Form **990-PF**

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

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

▶ 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.*

OMB No 1545-0052

2014

Open to Public Inspection

For calendar year 2014 or tax year beginning , and ending

Name of foundation
DAVID J. ANDERSON CHARITABLE FOUNDATION

A Employer identification number
36-4332919

Number and street (or P O box number if mail is not delivered to street address)
330 SPRING CREEK ROAD

Room/suite

B Telephone number
815-637-7619

City or town, state or province, country, and ZIP or foreign postal code
ROCKFORD, IL 61107

C If exemption application is pending, check here ▶ ☐

D 1. Foreign organizations, check here ▶ ☐

2. Foreign organizations meeting the 85% test, check here and attach computation ▶ ☐

E If private foundation status was terminated under section 507(b)(1)(A), check here ▶ ☐

F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ▶ ☐

G Check all that apply: ☐ Initial return ☐ Initial return of a former public charity ☐ Final return ☐ Amended return ☐ Address change ☐ Name change

H Check type of organization: ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation

I Fair market value of all assets at end of year *(from Part II, col. (c), line 16)* ▶$ 2,415,661.

J Accounting method: ☒ Cash ☐ Accrual ☐ Other (specify) *(Part I, column (d) must be on cash basis.)*

Part I **Analysis of Revenue and Expenses** (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))

			(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1	Contributions, gifts, grants, etc., received			N/A	
	2	Check ▶ ☒ if the foundation is not required to attach Sch B				
	3	Interest on savings and temporary cash investments	1.	1.		STATEMENT 1
	4	Dividends and interest from securities	18,361.	18,361.		STATEMENT 2
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10	62,229.			
	b	Gross sales price for all assets on line 6a				
	7	Capital gain net income (from Part IV, line 2)		62,229.		
	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	<1,535.>	<1,535.>		STATEMENT 3
	12	**Total.** Add lines 1 through 11	79,056.	79,056.		
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc	0.	0.		0.
	14	Other employee salaries and wages				
	15	Pension plans, employee benefits				
	16a	Legal fees				
	b	Accounting fees STMT 4	1,850.	0.		0.
	c	Other professional fees				
	17	Interest	2,038.	1,925.		0.
	18	Taxes STMT 5	2,744.	598.		0.
	19	Depreciation and depletion				
	20	Occupancy				
	21	Travel, conferences, and meetings				
	22	Printing and publications				
	23	Other expenses STMT 6	7,904.	7,860.		0.
	24	**Total operating and administrative expenses.** Add lines 13 through 23	14,536.	10,383.		0.
	25	Contributions, gifts, grants paid	112,642.			112,642.
	26	**Total expenses and disbursements.** Add lines 24 and 25	127,178.	10,383.		112,642.
	27	Subtract line 26 from line 12:				
	a	Excess of revenue over expenses and disbursements	<48,122.>			
	b	**Net investment income** (if negative, enter -0-)		68,673.		
	c	**Adjusted net income** (if negative, enter -0-)			N/A	

6

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	1,937.	1,796.	1,796.
	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			
	10a	Investments - U.S. and state government obligations			
	b	Investments - corporate stock			
	c	Investments - corporate bonds			
	11	Investments - land, buildings, and equipment basis ▶			
		Less accumulated depreciation ▶			
	12	Investments - mortgage loans			
	13	Investments - other STMT 7	2,165,216.	2,117,235.	2,413,865.
	14	Land, buildings, and equipment: basis ▶			
		Less accumulated depreciation ▶			
	15	Other assets (describe ▶)			
	16	**Total assets** (to be completed by all filers - see the instructions. Also, see page 1, item I)	2,167,153.	2,119,031.	2,415,661.
Liabilities	17	Accounts payable and accrued expenses			
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable			
	22	Other liabilities (describe ▶)			
	23	**Total liabilities** (add lines 17 through 22)	0.	0.	
Net Assets or Fund Balances		**Foundations that follow SFAS 117, check here ▶ ☐ and complete lines 24 through 26 and lines 30 and 31.**			
	24	Unrestricted			
	25	Temporarily restricted			
	26	Permanently restricted			
		Foundations that do not follow SFAS 117, check here ▶ ☒ and complete lines 27 through 31.			
	27	Capital stock, trust principal, or current funds	2,167,153.	2,119,031.	
	28	Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
	29	Retained earnings, accumulated income, endowment, or other funds	0.	0.	
	30	**Total net assets or fund balances**	2,167,153.	2,119,031.	
	31	**Total liabilities and net assets/fund balances**	2,167,153.	2,119,031.	

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	2,167,153.
2	Enter amount from Part I, line 27a	2	<48,122.>
3	Other increases not included in line 2 (itemize) ▶	3	0.
4	Add lines 1, 2, and 3	4	2,119,031.
5	Decreases not included in line 2 (itemize) ▶	5	0.
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	2,119,031.

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	SHORT-TERM GAINS THRU ANDERSON FUND LLC	P	VARIOUS	VARIOUS
b	LONG-TERM GAINS THRU ANDERSON FUND LLC	P	VARIOUS	VARIOUS
c	SEC. 1231 GAIN THRU ANDERSON FUND LLC	P	VARIOUS	VARIOUS
d	SEC. 1256 GAIN THRU ANDERSON FUND LLC	P	VARIOUS	VARIOUS
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				13,705.
b				49,909.
c				<236.>
d				<1,149.>
e				

	Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
	(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a				13,705.
b				49,909.
c				<236.>
d				<1,149.>
e				

2	Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	62,229.
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	111,795.	2,232,630.	.050073
2012	101,382.	2,166,789.	.046789
2011	110,498.	2,182,290.	.050634
2010	97,130.	2,213,483.	.043881
2009	122,106.	2,063,598.	.059171

2	**Total** of line 1, column (d)	2	.250548
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	.050110
4	Enter the net value of noncharitable-use assets for 2014 from Part X, line 5	4	2,334,948.
5	Multiply line 4 by line 3	5	117,004.
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	687.
7	Add lines 5 and 6	7	117,691.
8	Enter qualifying distributions from Part XII, line 4	8	112,642.

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

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see 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	1,373.
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	1,373.
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	1,373.
6	Credits/Payments:				
a	2014 estimated tax payments and 2013 overpayment credited to 2014	6a	1,560.		
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	1,560.
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	187.
11	Enter the amount of line 10 to be: **Credited to 2015 estimated tax** ▶ 187. **Refunded** ▶			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?	1a		X
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes (see instructions for the definition)?	1b		X
	If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.			
c	Did the foundation file **Form 1120-POL** for this year?	1c		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) ▶ IL			
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

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?	13	X	

Website address ▶ N/A

14 The books are in care of ▶ KRISTIN L. PECORA Telephone no. ▶ 815-637-7619

Located at ▶ 330 SPRING CREEK ROAD, ROCKFORD, IL ZIP+4 ▶ 61107

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

			Yes	No
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?	16		X
	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 ▶			

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

			Yes	No
	File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			
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)? N/A	1b		
	Organizations relying on a current notice regarding disaster assistance check here ▶ ☐			
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

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

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
DAVID J. ANDERSON 330 SPRING CREEK ROAD ROCKFORD, IL 61107	PRESIDENT & DIRECTOR 0.00	0.	0.	0.
JOHN R. ANDERSON 4151 GULF SHORE BLVD N, UNIT 404 NAPLES, FL 34103	VICE PRES., SEC & DIRECTOR 0.00	0.	0.	0.
KRISTIN L. PECORA 330 SPRING CREEK ROAD ROCKFORD, IL 61107	TREASURER & DIRECTOR 0.00	0.	0.	0.
JOHN GUSE 330 SPRING CREEK ROAD ROCKFORD, IL 61107	DIRECTOR 0.00	0.	0.	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
NONE				

Total number of other employees paid over $50,000 ▶ 0

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

3 Five highest-paid independent contractors for professional services. If none, enter "NONE."

(a) Name and address of each person paid more than $50,000	**(b)** Type of service	**(c)** Compensation
NONE		

Total number of others receiving over $50,000 for professional services ▶ 0

Part IX-A Summary of Direct Charitable Activities

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

Form **990-PF** (2014)

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:			
a	Average monthly fair market value of securities		1a	0.
b	Average of monthly cash balances		1b	8,236.
c	Fair market value of all other assets		1c	2,362,270.
d	**Total** (add lines 1a, b, and c)		1d	2,370,506.
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	2,370,506.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)		4	35,558.
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3. Enter here and on Part V, line 4		5	2,334,948.
6	**Minimum investment return** Enter 5% of line 5		6	116,747.

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	116,747.
2a	Tax on investment income for 2014 from Part VI, line 5	2a 1,373.		
b	Income tax for 2014. (This does not include the tax from Part VI.)	2b		
c	Add lines 2a and 2b		2c	1,373.
3	Distributable amount before adjustments. Subtract line 2c from line 1		3	115,374.
4	Recoveries of amounts treated as qualifying distributions		4	0.
5	Add lines 3 and 4		5	115,374.
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	115,374.

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	112,642.
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	112,642.
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	112,642.

Note. The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years.

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2013	(c) 2013	(d) 2014
1 Distributable amount for 2014 from Part XI, line 7				115,374.
2 Undistributed income, if any, as of the end of 2014				
a Enter amount for 2013 only			109,558.	
b Total for prior years: _____ , _____ , _____		0.		
3 Excess distributions carryover, if any, to 2014:				
a From 2009				
b From 2010				
c From 2011				
d From 2012				
e From 2013				
f **Total** of lines 3a through e	0.			
4 Qualifying distributions for 2014 from Part XII, line 4: ▶ $ 112,642.				
a Applied to 2013, but not more than line 2a			109,558.	
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				3,084.
e Remaining amount distributed out of corpus	0.			
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	0.			
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 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				112,290.
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	0.			
9 **Excess distributions carryover to 2015.** Subtract lines 7 and 8 from line 6a	0.			
10 Analysis of line 9:				
a Excess from 2010				
b Excess from 2011				
c Excess from 2012				
d Excess from 2013				
e Excess from 2014				

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

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

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

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

Part XV **Supplementary Information (Complete this part only if the foundation had $5,000 or more in assets at any time during the year-see instructions.)**

1 **Information Regarding Foundation Managers:**

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

SEE STATEMENT 8

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

NONE

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

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

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

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

c Any submission deadlines:

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

Part XV **Supplementary Information** (continued)

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

Recipient 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*				
SEE STATEMENT ATTACHED	NONE	PUBLIC	SEE STATEMENT ATTACHED	112,642.
Total			▶ 3a	112,642.
b *Approved for future payment* NONE				
Total			▶ 3b	0.

Form **990-PF** (2014)

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income
	(a) Business code	(b) Amount	(c) Exclu-sion code	(d) Amount	
1 Program service revenue:					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments			14	1.	
4 Dividends and interest from securities			14	18,361.	
5 Net rental income or (loss) from real estate:					
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal property					
7 Other investment income			14	<1,535.>	
8 Gain or (loss) from sales of assets other than inventory			18	62,229.	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue:					
a					
b					
c					
d					
e					
12 Subtotal. Add columns (b), (d), and (e)		0.		79,056.	0.

13 Total. Add line 12, columns (b), (d), and (e) 13 79,056.

(See worksheet in line 13 instructions to verify calculations.)

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

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

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.

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

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)? ☒ Yes ☐ No

▶ 5/12/15 ▶ President

Signature of officer or trustee Date Title

Paid Preparer Use Only

Print/Type preparer's name	Preparer's signature	Date	Check ☐ if self- employed	PTIN
DAN G. LOESCHER		5/9/15		P00096569

Firm's name ▶ LOESCHER & ASSOCIATES, LTD.

Firm's EIN ▶ 36-4038006

Firm's address ▶ 6845 WEAVER ROAD, SUITE 200
ROCKFORD, IL 61114

Phone no. 815-637-9584

FORM 990-PF INTEREST ON SAVINGS AND TEMPORARY CASH INVESTMENTS STATEMENT 1

SOURCE	(A) REVENUE PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME
WELLS FARGO A/C# 2820-8629	1.	1.	
TOTAL TO PART I, LINE 3	1.	1.	

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
ANDERSON FUND LLC	18,361.	0.	18,361.	18,361.	
TO PART I, LINE 4	18,361.	0.	18,361.	18,361.	

FORM 990-PF OTHER INCOME STATEMENT 3

DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
ROYALTY INCOME	103.	103.	
ORDINARY BUSINESS INCOME/(LOSS) THRU ANDERSON LLC	<1,704.>	<1,704.>	
OTHER INVESTMENT INCOME	66.	66.	
TOTAL TO FORM 990-PF, PART I, LINE 11	<1,535.>	<1,535.>	

FORM 990-PF ACCOUNTING FEES STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
TAX PREPARATION	1,850.	0.		0.
TO FORM 990-PF, PG 1, LN 16B	1,850.	0.		0.

FORM 990-PF TAXES STATEMENT 5

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FOREIGN TAXES	598.	598.		0.
FEDERAL EXCISE TAX	2,146.	0.		0.
TO FORM 990-PF, PG 1, LN 18	2,744.	598.		0.

FORM 990-PF OTHER EXPENSES STATEMENT 6

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ANNUAL FILING FEE	25.	0.		0.
PORTFOLIO DEDUCTIONS	7,407.	7,407.		0.
NONDEDUCTIBLE EXPENSES	19.	0.		0.
OTHER INVESTMENT DEDUCTIONS	5.	5.		0.
SECTION 59(E)(2) EXPENSES	448.	448.		0.
TO FORM 990-PF, PG 1, LN 23	7,904.	7,860.		0.

FORM 990-PF

OTHER INVESTMENTS

STATEMENT 7

DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
ANDERSON FUND LLC	COST	2,117,235.	2,413,865.
TOTAL TO FORM 990-PF, PART II, LINE 13		2,117,235.	2,413,865.

FORM 990-PF

PART XV - LINE 1A
LIST OF FOUNDATION MANAGERS

STATEMENT 8

NAME OF MANAGER

DAVID J. ANDERSON
JOHN R. ANDERSON

DAVID J. ANDERSON CHARITABLE FOUNDATION
DECEMBER 31, 2014

FEIN: 36-4332919

Charity	Cause	Date	Address	City	State	Zip	Amount
Alignment Rockford	Education	11/5/2014	330 Spring Creek Rd	Rockford	IL	61107	$ 2,000 00
Alliance Defending Freedom	Religion	3/4/2014	15100 N. 90th Street	Scottsdale	AZ	85260	$ 500 00
Anderson Japanese Gardens	Cultural	12/17/2014	318 Spring Creek Rd	Rockford	IL	61107	$ 4,200 00
Artists Ensemble Theater Inc	Cultural	5/20/2014	P O Box 1684	Rockford	IL	61110	$ 1,000 00
Barbara Olson Center of Hope	Social Welfare	12/10/2014	3206 N Central Ave	Rockford	IL	61101	$ 500 00
Benedictine University	Education	3/4/2014	1832 Centre Point Circle, Ste 102	Naperville	IL	60563	$ 500 00
Blackhawk Area Council BSA	Youth Services	10/17/2014	PO Box 4085	Rockford	IL	61110	$ 2,500 00
Boylan Catholic High School	Education	12/10/2014	4000 St Francis Drive	Rockford	IL	61103	$ 3,000 00
Boys and Girls Club of Rockford	Youth Services	12/3/2014	P.O Box 1716	Rockford	IL	61110	$ 1,000 00
Bridge Ministries	Religion	12/10/2014	407 S Highland Avenue	Rockford	IL	61104	$ 1,000 00
Burpee Museum of Natural History	Cultural	12/3/2014	737 North Main Street	Rockford	IL	61103	$ 1,000 00
Carpenter's Place	Social Welfare	10/17/2014	1149 Railroad Ave	Rockford	IL	61104	$ 2,500 00
Children's Home and Aid Society	Social Welfare	10/30/2014	910 2nd Ave	Rockford	IL	61104	$ 2,000 00
College of Medicine at Rockford	Education	12/10/2014	1601 Parkview Avenue	Rockford	IL	61107	$ 1,000 00
Covenant Harbor Foundation	Social Welfare	12/10/2014	1724 Main Street	Lake Geneva	WI	53147	$ 1,000 00
Crusader Health Foundation	Health Services	10/7/2014	1200 West State Street	Rockford	IL	61102	$ 4,000 00
Deerfoot Lodge	Philanthropy	9/22/2014	P O Box 228	Speculator	NY	12164	$ 200 00
Denison University	Education	12/10/2014	P O Box 716	Granville	OH	43023	$ 2,500 00
Discovery Center Museum	Cultural	11/6/2014	711 North Main Street	Rockford	IL	61103	$ 2,000 00
Easter Seals	Veteran Affairs	12/1/2014	233 S Wacker Dr , Ste 2400	Chicago	IL	60606	$ 10,000 00
Freedom Alliance	Veteran Affairs	4/16/2014	22570 Markey Court, Ste 240	Dulles	VA	20166	$ 2,000 00
Friends of Kishwauketoe	Conservation	10/1/2014	P.O Box 580	Williams Bay	WI	53191	$ 500 00
Geneva Lake Conservancy	Conservation	12/10/2014	P O Box 588	Fontana	WI	53125	$ 1,000 00
Healing Pathways-Cancer Resource Center	Health Services	12/10/2014	1601 Parkview Ave	Rockford	IL	61107	$ 1,000 00
Holiday Home Camp	Social Welfare	5/29/2014	P O Box 10	Williams Bay	WI	53191	$ 500 00
Honor Flight Inc	Veteran Affairs	10/31/2014	300 E Auburn Ave	Springfield	OH	45505	$ 500 00
Illinois Foundation FFA	Philanthropy	12/10/2014	3221 Northfield Dr	Springfield	IL	62702	$ 1,000 00
Keep Northern Illinois Beautiful	Conservation	5/20/2014	5417 North Second Street	Loves Park	IL	61111	$ 1,500 00
Lifescape Community Services	Social Welfare	9/26/2014	705 Kilburn Avenue	Rockford	IL	61111	$ 2,000 00
Literacy Council	Education	4/28/2014	982 N Main Street	Rockford	IL	61103	$ 860 00
Literacy Council	Education	10/31/2014	982 N Main Street	Rockford	IL	61103	$ 1,500 00
Make a Wish Foundation	Philanthropy	11/14/2014	P O Box 6062	Albert Lea	MN	56007	$ 500 00
MELD	Social Welfare	11/14/2014	3703 N Main Street, #107	Rockford	IL	61103	$ 1,000 00
Mendelssohn Performing Arts Center	Cultural	11/14/2014	406 North Main St.	Rockford	IL	61103	$ 500 00
Natural Land Institute	Conservation	5/27/2014	320 South Third Street	Rockford	IL	61104	$ 410 00
Natural Land Institute	Conservation	12/10/2014	320 South Third Street	Rockford	IL	61104	$ 2,000 00
Nature Conservancy of Illinois	Conservation	10/31/2014	8 S Michigan Avenue, Suite 9(	Chicago	IL	60603	$ 2,000 00
Northern IL Hospice And Grief Center	Health Services	4/10/2014	4215 Newburg Road	Rockford	IL	61108	$ 500 00
Northern Illinois Food Bank	Social Welfare	10/31/2014	273 Dearborn Court	Geneva	IL	60134	$ 2,000 00
Prison Fellowship	Religion	10/17/2014	PO Box 1550	Merrifield	VA	22116	$ 2,000 00
Project Undershare	Social Welfare	11/14/2014	6364 Sebring Way	Loves Park	IL	61111	$ 1,000 00
Rock River Valley Food Pantry	Social Welfare	10/17/2014	421 South Rockton Avenue	Rockford	IL	61102	$ 2,500 00
Rockford Day Nursery	Social Welfare	12/10/2014	2323 South 6th Street	Rockford	IL	61104	$ 1,500 00
Rockford Park District Foundation	Conservation	12/10/2014	401 South Main Street	Rockford	IL	61101	$ 5,000 00
Rockford Rescue Mission	Social Welfare	10/1/2014	PO Box 1958	Rockford	IL	61110	$ 4,000 00
Rosecrance Foundation	Health Services	11/14/2014	3815 Harrison Avenue	Rockford	IL	61108	$ 4,000 00
Salvation Army	Social Welfare	3/4/2014	500 S Rockford Ave	Rockford	IL	61104	$ 3,100 00
Salvation Army	Social Welfare	4/23/2014	500 S Rockford Ave	Rockford	IL	61104	$ 2,680 00
Salvation Army	Social Welfare	7/18/2014	500 S Rockford Ave	Rockford	IL	61104	$ 3,216 66
Salvation Army	Social Welfare	9/22/2014	500 S Rockford Ave	Rockford	IL	61104	$ 2,300 00
Samaritan's Purse	Social Welfare	10/10/2014	P O Box 3000	Boone	NC	28607	$ 5,000 00
Special Olympics of Illinois	Health Services	12/3/2014	605 E Willow Street	Normal	IL	61761	$ 1,000 00
St Patrick Community Foundation Food Pantry	Social Welfare	12/10/2014	32 N. Jones St	Amboy	IL	61310	$ 1,000 00
Stateline Youth For Christ	Religion	12/10/2014	316 Wood Road	Rockford	IL	61107	$ 500 00
United States Paralympic Foundation	Philanthropy	9/4/2014	1 Olympic Plaza	Colorado Spring·	CO	80909	$ 500 00
United Way of Rock River Valley	Philanthropy	10/31/2014	612 N Main Street Suite 300	Rockford	IL	61101	$ 2,000 00
Walworth County Children's Foundation	Social Welfare	11/7/2014	P O Box 384	Elkhorn	WI	53121	$ 100 00
Water Safety Patrol	Philanthropy	8/29/2014	PO Box 548	Williams Bay	WI	53191	$ 1,900 00
YMCA of Rock River Valley	Philanthropy	2/3/2014	200 Y Boulevard	Rockford	IL	61107	$ 2,250 00
YMCA of Rock River Valley	Philanthropy	5/20/2014	200 Y Boulevard	Rockford	IL	61107	$ 2,000 00
YMCA of Rock River Valley	Philanthropy	10/2/2014	200 Y Boulevard	Rockford	IL	61107	$ 1,000 00
YWCA of Rockford	Philanthropy	2/24/2014	4990 E State Street	Rockford	IL	61108	$ 425 00
							$ 112,641 66

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