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Extended to November 16, 2015

Return of Private Foundation

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

OMB No 1545-0052

2014

Open to Public Inspection

Form 990-PF

Department of the Treasury
Internal Revenue Service

Do not enter social security numbers on this form as it may be made public.

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

For calendar year 2014 or tax year beginning

, and ending

Name of foundation Retirement Research Foundation		A Employer identification number 36-2429540
Number and street (or P.O. box number if mail is not delivered to street address) 8765 West Higgins Road		B Telephone number (773) 714-8080
City or town, state or province, country, and ZIP or foreign postal code Chicago, IL 60631-4170		C If exemption application is pending, check here ☐
G Check all that apply: ☐ Initial return ☐ Final return ☐ Address change ☐ Initial return of a former public charity ☐ Amended return ☐ Name change		D 1. Foreign organizations, check here ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ☐
H Check type of organization: ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here ☐
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 139,993,812. (Part I, column (d) must be on cash basis)		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐
J Accounting method: ☐ Cash ☒ Accrual ☐ Other (specify) _____		

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))		(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				N/A	
2 Check ☒ if the foundation is not required to attach Sch. B					
3 Interest on savings and temporary cash investments		294.	294.		Statement 2
4 Dividends and interest from securities		2,618,031.	2,618,031.		Statement 3
5a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10		13,218,764.			
b Gross sales price for all assets on line 6a		13,218,764.			
7 Capital gain net income (from Part IV, line 2)			13,218,764.		
8 Net short-term capital gain					
9 Income modifications					
10a Gross sales less returns and allowances					
b Less Cost of goods sold					
c Gross profit or (loss)					
11 Other income		1,494,831.	1,797,497.		Statement 4
12 Total: Add lines 1 through 11		17,331,920.	17,634,586.		
13 Compensation of officers, directors, trustees, etc.		369,090.	61,550.		307,540.
14 Other employee salaries and wages		568,841.	14,235.		554,606.
15 Pension plans, employee benefits		253,497.	14,639.		238,858.
16a Legal fees					
b Accounting fees Stmt 5		73,000.	46,350.		18,750.
c Other professional fees Stmt 6		2,606,807.	2,373,066.		147,772.
17 Interest		553,978.	553,978.		0.
18 Taxes Stmt 7		368,567.	76,067.		0.
19 Depreciation and depletion		21,487.	2,149.		
20 Occupancy		125,594.	12,559.		113,035.
21 Travel, conferences, and meetings		52,676.	1,560.		51,116.
22 Printing and publications		1,726.	173.		1,553.
23 Other expenses Stmt 8		82,049.	2,850.		79,199.
24 Total operating and administrative expenses. Add lines 13 through 23		5,077,312.	3,159,176.		1,512,429.
25 Contributions, gifts, grants paid		4,888,777.			5,008,640.
26 Total expenses and disbursements. Add lines 24 and 25		9,966,089.	3,159,176.		6,521,069.
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements		7,365,831.			
b Net investment income (if negative, enter -0-)			14,475,410.		
c Adjusted net income (if negative, enter -0-)				N/A	

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LHA For Paperwork Reduction Act Notice, see instructions.

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Part II Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only

		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	211,368.	2,188,483.	2,188,483.
	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			
	7 Other notes and loans receivable ▶			
	Less: allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges	29,659.	4,483.	4,483.
	10a Investments - U.S. and state government obligations			
	b Investments - corporate stock Stmt 9	8,375,816.	7,780,291.	7,780,291.
	c Investments - corporate bonds Stmt 10	3,210,867.	3,403,514.	3,403,514.
	11 Investments - land, buildings, and equipment basis ▶			
Less accumulated depreciation ▶				
12 Investments - mortgage loans				
13 Investments - other Stmt 11	122,398,157.	126,569,178.	126,569,178.	
14 Land, buildings, and equipment: basis ▶ 254,327.				
Less accumulated depreciation Stmt 12 ▶ 206,464.	69,350.	47,863.	47,863.	
15 Other assets (describe ▶)				
16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item I)	134,295,217.	139,993,812.	139,993,812.	
Liabilities	17 Accounts payable and accrued expenses	69,531.	55,475.	
	18 Grants payable	2,903,992.	2,784,130.	
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe ▶)			
	23 Total liabilities (add lines 17 through 22)	2,973,523.	2,839,605.	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ ☒ and complete lines 24 through 26 and lines 30 and 31.			
	24 Unrestricted	131,321,694.	137,154,207.	
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ ☐ and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds			
	28 Paid-in or capital surplus, or land, bldg., and equipment fund			
	29 Retained earnings, accumulated income, endowment, or other funds			
	30 Total net assets or fund balances	131,321,694.	137,154,207.	
31 Total liabilities and net assets/fund balances	134,295,217.	139,993,812.		

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	131,321,694.
2 Enter amount from Part I, line 27a	2	7,365,831.
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	138,687,525.
5 Decreases not included in line 2 (itemize) ▶ Unrealized Security (Depreciation)	5	1,533,318.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	137,154,207.

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)		(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a				
b See Attached Statement				
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 13,218,764.			13,218,764.

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a			
b			
c			
d			
e			13,218,764.

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	13,218,764.
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). If (loss), enter -0- in Part I, line 8		3	N/A

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	6,757,283.	125,223,430.	.053962
2012	6,724,091.	119,359,162.	.056335
2011	5,969,076.	121,147,588.	.049271
2010	5,885,346.	113,459,220.	.051872
2009	8,380,409.	105,671,344.	.079306

2 Total of line 1, column (d)	2	.290746
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	.058149
4 Enter the net value of noncharitable-use assets for 2014 from Part X, line 5	4	135,039,258.
5 Multiply line 4 by line 3	5	7,852,398.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	144,754.
7 Add lines 5 and 6	7	7,997,152.
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	6,521,069.

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

1a	Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☐ and enter 1% of Part I, line 27b	1	289,508.
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	289,508.
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	289,508.
6	Credits/Payments:		
a	2014 estimated tax payments and 2013 overpayment credited to 2014	6a	394,091.
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	394,091.
8	Enter any penalty for underpayment of estimated tax. Check here ☒ if Form 2220 is attached	8	
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	104,583.
11	Enter the amount of line 10 to be: Credited to 2015 estimated tax ☐ 104,583. Refunded ☐ 0.	11	0.

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. \$ 0. (2) On foundation managers. \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities	2	X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes	3	X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a	X
b If "Yes," has it filed a tax return on Form 990-T for this year?	4b	X
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.	5	X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	X
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV	7	X
8a Enter the states to which the foundation reports or with which it is registered (see instructions) <u>IL, MI</u>		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	8b	X
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2014 or the taxable year beginning in 2014 (see instructions for Part XIV)? If "Yes," complete Part XIV	9	X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10	X

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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 ► <u>http://www.rrf.org</u>	13	X	
14	The books are in care of ► <u>Irene Frye</u> Telephone no. ► <u>773-714-8080</u> Located at ► <u>8765 W. Higgins Road, Suite 430, Chicago, IL</u> ZIP+4 ► <u>60631</u>			
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	N/A	
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? ☐ Yes ☒ No		
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No		
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☒ Yes ☐ No		
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☒ Yes ☐ No		
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☒ No		
(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) ☐ Yes ☒ No		
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here ► ☐	1b	X
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?	1c	X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):		
a At the end of tax year 2014, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2014? ☐ Yes ☒ No If "Yes," list the years ►		
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.) 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. ►		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☒ No		
b If "Yes," did it have excess business holdings in 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

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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

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?

N/A

7b

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

See Statement 14

1 List all officers, directors, trustees, foundation managers and their compensation.

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
See Statement 13		369,090.	28,432.	0.

2 Compensation of five highest-paid employees (other than those included on line 1). 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
Nancy Zweibel PHD - c/o RRF 8765 W. Higgins #430, Chicago, IL 60631	Program Officer 40.00	164,510.	23,461.	0.
Julie Kaufman PHD - c/o RRF 8765 W. Higgins #430, Chicago, IL 60631	Program Officer 40.00	142,370.	21,163.	0.
Mary O'Donnell - c/o RRF 8765 W. Higgins #430, Chicago, IL 60631	Program Officer 40.00	94,848.	13,052.	0.
Lee Parker MED - c/o RRF 8765 W. Higgins #430, Chicago, IL 60631	Grants and IT Administrator 40.00	77,347.	11,077.	0.
Marcia Kunstler - c/o RRF 8765 W. Higgins #430, Chicago, IL 60631	Office Administrator 40.00	65,204.	9,562.	0.
Total number of other employees paid over \$50,000				5

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

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
Global Endowment Management 100 N Tryon St, Charlotte, NC 28202 Naomi M Stanhaus	Investment Management	2,383,025.
720 N Larabee Street #204, Chicago, IL 60654 Varey & Vaccariello CPAs PC	Program Consultant	109,347.
2205 Point Blvd #210, Elgin, IL 60123	Accounting and Tax	55,500.

Total number of others receiving over \$50,000 for professional services

0

Part IX-A Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.

	Expenses
1 None	
	0.
2	
3	
4	

Part IX-B Summary of Program-Related Investments

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.

	Amount
1 None	
	0.
2	
All other program-related investments. See instructions.	
3	
Total. Add lines 1 through 3	0.

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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	136,580,539.
b	Average of monthly cash balances	1b	515,154.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	137,095,693.
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	137,095,693.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	2,056,435.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	135,039,258.
6	Minimum investment return. Enter 5% of line 5	6	6,751,963.

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	6,751,963.
2a	Tax on investment income for 2014 from Part VI, line 5	2a	289,508.
b	Income tax for 2014. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	289,508.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	6,462,455.
4	Recoveries of amounts treated as qualifying distributions	4	16,992.
5	Add lines 3 and 4	5	6,479,447.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	6,479,447.

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	6,521,069.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	6,521,069.
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	5	0.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	6,521,069.

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.

Form 990-PF (2014)

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				6,479,447.
2 Undistributed income, if any, as of the end of 2014				
a Enter amount for 2013 only			0.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2014:				
a From 2009	3,156,668.			
b From 2010	367,868.			
c From 2011	146,096.			
d From 2012	838,718.			
e From 2013	668,831.			
f Total of lines 3a through e	5,178,181.			
4 Qualifying distributions for 2014 from Part XII, line 4: ► \$ 6,521,069.				
a Applied to 2013, but not more than line 2a			0.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2014 distributable amount				6,479,447.
e Remaining amount distributed out of corpus	41,622.			
5 Excess distributions carryover applied to 2014 (If an amount appears in column (d), the same amount must be shown in column (a).)	0.			0.
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	5,219,803.			
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 2013. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2014. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2015				0.
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)	0.			
8 Excess distributions carryover from 2009 not applied on line 5 or line 7	3,156,668.			
9 Excess distributions carryover to 2015. Subtract lines 7 and 8 from line 6a	2,063,135.			
10 Analysis of line 9:				
a Excess from 2010	367,868.			
b Excess from 2011	146,096.			
c Excess from 2012	838,718.			
d Excess from 2013	668,831.			
e Excess from 2014	41,622.			

N/A

- ☐ 4942(j)(3) or ☐ 4942(j)(5)

- (4) Gross investment income**

[illegible]

21471028	805490	RetResearch	2014.04010	Retirement Research Foundat	RETRESE1
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Part XV Supplementary Information (continued)**3** Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year				
Grants Paid for General Funding Interests See Attachment A	None	All are Pub Charities	See attachment A	4,829,316.
Matching Gifts Program See Attachment B	None	All are Pub Charities	See attachment B	179,324.
Total			3a	5,008,640.
b Approved for future payment				
Grants Payable to General Funding Interests See Attachment C	None	All are Pub Charities	See attachment C	<119,863.>
Total			3b	<119,863.>

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

		Yes	No
1	Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?		
a	Transfers from the reporting foundation to a noncharitable exempt organization of:		
	(1) Cash	1a(1)	X
	(2) Other assets	1a(2)	X
b	Other transactions:		
	(1) Sales of assets to a noncharitable exempt organization	1b(1)	X
	(2) Purchases of assets from a noncharitable exempt organization	1b(2)	X
	(3) Rental of facilities, equipment, or other assets	1b(3)	X
	(4) Reimbursement arrangements	1b(4)	X
	(5) Loans or loan guarantees	1b(5)	X
	(6) Performance of services or membership or fundraising solicitations	1b(6)	X
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c	X
d	If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received.		

[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 instr. 9)? ☒ Yes ☐ No
	 Signature of officer or trustee	<u>11/11/15</u> Date	 Executive Director

Paid Preparer Use Only	Print/Type preparer's name Downey R. Varey	Preparer's signature 	Date 11/9/15	Check ☐ if self-employed	PTIN P00357499
	Firm's name ▶ Varey & Vaccariello CPAs PC			Firm's EIN ▶ 36-3994838	
	Firm's address ▶ 2205 Point Boulevard, Suite 210 Elgin, IL 60123			Phone no. 847-228-6977	

Form **990-PF** (2014)

Retirement Research Foundation

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 From Mid-Continent Capital Managed Accounts		P		
b From Form K-1 Global Endowment Management		P		
c From Form K-1 Global Endowment Management		P		
d From Form 4797		P		
e From Form 6781		P		
f From Form 6781		P		
g Litigation Proceeds From Past Trades		P		
h				
i				
j				
k				
l				
m				
n				
o				

(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 1,430,887.			1,430,887.
b 3,414,937.			3,414,937.
c 7,716,110.			7,716,110.
d 129,218.			129,218.
e 198,609.			198,609.
f 297,912.			297,912.
g 31,091.			31,091.
h			
i			
j			
k			
l			
m			
n			
o			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a			1,430,887.
b			3,414,937.
c			7,716,110.
d			129,218.
e			198,609.
f			297,912.
g			31,091.
h			
i			
j			
k			
l			
m			
n			
o			

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	13,218,764.
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). If (loss), enter "-0-" in Part I, line 8 }		3	N/A

Form 990-PF Interest on Savings and Temporary Cash Investments Statement 2

Source	(a) Revenue Per Books	(b) Net Investment Income	(c) Adjusted Net Income
Urban Partnership Bank	294.	294.	
Total to Part I, line 3	294.	294.	

Form 990-PF Dividends and Interest from Securities Statement 3

Source	Gross Amount	Capital Gains Dividends	(a) Revenue Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income
Global Endowment Fund II LP	2,046,651.	0.	2,046,651.	2,046,651.	
Global Endowment Fund II LP	62,586.	0.	62,586.	62,586.	
Mid-Continent Capital	508,794.	0.	508,794.	508,794.	
To Part I, line 4	2,618,031.	0.	2,618,031.	2,618,031.	

Form 990-PF Other Income Statement 4

Description	(a) Revenue Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income
Returned Grants	16,992.	0.	
Unrelated Business Taxable Income	<386,438.>	0.	
Net Ordinary and Other Portfolio Income and (Losses) from K-1	1,797,497.	1,797,497.	
Non-Taxable Income	66,780.	0.	
Total to Form 990-PF, Part I, line 11	1,494,831.	1,797,497.	

Form 990-PF	Accounting Fees			Statement	5
Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes	
Auditing fees	17,500.	6,750.		8,750.	
Bookkeeping, Payroll and Tax Services	55,500.	39,600.		10,000.	
To Form 990-PF, Pg 1, ln 16b	73,000.	46,350.		18,750.	

Form 990-PF	Other Professional Fees			Statement	6
Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes	
Investment management services: Mid Continent Capital LLC	48,179.	48,179.		0.	
Investment management services: Global Endowment Fund II	2,410,856.	2,324,887.		0.	
Program Grant Evaluation Consultants	147,772.	0.		147,772.	
To Form 990-PF, Pg 1, ln 16c	2,606,807.	2,373,066.		147,772.	

Form 990-PF	Taxes			Statement	7
Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes	
Excise tax	292,500.	0.		0.	
Tax on Foreign Dividends	76,067.	76,067.		0.	
To Form 990-PF, Pg 1, ln 18	368,567.	76,067.		0.	

Form 990-PF	Other Expenses			Statement	8
Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes	
Computer expense	44,114.	0.		44,114.	
Insurance	16,246.	1,625.		14,621.	
Office Supplies and Expense	9,363.	983.		8,380.	
Dues and Memberships	9,485.	0.		9,485.	
Postage and Shipping	2,424.	242.		2,182.	
Franchise and Filing Fees	417.	0.		417.	
To Form 990-PF, Pg 1, ln 23	82,049.	2,850.		79,199.	

Form 990-PF	Corporate Stock		Statement	9
Description	Book Value		Fair Market Value	
Mid-Continent Capital-ETF's	7,780,291.		7,780,291.	
Total to Form 990-PF, Part II, line 10b	7,780,291.		7,780,291.	

Form 990-PF	Corporate Bonds		Statement	10
Description	Book Value		Fair Market Value	
Mid-Continent Capital-Corporate Bonds	1,895,035.		1,895,035.	
Mid-Continent Capital-Corporate Preferreds	1,508,479.		1,508,479.	
Mid-Continent Capital-ETF's	0.		0.	
Total to Form 990-PF, Part II, line 10c	3,403,514.		3,403,514.	

Form 990-PF	Other Investments	Statement	11
Description	Valuation Method	Book Value	Fair Market Value
Global Endowment Fund II LP	FMV	126,539,158.	126,539,158.
Mid-Continent Capital-Other	COST	30,020.	30,020.
Total to Form 990-PF, Part II, line 13		126,569,178.	126,569,178.

Form 990-PF	Depreciation of Assets Not Held for Investment	Statement	12
Description	Cost or Other Basis	Accumulated Depreciation	Book Value
Furniture & Fixtures	79,085.	75,213.	3,872.
Software	12,620.	12,620.	0.
Office Equipment	7,815.	7,815.	0.
Laser Jet Printer	1,351.	1,351.	0.
Copy Machine	20,295.	20,295.	0.
Eaton Battery Backup	1,173.	1,173.	0.
Toshiba Strategy Phone System	8,623.	8,623.	0.
CDW Color Printer	1,307.	1,195.	112.
New Office Chairs	4,152.	3,735.	417.
TWO FOLDING TABLES	432.	301.	131.
TWO 24" MONITORS HPZR24	774.	542.	232.
HP DL380 G7 KMAT CTO SERVER	16,624.	11,637.	4,987.
SERVER INSTALLATION	15,700.	10,990.	4,710.
NETWORK VM WARE CISCO	6,130.	4,291.	1,839.
NETWORK UPGRADE BACKUP SW	5,696.	3,987.	1,709.
Computer Equipment	15,931.	15,931.	0.
File Server	14,272.	7,135.	7,137.
15 Workstations	27,671.	13,836.	13,835.
Broadband Installation and EQ	5,400.	2,700.	2,700.
IPAD	499.	250.	249.
Off Eq HP Projector	1,135.	568.	567.
IPADS For Board	6,452.	1,918.	4,534.
Samsung Printer	1,190.	358.	832.
Total To Fm 990-PF, Part II, ln 14	254,327.	206,464.	47,863.

Form 990-PF Part VIII - List of Officers, Directors Statement 13
Trustees and Foundation Managers

Name and Address	Title and Avrg Hrs/Wk	Compen- sation	Employee Ben Plan Expense Contrib Account	
Nathaniel McParland, MD c/o RRF 8765 W Higgins #430 Chicago, IL 606314170	Chairman/Trustee 9.00	34,000.	0.	0.
Ruth Ann Watkins c/o RRF 8765 W Higgins #430 chicago, IL 606314170	Trustee 6.00	26,000.	0.	0.
Marvin Meyerson c/o RRF 8765 W Higgins #430 Chicago, IL 606314170	Trustee 6.00	15,245.	0.	0.
Michael J. Starshak c/o RRF 8765 W Higgins #430 Chicago, IL 606314170	Secretary/Trustee 6.00	20,000.	0.	0.
Downey R. Varey, CPA c/o RRF 8765 W Higgins #430 Chicago, IL 606314170	Treasurer/Trustee 6.00	21,500.	0.	0.
Irene Frye c/o RRF 8765 W Higgins #430 Chicago, IL 606314170	Executive Director 40.00	192,345.	28,432.	0.
Marilyn Hennessy c/o RRF 8765 W Higgins #430 Chicago, IL 606314170	Trustee 6.00	20,000.	0.	0.
Thomas R. Prohaska, Ph D c/o RRF 8765 W Higgins #430 Chicago, IL 606314170	Trustee 6.00	20,000.	0.	0.
Cheryl E. Woodson, MD c/o RRF 8765 W Higgins #430 Chicago, IL 606314170	Trustee 6.00	17,000.	0.	0.
Kathleen W. Kolodgy c/o RRF 8765 W Higgins #430 Chicago, IL 606314170	Trustee 6.00	3,000.	0.	0.
Totals included on 990-PF, Page 6, Part VIII		369,090.	28,432.	0.

Form 990-PF

Officers, Directors, Trustees and
Foundation Managers Compensation Explanation
Part VIII, Line 1

Statement 14

Person's Name

Downey R Varey Trustee

Compensation Explanation

Mr Varey's compensation as Trustee for the year ended 12/31/14 totaled \$21,500. Mr. Varey also is a partner in the accounting firm of Varey & Vaccariello CPAs PC, which the Foundation paid accounting, consulting and tax related fees totaling \$55,500 for the year ended 12/31/14. All of those services to the Foundation were provided by Mr. Varey, and he was compensated by the accounting firm for them.

Form 990-PF	Grant Application Submission Information Part XV, Lines 2a through 2d	Statement 15
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Name and Address of Person to Whom Applications Should be Submitted

Irene Frye, Executive Director, Retirement Research Foundation
8765 W Higgins RD Ste 430
Chicago IL 606314022

Telephone Number	Name of Grant Program
773-714-8080	Major Grant Programs are discussed below under restrictions/limitations.

Email Address

frye@rrf.org

Form and Content of Applications

Our Website www.rrf.org contains the form in which Applications should be submitted along with eligibility criteria, exclusions, and letters of inquiry with required inclusions. Web inquiries should be addressed to info@rrf.org. Application forms can be downloaded in Word for completion.

Any Submission Deadlines

February 1, May 1, and August 1

Restrictions and Limitations on Awards

Our Website www.rrf.org contains the eligibility requirements, restrictions or limitations for all major grant programs. The major grant programs are as follows: Advocacy; Direct Service; Professional Education; Research; Organizational Capacity Building Standard Grants; Organizational Capacity Building Flex-Fund Grants and Accessible Faith Grants.

Form 990-PF	Other Revenue				Statement 16
Description	Bus Code	Unrelated Business Inc	Excl Code	Excluded Amount	Related or Exempt Function Income
Returned Grants					16,992.
Unrelated Business Taxable Income	523000	<386,438.>			
Net Ordinary and Other Portfolio Income and (Losses) from K-1			14	1,797,497.	
Non-Taxable Income			14	66,780.	
Total to Form 990-PF, Pg 12, ln 11		<386,438.>		1,864,277.	16,992.

2014 DEPRECIATION AND AMORTIZATION REPORT

Form 990-PF Page 1

990-PF

Asset No	Description	Date Acquired	Method	Life	Line No	Unadjusted Cost Or Basis	Bus % Excl	Reduction In Basis	Basis For Depreciation	Accumulated Depreciation	Current Sec 179	Current Year Deduction
	Computer Equipment											
19	Laser Jet Printer	041006SL		5.00	16	1,351.			1,351.	1,351.		0.
22	Eaton Battery Backup	080108SL		5.00	16	1,173.			1,173.	1,173.		0.
24	CDW Color Printer	020510SL		5.00	16	1,307.			1,307.	934.		261.
27	TWO 24" MONITORS	081611SL		5.00	16	774.			774.	387.		155.
28	HP DL380 G7 KMAT SERVER	092311SL		5.00	16	16,624.			16,624.	8,312.		3,325.
29	SERVER INSTALLATION	121211SL		5.00	16	15,700.			15,700.	7,850.		3,140.
32	Computer Equipment	Varies	SL	5.00	16	15,931.			15,931.	15,931.		0.
33	File Server	063012SL		5.00	16	14,272.			14,272.	4,281.		2,854.
34	15 Workstations	063012SL		5.00	16	27,671.			27,671.	8,301.		5,535.
35	Broadband Installation and EQ	063012SL		5.00	16	5,400.			5,400.	1,620.		1,080.
36	IPAD	063012SL		5.00	16	499.			499.	150.		100.
38	IPADS For Board	031913SL		5.00	16	6,452.			6,452.	628.		1,290.
	* 990-PF Pg 1 Total					107,154.		0.	107,154.	50,918.	0.	17,740.
	- Computer Equipme											
	Furniture & Fixtures											
	Furniture & Fixtures											
25	New Office Chairs	070610SL		5.00	16	4,152.		3,872.	75,213.	75,213.		0.
26	TWO FOLDING TABLES	030811SL		5.00	16	432.			432.	215.		86.

428102
05-01-14

(D) - Asset disposed

* ITC, Section 179, Salvage, Bonus, Commercial Revitalization Deduction

2014 DEPRECIATION AND AMORTIZATION REPORT

Form 990-PF Page 1

990-PF

Asset No	Description	Date Acquired	Method	Life	Line No	Unadjusted Cost Or Basis	Bus % Excl	Reduction In Basis	Basis For Depreciation	Accumulated Depreciation	Current Sec 179	Current Year Deduction
37	Off Eqp HP Projector	063012SL		5.00	16	1,135.			1,135.	341.		227.
39	Samsung Printer	100813SL		5.00	16	1,190.			1,190.	119.		239.
	* 990-PF Pg 1 Total											
	- Furniture & Fixt					85,994.		3,872.	82,122.	78,793.	0.	1,382.
	Office Equipment											
50	Office Equipment	VariesSL		5.00	16	7,815.			7,815.	7,815.		0.
20	Copy Machine	010606SL		5.00	16	20,295.			20,295.	20,295.		0.
	Toshiba Strategy											
23	Phone System	040208SL		5.00	16	8,623.			8,623.	8,623.		0.
	* 990-PF Pg 1 Total											
	- Office Equipment					36,733.		0.	36,733.	36,733.	0.	0.
30	Software	032499SL		5.00	16	12,620.			12,620.	12,620.		0.
	NETWORK VM WARE											
30	CISCO	122111SL		5.00	16	6,130.			6,130.	3,065.		1,226.
	NETWORK UPGRADE											
31	BACKUP SW	122211SL		5.00	16	5,696.			5,696.	2,848.		1,139.
	* 990-PF Pg 1 Total											
	- Office Equipment					24,446.		0.	24,446.	18,533.	0.	2,365.
	* Grand Total											
	990-PF Pg 1 Depr					254,327.		3,872.	250,455.	184,977.	0.	21,487.

ATTACHMENT A

Page 1 of 30

[illegible]

ATTACHMENT A

36-2429540

For the year ended December 31, 2014

Details to Line 3a

Pages 1 - 30

Page 2 of 30

RETIREMENT RESEARCH FOUNDATION

CHICAGO, IL

36-2429540

FORM 990PF

For the year ended December 31, 2014

Part XV, Page 11

Details to Line 3a

Pages 1 - 30

ATTACHMENT A

Request ID	Recipient Name and Address	Relationship	Foundation Status of Recipient	Purpose of Grant	Amount
<u>American Medical Directors Association Foundation, Inc.</u>					
2013182	American Medical Directors Association Foundation, Inc.	NONE	PC	Eighteen-month grant to update and disseminate AMDA Clinical Practice Guidelines for diabetes, COPD, and heart failure, for use by personnel working in long-term care facilities.	\$50,000
	11000 Broken Land Parkway, Suite 405 Columbia, Maryland 21044				
<u>American Public Health Association</u>					
2008070	American Public Health Association	NONE	PC	Ten-year grant (\$6,000 each year) for awards to six students annually for research excellence in gerontological health.	\$6,000
	800 I Street, N.W. Washington, DC 20001-3710				
<u>American Society on Aging</u>					
2014047	American Society on Aging	NONE	PC	One-year grant to support a collaborative project involving eight national aging organizations to conduct research that will help reframe the perception of aging in America.	\$25,000
	575 Market Street, Suite 2100 San Francisco, California 94105-2938				
<u>Asian Health Coalition</u>					
2013190	Asian Health Coalition	NONE	PC	One-year grant to continue and expand a colorectal cancer screening program for elderly Asian Americans.	\$30,000
	180 W. Washington St., Suite 1000 Chicago, Illinois 60602				
<u>Bethlehem Evangelical Lutheran Church</u>					
2014166	Bethlehem Evangelical Lutheran Church	NONE	PC	Eighteen-month grant to construct a concrete entrance ramp and remodel the entrance to provide accessibility.	\$30,000
	1145 N. 5th Avenue, P.O. Box 3850 St. Charles, Illinois 60174-9085				

RETIREMENT RESEARCH FOUNDATION

CHICAGO, IL

36-2429540

FORM 990PF

For the year ended December 31, 2014

Part XV, Page 11

Details to Line 3a

Pages 1 - 30

ATTACHMENT A

Request ID	Recipient Name and Address	Relationship	Foundation Status of Recipient	Purpose of Grant	Amount
Brown University					
2011266	Brown University Office of Sponsored Projects Box 1929, 164 Angell Street Providence, Rhode Island 02912-9002	NONE	PC	Three-year grant to evaluate toward objectives of RRF Initiative to supporting national expansion of the 'Physicians Orders for Life-Sustaining Treatment' paradigm.	\$20,000
2013016	Brown University Office of Sponsored Projects Box 1929, 164 Angell Street Providence, Rhode Island 02912-9002	NONE	PC	One-year grant to examine the financial antecedents and outcomes of nursing home culture change adoption.	\$41,986
Brown University School of Public Health, Center for Gerontology & Healthcare Research					
2014011	Brown University School of Public Health, Center for Gerontology & Healthcare Research Box G-S121 121 South Main Street Providence, Rhode Island 02912	NONE	PC	One-year grant to conduct research characterizing changes in the quality of end-of-life care for Medicare beneficiaries between 2000 and 2012.	\$53,590
Catholic Charities of the Archdiocese of Chicago					
2013218	Catholic Charities of the Archdiocese of Chicago Saint Vincent Center 721 North LaSalle Street Chicago, Illinois 60654-3503	NONE	PC	One-year grant in continuation funding for a nutrition project that trains home care aides and the seniors whom they serve about proper nutrition and healthy meal preparation.	\$39,998
2014059	Catholic Charities of the Archdiocese of Chicago Saint Vincent Center 721 North LaSalle Street Chicago, Illinois 60654-3503	NONE	PC	Two-year Flexible Support Pilot Project grant to re-instate the Red Tape Cutters Program at its south suburban site, which was eliminated due to funding cuts.	\$37,500

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CJE SeniorLife					
2014058	CJE SeniorLife	NONE	PC	Two-year grant to re-instate staffing levels in the community-based services department, which was hit hard by funding cuts due to the economic downturn.	\$52,500
	3003 West Touhy Avenue Chicago, Illinois 60645				
2014058	CJE SeniorLife	NONE	PC	Two-year grant to re-instate staffing levels in the community-based services department, which was hit hard by funding cuts due to the economic downturn.	\$52,500
	3003 West Touhy Avenue Chicago, Illinois 60645				
2014119	CJE SeniorLife	NONE	PC	One-year grant to redesign the organization's systems to become an effective and financially viable managed care vendor.	\$25,000
	3003 West Touhy Avenue Chicago, Illinois 60645				
Council on Foundations					
2014043	Council on Foundations	NONE	PC	One-year grant for 2014 support; allocations: \$500 for administrative expenses and \$12,800 for 2014 program support.	\$12,800
	2121 Crystal Drive, Suite 700 Arlington, Virginia 22202				
Donors Forum					
2014044	Donors Forum	NONE	PC	One-year grant for 2014 support; allocations: \$770 for administrative expenses and \$9,400 for program support.	\$9,400
	208 South LaSalle Street, Suite 1540 Chicago, Illinois 60604				
2014269	Donors Forum	NONE	PC	One-month grant to pool funding from local grantmakers to support promotional efforts of the IL Gives Big Campaign, using public radio announcements and digital posts on WBEZ.	\$750
	208 South LaSalle Street, Suite 1540 Chicago, Illinois 60604				

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<u>Epworth United Methodist Church</u>					
2014174	Epworth United Methodist Church	NONE	PC	Eighteen-month grant to construct a sloped sidewalk to provide accessibility to the church entrance; construct a new parking lot with the required accessible parking spaces; and install automatic door openers.	\$30,000
	5253 North Kenmore Avenue Chicago, Illinois 60640				
<u>Families USA Foundation</u>					
2013071	Families USA Foundation	NONE	PC	One-year grant for an advocacy effort to protect vulnerable, low-income elderly from the potential harmful effects of possible cuts to the Medicare program.	\$46,670
	1201 New York Avenue, NW, Suite 1100 Washington, DC 20005				
<u>Family Service Agency of DeKalb County</u>					
2013189	Family Service Agency of DeKalb County	NONE	PC	Second-year support to help older adults become active, energized, and empowered to sustain healthy lives.	\$20,000
	14 Health Services Drive DeKalb, Illinois 60115				
<u>Family Service: Prevention, Education & Counseling NFP</u>					
2014094	Family Service: Prevention, Education & Counseling NFP	NONE	PC	Six-month grant to receive targeted consultation services for preliminary planning around a fundraising campaign.	\$5,000
	777 Central Avenue, Suite 17 Highland Park, IL 60035				
<u>Ford Heights Community Service Organization Inc.</u>					
2014098	Ford Heights Community Service Organization Inc.	NONE	PC	Second-year grant to support its Senior Wellness & Education Lifestyles (SWEL) and weekend hot meal programs, serving older adults in Ford Heights, Illinois.	\$44,849
	943 East Lincoln Highway Ford Heights, Illinois 60411				

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George Mason University Foundation					
2014064	George Mason University Foundation	NONE	PC	Three-month grant to support a conference on managing Dementia, Depression and Delirium for health care professionals, students and faculty.	\$10,000
	4400 University Drive, Suite D201 MS 1A3 Fairfax, Virginia 22030				
Gerontological Society of America					
2014048	Gerontological Society of America	NONE	PC	Three-year grant to fund special projects.	\$30,000
	1220 L Street NW, Suite 901 Washington, DC 20005				
Governors State University					
2014054	Governors State University	NONE	PC	One-year grant to provide opportunities for seniors to actively participate in music programs.	\$20,000
	One University Parkway University Park, Illinois 60484-0975				
Grantmakers in Aging					
2014001	Grantmakers in Aging	NONE	PC	One-year grant to support GIA programming in 2014, specifically conference and webinar activities.	\$15,000
	2001 Jefferson Davis Highway, Suite 504 Arlington, Virginia 22202				
Grantmakers in Health					
2014264	Grantmakers in Health	NONE	PC	One-year grant for 2014 program support.	\$2,875
	1100 Connecticut Ave., NW, Suite 1200 Washington, DC 20036-4110				

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<u>Greater Chicago Food Depository</u>					
2013104	Greater Chicago Food Depository 4100 West Ann Lurie Place Chicago, Illinois 60632	NONE	PC	One-year grant to continue ensuring older adults have access to healthy food options.	\$75,000
<u>Hanul Family Alliance</u>					
2014056	Hanul Family Alliance 5008 North Kedzie Avenue Chicago, Illinois 60625	NONE	PC	Two-year Flexible Pilot Project grant to bolster its staffing structure to make the organization more responsive to client needs and retain high-quality workers.	\$30,075
2014056	Hanul Family Alliance 5008 North Kedzie Avenue Chicago, Illinois 60625	NONE	PC	Two-year Flexible Pilot Project grant to bolster its staffing structure to make the organization more responsive to client needs and retain high-quality workers.	\$30,075
<u>Hebrew SeniorLife Inc.</u>					
2013187	Hebrew SeniorLife Inc. 1200 Centre Street Boston, Massachusetts 02131-1097	NONE	PC	Two-year grant for a business plan to sustain and disseminate the HELP model of delirium prevention.	\$72,072
<u>Hektoen Institute for Medical Research</u>					
2013034	Hektoen Institute for Medical Research 2240 W. Ogden, 2nd Floor Chicago, Illinois 60612	NONE	PC	Two-year grant for Phase 2 of a multi-center cohort study on victims of elder mistreatment seen in five Chicago-area medical centers.	\$40,000

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<u>Housing Opportunities and Maintenance for the Elderly</u>					
2013200	Housing Opportunities and Maintenance for the Elderly	NONE	PC	One-year grant to re- establish a Moving Services Program for seniors.	\$40,000
	1419 West Carroll Avenue, FL 2 Chicago, Illinois 60607-1149				
2013200	Housing Opportunities and Maintenance for the Elderly	NONE	PC	One-year grant to re- establish a Moving Services Program for seniors	\$20,000
	1419 West Carroll Avenue, FL 2 Chicago, Illinois 60607-1149				
<u>Illinois Partners for Human Service</u>					
2013184	Illinois Partners for Human Service	NONE	PC	One-year grant to advocate for aging services providers in Illinois.	\$25,000
	310 S. Peoria, Suite 404 Chicago, Illinois 60607				
<u>Illinois Pioneer Coalition</u>					
2014116	Illinois Pioneer Coalition	NONE	PC	Eighteen-month grant for a statewide campaign to educate consumers about long-term care culture change.	\$16,667
	639 York Street Quincy, Illinois 62301				
<u>Indiana University</u>					
2013227	Indiana University	NONE	PC	Two-year grant to test whether a new strength training program helps older adults maintain their independence.	\$50,000
	Office of Research Administration 980 Indiana Avenue, Lockefield 2232 Indianapolis, Indiana 46202-2915				
2013227	Indiana University	NONE	PC	Two-year grant to test whether a new strength training program helps older adults maintain their independence.	\$48,541
	Office of Research Administration Same as above				

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2012287	Justice In Aging 1444 Eye Street, NW, Suite 1100 Washington, DC 20005	NONE	PC	Two-year grant for advocacy in three states that are implementing managed care for long- term services and supports.	\$45,000
<u>Latino Alzheimer's and Memory Disorders Alliance</u>					
2014268	Latino Alzheimer's and Memory Disorders Alliance 1600 West Lake Street Melrose Park, Illinois 60106	NONE	PC	Requests \$4,400 over six months to engage in an organizational assessment to prioritize capacity building needs and opportunities.	\$4,400
<u>Lincoln Park Village, Inc.</u>					
2013042	Lincoln Park Village, Inc. 2502 N. Clark Street, #225 Chicago, Illinois 60614	NONE	PC	Fifteen-month grant to build capacity for improved resource development.	\$16,550
<u>Little Brothers Friends of the Elderly</u>					
2014265	Little Brothers Friends of the Elderly 355 North Ashland Avenue Chicago, Illinois 60607	NONE	PC	One-year grant to create an accessible outdoor space and raised garden beds in a rural retreat house for isolated and lonely elders.	\$50,000
<u>Little Sisters of the Poor, St. Mary's Home</u>					
2014115	Little Sisters of the Poor, St. Mary's Home 2325 North Lakewood Avenue Chicago, Illinois 60614	NONE	PC	Two-month grant to replace a nurse call system.	\$90,000
<u>Lyric Opera of Chicago</u>					
2014039	Lyric Opera of Chicago 20 North Wacker Drive, Suite 860 Chicago, Illinois 60606	NONE	PC	One-year grant to bring 2,000 older adults, mostly low-income and ethnically diverse, to the Lyric Opera for the Senior Matinee performance of Il Trovatore by Giuseppe Verdi..	\$7,500

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Maplewood Housing for the Visually Impaired dba Friedman Place					
2013180	Maplewood Housing for the Visually Impaired dba Friedman Place	NONE	PC	One-year grant to develop a strategic plan to guide the organization's growth.	\$13,000
	5527 North Maplewood Avenue Chicago, Illinois 60625				
Marquette University					
2013238	Marquette University P. O. Box 1881 Milwaukee, Wisconsin 53201-1881	NONE	PC	One-year grant for research on ways to prepare family caregivers to recognize and take appropriate action for delirium symptoms in older adult family members.	\$50,000
2013238	Marquette University P. O. Box 1881 Milwaukee, Wisconsin 53201-1881	NONE	PC	One-year grant for research on ways to prepare family caregivers to recognize and take appropriate action for delirium symptoms in older adult family members.	\$54,480
Meals on Wheels of Tampa Inc					
2014129	Meals on Wheels of Tampa Inc 550 West Hillsborough Avenue Tampa, Florida 33603-1302	NONE	PC	One-year grant to purchase two vans to deliver meals to homebound seniors.	\$37,065
Mercy Housing Lakefront					
2014135	Mercy Housing Lakefront 120 South LaSalle, Suite 1850 Chicago, Illinois 60603	NONE	PC	One-year grant to implement a health and wellness program for low-income residents with mental illness living at Lakefront Residences in Grayslake.	\$15,000

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National Academy of Medicine					
2013222	National Academy of Medicine	NONE	PC	Fifteen-month grant in partial support to convene a committee of experts to produce a public health report on cognitive health and aging, designed to translate research into practice.	\$37,500
	Keck Center 500 5th Street, NW Washington, DC 20001-2721				
2013222	National Academy of Medicine	NONE	PC	Fifteen-month grant in partial support to convene a committee of experts to produce a public health report on cognitive health and aging, designed to translate research into practice.	\$37,500
	Keck Center 500 5th Street, NW Washington, DC 20001-2721				
2013247	National Academy of Medicine	NONE	PC	Twenty-two month grant to complete an in-depth, expert review of knowledge and practice related to family caregiving in the U.S., to develop recommendations for improved policies and practices to assist caregivers, and disseminate results broadly to policymakers, advocates, and the media.	\$25,000
	Keck Center 500 5th Street, NW Washington, DC 20001-2721				

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2013036	National Academy of Social Insurance	NONE	PC	One-year grant to educate lower-income older Americans on how delaying Social Security claims until after the age of 62 can increase one's retirement benefits significantly.	\$25,000
	1200 New Hampshire Avenue, NW, Suite 830 Washington, DC 20036				
2014117	National Academy of Social Insurance	NONE	PC	Second-year grant to help lower-income Americans understand how delaying Social Security claims until after the age of 62 may increase their retirement benefits significantly.	\$37,500
	1200 New Hampshire Avenue, NW, Suite 830 Washington, DC 20036				
	National Committee for Responsive Philanthropy (NCRP)				
2014177	National Committee for Responsive Philanthropy (NCRP)	NONE	PC	One-year grant for membership support.	\$15,000
	1331 H Street, N.W., Suite 200 Washington, DC 20005				
	National Council on Aging, Inc.				
2011132	National Council on Aging, Inc.	NONE	PC	Three-year special initiative to enhance the development of a new comprehensive model of assisting older adults to become more economically secure by creating, testing, and evaluating new technology tools for service providers and consumers.	\$133,543
	251 18th Street South, Suite 500 Arlington, Virginia 22202				
2011132	National Council on Aging, Inc.	NONE	PC	Three-year special initiative to enhance the development of a new comprehensive model of assisting older adults to become more economically secure by creating, testing, and evaluating new technology tools for service providers and consumers.	\$72,131
	251 18th Street South, Suite 500 Arlington, Virginia 22202				

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National People's Action					
2013207	National People's Action	NONE	PC	One-year grant in continuation funding to advocate to end predatory lending practices that target senior citizens.	\$45,000
	810 North Milwaukee Avenue Chicago, Illinois 60642				
NE Focal Point CASA, Inc.					
2014186	NE Focal Point CASA, Inc.	NONE	PC	One-year grant to expand a yoga program for seniors.	\$9,238
	227 NW 2nd Street Deerfield Beach, Florida 33441				
North Shore Senior Center					
2013194	North Shore Senior Center	NONE	PC	One-year grant to expand its Care Management Program to fill gaps in services and generate revenue toward financial self-sufficiency.	\$35,000
	161 Northfield Road Northfield, Illinois 60093				
North Tulsa Economic Development Initiative					
2014122	North Tulsa Economic Development Initiative	NONE	PC	One-year grant to provide respite and supportive services to low-income elders.	\$7,500
	P.O. Box 6201 Tulsa, Oklahoma 74148-0447				
Northwest Side Housing Center					
2014286	Northwest Side Housing Center	NONE	PC	One-month grant as a matching gift through the IL Gives Big Campaign.	\$5,000
	5233 W. Diversey Chicago, Illinois 60639				

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Open Communities					
2014157	Open Communities	NONE	PC	Six-month grant to receive targeted consultation services to develop a preliminary succession plan.	\$5,000
	614 Lincoln Avenue				
	Winnetka, Illinois 60093-2308				
Pension Rights Center					
2013008	Pension Rights Center	NONE	PC	One-year grant to continue providing training and technical assistance to regional pension counseling and information programs across the country.	\$25,000
	1350 Connecticut Avenue, NW, Suite 206				
	Washington, DC 20036-1739				
2014004	Pension Rights Center	NONE	PC	One-year grant to continue training and technical assistance to the nation's regional pension counseling and information centers.	\$50,000
	1350 Connecticut Avenue, NW, Suite 206				
	Washington, DC 20036-1739				
2013245	Pillars Community Services	NONE	PC	Third-year support for the program providing mental health treatment to older adults, including PEARLS therapy and case management.	\$50,000
	333 North LaGrange Road, Suite One				
	LaGrange Park, Illinois				
	60526				

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Pioneer Network in Culture Change					
2013113	Pioneer Network In Culture Change	NONE	PC	One-year grant to develop and disseminate nationwide tools for implementing essential practices that enable person-centered care to 4,000 quality-focused nursing homes.	\$79,008
	P.O. Box 18609 Rochester, New York 14618				
2013242	Pioneer Network In Culture Change	NONE	PC	Two-year grant to produce a report documenting the advocacy strategies leading to the 1987 Nursing Home Reform Act and its implementation.	\$26,250
	P.O. Box 18609 Rochester, New York 14618				
Prairie State Legal Services, Inc.					
2014112	Prairie State Legal Services, Inc.	NONE	PC	One-year grant to create a new attorney position to strengthen its services to older adults.	\$24,000
	303 North Main Street, Suite 600 Rockford, Illinois 61101				
Saint Anthony Hospital Foundation					
2014020	Saint Anthony Hospital Foundation	NONE	PC	Third-year grant to provide support for outreach to Spanish-speaking elders to participate in the Senior Wellness Program, which assists elders with information, services, benefits, and programs for their physical and emotional needs.	\$15,000
	2875 West 19th Street Chicago, Illinois 60623				
Saint Catherine Laboure Catholic Church					
2014171	Saint Catherine Laboure Catholic Church	NONE	PC	Eighteen-month grant to construct new entrance doors and install automatic door openers.	\$16,600
	3535 Thornwood Avenue Glenview, Illinois 60026				

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Saint John's Community Care					
2014033	Saint John's Community Care	NONE	PC	Second-year grant to provide support for its new adult day service site in Edwardsville.	\$30,000
	222 Goethe Avenue				
	Collinsville, Illinois 62234-				
	3306				
Saint John's Lutheran Church					
2014156	Saint John's Lutheran Church	NONE	PC	Eighteen-month grant to install an enclosed vertical platform lift to create an accessible entrance and provide accessibility to all building levels.	\$30,000
	9812 Saint Albans Street				
	Hebron, Illinois 60034				
2013138	Saint Martin's Episcopal Church	NONE	PC	Eighteen-month grant to a install vertical platform lift from the main level of the church and the administrative building for access to the lower level restrooms and meeting space.	\$15,000
	5710 West Midway Park				
	Chicago, Illinois 60644				

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Saint Matthew Lutheran Church and School					
2014144	Saint Matthew Lutheran Church and School	NONE	PC	Eighteen-month grant to install an elevator to provide accessibility to all building levels.	\$30,000
	24500 North Old McHenry Road				
	Hawthorn Woods, Illinois				
	60047				
Saint Paul's Lutheran Church of Evanston					
2014151	Saint Paul's Lutheran Church of Evanston	NONE	PC	Eighteen-month grant to install an interior vertical platform lift to provide accessibility to all building levels	\$30,000
	1004 Greenwood Street				
	Evanston, Illinois 60201				
Saint Pius X Parish					
2014146	Saint Pius X Parish	NONE	PC	Eighteen-month grant to construct two new accessible restrooms.	\$30,000
	1025 E. Madison Street				
	Lombard, Illinois 60148				
Saint Therese Chinese Catholic Church					
2014161	Saint Therese Chinese Catholic Church	NONE	PC	Eighteen-month grant to install an enclosed vertical platform lift to create an accessible entrance and provide accessibility to all building levels.	\$30,000
	218 W. Alexander Street				
	Chicago, Illinois 60616				
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2014078	<u>Sargent Shriver National Center on Poverty Law</u>	NONE	PC	Second-year grant to support the provision of education about retirement insecurity facing private sector workers and the benefits of creating an Illinois Automatic IRA Program to improve economic security.	\$25,000
	Sargent Shriver National Center on Poverty Law				
	50 E. Washington Street, Suite 500 Chicago, Illinois 60602				
2014130	<u>Second Sense</u>	NONE	PC	One-year grant to provide training and educational resources to leaders of low vision support groups.	\$34,495
	65 E. Wacker Place, Suite 1010 Chicago, Illinois 60601				
2014102	<u>Services and Advocacy for Gay, Lesbian, Bisexual and Transgender Elders (SAGE)</u>	NONE	PC	One-year grant to continue enhancements to the National Resource Center's training program for aging services providers.	\$20,000
	305 Seventh Avenue, 15th Floor New York, New York 10001				
2014196	<u>Services for Adults Staying in Their Homes (SASI)</u>	NONE	PC	Six-month grant to receive targeted consultation services to develop a roadmap for future growth.	\$5,000
	1123 Emerson Street, Suite 200 Evanston, Illinois 60201				
2014284	<u>Services for Adults Staying in Their Homes (SASI)</u>	NONE	PC	One-month grant as a matching gift through the IL Gives Big Campaign.	\$5,000
	1123 Emerson Street, Suite 200 Evanston, Illinois 60201				

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<u>Sinsinawa Dominicans</u>					
2014180	Sinsinawa Dominicans	NONE	PC	Six-month grant to purchase and install six Automatic External Defibrillators (AEDs) in the Sinsinawa Dominican's motherhouse building.	\$10,000
	585 County Road Z				
	Sinsinawa, Wisconsin				
	53824-9700				
<u>Sisters of the Holy Family of Nazareth</u>					
2014046	Sisters of the Holy Family of Nazareth	NONE	PC	Grant for the Trustee Endowment.	\$75,000
	Nazareth				
	310 North River Road				
	Des Plaines, Illinois 60016				
<u>Social Security Works Education Fund</u>					
2013225	Social Security Works Education Fund	NONE	PC	One-year grant to provide media training to older adults already involved in advocacy efforts involving retirement income security, so they will be much more effective in sharing their stories with decision makers and the media.	\$40,000
	815 16th Street NW - 4th floor				
	Washington, District of Columbia 20006				
2013225	Social Security Works Education Fund	NONE	PC	One-year grant to provide media training to older adults already involved in advocacy efforts involving retirement income security, so they will be much more effective in sharing their stories with decision makers and the media.	\$40,000
	815 16th Street NW - 4th floor				
	Washington, District of Columbia 20006				
<u>Terra Nova Films, Inc.</u>					
2014103	Terra Nova Films, Inc.	NONE	PC	Sixteen-month grant for national dissemination of a community forum offering education in Spanish and English for Hispanic families caring for loved ones with Alzheimer's in the home.	\$17,000
	9848 South Winchester Avenue				
	Chicago, Illinois 60643				

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<u>Texas Woman's University</u>					
2014090	Texas Woman's University	NONE	PC	One-year grant to examine and implement a cultural heritage program in nursing homes.	\$25,000
	P.O. Box 425619				
	Denton, Texas 76204				
<u>The Equal Rights Center</u>					
2014137	The Equal Rights Center	NONE	PC	One-year grant to promote equal housing opportunity for lesbian, gay, bisexual, and transgender older adults through outreach, training, and advocacy.	\$35,819
	11 Dupont Circle NW, Suite 450				
	Washington, District of				
	Columbia 20036				
<u>The Foundation Center</u>					
2014049	The Foundation Center	NONE	PC	One-year grant for 2014 membership.	\$12,000
	79 Fifth Avenue, 4th floor				
	New York, New York 10003				
<u>The Hospice of the Florida Suncoast</u>					
2014063	The Hospice of the Florida Suncoast	NONE	PC	One-year grant to collaborate with a medical practice that desires to increase its physicians' appropriate referrals of older patients to hospice care.	\$41,700
	5771 Roosevelt Boulevard				
	Clearwater, Florida 33760				
<u>The Little Home Church by the Wayside</u>					
2014168	The Little Home Church by the Wayside	NONE	PC	Eighteen-month grant to replace entrance doors and install automatic door openers.	\$9,726
	32W128 Army Trail Road				
	Wayne, Illinois 60184				

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The University of Texas at El Paso					
2014070	The University of Texas at El Paso	NONE	PC	Eighteen-month grant to test Whole Body Vibration for its potential to reduce both fall risk and fall rate in older Hispanic adults.	\$39,074
	500 West University Avenue El Paso, Texas 79968				
University at Buffalo Foundation Inc.					
2013241	University at Buffalo Foundation Inc.	NONE	PC	Seven-month grant for advocacy work to ensure that a developing National Plan on Alzheimer's addresses support of person-centered programs for patients and caregivers, in addition to the longstanding goals to find a cure and develop new drug treatments.	\$50,000
	P.O. Box 900 Buffalo, New York 14226				
University of Arizona. Sponsored Projects Services					
2013234	University of Arizona, Sponsored Projects Services Office of Research and Contract Analysis	NONE	PC	One-year grant to develop and assess an innovative interactive online support group for older adults recently widowed.	\$44,980
	P.O. Box 210158 Room 510 Tucson, Arizona 85721-0158				
University of California, Berkeley					
2014082	University of California, Berkeley	NONE	PC	Eighteen-month grant to test the feasibility of developing a national data infrastructure of the Village model, to provide the means to study the model with valid and reliable data from Villages nationwide.	\$30,149
	Sponsored Projects Office 2150 Shattuck Avenue, Suite 300 Berkeley, California 94704-5940				

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Request ID	Recipient Name and Address	Relationship	Foundation Status of Recipient	Purpose of Grant	Amount
2013239	University of California, San Francisco Office of Sponsored Research Contracts and Grants 3333 California Street Suite 315 San Francisco, California 94118	NONE	PC	One-year grant to help develop a national quality-improvement registry to improve the cost-effectiveness of primary care practice for home-bound patients.	\$60,000
2013239	University of California, San Francisco Office of Sponsored Research Contracts and Grants 3333 California Street Suite 315 San Francisco, California 94118	NONE	PC	One-year grant to help develop a national quality-improvement registry to improve the cost-effectiveness of primary care practice for home-bound patients.	\$38,803
2013058	University of Florida Foundation PO Box 14425 1938 West University Avenue Gainesville, Florida 32604	NONE	PC	Two-year grant to strengthen and expand Shands Teaching Hospital's current NICHE (Nurse Improving Care for Healthsystem Elders) program, which trains nurses and others how to improve care of geriatric patients	\$45,789
2013193	University of Illinois at Chicago Office of the Chancellor 2833 UH MC 102 601 South Morgan Chicago, Illinois 60607-7128	NONE	PC	One-year grant to continue disseminating "Fit and Strong!," an evidence-based program to promote activity in persons with osteoarthritis.	\$61,929

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University of Iowa 2014016	University of Iowa Division of Sponsored Programs 2 Gilmore Hall 112 North Capital Street Iowa City, Iowa 52242	NONE	PC	One-year grant to understand the functioning of public health network systems with regard to rural elderly, in relation to disaster responses.	\$48,090
University of Massachusetts 2013073	University of Massachusetts Boston Office of Research and Sponsored Programs 100 Morrissey Blvd. Boston, Massachusetts 02125	NONE	PC	Second-year support to continue to provide pension counseling to retirees in Illinois.	\$67,540
2014076	University of Massachusetts Boston Office of Research and Sponsored Programs 100 Morrissey Blvd. Boston, Massachusetts 02125	NONE	PC	Third-year grant in support of assisting Illinois retirees who have been unable to locate a lost pension, denied earned pension benefits, or other pension problems.	\$60,000
University of Wisconsin-Milwaukee 2013185	University of Wisconsin-Milwaukee P. O. Box 340 Milwaukee, Wisconsin 53201	NONE	PC	One-year grant for a pilot study of the T3 Protocol, which addresses stopping, altering, or replacing ineffective or unneeded treatments for nursing home residents with dementia.	\$54,558

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2014131	Vets Helping Heroes, Inc.				
	Vets Helping Heroes, Inc.	NONE	PC	One-year grant to support the training of 15-17 assistance dogs for older veterans who served in the U.S. Armed Forces.	\$30,000
	8000 North Federal Highway, Suite 207 Boca Raton, Florida 33487-1681				
2013237	Washington University in St. Louis				
	Washington University in St. Louis	NONE	PC	Two-year grant to develop and test messages for recruiting Boomers as volunteers for senior nutrition programs in rural and low-income, inner city neighborhoods.	\$45,000
	Campus Box 1054 One Brookings Drive St. Louis, Missouri 63130-4862				
2013237	Washington University in St. Louis	NONE	PC	Two-year grant to develop and test messages for recruiting Boomers as volunteers for senior nutrition programs in rural and low-income, inner city neighborhoods.	\$40,626
	Campus Box 1054 One Brookings Drive St. Louis, Missouri 63130-4862				
	Wayne State University				
2014024	Wayne State University	NONE	PC	One-year grant to protect elders from financial abuse by testing new tools for professionals working with older adults.	\$35,000
	Office of Research and Sponsored Programs 5057 Woodward Avenue, 13th Floor Detroit, Michigan 48202				
	Wisconsin Institute for Healthy Aging				
2014032	Wisconsin Institute for Healthy Aging	NONE	PC	One-year grant to design and implement a referral system for community clinics to promote evidenced-based health promotion programs.	\$34,822
	1414 MacArthur Road, Suite B Madison, Wisconsin 53714				

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<u>Women's Institute for a Secure Retirement</u>					
2014089	Women's Institute for a Secure Retirement	NONE	PC	One-year grant to help older adults, especially women, make the best financial decisions they can with the limited resources they have.	\$20,000
	1140 19th Street N.W., Suite 550				
	Washington, D.C. 20036				
<u>Woodstock Institute</u>					
2014203	Woodstock Institute	NONE	PC	One-year grant to continue advocacy for an Illinois policy solution to improve retirement security for Illinois workers.	\$12,500
	29 East Madison Street, Suite 1710				
	Chicago, Illinois 60602-4566				
<u>World Relief DuPage/Aurora</u>					
2014017	World Relief DuPage/Aurora	NONE	PC	One-year grant to provide specialized mental health services for older refugees residing in DuPage and Kane counties to help them achieve and maintain independence.	\$22,500
	1825 College Avenue Suite 230				
	Wheaton, Illinois 60187				
2014017	World Relief DuPage/Aurora	NONE	PC	One-year grant to provide specialized mental health services for older refugees residing in DuPage and Kane counties to help them achieve and maintain independence.	\$22,500
	1825 College Avenue Suite 230				
	Wheaton, Illinois 60187				
Total Grants Paid					\$4,829,316
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Date	Name	Address	City	State	Zip Code	Amount
1/13/14	The University of Chicago	5801 S Ellis Avenue	Chicago	IL	60637	\$ 600 00
1/13/14	Athenaeum Theatre Productions	2936 N Southport	Chicago	IL	60657	450 00
1/13/14	Rehabilitation Institute of Chicago	345 E Superior Street	Chicago	IL	60611	300.00
1/13/14	Wayland Academy	101 N. University Avenue	Beaver Dam	WI	53916	750.00
1/13/14	St Luke's Episcopal Church	939 Hinman Avenue	Evanston	IL	60202	3,750 00
1/21/14	University of Illinois Foundation	1305 West Green Street	Urbana	IL	61801-2962	600 00
2/4/14	Archdiocese of Miami Inc	9401 Biscayne Blvd	Miami Shores	FL	33138	300 00
2/12/14	American Occupational Therapy Found	4720 Montgomery Lane	Bethesda	MD	20814-1220	900 00
2/12/14	St Luke's Episcopal Church	939 Hinman Avenue	Evanston	IL	60202	3,750 00
2/17/14	Services for Adults Staying in Their Homes	(SASI)	Evanston	IL	60201	3,000 00
2/17/14	Central Catholic High School	1201 Airport Road	Bloomington	IL	31701	1,500 00
2/24/14	Umoja Student Development Corporation	954 W Washington, #225	Chicago	IL	60607	450 00
3/5/14	Archdiocese of Chicago-	Annual Catholic Appeal	Chicago	IL	60611	3,000 00
3/5/14	Karmanos Cancer Institute	4100 John R	Detroit	MI	48201	150 00
3/6/14	Cities at Peace	104 W 27th Street, 12th Floor	New York	NY	10001	3,000.00
3/20/14	St Luke's Episcopal Church	939 Hinman Avenue	Evanston	IL	60202	3,750 00
3/20/14	Wildflowers Institute	1144 Pacific Avenue	San Francisco	CA	94133-4212	3,000 00
3/24/14	Rehabilitation Institute of Chicago	345 E. Superior Street	Chicago	IL	60611	600 00
4/1/14	DonorsChoose.Org	134 W 37th Street, 11th Floor	New York	NY	10018	150 00
4/1/14	Chicago Public Media, Inc	848 E. Grand Avenue	Chicago	IL	60611	360.00
4/14/14	Housing Opportunities & Maintenance	for the Elderly	Chicago	IL	60607-1149	750.00
4/14/14	Sickle Cell Fdn-Palm Beach Cty, Inc	Palm Beach County, Inc	West Palm Beach	FL	33407-5621	150 00
4/14/14	St Luke's Episcopal Church	939 Hinman Avenue	Evanston	IL	60202	3,750 00
4/14/14	Treasure Coast Hospice	1201 S E Indian St	Stuart	FL	34997	750.00
4/25/14	Jubilee Faith Community Church	17450 S Pulaski	Country Club Hills	IL	60478	18,714 03
4/25/14	Council on Aging of Martin County Inc	900 E Salerno Road	Stuart	FL	34997	750 00

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4/25/14	Holy Spirit Catholic Church	1000 Lantana Road	Lantana	FL	33462	9,000.00
4/30/14	Free Spirit Media	1327 W Washington #103-B	Chicago	IL	60607	150.00
5/9/14	Quinn Chapel A.M.E. Church	2401 S. Wabash Ave.	Chicago	IL	60616	150.00
5/9/14	St. Luke's Episcopal Church	939 Hinman Avenue	Evanston	IL	60202	3,750.00
5/9/14	Benedictine Sisters of Chicago	St. Scholastica Monastery	Chicago	IL	60645-1913	1,500.00
5/19/14	Catholic Charities of Chicago	721 N LaSalle Street	Chicago	IL	60654-3503	3,000.00
5/19/14	School Sisters of Notre Dame	13105 Watertown Plank Road	Elm Grove	WI	53122	1,500.00
5/19/14	Pioneer Network in Culture Change	P O Box 18609	Rockester	NY	14618	300.00
5/23/14	Access Living of Metropolitan Chicago	115 W Chicago Avenue	Chicago	IL	60654	1,500.00
5/23/14	DonorsChoose.Org	134 W. 37th Street, 11th Floor	New York	NY	10018	330.00
5/23/14	Housing Opportunities & Maintenance	for the Elderly	Chicago	IL	60607-1149	900.00
5/29/14	Central Catholic High School	1201 Airport Road	Bloomington	IL	31701	4,500.00
5/29/14	The Donnelley Foundation	c/o Thomas Donnelley	Chicago	IL	60601	3,000.00
6/6/14	St. Gabriel Catholic Church	731 N. Ocean Blvd.	Pompano Beach	FL	33062	600.00
6/6/14	St. Luke's Episcopal Church	939 Hinman Avenue	Evanston	IL	60202	3,600.00
6/6/14	Young Life	P.O. Box 520	Colorado Springs	CO	80901	150.00
6/12/14	George Mason University Foundation	4400 University MSN 1A3	Fairfax	VA	22030	3,750.00
6/12/14	Ridgewood High School	7500 W. Montrose	Norridge	IL	60706	300.00
7/1/14	Misericordia Home	6300 North Ridge	Chicago	IL	60660	1,500.00
7/1/14	Avon Products Foundation	1 Avon Plaza	Rye	NY	10580	375.00
7/1/14	Rev John P Smyth Standing Tall Fdn	Charitable Foundation	Des Plaines	IL	60016	300.00
7/1/14	Univ of Massachusetts/School of Nursing	55 Lake Avenue North	Worcester	MA	01655	175.00
7/1/14	St. Luke's Episcopal Church	939 Hinman Avenue	Evanston	IL	60202	450.00
7/1/14	Lincoln Park Village, Inc.	2502 N Clark Street	Chicago	IL	60614	3,000.00
7/1/14	Lincoln Park Village, Inc	2502 N Clark Street	Chicago	IL	60614	375.00
7/1/14	Deborah's Place	2822 W Jackson Blvd	Chicago	IL	60612	150.00
7/7/14	St Philip The Apostle Church	1962 Old Willow Road	Northfield	IL	60093	9,000.00

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Date	Name	Address	City	State	Zip Code	Amount
7/7/14	Housing Opportunities & Maintenance for the Elderly	19518 Nahsville St.	Chicago	IL	60607-1149	750 00
7/7/14	English Springer Rescue America, Inc	939 Hinman Avenue	Northridge	CA	91326	150 00
7/15/14	St Luke's Episcopal Church	1550 Clarke Drive	Evanston	IL	60202	3,450 00
7/15/14	Clarke University	111 S. Michigan Avenue	Dubuque	IA	52001	7,500 00
7/15/14	Art Institute of Chicago	One Old Ferry Road	Chicago	IL	60603	555 00
7/15/14	Roger Williams University	P O. Box 682528	Bristol	RI	03809	750 00
7/29/14	God's Awesome Army Ministries	W153 N5181 Plaza Drive	Houston	TX	77268-2528	4,500 00
8/4/14	IMAL, Inc	939 Hinman Avenue	Menomonee Falls	WI	53051	300 00
8/4/14	St Luke's Episcopal Church	20 N Michigan Ave -Suite 520	Evanston	IL	60202	3,750 00
8/19/14	Chicago Public Library Foundation	1 E. Wacker Dr, Suite 1620	Chicago	IL	60602	600 00
9/17/14	Chicago Foundation for Women	220 E. Chicago	Chicago	IL	60601	300 00
9/17/14	Museum of Contemporary Art Chicago	1011 Lake Street, #403	Chicago	IL	60611	225 00
9/17/14	L'Arche Chicago	355 N. Ashland Avenue	Oak Park	IL	60301	750 00
9/17/14	Little Brothers-Friends of the Elderly	224 S. Michigan Avenue	Chicago	IL	60607	1,950 00
9/17/14	Chicago Architecture Foundation	4100 W. Ann Lurie Place	Chicago	IL	60604	195 00
9/17/14	Greater Chicago Food Depository	8430 W Bryn Mawr, #800	Chicago	IL	60632	150 00
9/17/14	Alzheimer's Assn - Greater IL Chapter	3025 4th Street, NE	Chicago	IL	60631	150 00
9/18/14	Support Our Aging Religious, Inc (SOAR!)	111 S Michigan Avenue	Washington	DC	20017	900 00
9/24/14	Art Institute of Chicago	P O Box 17090	Chicago	IL	60603	405 00
9/24/14	Catholic Relief Services, Inc	8700 W 31st Street	Baltimore	MD	21297-0303	1,500 00
10/13/14	Cantata Best Life Foundation	P O Box 2582	Brookfield	IL	60513-1097	390 00
10/13/14	Valley Quilters Guild	P O Box 10860	Palmer	AK	99645-2582	300 00
10/13/14	Pets for Vets	300 E Auburn	Wilmington	NC	28404	150 00
10/13/14	Honor Flight	1550 Bishop Ct	Springfield	OH	45505	150 00
10/27/14	Rainbow Hospice and Palliative Care	(SASI)	Park Ridge	IL	60056	300 00
10/27/14	Services for Adults Staying in Their Homes	2502 N Clark Street	Evanston	IL	60201	300 00
10/27/14	Lincoln Park Village, Inc.		Chicago	IL	60614	6,000 00

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Date	Name	Address	City	State	Zip Code	Amount
11/4/14	AARP Foundation	Haiti Relief Fund	Long Beach	CA	90809	175.00
11/4/14	University of Illinois Foundation	1305 West Green Street	Urbana	IL	61801-2962	1,500.00
11/4/14	Grantmakers in Aging, Inc	2001 Jefferson Davis Hwy, #504	Arlington	VA	22202	300.00
11/11/14	Services for Adults Staying in Their Homes	(SASI)	Evanston	IL	60201	750.00
11/11/14	Temple Congregation Ohabai Shalom	5015 Harding Road	Nashville	TN	37205	150.00
11/17/14	American Cancer Society, Inc	250 Williams Street, 4th Floor	Atlanta	GA	30303-1032	150.00
11/17/14	University Club Foundation	76 E. Monroe Street	Chicago	IL	60603	300.00
11/21/14	Horizon Hospice & Palliative Care, Inc	833 W Chicago Ave	Chicago	IL	60622	150.00
12/11/14	Alzheimer's Association	225 N Michigan, 17th Floor	Chicago	IL	60601-7633	150.00
12/3/14	Loras College	1450 Alta Vista Street	Dubuque	IA	52001	2,700.00
12/3/14	Lincoln Park Village, Inc	2502 N Clark Street	Chicago	IL	60614	375.00
12/3/14	Housing Opportunities & Maintenance	for the Elderly	Chicago	IL	60607-1149	375.00
12/3/14	Housing Opportunities & Maintenance	for the Elderly	Chicago	IL	60607-1149	1,500.00
12/30/14	Roger Williams University	One Old Ferry Road	Bristol	RI	03809	375.00
12/30/14	Access Living of Metropolitan Chicago	115 W Chicago Avenue	Chicago	IL	60654	150.00
12/30/14	Robert R McCormick Foundation	205 N Michigan, #4300	Chicago	IL	60601	450.00
12/30/14	Little Brothers-Friends of the Elderly	355 N Ashland Avenue	Chicago	IL	60607	3,750.00
12/30/14	University of Chicago	1427 E 60th	Chicago	IL	60637	600.00
12/30/14	Bonnet House, Inc.	900 N. Birch Rd	Ft Lauderdale	FL	33304	150.00
12/30/14	Rehabilitation Institute of Chicago	345 E Superior Street	Chicago	IL	60611	150.00
12/30/14	Umoja Student Development Corporation	954 W Washington, #225	Chicago	IL	60607	450.00
12/30/14	United Fund of Iowa County	P.O. Box 63	Dodgeville	WI	53533	1,500.00
12/30/14	Hanul Family Alliance	5008 N Kedzie Ave	Chicago	IL	60625	150.00
12/30/14	University of Wisc Milwaukee Foundation	1440 E North Ave	Milwaukee	WI	53202	15,000.00
12/30/14	Elderday Center, Inc	328 W Wilson Street	Batavia	IL	60510	150.00
12/30/14	American Occupational Therapy Found	4720 Montgomery Lane	Bethesda	MD	20814-1220	750.00
12/30/14	Rehabilitation Institute of Chicago	345 E Superior Street	Chicago	IL	60611	300.00

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Date	Name	Address	City	State	Zip Code	Amount
12/30/14	St Jude Children's Research Hospital	Workplace Giving-ALSAC	Memphis	TN	38105	150.00
12/30/14	Aging Care Connections	111 W Harris Ave.	LaGrange	IL	60525	375.00
12/30/14	Lincoln Park Zoological Society	2001 N. Clark Street	Chicago	IL	60614	150.00
12/30/14	Wayland Academy	101 N University Avenue	Beaver Dam	WI	53916	750.00
12/30/14	ARC Gallery & Education Foundation	2156 N. Damen	Chicago	IL	60647	150.00
12/30/14	Wayside Cross Ministries	215 E New York Street	Aurora	IL	60505	300.00
	Total					\$ 179,324.03

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<u>Advocate Charitable Foundation</u>				
<u>Advocate Charitable Foundation</u>	PC	Two-year grant to train Advanced Practice Nurses in post-acute care to provide advance care planning consultation for patients with chronic and progressive illness.	1/15/2015	\$38,900
205 West Touhy Avenue, Suite 225 Park Ridge, Illinois 60068				
<u>AgeOptions, Inc.</u>				
<u>AgeOptions, Inc.</u>	PC	One-year grant to expand a culturally competent caregiver support program through a network of local churches.	1/15/2015	\$30,000
1048 West Lake Street, Suite 300 Oak Park, Illinois 60301-1102				
<u>AgeOptions, Inc.</u>	PC	One-year grant to build the capacity of service providers and advocates to ensure older adults have access to the most appropriate and affordable healthcare coverage.	1/15/2015	\$60,000
1048 West Lake Street, Suite 300 Oak Park, Illinois 60301-1102				
<u>AgeOptions, Inc.</u>	PC	One-year grant to build the capacity of service providers and advocates to ensure older adults have access to the most appropriate and affordable healthcare coverage.	7/15/2015	\$55,000
1048 West Lake Street, Suite 300 Oak Park, Illinois 60301-1102				
<u>AgeOptions, Inc.</u>	PC	One-month grant as a matching gift through the IL Gives Big Campaign.	1/15/2015	\$2,285
1048 West Lake Street, Suite 300 Oak Park, Illinois 60301-1102				
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Aging Care Connections				
Aging Care Connections	PC	Two-year grant to support a new staffing structure that allows for a more systematic approach to financial management and staff retention.	7/15/2015	\$51,500
111 West Harris Avenue La Grange, Illinois 60525				
Aging Care Connections	PC	Two-year grant to support a new staffing structure that allows for a more systematic approach to financial management and staff retention.	12/16/2015	\$51,500
111 West Harris Avenue La Grange, Illinois 60525				
Aging Care Connections	PC	One-month grant as a matching gift through the Illinois Gives Big Campaign.	1/15/2015	\$5,000
111 West Harris Avenue La Grange, Illinois 60525				
Alivio Medical Center, Inc.				
Alivio Medical Center, Inc.	PC	Third-year support to continue implementing a program that recruits and trains volunteers to help seniors access benefits and resources.	1/15/2015	\$50,000
966 W. 21st Street Chicago, Illinois 60608				
American Academy of Home Care Medicine				
American Academy of Home Care Medicine	PC	Two-year grant to complete a learning collaborative for improving cost effectiveness of homecare practices in the Independence at Home federal demonstration project.	1/15/2015	\$29,715
11 East Mount Royal Ave., Suite 3-C Baltimore, Maryland 21202				
American Medical Directors Association Foundation, Inc.				
American Medical Directors Association Foundation	PC	Eighteen-month grant to update and disseminate AMDA Clinical Practice Guidelines for diabetes, COPD, and heart failure, for use by personnel working in long-term care facilities.	1/15/2015	\$45,183
11000 Broken Land Parkway, Suite 405 Columbia, Maryland 21044				
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<u>American Public Health Association</u>				
American Public Health Association	PC	Ten-year grant (\$6,000 each year) for awards to	11/15/2015	\$6,000
800 I Street, N.W.		six students annually for research excellence in		
Washington, DC 20001-3710		gerontological health.		
<u>American Public Health Association</u>	PC	Ten-year grant (\$6,000 each year) for awards to	11/15/2016	\$6,000
American Public Health Association		six students annually for research excellence in		
800 I Street, N.W.		gerontological health.		
Washington, DC 20001-3710				
<u>American Public Health Association</u>	PC	Ten-year grant (\$6,000 each year) for awards to	11/15/2017	\$6,000
American Public Health Association		six students annually for research excellence in		
800 I Street, N.W.		gerontological health.		
Washington, DC 20001-3710				
<u>Benedictine Sisters of Chicago-St. Scholastica Monastery</u>				
Benedictine Sisters of Chicago-St. Scholastica Monastery	PC	One-month grant as a matching gift through the	1/15/2015	\$5,000
7430 North Ridge Boulevard		Illinois Gives Big Campaign.		
Chicago, Illinois 60645-1913				
<u>Brown University School of Public Health, Center for Gerontology & Healthcare Research</u>				
Brown University School of Public Health, Center for Gerontology & Healthcare Research	PC	One-year grant to conduct research	4/15/2015	\$53,589
Box G-S121		characterizing changes in the quality of		
121 South Main Street		end-of-life care for Medicare beneficiaries		
Providence, Rhode Island 02912		between 2000 and 2012.		
<u>Cambodian Association of Illinois</u>				
Cambodian Association of Illinois	PC	One-month grant as a matching gift through the	1/15/2015	\$370
2831 West Lawrence Avenue		Illinois Gives Big Fundraising Campaign.		
Chicago, Illinois 60625				Page 3 of 16

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<u>Catholic Charities of the Archdiocese of Chicago</u>				
Catholic Charities of the Archdiocese of Chicago	PC	Two-year Flexible Support Pilot Project grant to re-instate the Red Tape Cutters Program at its south suburban site, which was eliminated due to funding cuts.	7/15/2015	\$37,500
Saint Vincent Center 721 North LaSalle Street Chicago, Illinois 60654-3503				
<u>Catholic Charities of the Archdiocese of Chicago</u>	PC	Two-year Flexible Support Pilot Project grant to re-instate the Red Tape Cutters Program at its south suburban site, which was eliminated due to funding cuts.	12/16/2015	\$37,500
Saint Vincent Center 721 North LaSalle Street Chicago, Illinois 60654-3503				
<u>Center of Concern</u>				
<u>Center of Concern</u>	PC	One-year grant to help implement and build upon the organization's strategic fundraising plan.	1/15/2015	\$23,210
1580 N. Northwest Highway, Suite 310 Park Ridge, Illinois 60068-1469				
<u>Center of Concern</u>	PC	One-month grant as a matching gift through the Illinois Gives Big Campaign.	1/15/2015	\$5,000
1580 N. Northwest Highway, Suite 310 Park Ridge, Illinois 60068-1469				
<u>Chicago Coalition to Save Our Mental Health Centers</u>				
<u>Chicago Coalition to Save Our Mental Health Centers</u>	PC	One-year grant to increase and improve access to mental health services for seniors.	1/15/2015	\$27,500
5750 W. Irving Park Road Chicago, Illinois 60634				
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<u>Chinese American Service League, Inc.</u>				
Chinese American Service League, Inc.	PC	Third-year support of the Matter of Balance falls prevention program, serving older Chinese immigrants.	1/15/2015	\$55,000
2141 South Tan Court Chicago, Illinois 60616				
<u>Chinese American Service League, Inc.</u>				
Chinese American Service League, Inc.	PC	One-month grant as a matching gift through the Illinois Gives Big Campaign.	1/15/2015	\$5,000
2141 South Tan Court Chicago, Illinois 60616				
<u>Chinese Mutual Aid Association</u>				
Chinese Mutual Aid Association	PC	One-year grant for a strategic alignment project to build organizational capacity.	1/15/2015	\$24,000
1016 West Argyle Street Chicago, Illinois 60640				
<u>CJE SeniorLife</u>				
CJE SeniorLife	PC	Two-year grant to re-instate staffing levels in the community-based services department, which was hit hard by funding cuts due to the economic downturn.	7/15/2015	\$52,500
3003 West Touhy Avenue Chicago, Illinois 60645				
<u>CJE SeniorLife</u>				
CJE SeniorLife	PC	Two-year grant to re-instate staffing levels in the community-based services department, which was hit hard by funding cuts due to the economic downturn.	12/16/2015	\$52,500
3003 West Touhy Avenue Chicago, Illinois 60645				
<u>CJE SeniorLife</u>				
CJE SeniorLife	PC	One-year grant to redesign the organization's systems to become an effective and financially viable managed care vendor.	4/15/2015	\$25,000
3003 West Touhy Avenue Chicago, Illinois 60645				
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CJE SeniorLife	PC	One-month grant as a matching gift through the Illinois Gives Big Campaign.	1/15/2015	\$5,000
3003 West Touhy Avenue Chicago, Illinois 60645				
Coalition of Limited English Speaking Elderly				
Coalition of Limited English Speaking Elderly	PC	Second-year support to continue its assistance to 28 community care provider agencies and ethnic elders, helping them make informed choices when enrolling in Illinois' managed care programs.	1/15/2015	\$35,000
53 W Jackson Blvd., Suite 1340 Chicago, Illinois 60604				
Education, Training and Research Associates				
Education, Training and Research Associates	PC	Third-year support to sustain and bring to scale a successful sleep intervention for older adults in residential care facilities.	2/16/2015	\$35,000
100 Enterprise Way, Suite G300 Scotts Valley, California 95066				
Education, Training and Research Associates	PC	Third-year support to sustain and bring to scale a successful sleep intervention for older adults in residential care facilities.	7/15/2015	\$34,950
100 Enterprise Way, Suite G300 Scotts Valley, California 95066				
Hands On Suburban Chicago				
Hands On Suburban Chicago	PC	One-month grant as a matching gift through the Illinois Gives Big Campaign.	1/15/2015	\$5,000
2121 South Goebbert Road Arlington Heights, Illinois 60005				
Hanul Family Alliance				
Hanul Family Alliance	PC	Two-year Flexible Pilot Project grant to bolster its staffing structure to make the organization more responsive to client needs and retain high-quality workers.	7/15/2015	\$30,075
5008 North Kedzie Avenue Chicago, Illinois 60625				

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Hanul Family Alliance	PC	Two-year Flexible Pilot Project grant to bolster its staffing structure to make the organization more responsive to client needs and retain high-quality workers.	12/16/2015	\$30,075
5008 North Kedzie Avenue Chicago, Illinois 60625				
Hanul Family Alliance	PC	One-month grant as a matching gift through the Illinois Gives Big Campaign.	1/15/2015	\$5,000
5008 North Kedzie Avenue Chicago, Illinois 60625				
Hebrew SeniorLife Inc.				
Hebrew SeniorLife Inc.	PC	Two-year grant for a business plan to sustain and disseminate the HELP model of delirium prevention.	1/15/2015	\$72,957
1200 Centre Street Boston, Massachusetts 02131-1097				
Illinois Pioneer Coalition	PC	Eighteen-month grant for a statewide campaign to educate consumers about long-term care culture change.	7/15/2015	\$33,333
639 York Street Quincy, Illinois 62301				
Indiana University				
Indiana University	PC	Two-year grant to test whether a new strength training program helps older adults maintain their independence.	7/15/2015	\$89,001
Office of Research Administration 980 Indiana Avenue, Lockefield 2232 Indianapolis, Indiana 46202-2915				

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<u>Jane Addams Senior Caucus</u>				
Jane Addams Senior Caucus	PC	Third-year support to continue training women to improve the quality of life for older women through advocacy at the state level.	1/15/2015	\$30,000
1111 N. Wells Street, Suite 302 Chicago, Illinois 60610				
<u>Jewish Family & Community Services of Southwest Florida</u>				
<u>Jewish Family & Community Services of Southwest Florida</u>	PC	One-year grant to continue and expand Senior Outreach and Support volunteer program.	1/15/2015	\$31,543
5025 Castello Dr. Naples, Florida 34103				
<u>Justice In Aging</u>				
<u>Justice In Aging</u>	PC	Two-year grant for advocacy in three states that are implementing managed care for long-term services and supports.	1/15/2015	\$45,000
1444 Eye Street, NW, Suite 1100 Washington, DC 20005				
<u>Lincoln Park Village, Inc.</u>				
<u>Lincoln Park Village, Inc.</u>	PC	One-month grant as a matching gift through the Illinois Gives Big Campaign.	1/15/2015	\$5,000
2502 N. Clark Street, #225 Chicago, Illinois 60614				
<u>Little Brothers Friends of the Elderly</u>				
<u>Little Brothers Friends of the Elderly</u>	PC	One-month grant as a matching gift through the Illinois Gives Big Campaign.	1/15/2015	\$5,000
355 North Ashland Avenue Chicago, Illinois 60607				
<u>Memory Care Home Solutions</u>				
<u>Memory Care Home Solutions</u>	PC	Two-year grant to enhance its current intervention model for caregivers of a loved one with dementia, by adding four visits from an occupational therapist to provide more in-depth assistance.	1/15/2015	\$42,790
4389 West Pine Blvd. Saint Louis, Missouri 63108				
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Oral Health America	PC	One-year grant to train dental hygienists to deliver a community-based oral health education program for older adults.	7/15/2015	\$30,000
180 North Michigan Avenue, Suite 1150 Chicago, Illinois 60601				
Oregon Health & Science University Foundation				
Oregon Health & Science University Foundation	PC	Eighteen-month grant to strengthen the quality and fidelity with which providers implement the POLST paradigm to translate the end-of-life care wishes of persons with serious advanced illness into actionable medical orders.	1/15/2015	\$70,529
1121 SW Salmon Street, Suite 100 Portland, Oregon 97205-2021				
Oregon Health & Science University Foundation	PC	Eighteen-month grant to strengthen the quality and fidelity with which providers implement the POLST paradigm to translate the end-of-life care wishes of persons with serious advanced illness into actionable medical orders.	12/15/2015	\$69,391
1121 SW Salmon Street, Suite 100 Portland, Oregon 97205-2021				
Pension Rights Center				
Pension Rights Center	PC	One-year grant to continue training and technical assistance to the nation's regional pension counseling and information centers.	1/15/2015	\$25,000
1350 Connecticut Avenue, NW, Suite 206 Washington, DC 20036-1739				
Pioneer Network in Culture Change				
Pioneer Network in Culture Change	PC	Two-year grant to produce a report documenting the advocacy strategies leading to the 1987 Nursing Home Reform Act and its implementation.	7/15/2015	\$26,250
P.O. Box 18609 Rochester, New York 14618				
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<u>Prairie State Legal Services, Inc.</u>				
<u>Prairie State Legal Services, Inc.</u>	PC	One-year grant to create a new attorney position to strengthen its services to older adults.	4/15/2015	\$24,000
303 North Main Street, Suite 600 Rockford, Illinois 61101				
<u>Sargent Shriver National Center on Poverty Law</u>				
<u>Sargent Shriver National Center on Poverty Law</u>	PC	Second-year grant to support the provision of education about retirement insecurity facing private sector workers and the benefits of creating an Illinois Automatic IRA Program to improve economic security.	4/15/2015	\$25,000
50 E. Washington Street, Suite 500 Chicago, Illinois 60602				
<u>Seniors Assistance Center</u>				
<u>Seniors Assistance Center</u>	PC	One-month grant as a matching gift through the Illinois Gives Big Campaign.	1/15/2015	\$2,165
7774 W. Irving Park Road Norridge, Illinois 60706				
<u>Services and Advocacy for Gay, Lesbian, Bisexual and Transgender Elders (SAGE)</u>				
<u>Services and Advocacy for Gay, Lesbian, Bisexual and Transgender Elders (SAGE)</u>	PC	One-year grant to continue enhancements to the National Resource Center's training program for aging services providers.	4/15/2015	\$20,000
305 Seventh Avenue, 15th Floor New York, New York 10001				
<u>Terra Nova Films, Inc.</u>				
<u>Terra Nova Films, Inc.</u>	PC	Sixteen-month grant for national dissemination of a community forum offering education in Spanish and English for Hispanic families caring for loved ones with Alzheimer's in the home.	1/15/2015	\$17,000
9848 South Winchester Avenue Chicago, Illinois 60643				

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Recipient's Name and Address	Foundation Status of Recipient	Purpose of Grant	Schedule Date	Amount
Terra Nova Films, Inc.	PC	Sixteen-month grant for national dissemination of a community forum offering education in Spanish and English for Hispanic families caring for loved ones with Alzheimer's in the home.	7/15/2015	\$17,000
9848 South Winchester Avenue Chicago, Illinois 60643				
<u>Texas Woman's University</u>				
Texas Woman's University	PC	One-year grant to examine and implement a cultural heritage program in nursing homes.	1/15/2015	\$24,999
P.O. Box 425619 Denton, Texas 76204				
<u>The Hospice of the Florida Suncoast</u>				
The Hospice of the Florida Suncoast	PC	One-year grant to collaborate with a medical practice that desires to increase its physicians' appropriate referrals of older patients to hospice care.	1/15/2015	\$41,700
5771 Roosevelt Boulevard Clearwater, Florida 33760				
<u>The Mental Health Association of New York City, Inc.</u>				
The Mental Health Association of New York City,	PC	One-year grant to strengthen the effectiveness of state coalitions of mental health and aging.	1/15/2015	\$40,000
50 Broadway, 19th Floor New York, New York 10004				
The Mental Health Association of New York City,	PC	One-year grant to strengthen the effectiveness of state coalitions of mental health and aging.	10/15/2015	\$25,000
50 Broadway, 19th Floor New York, New York 10004				
<u>The University of Akron</u>				
The University of Akron	PC	Two-year grant for research to determine if older adults can be trained to detect lies as a way of protecting them against scams.	1/15/2015	\$29,153
Akron, Ohio 44325-4702				
The University of Akron	PC	Two-year grant for research to determine if older adults can be trained to detect lies as a way of protecting them against scams.	1/15/2016	\$32,135
Akron, Ohio 44325-4702				
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The University of Texas at El Paso The University of Texas at El Paso 500 West University Avenue El Paso, Texas 79968	PC	Eighteen-month grant to test Whole Body Vibration for its potential to reduce both fall risk and fall rate in older Hispanic adults.	7/15/2015	\$39,074
United Community Center, Inc. United Community Center, Inc. 1028 South 9th Street Milwaukee, Wisconsin 53204	PC	One-year grant to provide services to family caregivers of patients with Alzheimer's disease and other forms of dementia.	1/15/2015	\$21,700
University of California, Berkeley University of California, Berkeley Sponsored Projects Office 2150 Shattuck Avenue, Suite 300 Berkeley, California 94704-5940	PC	Eighteen-month grant to test the feasibility of developing a national data infrastructure of the Village model, to provide the means to study the model with valid and reliable data from Villages nationwide.	4/15/2015	\$30,149
University of California, Berkeley Sponsored Projects Office 2150 Shattuck Avenue, Suite 300 Berkeley, California 94704-5940	PC	Eighteen-month grant to test the feasibility of developing a national data infrastructure of the Village model, to provide the means to study the model with valid and reliable data from Villages nationwide.	10/15/2015	\$14,716

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<u>University of Chicago</u>				
University of Chicago	PC	One-year grant to build an economically sustainable home- based primary care program on Chicago's South Side.	1/15/2015	\$40,000
5801 S. Ellis Avenue Chicago, Illinois 60637-5418				
<u>University of Chicago</u>				
University of Chicago	PC	One-year grant to build an economically sustainable home- based primary care program on Chicago's South Side.	7/15/2015	\$39,230
5801 S. Ellis Avenue Chicago, Illinois 60637-5418				
<u>University of Iowa</u>				
University of Iowa	PC	One-year grant to understand the functioning of public health network systems with regard to rural elderly, in relation to disaster responses.	1/15/2015	\$48,090
Division of Sponsored Programs 2 Gilmore Hall 112 North Capital Street Iowa City, Iowa 52242				
<u>University of Kentucky Research Foundation</u>				
University of Kentucky Research Foundation	SOI	Two-year grant to implement and evaluate an intergenerational gardening program to improve the health and well-being of rural older adults.	1/15/2015	\$80,334
500 South Limestone 109 Kinkead Hall Lexington, Kentucky 40506-0057				
<u>University of Kentucky Research Foundation</u>				
University of Kentucky Research Foundation	SOI	Two-year grant to implement and evaluate an intergenerational gardening program to improve the health and well-being of rural older adults.	1/15/2016	\$73,047
500 South Limestone 109 Kinkead Hall Lexington, Kentucky 40506-0057				

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Recipient's Name and Address	Foundation Status of Recipient	Purpose of Grant	Schedule Date	Amount
<u>University of Massachusetts Boston</u>				
<u>University of Massachusetts Boston</u>	PC	Third-year grant in support of assisting Illinois retirees who have been unable to locate a lost pension, denied earned pension benefits, or other pension problems.	1/15/2015	\$59,131
Office of Research and Sponsored Programs 100 Morrissey Blvd. Boston, Massachusetts 02125				
<u>Washington University in St. Louis</u>				
<u>Washington University in St. Louis</u>	PC	Two-year grant to develop and test messages for recruiting Boomers as volunteers for senior nutrition programs in rural and low- income, inner city neighborhoods.	1/15/2015	\$60,179
Campus Box 1054 One Brookings Drive St. Louis, Missouri 63130-4862				
<u>Wayne State University</u>				
<u>Wayne State University</u>	PC	One-year grant to protect elders from financial abuse by testing new tools for professionals working with older adults.	1/15/2015	\$34,075
Office of Research and Sponsored Programs 5057 Woodward Avenue, 13th Floor Detroit, Michigan 48202				
<u>Wider Opportunities for Women</u>				
<u>Wider Opportunities for Women</u>	PC	Two-year grant to create and then provide technical assistance around the Elder Economic Insecurity Rate, a tool to help communities define and measure needs of older residents and inform policy decisions.	1/15/2015	\$48,500
1001 Connecticut Avenue, NW, Suite 930 Washington, DC 20036				
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Recipient's Name and Address	Foundation Status of Recipient	Purpose of Grant	Schedule Date	Amount
Wider Opportunities for Women				
Wider Opportunities for Women	PC	Two-year grant to create and then provide technical assistance around the Elder Economic Insecurity Rate, a tool to help communities define and measure needs of older residents and inform policy decisions.	1/15/2016	\$48,500
1001 Connecticut Avenue, NW, Suite 930 Washington, DC 20036				
Wisconsin Institute for Healthy Aging				
Wisconsin Institute for Healthy Aging	PC	One-year grant to design and implement a referral system for community clinics to promote evidenced-based health promotion programs.	1/15/2015	\$34,821
1414 MacArthur Road, Suite B Madison, Wisconsin 53714				
Women's Institute for a Secure Retirement				
Women's Institute for a Secure Retirement	PC	One-year grant to help older adults, especially women, make the best financial decisions they can with the limited resources they have.	1/15/2015	\$20,000
1140 19th Street N.W., Suite 550 Washington, D.C. 20036				
Total				\$2,774,130