00		2,400.00
<b>25</b> Contributions, gifts, grants paid	561,828.00			561,828.00
<b>26</b> Total expenses and disbursements. Add lines 24 and 25	701,453.00	133,454.00		564,228.00
<b>27</b> Subtract line 26 from line 12				
<b>a</b> Excess of revenue over expenses and disbursements	710,164.00			
<b>b</b> Net investment income (if negative, enter -0-)		1,278,163.00		
<b>c</b> Adjusted net income (if negative, enter -0-)				

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<b>Part II Balance Sheets</b>		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
<b>Assets</b>	1	Cash - non-interest-bearing . . . . .		25,246.00	74,658.00	74,658.00
	2	Savings and temporary cash investments . . . . .		113,154.00	113,498.00	113,498.00
	3	Accounts receivable ▶				
		Less allowance for doubtful accounts ▶				
	4	Pledges receivable ▶				
		Less allowance for doubtful accounts ▶				
	5	Grants receivable . . . . .				
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions) . . . . .				
	7	Other notes and loans receivable (attach schedule) ▶				
		Less allowance for doubtful accounts ▶				
	8	Inventories for sale or use . . . . .				
	9	Prepaid expenses and deferred charges . . . . .				
	10 a	Investments - U S and state government obligations (attach schedule) . . . . .				
	b	Investments - corporate stock (attach schedule) . . . . .				
	c	Investments - corporate bonds (attach schedule) . . . . .		83,300.00	83,300.00	144,620.00
	11	Investments - land, buildings, and equipment basis ▶				
		Less accumulated depreciation ▶ (attach schedule)				
	12	Investments - mortgage loans . . . . .				
	13	Investments - other (attach schedule) . . . . .		9,138,258.00	9,798,666.00	11,029,121.00
	14	Land, buildings, and equipment basis ▶				
		Less accumulated depreciation ▶ (attach schedule)				
	15	Other assets (describe ▶) . . . . .				
	16	<b>Total assets</b> (to be completed by all filers - see the instructions Also, see page 1, item I) . . . . .		9,359,958.00	10,070,122.00	11,361,897.00
<b>Liabilities</b>	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	<b>Total liabilities</b> (add lines 17 through 22) . . . . .				
<b>Net Assets or Fund Balances</b>		<b>Foundations that follow SFAS 117, check here ▶</b> <input type="checkbox"/> <b>and complete lines 24 through 26 and lines 30 and 31.</b>				
	24	Unrestricted . . . . .				
	25	Temporarily restricted . . . . .				
	26	Permanently restricted . . . . .				
		<b>Foundations that do not follow SFAS 117, . . . ▶</b> <input type="checkbox"/> <b>check here and complete lines 27 through 31.</b>				
	27	Capital stock, trust principal, or current funds . . . . .				
	28	Paid-in or capital surplus, or land, bldg. and equipment fund . . . . .				
	29	Retained earnings, accumulated income, endowment, or other funds . . . . .		9,359,958.00	10,070,122.00	
	30	<b>Total net assets or fund balances</b> (see instructions) . . . . .		9,359,958.00	10,070,122.00	
	31	<b>Total liabilities and net assets/fund balances</b> (see instructions) . . . . .		9,359,958.00	10,070,122.00	

**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	9,359,958.00
2	Enter amount from Part I, line 27a . . . . .	2	710,164.00
3	Other increases not included in line 2 (itemize) ▶	3	
4	Add lines 1, 2, and 3 . . . . .	4	10,070,122.00
5	Decreases not included in line 2 (itemize) ▶	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 . . . . .	6	10,070,122.00

**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.)
<b>1a</b>					
<b>b</b>					
<b>c</b>					
<b>d</b>					
<b>e</b>					
(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)		
<b>a</b>	5,623,963.45	4,489,996.10	1,133,967.35		
<b>b</b>					
<b>c</b>					
<b>d</b>					
<b>e</b>					
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))		
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any			
<b>a</b>			1,133,967.35		
<b>b</b>					
<b>c</b>					
<b>d</b>					
<b>e</b>					
<b>2</b> 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		<b>2</b>	1,133,967.35	
<b>3</b> 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		<b>3</b>		

**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	507,619.00	10,241,090.00	0.0496
2012	318,967.00	9,802,457.00	0.0325
2011	274,817.00	9,638,558.00	0.0285
2010	413,065.00	9,021,064.00	0.0458
2009	338,220.00	8,184,845.00	0.0413
<b>2</b> Total of line 1, column (d)			<b>2</b> 0.1977
<b>3</b> 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			<b>3</b> 0.0395
<b>4</b> Enter the net value of noncharitable-use assets for 2014 from Part X, line 5			<b>4</b> 11,224,612.81
<b>5</b> Multiply line 4 by line 3			<b>5</b> 443,372.21
<b>6</b> Enter 1% of net investment income (1% of Part I, line 27b)			<b>6</b> 12,781.63
<b>7</b> Add lines 5 and 6			<b>7</b> 456,153.84
<b>8</b> 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			<b>8</b> 564,228.00

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

<b>1a</b> 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)		1	12,782.00
<b>b</b> Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b . . . . .			
<b>c</b> All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col (b)			
<b>2</b> Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		2	
<b>3</b> Add lines 1 and 2 . . . . .		3	12,782.00
<b>4</b> Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		4	
<b>5</b> Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-		5	12,782.00
<b>6</b> Credits/Payments			
<b>a</b> 2014 estimated tax payments and 2013 overpayment credited to 2014 . . .	<b>6a</b> 14,879.00	7	14,879.00
<b>b</b> Exempt foreign organizations - tax withheld at source . . . . .	<b>6b</b>		
<b>c</b> Tax paid with application for extension of time to file (Form 8868) . . . . .	<b>6c</b>		
<b>d</b> Backup withholding erroneously withheld . . . . .	<b>6d</b>		
<b>7</b> Total credits and payments. Add lines 6a through 6d . . . . .		7	14,879.00
<b>8</b> Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached . . . . .		8	
<b>9</b> Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed . . . . .		9	
<b>10</b> Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid . . . . .		10	2,097.00
<b>11</b> Enter the amount of line 10 to be Credited to 2015 estimated tax <input checked="" type="checkbox"/> 2,097.00 Refunded <input type="checkbox"/>		11	

**Part VII-A Statements Regarding Activities**

	Yes	No
<b>1a</b> 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>b</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 <b>1a</b> or <b>1b</b> , attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities		X
<b>c</b> Did the foundation file Form 1120-POL for this year? . . . . .		X
<b>d</b> Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation <input checked="" type="checkbox"/> \$ (2) On foundation managers <input checked="" type="checkbox"/> \$		
<b>e</b> Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input checked="" type="checkbox"/> \$		
<b>2</b> 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
<b>3</b> 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
<b>4a</b> Did the foundation have unrelated business gross income of \$1,000 or more during the year? . . . . .		X
<b>b</b> If "Yes," has it filed a tax return on Form 990-T for this year? . . . . .		X
<b>5</b> Was there a liquidation, termination, dissolution, or substantial contraction during the year? . . . . . If "Yes," attach the statement required by General Instruction T		X
<b>6</b> 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	
<b>7</b> 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	
<b>8a</b> Enter the states to which the foundation reports or with which it is registered (see instructions) <input checked="" type="checkbox"/>		
<b>b</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	
<b>9</b> 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
<b>10</b> 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 ▶	13	X	
14	The books are in care of ▶ <u>Matthew C. Anderson</u> Telephone no ▶ <u>419 893-5050</u> Located at ▶ <u>480W. Dussel Drive, Maumee, OH</u> ZIP+4 ▶ <u>43537</u>			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here ▶ <input type="checkbox"/> and enter the amount of tax-exempt interest received or accrued during the year. ▶ <u>15</u>			
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
<b>1a</b> 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 checked="" type="checkbox"/> Yes <input 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>b</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. ▶ <input type="checkbox"/>	1b	X
<b>c</b> 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?	1c	X
<b>2</b> 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))		
<b>a</b> 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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years ▶		
<b>b</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	X
<b>c</b> If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ▶		
<b>3a</b> 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>b</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)	3b	X
<b>4a</b> Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	X
<b>b</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

Form **990-PF** (2014)

**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)? ☐ **5b** ☒ X

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** ☒ X

If "Yes" to 6b, file Form 8870

**7a** At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☒ No

**b** If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction? ☐ **7b** ☒ X

**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
Matthew C. Anderson	Chairman			
	2 hours	0.00		
Richard M. Anderson, Lu Stauffer	Trustees			
Jeffrey W. Anderson, John P. Kraus	1 hour	0.00		
Richard P. Anderson, Michael J. Anderson	Trustees			
all located at: 480 W. Dussel Drive	1 hour	0.00		
Maumee, OH 43537		0.00		

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

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

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

**Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors** *(continued)***3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE."**

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
None		
Total number of others receiving over \$50,000 for professional services . . . . .		▶

**Part IX-A Summary of Direct Charitable Activities**

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
<b>1</b>	
<b>2</b>	
<b>3</b>	
<b>4</b>	

**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
<b>1</b>	
<b>2</b>	
All other program-related investments. See instructions.	
<b>3</b>	
Total. Add lines 1 through 3 . . . . .	0.00 ▶

Form **990-PF** (2014)



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

<b>1</b>	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
<b>a</b>	Average monthly fair market value of securities	<b>1a</b>	10,629,141.00
<b>b</b>	Average of monthly cash balances	<b>1b</b>	766,405.00
<b>c</b>	Fair market value of all other assets (see instructions)	<b>1c</b>	
<b>d</b>	<b>Total</b> (add lines 1a, b, and c)	<b>1d</b>	11,395,546.00
<b>e</b>	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	<b>1e</b>	
<b>2</b>	Acquisition indebtedness applicable to line 1 assets	<b>2</b>	
<b>3</b>	Subtract line 2 from line 1d	<b>3</b>	11,395,546.00
<b>4</b>	Cash deemed held for charitable activities Enter 1 1/2 % of line 3 (for greater amount, see instructions)	<b>4</b>	170,933.19
<b>5</b>	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3 Enter here and on Part V, line 4	<b>5</b>	11,224,612.81
<b>6</b>	<b>Minimum investment return.</b> Enter 5% of line 5	<b>6</b>	561,230.64

**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 )

<b>1</b>	Minimum investment return from Part X, line 6	<b>1</b>	561,230.64
<b>2a</b>	Tax on investment income for 2014 from Part VI, line 5	<b>2a</b>	12,782.00
<b>b</b>	Income tax for 2014 (This does not include the tax from Part VI)	<b>2b</b>	
<b>c</b>	Add lines 2a and 2b	<b>2c</b>	12,782.00
<b>3</b>	Distributable amount before adjustments Subtract line 2c from line 1	<b>3</b>	548,448.64
<b>4</b>	Recoveries of amounts treated as qualifying distributions	<b>4</b>	
<b>5</b>	Add lines 3 and 4	<b>5</b>	548,448.64
<b>6</b>	Deduction from distributable amount (see instructions)	<b>6</b>	
<b>7</b>	<b>Distributable amount</b> as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1	<b>7</b>	548,448.64

**Part XII Qualifying Distributions** (see instructions)

<b>1</b>	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes		
<b>a</b>	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	<b>1a</b>	564,228.00
<b>b</b>	Program-related investments - total from Part IX-B	<b>1b</b>	
<b>2</b>	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	<b>2</b>	
<b>3</b>	Amounts set aside for specific charitable projects that satisfy the		
<b>a</b>	Suitability test (prior IRS approval required)	<b>3a</b>	
<b>b</b>	Cash distribution test (attach the required schedule)	<b>3b</b>	
<b>4</b>	<b>Qualifying distributions.</b> Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	<b>4</b>	564,228.00
<b>5</b>	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)	<b>5</b>	12,782.00
<b>6</b>	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4	<b>6</b>	551,446.00

**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
<b>1</b> Distributable amount for 2014 from Part XI, line 7 . . . . .				548,448.64
<b>2</b> Undistributed income, if any, as of the end of 2014				
<b>a</b> Enter amount for 2013 only . . . . .				
<b>b</b> Total for prior years 20____, 20____, 20____				
<b>3</b> Excess distributions carryover, if any, to 2014				
<b>a</b> From 2009 . . . . .				
<b>b</b> From 2010 . . . . .				
<b>c</b> From 2011 . . . . .				
<b>d</b> From 2012 . . . . .				
<b>e</b> From 2013 . . . . .				
<b>f</b> Total of lines 3a through e . . . . .				
<b>4</b> Qualifying distributions for 2014 from Part XII, line 4 ▶ \$ <u>564,228.00</u>				
<b>a</b> Applied to 2013, but not more than line 2a . . .				
<b>b</b> Applied to undistributed income of prior years (Election required - see instructions). . . . .				
<b>c</b> Treated as distributions out of corpus (Election required - see instructions) . . . . .				
<b>d</b> Applied to 2014 distributable amount . . . . .				564,228.00
<b>e</b> Remaining amount distributed out of corpus . .				
<b>5</b> Excess distributions carryover applied to 2014 . (If an amount appears in column (d), the same amount must be shown in column (a) )	-15,779.36			-15,779.36
<b>6</b> Enter the net total of each column as indicated below:				
<b>a</b> Corpus Add lines 3f, 4c, and 4e Subtract line 5	15,779.36			
<b>b</b> Prior years' undistributed income Subtract line 4b from line 2b				
<b>c</b> 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 . . . . .				
<b>d</b> Subtract line 6c from line 6b Taxable amount - see instructions . . . . .				
<b>e</b> Undistributed income for 2013 Subtract line 4a from line 2a Taxable amount - see instructions . . . . .				
<b>f</b> Undistributed income for 2014 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2015 . . . . .				
<b>7</b> 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) . . . . .				
<b>8</b> Excess distributions carryover from 2009 not applied on line 5 or line 7 (see instructions) . . .				
<b>9</b> Excess distributions carryover to 2015. Subtract lines 7 and 8 from line 6a . . . . .	15,779.36			
<b>10</b> Analysis of line 9				
<b>a</b> Excess from 2010 . . .				
<b>b</b> Excess from 2011 . . .				
<b>c</b> Excess from 2012 . . .				
<b>d</b> Excess from 2013 . . . <u>15,126.48</u>				
<b>e</b> Excess from 2014 . . . <u>15,779.36</u>				

**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 \_\_\_\_\_

4942(j)(3) or

4942(j)(5)

Tax year	Prior 3 years			(e) Total
(a) 2014	(b) 2013	(c) 2012	(d) 2011	

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[illegible]

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## 1 Information Regarding Foundation Managers:

N/A

N/A

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.

SEE ATTACHED STATEMENT

SEE ATTACHED STATEMENT

SEE ATTACHED STATEMENT

SEE ATTACHED STATEMENT

**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)				
<b>a</b> <i>Paid during the year</i> SEE ATTACHED STATEMENT				561,828.00
<b>Total</b> . . . . .			▶ <b>3a</b>	561,828.00
<b>b</b> <i>Approved for future payment</i> SEE ATTACHED STATEMENT				50,000.00
<b>Total</b> . . . . .			▶ <b>3b</b>	50,000.00

## Enter gross amounts unless otherwise indicated

(See worksheet in line 13 instructions to verify calculations )

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

[illegible]

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?		Yes	No
<b>a</b> Transfers from the reporting foundation to a noncharitable exempt organization of			
(1) Cash . . . . .	1a(1)		X
(2) Other assets . . . . .	1a(2)		X
<b>b</b> Other transactions			
(1) Sales of assets to a noncharitable exempt organization . . . . .	1b(1)		X
(2) Purchases of assets from a noncharitable exempt organization . . . . .	1b(2)		X
(3) Rental of facilities, equipment, or other assets . . . . .	1b(3)		X
(4) Reimbursement arrangements . . . . .	1b(4)		X
(5) Loans or loan guarantees . . . . .	1b(5)		X
(6) Performance of services or membership or fundraising solicitations . . . . .	1b(6)		X
<b>c</b> Sharing of facilities, equipment, mailing lists, other assets, or paid employees . . . . .	1c		X
<b>d</b> 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.			

[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

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 and correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

Signature of officer or trustee

Date \_\_\_\_\_

**Title**

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

**Paid  
Preparer  
Use Only**

Print/Type preparer's name	Preparer's signature	Date	Check <input type="checkbox"/> if self-employed	PTIN
Firm's name ► The Andersons Inc.			Firm's EIN ► 34-1562374	
Firm's address ► 480 W. Dussel Drive Maumee, OH 43537			Phone no 419 893-5050	

Form **990-PF** (2014)

ANDERSON FOUNDATION #34-6528868  
TAX SCHEDULE - FORM 990-PF  
CALENDAR YEAR 2014

Part II, line 10b - Investments - corporate stock

<u>Description</u>	<u>(b) Book value</u>	<u>(c) Fair market value</u>
2,000 shares Waterford Bank	50,000	98,000
740 shares Signature Bancorp	33,300	46,620
	<u>83,300</u>	<u>144,620</u>

Part II, line 13 - Investments - other

<u>Description</u>	<u>(b) Book value</u>	<u>(c) Fair market value</u>
Confluence Investment Management	654,365	719,721
Agincourt AGIN CFI Fund	2,924,919	2,672,321
Fred Alger Small Growth Fund	205,300	226,439
Alta Large Cap Growth Fund	518,984	721,603
Mill Creek FXD Inc MF/ETF	2,003,701	2,818,966
MFS Large Cap Value Fund	538,149	725,707
Mill Creek Funding Fund	329,764	270,900
AIM Int'l Growth Fund	392,250	498,701
Alliance Bernstein BPH-011177	459,472	480,186
Moody Aldrich Small Cap Value Fund	185,253	228,984
Alger All Cap Growth Fund	649,788	727,639
Midpoint BPD-003663	804,856	781,600
Midpoint Food And Ag Fund, L P	131,865	156,354
	<u>9,798,666</u>	<u>11,029,121</u>

\* Mill Creek Capital Advisors LLC manages our portfolio of mutual funds and fixed income securities

ANDERSON FOUNDATION # 34-6528868  
TAX SCHEDULE - FORM 990-PF  
CALENDAR YEAR 2014

Line 16c - Other Professional Fees

DESCRIPTION	TOTAL EXPENSE 77171	%	INVESTMENT RELATED AMOUNT	%	EXEMPT PURPOSE AMOUNT
Mill Creek Capital Advisors	92,946	100	92,946		
Toledo Community Foundation	3,920	100	3,920		
Midpoint	3,771	100	0 **		
General Accounting	2,000	40%	800	60%	1,200
Finance	16,000	100%	16,000		
Administration	<u>2,000</u>	40%	<u>800</u>	60%	<u>1,200</u>
Total	<u><u>120,637</u></u>		<u><u>114,466</u></u>		<u><u>2,400</u></u>

\*\*limited by investment income

NOTE: Percentages are based upon an IRS worksheet from the 1985 examination of the 1983 and 1984 Foundation tax returns.



ANDERSON FOUNDATION #34-6528868  
TAX SCHEDULE - FORM 990-PF  
CALENDAR YEAR 2014

Part I, Line 18 - Taxes

Foreign taxes	5,788
Federal excise taxes	<u>13,000</u>
Total	<u><u>18,788</u></u>

Part I, Line 23 - Other Expenses

Filing fees - Ohio Attorney General	200
Total	<u><u>200</u></u>

ANDERSON FOUNDATION #34-6528868  
TAX SCHEDULE - FORM 990-PF  
CALENDAR YEAR 2014

**Part IV, line 1 - Capital Gains and Losses for Tax on Investment Income**

(a) Description of property sold	(c) Date acquired	# of Shares	(d) Date sold	(e) Gross sales price	(g) Cost or other basis	(h) Gain or (loss)
<b>National Financial Services, LLC</b>						
Alliancebernstein Intl Value Fund	various	various	various	321,861 88	289,061 35	32,800 53
Mill Creek Mutual FD ETF	various	various	various	673,327 35	358,678 85	314,648 50
Confluence Investment Management	various	various	various	652,360 52	517,726 98	134,633 54
Agincourt Cap Mgmt - CFI	various	various	various	791,407 94	732,227 10	59,180 84
Delaware Large Cap Value Fund	various	various	various	90,939 87	72,276 51	18,663 36
Midpoint Food and AG Fund	various	various	various	91,539 00	0 00	91,539 00
Alta Large Cap Growth	various	various	various	483,089 12	361,623 56	121,465 56
Fred Alger Small Cap Growth Fund	various	various	various	293,315 29	271,541 24	21,774 05
MFS Large Cap Value Fund	various	various	various	289,029 82	186,305 21	102,724 61
AIM Int'l Growth Fund	various	various	various	119,236 28	71,290 78	47,945 50
Moody Aldrich Small Cap Value Fund	various	various	various	133,122 89	116,506 72	16,616 17
Fred Alger ALL Cap Growth Fund	various	various	various	1,315,613 90	1,144,519 21	171,094 69
MillCreek Fund BPD003663	various	various	various	369,119 59	368,238 59	881 00
<b>GRAND TOTAL</b>				<b>5,623,963.45</b>	<b>4,489,996.10</b>	<b>1,133,967.35</b>

\* Mill Creek Capital Advisors LLC manages our portfolio of mutual funds and fixed income securities

**THE ANDERSONS FOUNDATION**

January 1, 2014 - December 31, 2014

Tax Year 2014

Tax ID# 34-6528868

Grantee Name & Address	Purpose of Grant	Grant Amount
Anderson Foundation - 990 Grant Detail		
Adelante, Inc 520 Broadway Toledo, OH 43602	Human Services	\$22,991 00
African Food & Peace Foundation 1060 Lowell Rd Concord, MA 01742	Human Services	\$1,000 00
American Cancer Society - Oklahoma City P O Box 22718 Oklahoma City, OK 73123-1718	Human Services	\$333.00
Archdiocese of Philadelphia Office of Financial Services c/o Beneficial Bank P.O Box 13426 Philadelphia, PA 19101	Religion	\$500 00
ASSETS Toledo 2200 Jefferson Ave - 1st Floor Toledo, OH 43604	Human Services	\$5,000 00
Bethany House PO Box 5930 Toledo, OH 43613	Human Services	\$2,500 00
Big Brothers Big Sisters of NW Ohio Four SeaGate, Suite 660 Toledo, OH 43604	Educational	\$2,500.00
Bittersweet Farms 12660 Archbold Whitehouse Rd Whitehouse, OH 43571	Human Services	\$5,000 00
Black Swamp Conservancy 4825 Sugar Ridge Road Pemberville, OH 43450	Human Services	\$1,000 00
Black Swamp Conservancy 4825 Sugar Ridge Road Pemberville, OH 43450	Human Services	\$250 00
Catholic Club 1601 Jefferson Avenue Toledo, OH 43604	Educational	\$17,000 00
Central City Ministries of Toledo (CCMT) 1933 Spielbusch Ave Toledo, OH 43604	Educational	\$1,000 00
Central City Ministries of Toledo (CCMT) 1933 Spielbusch Ave Toledo, OH 43604	Educational	\$5,000.00
Columbus Foundation 1234 E Broad St. Columbus, OH 43205	Human Services	\$1,000 00
Compassion & Choices P O Box 101810 Denver, CO 80250	Human Services	\$250 00
Conserve School 5400 N Black Oak Lake Rd Land O' Lakes, WI 54540	Educational	\$250 00

Cornell University 130 E Seneca St , Suite 400 Ithaca, NY 14850		Educational		\$1,000 00
Cornell University 130 E. Seneca St., Suite 400 Ithaca, NY 14850		Educational		\$500 00
Diabetes Youth Services 2100 W. Central Ave Toledo, OH 43606		Human Services		\$2,500 00
Educational Service Center of Lake Erie West (Collingwood Center) 2275 Collingwood Blvd Toledo, OH 43620		Educational		\$2,500 00
Faithful Shepherd Catholic School 3355 Columbia Dr Eagan, MN 55121		Religion		\$1,000 00
Fistula Foundation 1900 The Alameda Suite 500 San Jose, CA 95126		Human Services		\$450 00
Foundation For Life 3454 Oak Alley Court, Suite 211 Toledo, OH 43606		Human Services		\$2,500 00
Fred Hutchinson Cancer Research Center 1100 Fairview Ave N J5-200 Seattle, WA 98109-1024		Human Services		\$334 00
Friends of Magee Marsh P O Box 92 Port Clinton, OH 43452		Human Services		\$5,000 00
Good Grief of Northwest Ohio 6855 Spring Valley Dr Suite 100 Holland, OH 43528		Human Services		\$2,500 00
Goodwill Industries of Northwest Ohio, Inc. 626 N Huron Street Toledo, OH 43604		Human Services		\$2,500 00
Habitat for Humanity - Maumee Valley 1310 Conant St Maumee, OH 43537		Human Services		\$250 00
Habitat for Humanity - Minneapolis 2401 Lowry Ave. NE #210 Minneapolis, MN 55418		Human Services		\$250 00
Helping Hands of St Louis 443 Sixth Street Toledo, OH 43605-1701		Human Services		\$5,000 00
Homeless Families Foundation of Columbus 33 N Grubb St Columbus, OH 43215		Human Services		\$8,400 00
Hospice of Northwest Ohio 30000 East River Road Perrysburg, OH 43551		Human Services		\$200 00
Hospice of Northwest Ohio 30000 East River Road Perrysburg, OH 43551		Human Services		\$2,500 00
Library Legacy Foundation 325 Michigan Street Toledo, OH 43604		Educational		\$10,000 00
Library Legacy Foundation 325 Michigan Street Toledo, OH 43604		Educational		\$10,000 00

Lifeline Toledo P O Box 20097 Toledo, OH 43610		Human Services		\$150 00
Little Sisters of the Poor Sacred Heart Home 930 South Wynn Road Oregon, OH 43616-3599		Human Services		\$15,000 00
Little Sisters of the Poor Sacred Heart Home 930 South Wynn Road Oregon, OH 43616-3599		Human Services		\$2,500 00
Lourdes University 6832 Convent Boulevard Sylvania, OH 43560		Educational		\$30,000 00
Martin Luther King Kitchen for the Poor 650 Vance Toledo, OH 43604		Human Services		\$2,500 00
Mercy College of Northwest Ohio 2221 Madison Avenue Toledo, OH 43604-1132		Educational		\$20,000 00
Mobile Meals of Toledo, Inc 2200 Jefferson Avenue Toledo, OH 43624		Human Services		\$5,000 00
Northwest Ohio SCORE 2200 Jefferson Ave 1st Floor Toledo, OH 43604		Educational		\$2,500 00
Northwestern University School of Law Center on Wrongful Convictions 375 E Chicago Ave Chicago, IL 60611		Educational		\$500 00
Notre Dame Academy 3535 W. Sylvania Avenue Toledo, OH 43623		Educational		\$500 00
Notre Dame Academy 3535 W Sylvania Avenue Toledo, OH 43623		Educational		\$15,000 00
Notre Dame Academy 3535 W Sylvania Avenue Toledo, OH 43623		Educational		\$10,000 00
Oceana 1350 Connecticut Ave NW 5th Floor Washington, DC 20036		Educational		\$250 00
Oceana 1350 Connecticut Ave. NW 5th Floor Washington, DC 20036		Educational		\$250 00
Planned Parenthood Federation of America P O Box 97166 Washington, D.C. 20077-7543		Human Services		\$250 00
Planned Parenthood Federation of America P O Box 97166 Washington, D C 20077-7543		Human Services		\$250 00
Read for Literacy 325 N Michigan Toledo, OH 43624		Educational		\$500 00
Read for Literacy 325 N Michigan Toledo, OH 43624		Educational		\$2,500 00

REEF Environmental Education Foundation PO Box 246 Key Largo, FL 33037		Educational		\$333 00
Sara's Garden-The Sara Joy Rychener- Burkholder Hyperbaric Center 620 West Leggett St Wauseon, OH 43567		Human Services		\$1,000 00
Sauder Village P O Box 235 Archbold, OH 43502		Educational		\$2,500 00
Servant Leadership Center of Toledo 1618 W Sylvania Avenue Toledo, OH 43612		Human Services		\$350 00
Servant Leadership Center of Toledo 1618 W Sylvania Avenue Toledo, OH 43612		Human Services		\$2,500.00
Servant Leadership Center of Toledo 1618 W Sylvania Avenue Toledo, OH 43612		Human Services		\$150 00
Sierra Club - San Francisco 85 2nd St San Francisco, CA 94105		Human Services		\$500 00
Sisters of Notre Dame 3837 Secor Road Toledo, OH 43623		Religion		\$50,000 00
St. Francis de Sales High School 2323 W Bancroft Street Toledo, OH 43607-1399		Educational		\$500 00
St. Francis de Sales High School 2323 W. Bancroft Street Toledo, OH 43607-1399		Educational		\$15,000 00
St. Ursula Academy 4025 Indian Road Toledo, OH 43606		Educational		\$1,000 00
Stratford Ecological Center Inc 3083 Liberty Rd Delaware, OH 43015		Educational		\$2,500 00
Sunshine Foundation, Inc 7223 Maumee-Western Rd. Maumee, OH 43537-9656		Human Services		\$1,000 00
Sunshine Foundation, Inc 7223 Maumee-Western Rd Maumee, OH 43537-9656		Human Services		\$500.00
Sunshine Foundation, Inc. 7223 Maumee-Western Rd Maumee, OH 43537-9656		Human Services		-\$50 00
Sunshine Foundation, Inc. 7223 Maumee-Western Rd Maumee, OH 43537-9656		Human Services		\$50.00
Sunshine Foundation, Inc 7223 Maumee-Western Rd. Maumee, OH 43537-9656		Human Services		\$2,500 00
Sunshine Foundation, Inc. 7223 Maumee-Western Rd Maumee, OH 43537-9656		Human Services		\$50 00
The Innocence Project Attn Development Dept 40 Worth St , Suite 701 New York, NY 10013		Human Services		\$500.00

The Nature Conservancy Attn Treasury 4245 N Fairfax Dr Ste 100 Arlington, VA 22203		Educational		\$250 00
The Nature Conservancy Attn Treasury 4245 N. Fairfax Dr Ste 100 Arlington, VA 22203		Educational		\$250 00
The Pregnancy Center of Greater Toledo 716 N Westwood Ave Toledo, OH 43607		Human Services		\$2,500 00
The Sight Center 1002 Garden Lake Parkway Toledo, OH 43624		Human Services		\$5,000 00
Toledo Community Foundation 300 Madison Ave # 1300 Toledo, OH 43604-1583		Educational		\$3,920 00
Toledo GROWs c/o Toledo Botanical Garden 5403 Elmer Drive Toledo, OH 43615		Educational		\$250 00
Toledo GROWs c/o Toledo Botanical Garden 5403 Elmer Drive Toledo, OH 43615		Educational		\$250 00
Toledo GROWs c/o Toledo Botanical Garden 5403 Elmer Drive Toledo, OH 43615		Educational		\$100 00
Toledo School for the Arts 333 - 14Th Street Toledo, OH 43604		Educational		\$500 00
Toledo School for the Arts 333 - 14Th Street Toledo, OH 43604		Educational		\$400 00
Toledo School for the Arts 333 - 14Th Street Toledo, OH 43604		Educational		\$10,000 00
Toledo School for the Arts 333 - 14Th Street Toledo, OH 43604		Educational		\$10,000 00
Toledo School for the Arts 333 - 14Th Street Toledo, OH 43604		Educational		\$10,000.00
Toledo School for the Arts 333 - 14Th Street Toledo, OH 43604		Educational		\$5,000 00
Toledo Symphony Orchestra 1838 Parkwood Ave, Suite 310 Toledo, OH 43604-6059		Educational		\$500 00
Toledo/Lucas County CareNet 3231 Central Park West, Suite 200 Toledo, OH 43617		Educational		\$2,500 00
Toledoans United for Social Action (TUSA) P.O. Box 20157 442 Floyd Street Toledo, OH 43610		Human Services		\$2,500 00
Union of Concerned Scientists 2 Brattle Square Cambridge, MA 02138		Educational		\$250 00

United Way - Greater Toledo 424 Jackson St Toledo, OH 43604		Human Services		\$75,000 00
United Way - Greater Toledo 424 Jackson St. Toledo, OH 43604		Human Services		\$75,000 00
United Way - Greater Toledo 424 Jackson St Toledo, OH 43604		Human Services		\$300 00
University of Minnesota Foundation 200 Oak Street S E , Suite 500 Minneapolis, MN 55455		Educational		\$250 00
University of Toledo Foundation 2801 W. Bancroft St., MS#318 Toledo, OH 43606-3328		Educational		\$20,000.00
Walsh Jesuit High School 4550 Wyoga Lake Rd Cuyahoga Falls, OH 44224		Educational		\$500 00
Water for Ishmael P O. Box 2861 3925 W Central Ave Toledo, OH 43606		Human Services		\$2,500 00
YMCA - Camp Wilson 2732 County Rd 11 Bellefontaine, OH 43311		Educational		\$400 00
YMCA and JCC of Greater Toledo 1500 N Superior, 2nd Floor Toledo, OH 43604		Educational		\$1,000 00
YMCA and JCC of Greater Toledo 1500 N Superior, 2nd Floor Toledo, OH 43604		Educational		\$2,500 00
YMCA and JCC of Greater Toledo 1500 N Superior, 2nd Floor Toledo, OH 43604		Educational		\$1,000 00
YMCA and JCC of Greater Toledo 1500 N Superior, 2nd Floor Toledo, OH 43604		Educational		\$500 00
YMCA and JCC of Greater Toledo 1500 N Superior, 2nd Floor Toledo, OH 43604		Educational		\$17,216 66
Total Grants 2014 - Anderson Foundation				\$561,827 66



Anderson Foundation  
Tax Year 2014  
Tax ID #34-6528868

Part XV: Grants and Contributions Approved for Future Payments

Grantee Name	Address	Program Area	Grant Amount Balance
Sisters of Notre Dame	3837 Secor Road Toledo, OH 43623	Religion	\$50,000 00
Grand Total			\$50,000.00

*Anderson Foundation*  
**Information for Applicants**

**General Policies**

The Anderson Foundation strives to enhance the quality of life in communities in which the donor company, The Andersons, Inc. has business operations.

The Foundation will consider requests from organizations that have received 501(c)(3) tax-exempt status from the Internal Revenue Service and which are not classified as private foundations under the Internal Revenue Code 509. State and local government requests are also considered.

Grants are made for general operations, specific projects and capital campaigns. As a general rule, the Foundation will not serve as the major or sole funder of a project. Multi-year commitments are normally confined to capital campaigns and are generally restricted to a period of three years or less. The Foundation does not commit to annual support. A specific written request is required each year.

Grants are not made to individuals; to endowment funds; to church building or operating funds; or to the building or operating funds of elementary schools or public high schools.

**Application Deadlines**

**NOTE – We are implementing a new grants management system in January 2015.**

All new grant requests will be required to be completed on-line.  
To obtain the link to the application, email a grant inquiry to  
[Julie\\_payeff@andersonsinc.com](mailto:Julie_payeff@andersonsinc.com) **after February 1, 2015.**

Please include the following in the email:

- Copy of the 501(c)(3) tax-exempt status letter including the EIN number
- One paragraph summary of the project/program, including the total project budget amount and amount requested. Also include the total amount that has been secured from other donors.
- Name of the The Andersons location manager providing a letter of support

Grant proposals are accepted at any time. Foundation meetings are held three times per year. 2015 deadlines are as follows: **March 17, June 16, and September 29.**

If the complete proposal is received by the deadline, it will be presented at the next scheduled meeting. Special circumstances sometimes inhibit this process, however, and a request may need to be held for a subsequent meeting. In either case, the applicant will be notified as to the status of the request.

## **Required Application Documents**

The Foundation is converting to an on-line application after February 1, 2015. The application format will be communicated after the grant inquiry letter is received – see above.

The required information for an application includes the following:

1. **501(c)(3) IRS Letter** - A copy of the IRS 501(c)(3) tax-exempt letter.
2. **Organization Address and Contact Information** – Full mailing address, email, phone, name and phone number of the contact person for the request.
3. **Written request** – a request for a specific amount with an explanation of how the funds will be used, the geographical area and population to be served, a timetable for the drive or project and the total project budget.
4. **Mission/Statement of Purpose** - A brief description of the organization, including a statement of its purposes and objectives.
5. **Letter of support** - Applications from outside the Toledo area require written support from the local manager of the nearest Anderson facility. Applications will not be processed without a recommendation letter.
6. **Financials** - A copy of the last audited, reviewed or compiled financial statements.
7. **Operating Budget** - A copy of the current year operating budget.
8. **Board Members/Directors** - A list of the organization's officers and directors
9. **Capital Projects Only** -
  - Project Budget** – The project budget.
  - Other Donors & Outstanding Requests** - Include a list of current corporate or foundation commitments, and any grant requests pending. Individual donors should be summarized as one line.
  - Donor Recognition Levels** – A list of donor recognition levels for the project, as applies.

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