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

OMB No 1545-0052

2014Department of the Treasury
Internal Revenue Service▶ 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.

Open to Public Inspection

For calendar year 2014 or tax year beginning , 2014, and ending , 20

Name of foundation INDEPENDENCE BLUE CROSS FOUNDATION		A Employer identification number 36-4685801
Number and street (or P O box number if mail is not delivered to street address) 1901 MARKET STREET	Room/suite	B Telephone number (see instructions) 2152410647
City or town, state or province, country, and ZIP or foreign postal code PHILADELPHIA PA 19103		C If exemption application is pending, check here ☐
G Check all that apply: ☐ Initial return ☐ Initial return of a former public charity ☐ Final return ☐ Amended return ☐ Address change ☐ Name change		D 1. Foreign organizations, check here ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ☐
H Check type of organization: ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here ☐
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ▶ \$ 63,755,760	J Accounting method: ☐ Cash ☒ Accrual ☐ Other (specify) _____ (Part I, column (d) must be on cash basis)	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions).)		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received (attach schedule)	5,000,000			
	2 Check ☐ if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments	1,254	1,254		
	4 Dividends and interest from securities	1,140,714	1,140,714		
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10				
	b Gross sales price for all assets on line 6a				
	7 Capital gain net income (from Part IV, line 2)		3,414,981		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances	217,609			
b Less: Cost of goods sold	114,208				
c Gross profit or (loss) (attach schedule)	103,401				
11 Other income (attach schedule)					
12 Total. Add lines 1 through 11	6,245,369	4,556,949	0		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc.				
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)				
	c Other professional fees (attach schedule)	11,200			11,200
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	177,847			
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	385,515	385,515		
	24 Total operating and administrative expenses. Add lines 13 through 23	574,562	385,515	0	11,200
	25 Contributions, gifts, grants paid	5,000,963			5,000,963
26 Total expenses and disbursements. Add lines 24 and 25	5,575,525	385,515	0	5,012,163	
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements	669,844				
b Net investment income (if negative, enter -0-)		4,171,434			
c Adjusted net income (if negative, enter -0-)			0		

For Paperwork Reduction Act Notice, see instructions.

Form **990-PF** (2014)925
JAH
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Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only. (See instructions.)	Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing			
	2	Savings and temporary cash investments	1,678,311	1,607,960	1,607,960
	3	Accounts receivable ▶ 143,993			
		Less: allowance for doubtful accounts ▶	143,993	155,729	155,729
	4	Pledges receivable ▶			
		Less: allowance for doubtful accounts ▶			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7	Other notes and loans receivable (attach schedule) ▶			
		Less: allowance for doubtful accounts ▶			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10a	Investments—U.S. and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)	32,069,486	34,461,034	34,461,034
	c	Investments—corporate bonds (attach schedule)	25,226,506	27,531,037	27,531,037
	11	Investments—land, buildings, and equipment: basis ▶			
		Less: accumulated depreciation (attach schedule) ▶			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)			
	14	Land, buildings, and equipment: basis ▶			
		Less: accumulated depreciation (attach schedule) ▶			
	15	Other assets (describe ▶)			
	16	Total assets (to be completed by all filers—see the instructions. Also, see page 1, item I)	59,118,296	63,755,760	63,755,760
Liabilities	17	Accounts payable and accrued expenses	9,951	7,469	
	18	Grants payable	1,204,000	1,311,984	
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶ <u>Deferred Tax Unrlzd Appr on Invest</u>)		94,330	
	23	Total liabilities (add lines 17 through 22)	1,213,951	1,413,783	
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			
	28	Paid-in or capital surplus, or land, bldg., and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds	57,904,345	62,341,977	
	30	Total net assets or fund balances (see instructions)	57,904,345	62,341,977	
	31	Total liabilities and net assets/fund balances (see instructions)	59,118,296	63,755,760	

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	57,904,345
2	Enter amount from Part I, line 27a	2	669,844
3	Other increases not included in line 2 (itemize) ▶ <u>Net realized & unrealized gains on investments</u>	3	3,767,790
4	Add lines 1, 2, and 3	4	62,341,979
5	Decreases not included in line 2 (itemize) ▶ <u>Rounding</u>	5	2
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	62,341,977

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 Publicly traded securities		P	VARIOUS	VARIOUS
b				
c				
d				
e				
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)	
a 68,614,584	0	65,199,603	3,414,981	
b				
c				
d				
e				
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69				
(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))	
a				
b				
c				
d				
e				
2 Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }		2	3,414,981
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c) (see instructions). If (loss), enter -0- in Part I, line 8	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }		3	

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☐ No
 If "Yes," the foundation does not qualify under section 4940(e). Do not complete this part.

(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	3,873,382	57,594,459	0.0673
2012	5,153,399	44,066,828	0.1169
2011	3,284,458	12,430,997	0.2642
2010	0	82,192	0.0000
2009			
2 Total of line 1, column (d)			2 0.4484
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 4.027397 years.			3 .111337
4 Enter the net value of noncharitable-use assets for 2014 from Part X, line 5			4 62,499,641
5 Multiply line 4 by line 3			5 6,958,523
6 Enter 1% of net investment income (1% of Part I, line 27b)			6 41,714
7 Add lines 5 and 6			7 7,000,237
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 5,012,163

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	83,429
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	
3	Add lines 1 and 2	3	83,429
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5	83,429
6	Credits/Payments:		
a	2014 estimated tax payments and 2013 overpayment credited to 2014	6a	78,420
b	Exempt foreign organizations—tax withheld at source	6b	
c	Tax paid with application for extension of time to file (Form 8868)	6c	6,000
d	Backup withholding erroneously withheld	6d	
7	Total credits and payments. Add lines 6a through 6d	7	84,420
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	0
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	991
11	Enter the amount of line 10 to be: Credited to 2015 estimated tax 991 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?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for the definition)? <i>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.</i>		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. ► \$ _____ (2) On foundation managers. ► \$ _____		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ► \$ _____		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If "Yes," attach a detailed description of the activities.</i>		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? <i>If "Yes," attach a conformed copy of the changes.</i>		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If "Yes," attach the statement required by General Instruction T.</i>		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col. (c), and Part XV</i>	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ► PENNSYLVANIA		
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? <i>If "No," attach explanation</i>	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)? <i>If "Yes," complete Part XIV</i>		X
10 Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses</i>	X	

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► WWW.IBXFOUNDATION.ORG	13	X	
14	The books are in care of ► KEN ROBINSON Telephone no. ► 215-241-2543 Located at ► 1901 MARKET STREET, PHILADELPHIA, PA 19103 ZIP+4 ► 19103			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041—Check here. ► ☐ and enter the amount of tax-exempt interest received or accrued during the year ► 15			
16	At any time during calendar year 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	
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 ► 20____, 20____, 20____, 20____		
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions.)	2b	
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ► 20____, 20____, 20____, 20____		
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☒ No		
b	If "Yes," did it have excess business holdings in 2014 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2014.)	3b	
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)? **5b**Organizations relying on a current notice regarding disaster assistance check here ☐**c** If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? ☐ Yes ☐ No

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

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? ☐ Yes ☒ No**b** Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? **6b** ☒

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

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☒ No**b** If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction? **7b****Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors****1** List all officers, directors, trustees, foundation managers and their compensation (see instructions).

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

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

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

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

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

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

Part IX-A Summary of Direct Charitable Activities

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

	Expenses
1 NONE	
2	
3	
4	

Part IX-B Summary of Program-Related Investments (see instructions)

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

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

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	61,917,208
b	Average of monthly cash balances	1b	1,534,204
c	Fair market value of all other assets (see instructions)	1c	
d	Total (add lines 1a, b, and c)	1d	63,451,412
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	
2	Acquisition indebtedness applicable to line 1 assets	2	
3	Subtract line 2 from line 1d	3	63,451,412
4	Cash deemed held for charitable activities. Enter 1 1/2 % of line 3 (for greater amount, see instructions)	4	951,771
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	62,499,641
6	Minimum investment return. Enter 5% of line 5	6	3,124,982

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	3,124,982
2a	Tax on investment income for 2014 from Part VI, line 5	2a	83,429
b	Income tax for 2014. (This does not include the tax from Part VI)	2b	
c	Add lines 2a and 2b	2c	83,429
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	3,041,553
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	3,041,553
6	Deduction from distributable amount (see instructions)	6	
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	3,041,553

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	5,012,163
b	Program-related investments—total from Part IX-B	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	5,012,163
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b (see instructions)	5	
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	5,012,163

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				3,041,553
2 Undistributed income, if any, as of the end of 2014:				
a Enter amount for 2013 only				
b Total for prior years: 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2014:				
a From 2009				
b From 2010				
c From 2011 2,663,038				
d From 2012 3,015,509				
e From 2013 1,062,967				
f Total of lines 3a through e	6,741,514			
4 Qualifying distributions for 2014 from Part XII, line 4: ► \$ 5,012,163				
a Applied to 2013, but not more than line 2a				
b Applied to undistributed income of prior years (Election required—see instructions)				
c Treated as distributions out of corpus (Election required—see instructions)				
d Applied to 2014 distributable amount				3,041,553
e Remaining amount distributed out of corpus	1,970,610			
5 Excess distributions carryover applied to 2014 (If an amount appears in column (d), the same amount must be shown in column (a).)				
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	8,712,124			
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				
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 instructions			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)				
8 Excess distributions carryover from 2009 not applied on line 5 or line 7 (see instructions)				
9 Excess distributions carryover to 2015. Subtract lines 7 and 8 from line 6a	8,712,124			
10 Analysis of line 9:				
a Excess from 2010				
b Excess from 2011 2,663,038				
c Excess from 2012 3,015,509				
d Excess from 2013 1,062,967				
e Excess from 2014 1,970,610				

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

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

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

	Tax year	Prior 3 years			(e) Total
	(a) 2014	(b) 2013	(c) 2012	(d) 2011	
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					0
b 85% of line 2a	0	0	0	0	0
c Qualifying distributions from Part XII, line 4 for each year listed					0
d Amounts included in line 2c not used directly for active conduct of exempt activities					0
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c	0	0	0	0	0
3 Complete 3a, b, or c for the alternative test relied upon:					
a "Assets" alternative test—enter					
(1) Value of all assets					0
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					0
b "Endowment" alternative test—enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed					0
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)					0
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					0
(3) Largest amount of support from an exempt organization					0
(4) Gross investment income					0

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).)

NONE

- 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:

SEE ATTACHMENT

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

SEE ATTACHMENT

- c** Any submission deadlines:

SEE ATTACHMENT

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

SEE ATTACHMENT

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 <i>Paid during the year</i> SEE ATTACHMENT				
Total			3a	0
b <i>Approved for future payment</i>				
Total			3b	0

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.

Enter gross amounts unless otherwise indicated.		Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions.)
		(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1	Program service revenue:					
a						
b						
c						
d						
e						
f						
g	Fees and contracts from government agencies					
2	Membership dues and assessments					
3	Interest on savings and temporary cash investments			14	1,254	
4	Dividends and interest from securities			14	1,140,714	
5	Net rental income or (loss) from real estate:					
a	Debt-financed property					
b	Not debt-financed property					
6	Net rental income or (loss) from personal property					
7	Other investment income					
8	Gain or (loss) from sales of assets other than inventory					
9	Net income or (loss) from special events					
10	Gross profit or (loss) from sales of inventory			01	103,401	
11	Other revenue: a					
b						
c						
d						
e						
12	Subtotal. Add columns (b), (d), and (e)		0		1,245,369	0
13	Total. Add line 12, columns (b), (d), and (e)				13	1,245,369

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

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

[illegible]

1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?

(1) Cash

(2) Other assets

(1) Sales of assets to a noncharitable exempt organization

(2) Purchases of assets from a noncharitable exempt organization

(3) Rental of facilities, equipment, or other assets

(4) Reimbursement arrangements

(5) Loans or loan guarantees

(6) Performance of services or membership or fundraising solicitations

c Sharing of facilities, equipment, mailing lists, other assets, or paid employees

d If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received.

[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

**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.

Signature of officer or trustee

11/10/15
Date

PRESIDENT
Title

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

**Paid
Preparer
Use Only**

Print/Type preparer's name

Preparer's signature

Date

Check ☐ if self-employed

PTIN

Firm's name ▶

Firm's EIN ►

Firm's address ►

Phone no.

Schedule B

(Form 990, 990-EZ, or 990-PF)

Department of the Treasury
Internal Revenue Service**Schedule of Contributors**

OMB No 1545-0047

2014

▶ Attach to Form 990, Form 990-EZ, or Form 990-PF.

▶ Information about Schedule B (Form 990, 990-EZ, or 990-PF) and its instructions is at www.irs.gov/form990.

Name of the organization

INDEPENDENCE BLUE CROSS FOUNDATION

Employer identification number

36-4685801

Organization type (check one):

Filers of:

Section:

Form 990 or 990-EZ

☐ 501(c)() (enter number) organization☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation☐ 527 political organization

Form 990-PF

☒ 501(c)(3) exempt private foundation☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation☐ 501(c)(3) taxable private foundationCheck if your organization is covered by the **General Rule** or a **Special Rule**.**Note.** Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.**General Rule**

- ☒ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions.

Special Rules

- ☐ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33 $\frac{1}{3}$ % support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I, II, and III.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Do not complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling \$5,000 or more during the year ▶ \$ _____

Caution. An organization that is not covered by the General Rule and/or the Special Rules does not file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2, of its Form 990; or check the box on line H of its Form 990-EZ or on its Form 990-PF, Part I, line 2, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

Name of organization

INDEPENDENCE BLUE CROSS FOUNDATION

Employer identification number

36-4685801

Part I **Contributors** (see instructions). Use duplicate copies of Part I if additional space is needed.

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	INDEPENDENCE HEALTH GROUP, INC. 1901 MARKET STREET PHILADELPHIA, PA 19103	\$ 5,000,000	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)

Independence Blue Cross Foundation

EIN 36-4685801

December 31, 2014

Part I, Analysis of Revenue And Expenses

Line 10a,b & c Gross sales less returns

Line 10a - Golf Fundraising	\$217,609
Line 10b - Golf Expenses	<u>(114,208)</u>
Line 10c - Gross Profit	<u><u>\$103,401</u></u>

Part I, Analysis of Revenue And Expenses

Line 16c, Other Professional Fees

Audit Expense	<u>\$11,200</u>
	<u><u>\$11,200</u></u>

Part I, Analysis of Revenue And Expenses

Line 18, Taxes

Excise tax	<u>\$177,847</u>
	<u><u>\$177,847</u></u>

Part I, Analysis of Revenue And Expenses

Line 23, Other Expenses

Bank/Investment Expense	<u>385,515</u>
	<u><u>\$385,515</u></u>

INDEPENDENCE BLUE CROSS FOUNDATION
SCHEDULE OF GAINS AND LOSSES
FORM 990-PF, PART IV
DECEMBER 31, 2014

(a) <u>Description</u>	(b) <u>How Acquired</u>	(c) <u>Date Acquired</u>	(d) <u>Date Sold</u>	(e) <u>Gross Sales Price</u>	(f) <u>Depreciation allowed</u>	(g) <u>Cost Basis</u>	(h) <u>Gain/(Loss)</u>
ABBVIE INC	P	1/7/2013	4/4/2014	300,215 88	0	159,740 70	140,475 16
ABBVIE INC	P	1/25/2013	4/4/2014	181,164 74	0	131,808 25	49,356 49
ABBVIE INC	P	2/11/2013	4/4/2014	87,289 78	0	48,748 00	20,541 78
ABBVIE INC	P	2/11/2013	5/28/2014	16,135 14	0	10,788 00	5,347 14
ABBVIE INC	P	3/5/2013	5/28/2014	18,135 15	0	11,294 01	4,841 14
ABBVIE INC	P	3/5/2013	7/14/2014	80,545 52	0	41,411 37	19,134 15
ABBVIE INC	P	3/5/2013	10/7/2014	42,445 09	0	28,235 03	14,210 06
ABBVIE INC	P	3/20/2013	10/7/2014	84,890 17	0	58,495 35	28,394 82
AMAZON COM INC	P	11/28/2013	4/7/2014	688,884 67	0	740,962 56	(74,077 89)
AMAZON COM INC	P	1/6/2014	4/7/2014	88,398 43	0	78,341 52	(9,943 09)
AMAZON COM INC	P	2/7/2014	4/7/2014	51,298 82	0	53,279 00	(1,980 18)
AMERICAN AIRLINES GROUP	P	12/4/2013	5/28/2014	28,910 41	0	15,423 52	11,486 89
AMERICAN AIRLINES GROUP	P	12/4/2013	6/25/2014	98,480 10	0	49,575 80	48,904 50
AMERICAN AIRLINES GROUP	P	12/4/2013	11/14/2014	75,920 50	0	38,558 80	37,361 70
AMERICAN AIRLINES GROUP	P	12/4/2013	12/8/2014	111,095 20	0	51,778 96	59,316 24
AMERICAN AIRLINES GROUP	P	12/4/2013	12/15/2014	110,260 61	0	49,575 80	60,685 01
APPLE COMPUTER INC	P	12/22/2011	5/28/2014	80,567 88	0	39,855 00	20,712 66
APPLE COMPUTER INC	P	12/22/2011	8/18/2014	191,777 42	0	119,565 00	72,212 42
APPLE COMPUTER INC	P	11/14/2012	8/18/2014	83,925 81	0	54,334 97	9,590 84
APPLE COMPUTER INC	P	12/14/2012	8/18/2014	77,824 19	0	62,072 33	15,551 86
APPLE COMPUTER INC	P	12/14/2012	10/7/2014	54,683 53	0	40,184 45	14,519 08
APPLE COMPUTER INC	P	1/3/2013	10/7/2014	54,683 53	0	42,954 05	11,729 48
APPLE COMPUTER INC	P	1/3/2013	10/16/2014	50,221 79	0	39,049 14	11,172 65
APPLE COMPUTER INC	P	1/24/2013	10/16/2014	35,155 25	0	23,041 47	12,113 78
AT&T INC	P	2/8/2012	7/15/2014	251,021 81	0	249,965 59	1,056 22
BANK OF AMERICA CORP	P	2/2/2012	1/21/2014	284,957 50	0	260,163 85	24,793 65
BANK OF AMERICA CORP	P	9/24/2014	10/7/2014	122,193 87	0	123,907 58	(1,713 71)
BANK OF AMERICA CORP	P	9/24/2014	11/24/2014	898,236 46	0	903,670 76	(5,434 30)
CITIGROUP INC	P	4/9/2013	2/6/2014	528,982 89	0	499,253 30	29,729 59
CITIGROUP INC	P	5/10/2013	12/12/2014	402,240 00	0	400,597 82	1,642 18
CITIGROUP INC	P	5/1/2013	2/8/2014	98,820 98	0	97,372 60	1,448 38
CITIGROUP INC	P	9/17/2013	2/8/2014	69,755 98	0	78,554 45	(8,798 47)
DELTA AIR LINES INC DEL	P	6/17/2013	1/9/2014	29,053 79	0	18,747 90	10,305 89
DELTA AIR LINES INC DEL	P	6/17/2013	2/12/2014	69,482 34	0	41,245 38	28,236 96
DELTA AIR LINES INC DEL	P	6/17/2013	5/28/2014	30,807 32	0	14,998 32	15,809 00
DELTA AIR LINES INC DEL	P	6/17/2013	8/25/2014	59,971 97	0	28,121 85	31,850 12
DELTA AIR LINES INC DEL	P	6/17/2013	11/14/2014	84,324 58	0	28,121 85	36,202 73
DELTA AIR LINES INC DEL	P	6/19/2013	11/14/2014	2,144 15	0	946 37	1,197 78
DELTA AIR LINES INC DEL	P	6/19/2013	12/15/2014	118,999 23	0	48,264 62	70,734 61
EBAY INC COM	P	8/23/2013	1/15/2014	484,932 48	0	486,306 45	(1,373 97)
EBAY INC COM	P	8/23/2013	1/15/2014	102,631 21	0	103,334 40	(703 19)
EBAY INC COM	P	11/21/2013	1/15/2014	229,637 34	0	226,123 54	3,513 80
ECOLAB INC	P	2/19/2013	4/4/2014	83,526 10	0	58,642 39	24,883 71
ECOLAB INC	P	2/20/2013	4/4/2014	352,965 15	0	247,856 16	105,308 99
ECOLAB INC	P	2/21/2013	4/4/2014	323,326 85	0	221,888 10	101,438 75
ECOLAB INC	P	3/27/2014	4/4/2014	12,933 07	0	12,744 00	189 07
ECOLAB INC	P	3/27/2014	4/4/2014	1,000,157 73	0	985,536 00	14,621 73
ECOLAB INC	P	3/27/2014	5/28/2014	5,382 22	0	5,310 00	72 22
ECOLAB INC	P	3/27/2014	5/28/2014	26,911 08	0	26,550 00	361 08
ECOLAB INC	P	3/27/2014	10/7/2014	118,058 13	0	111,510 00	6,548 13
F5 NETWORKS INC COM	P	9/5/2013	1/30/2014	119,686 00	0	97,627 39	22,058 61
F5 NETWORKS INC COM	P	9/5/2013	5/28/2014	32,425 65	0	26,033 97	6,391 68
F5 NETWORKS INC COM	P	9/5/2013	8/25/2014	10,383 17	0	7,376 29	3,006 88
F5 NETWORKS INC COM	P	8/6/2013	8/25/2014	102,610 20	0	73,067 65	29,542 55
F5 NETWORKS INC COM	P	9/6/2013	10/7/2014	201,055 75	0	147,875 01	53,180 74
F5 NETWORKS INC COM	P	9/6/2013	11/3/2014	262,154 08	0	195,716 93	66,437 15
F5 NETWORKS INC COM	P	9/16/2013	11/3/2014	166,030 92	0	130,064 17	35,966 75
F5 NETWORKS INC COM	P	10/24/2013	11/3/2014	166,030 92	0	121,783 92	44,247 00
F5 NETWORKS INC COM	P	11/7/2013	11/3/2014	136,902 68	0	94,692 19	42,210 49
FORD MOTOR COMPANY	P	4/2/2014	5/14/2014	760,092 34	0	794,196 22	(34,103 88)
FORD MOTOR COMPANY	P	4/9/2014	5/14/2014	118,665 87	0	119,968 13	(1,302 26)
FORD MOTOR COMPANY	P	4/25/2014	5/14/2014	45,731 69	0	45,994 00	(262 31)
GENERAL MOTORS CO	P	4/30/2013	3/17/2014	256,218 74	0	228,877 60	29,341 14
GENERAL MOTORS CO	P	5/1/2013	3/17/2014	320,709 17	0	282,760 16	37,949 01
GENERAL MOTORS CO	P	5/3/2013	3/17/2014	101,093 11	0	92,475 20	8,617 91
GENERAL MOTORS CO	P	9/17/2013	3/17/2014	48,803 57	0	51,574 74	(2,771 17)
GENERAL MOTORS CO	P	2/7/2014	3/17/2014	81,920 28	0	83,957 23	(2,036 95)
GENERAL MOTORS CO	P	5/8/2014	5/28/2014	33,387 28	0	34,518 20	(1,130 94)
GENERAL MOTORS CO	P	5/8/2014	8/1/2014	452,694 54	0	452,188 42	506 12
GENERAL MOTORS CO	P	5/8/2014	8/4/2014	440,714 40	0	443,558 87	(2,844 47)
GILEAD SCIENCES INC COM	P	4/19/2013	1/30/2014	54,805 90	0	37,109 45	17,696 45
GILEAD SCIENCES INC COM	P	4/19/2013	5/28/2014	4,153 91	0	2,850 67	1,503 24
GILEAD SCIENCES INC COM	P	4/23/2013	5/28/2014	29,077 38	0	18,988 06	10,089 30
GILEAD SCIENCES INC COM	P	4/23/2013	7/14/2014	22,074 69	0	13,562 90	8,511 79
GILEAD SCIENCES INC COM	P	4/23/2013	8/18/2014	89,379 91	0	51,539 02	37,840 89
GILEAD SCIENCES INC COM	P	4/23/2013	9/8/2014	135,795 00	0	67,814 50	67,980 50
GILEAD SCIENCES INC COM	P	4/23/2013	10/7/2014	52,477 54	0	27,125 80	25,351 74
GILEAD SCIENCES INC COM	P	4/25/2013	10/7/2014	68,220 80	0	33,579 52	34,641 28
GILEAD SCIENCES INC COM	P	4/25/2013	11/24/2014	132,578 35	0	67,159 04	65,419 31
GILEAD SCIENCES INC COM	P	5/6/2013	11/24/2014	249,859 19	0	135,553 11	114,306 08
GOLDMAN SACHS GRP	P	7/14/2014	10/7/2014	126,880 18	0	116,937 31	9,942 87
GOLDMAN SACHS GRP	P	7/14/2014	11/24/2014	440,221 11	0	388,398 92	51,822 19
GOLDMAN SACHS GRP	P	8/1/2014	11/24/2014	515,958 08	0	468,044 09	47,913 99
GOOGLE INC	P	1/15/2014	8/25/2014	89,285 85	0	88,424 74	2,841 11
GOOGLE INC	P	1/15/2014	10/7/2014	58,081 49	0	57,818 50	484 99
GOOGLE INC	P	4/9/2014	10/7/2014	85,498 31	0	88,148 59	(650 28)
HONEYWELL INTL INC	P	1/7/2013	2/12/2014	73,848 47	0	53,237 12	20,611 35
HONEYWELL INTL INC	P	1/7/2013	3/18/2014	204,190 46	0	146,402 08	57,788 38
HONEYWELL INTL INC	P	1/7/2013	3/19/2014	111,088 14	0	79,855 68	31,232 46
HONEYWELL INTL INC	P	1/7/2013	3/25/2014	162,484 83	0	116,456 20	48,008 63

INDEPENDENCE BLUE CROSS FOUNDATION
SCHEDULE OF GAINS AND LOSSES
FORM 990-PF, PART IV
DECEMBER 31, 2014

(a)	(b)	(c)	(d)	(e)	(f)	(g)	(h)
<u>Description</u>	<u>How Acquired</u>	<u>Date Acquired</u>	<u>Date Sold</u>	<u>Gross Sales Price</u>	<u>Depreciation allowed</u>	<u>Cost Basis</u>	<u>Gain/(Loss)</u>
HONEYWELL INTL INC	P	1/7/2013	3/31/2014	100,156 53	0	73,201 04	26,955 49
HONEYWELL INTL INC	P	3/26/2013	3/31/2014	59,183 40	0	49,135 78	10,047 62
HONEYWELL INTL INC	P	3/27/2014	4/14/2014	398,883 48	0	388,290 00	10,573 48
IBM CORP	P	2/1/2012	4/1/2014	251,412 50	0	249,359 47	2,053 03
ISHARES	P	6/6/2014	10/7/2014	129,453 13	0	142,274 00	(12,820 87)
LAM RESEARCH CORPORATION	P	12/4/2013	5/28/2014	29,821 34	0	25,770 75	4,050 59
LAM RESEARCH CORPORATION	P	12/4/2013	7/18/2014	244,872 49	0	177,818 17	67,054 32
LAM RESEARCH CORPORATION	P	12/4/2013	7/21/2014	549,728 97	0	398,158 09	151,570 88
LAM RESEARCH CORPORATION	P	1/15/2014	7/21/2014	254,405 32	0	200,824 71	53,780 61
LAM RESEARCH CORPORATION	P	4/15/2014	7/21/2014	138,766 54	0	100,980 95	37,785 59
LAM RESEARCH CORPORATION	P	9/15/2014	10/7/2014	90,328 00	0	90,187 50	140 50
METLIFE INC	P	4/9/2014	5/28/2014	30,311 33	0	31,188 86	(875 53)
METLIFE INC	P	4/9/2014	10/7/2014	115,528 02	0	114,351 82	1,176 20
OFFICE DEPOT INC	P	6/25/2014	10/7/2014	55,114 27	0	61,198 50	(6,084 23)
OSHKOSH TRUCK CORP CL B COM	P	3/13/2014	5/28/2014	26,608 91	0	28,015 15	(1,406 24)
OSHKOSH TRUCK CORP CL B COM	P	3/13/2014	10/7/2014	13,114 27	0	16,809 09	(3,694 82)
OSHKOSH TRUCK CORP CL B COM	P	3/14/2014	10/7/2014	78,685 61	0	101,103 30	(22,417 69)
OSHKOSH TRUCK CORP CL B COM	P	3/14/2014	11/7/2014	56,497 14	0	73,019 05	(16,521 91)
OSHKOSH TRUCK CORP CL B COM	P	3/19/2014	11/7/2014	76,053 84	0	99,925 00	(23,871 16)
OSHKOSH TRUCK CORP CL B COM	P	3/19/2014	11/10/2014	4,364 77	0	5,710 00	(1,345 23)
OSHKOSH TRUCK CORP CL B COM	P	3/20/2014	11/10/2014	63,289 21	0	82,708 00	(19,418 79)
OSHKOSH TRUCK CORP CL B COM	P	3/24/2014	11/10/2014	58,924 44	0	77,815 08	(18,890 64)
OSHKOSH TRUCK CORP CL B COM	P	3/26/2014	11/10/2014	6,547 17	0	8,602 62	(2,055 45)
OSHKOSH TRUCK CORP CL B COM	P	3/26/2014	11/12/2014	120,067 69	0	154,847 16	(34,779 47)
OSHKOSH TRUCK CORP CL B COM	P	4/3/2014	11/12/2014	37,799 09	0	51,133 54	(13,334 45)
OSHKOSH TRUCK CORP CL B COM	P	4/9/2014	11/12/2014	36,687 35	0	48,334 28	(11,646 93)
OSHKOSH TRUCK CORP CL B COM	P	5/2/2014	11/12/2014	86,715 56	0	107,682 51	(20,966 95)
OSHKOSH TRUCK CORP CL B COM	P	7/29/2014	11/12/2014	52,251 68	0	53,838 85	(1,587 17)
OSHKOSH TRUCK CORP CL B COM	P	7/29/2014	11/13/2014	73,283 60	0	74,457 99	(1,174 39)
PENNEY J C COMPANY INC	P	11/8/2013	5/28/2014	17,005 57	0	15,599 57	1,406 00
PENNEY J C COMPANY INC	P	11/8/2013	8/20/2014	201,368 83	0	178,521 45	24,847 38
PENNEY J C COMPANY INC	P	11/11/2013	8/20/2014	213,310 47	0	194,589 60	18,720 87
PENNEY J C COMPANY INC	P	11/12/2013	8/20/2014	20,839 33	0	18,685 33	2,154 00
PENNEY J C COMPANY INC	P	4/9/2014	8/20/2014	51,512 96	0	48,290 00	3,222 96
PENNEY J C COMPANY INC	P	4/21/2014	8/20/2014	85,698 82	0	70,110 05	15,588 77
SCHLUMBERGER LTD COM	P	10/30/2013	5/28/2014	30,419 33	0	28,187 19	2,232 14
SCHLUMBERGER LTD COM	P	10/30/2013	7/22/2014	131,540 53	0	108,050 90	23,489 63
SCHLUMBERGER LTD COM	P	10/30/2013	10/7/2014	102,216 71	0	98,655 16	3,561 55
SELECT SECTOR SPDR TR	P	2/25/2013	3/28/2014	61,234 64	0	54,403 18	6,831 46
SELECT SECTOR SPDR TR	P	2/25/2013	5/28/2014	28,364 37	0	23,315 64	5,048 73
SELECT SECTOR SPDR TR	P	2/25/2013	9/19/2014	86,263 09	0	69,946 92	16,316 17
SELECT SECTOR SPDR TR	P	2/25/2013	10/7/2014	175,956 11	0	155,437 60	20,518 51
SELECT SECTOR SPDR TR	P	2/25/2013	12/15/2014	82,360 37	0	64,118 01	(1,757 64)
SELECT SECTOR SPDR TR	P	2/22/2013	4/14/2014	6,019 92	0	4,848 25	1,171 67
SELECT SECTOR SPDR TR	P	2/28/2013	1/9/2014	33,035 42	0	25,680 00	7,355 42
SELECT SECTOR SPDR TR	P	2/26/2013	4/16/2014	121,536 81	0	92,020 00	29,516 81
SELECT SECTOR SPDR TR	P	2/26/2013	4/22/2014	124,827 24	0	94,160 00	30,667 24
SELECT SECTOR SPDR TR	P	2/26/2013	5/28/2014	29,499 34	0	21,400 00	8,099 34
SELECT SECTOR SPDR TR	P	2/26/2013	10/7/2014	44,204 02	0	29,960 00	14,244 02
SELECT SECTOR SPDR TR	P	3/14/2013	4/14/2014	209,602 65	0	176,545 77	33,056 88
SELECT SECTOR SPDR TR	P	3/14/2013	4/15/2014	13,124 35	0	11,062 92	2,061 43
SELECT SECTOR SPDR TR	P	3/20/2013	4/15/2014	196,318 39	0	164,152 75	32,165 64
SELECT SECTOR SPDR TR	P	3/20/2013	4/16/2014	80,971 96	0	69,044 75	11,927 21
SELECT SECTOR SPDR TR	P	3/20/2013	10/7/2014	34,731 73	0	24,684 00	10,047 73
SELECT SECTOR SPDR TR	P	3/27/2013	10/7/2014	85,250 62	0	61,438 50	23,812 12
SELECT SECTOR SPDR TR	P	4/2/2013	5/28/2014	52,966 82	0	48,186 48	4,780 34
SELECT SECTOR SPDR TR	P	4/2/2013	7/10/2014	154,327 08	0	137,532 25	16,794 83
SELECT SECTOR SPDR TR	P	4/2/2013	10/7/2014	59,477 93	0	53,205 90	6,272 03
SELECT SECTOR SPDR TR	P	4/4/2013	10/7/2014	122,322 55	0	108,978 20	13,344 35
SELECT SECTOR SPDR TR	P	5/20/2013	4/16/2014	41,290 33	0	38,597 79	2,692 54
SELECT SECTOR SPDR TR	P	5/20/2013	4/22/2014	137,793 22	0	127,322 58	10,470 64
SELECT SECTOR SPDR TR	P	5/20/2013	5/2/2014	64,972 56	0	59,651 13	5,321 43
SELECT SECTOR SPDR TR	P	5/20/2013	5/7/2014	129,985 02	0	117,798 45	12,186 57
SELECT SECTOR SPDR TR	P	5/21/2013	5/7/2014	24,890 75	0	22,808 68	2,282 07
SELECT SECTOR SPDR TR	P	5/21/2013	5/12/2014	86,752 46	0	79,883 99	6,868 47
SELECT SECTOR SPDR TR	P	5/21/2013	5/28/2014	74,560 35	0	68,328 44	6,231 91
SELECT SECTOR SPDR TR	P	5/21/2013	7/10/2014	257,944 87	0	226,589 16	31,355 71
SELECT SECTOR SPDR TR	P	5/21/2013	7/17/2014	98,037 83	0	86,415 38	11,622 45
SELECT SECTOR SPDR TR	P	8/26/2013	12/15/2014	35,904 45	0	38,946 20	(3,041 75)
SELECT SECTOR SPDR TR	P	10/22/2013	7/17/2014	409,250 85	0	375,731 20	33,519 75
SELECT SECTOR SPDR TR	P	10/22/2013	8/6/2014	285,246 89	0	266,884 27	18,362 62
SELECT SECTOR SPDR TR	P	10/23/2013	8/6/2014	184,012 21	0	170,699 18	13,313 03
SELECT SECTOR SPDR TR	P	10/23/2013	9/29/2014	514,030 03	0	456,062 58	57,967 47
SELECT SECTOR SPDR TR	P	11/7/2013	1/21/2014	486,889 36	0	459,213 57	27,775 79
SELECT SECTOR SPDR TR	P	1/2/2014	1/21/2014	160,832 28	0	158,816 41	2,015 87
SELECT SECTOR SPDR TR	P	1/10/2014	1/21/2014	442,962 65	0	433,800 58	9,162 09
SELECT SECTOR SPDR TR	P	1/10/2014	4/7/2014	396,166 44	0	379,245 52	16,920 92
SELECT SECTOR SPDR TR	P	2/3/2014	9/29/2014	459,059 81	0	406,594 68	52,465 13
SELECT SECTOR SPDR TR	P	2/3/2014	10/7/2014	33,276 78	0	30,041 39	3,235 37
SELECT SECTOR SPDR TR	P	5/22/2014	6/11/2014	748,322 68	0	723,357 60	24,965 08
SELECT SECTOR SPDR TR	P	5/30/2014	6/11/2014	250,554 48	0	246,075 00	4,479 48
SELECT SECTOR SPDR TR	P	5/30/2014	8/30/2014	169,469 25	0	167,331 00	2,138 25
SELECT SECTOR SPDR TR	P	6/2/2014	6/30/2014	66,458 53	0	65,900 00	558 53
SELECT SECTOR SPDR TR	P	6/2/2014	7/2/2014	259,656 26	0	257,010 00	2,646 26

INDEPENDENCE BLUE CROSS FOUNDATION
SCHEDULE OF GAINS AND LOSSES
FORM 990-PF, PART IV
DECEMBER 31, 2014

(a)	(b)	(c)	(d)	(e)	(f)	(g)	(h)
<u>Description</u>	<u>How Acquired</u>	<u>Date Acquired</u>	<u>Date Sold</u>	<u>Gross Sales Price</u>	<u>Depreciation allowed</u>	<u>Cost Basis</u>	<u>Gain/(Loss)</u>
SELECT SECTOR SPDR TR	P	6/2/2014	10/7/2014	118,545 37	0	118,820 00	(74 63)
SELECT SECTOR SPDR TR	P	6/2/2014	10/17/2014	28,728 44	0	29,655 00	(928 56)
SELECT SECTOR SPDR TR	P	6/13/2014	10/7/2014	249,295 48	0	242,314 73	6,980 75
SELECT SECTOR SPDR TR	P	6/13/2014	10/18/2014	102,841 00	0	103,031 46	(190 46)
SELECT SECTOR SPDR TR	P	7/7/2014	10/17/2014	391,026 05	0	414,744 58	(23,718 53)
SELECT SECTOR SPDR TR	P	7/15/2014	10/18/2014	58,181 65	0	57,718 75	(1,535 10)
SELECT SECTOR SPDR TR	P	7/15/2014	11/24/2014	129,340 27	0	122,281 25	7,059 02
SELECT SECTOR SPDR TR	P	7/18/2014	11/24/2014	464,590 23	0	444,128 11	20,464 12
SELECT SECTOR SPDR TR	P	7/30/2014	10/17/2014	239,403 71	0	250,912 50	(11,508 79)
SELECT SECTOR SPDR TR	P	8/20/2014	10/17/2014	181,948 82	0	195,040 89	(13,094 07)
SPDR SERIES TRUST	P	3/12/2014	5/28/2014	773,123 19	0	808,450 66	(35,327 37)
SPDR SERIES TRUST	P	4/15/2014	5/28/2014	111,827 41	0	109,080 00	2,547 41
SPDR SERIES TRUST	P	4/15/2014	5/28/2014	24,908 44	0	24,240 00	668 44
TESLA MTRS INC	P	7/29/2014	10/7/2014	88,957 44	0	79,311 23	7,646 21
TESLA MTRS INC	P	7/29/2014	10/17/2014	320,713 02	0	317,244 90	3,468 12
TESLA MTRS INC	P	7/30/2014	10/17/2014	239,389 37	0	235,684 18	3,705 19
T-MOBILE US INC	P	5/23/2013	1/7/2014	25,821 13	0	15,898 17	9,922 96
T-MOBILE US INC	P	5/24/2013	1/7/2014	128,105 68	0	79,154 24	48,951 42
T-MOBILE US INC	P	5/24/2013	5/28/2014	5,046 04	0	3,084 03	1,982 01
T-MOBILE US INC	P	8/4/2013	5/28/2014	28,594 21	0	17,847 44	10,946 77
T-MOBILE US INC	P	8/4/2013	10/7/2014	118,804 87	0	87,199 14	32,605 73
TYCO INTERNATIONAL LTD	P	9/25/2013	2/12/2014	51,418 23	0	43,754 75	7,661 48
TYCO INTERNATIONAL LTD	P	9/25/2013	5/7/2014	200,328 14	0	171,518 62	28,809 52
TYCO INTERNATIONAL LTD	P	9/25/2013	5/28/2014	21,474 52	0	17,501 90	3,972 62
TYCO INTERNATIONAL LTD	P	9/25/2013	10/7/2014	90,794 43	0	73,507 98	17,286 45
TYCO INTERNATIONAL LTD	P	9/25/2013	10/20/2014	28,894 18	0	26,252 85	2,641 31
TYCO INTERNATIONAL LTD	P	9/28/2013	10/20/2014	114,613 50	0	104,692 63	9,920 87
TYCO INTERNATIONAL LTD	P	9/27/2013	10/20/2014	118,539 78	0	105,735 85	10,803 93
TYCO INTERNATIONAL LTD	P	10/22/2013	10/20/2014	66,456 57	0	62,664 42	3,792 15
TYCO INTERNATIONAL LTD	P	10/23/2013	10/20/2014	37,562 41	0	35,321 82	2,240 79
TYCO INTERNATIONAL LTD	P	11/22/2013	10/20/2014	69,345 99	0	68,027 40	1,318 59
TYCO INTERNATIONAL LTD	P	1/6/2014	10/20/2014	46,230 66	0	49,592 04	(3,361 38)
TYCO INTERNATIONAL LTD	P	4/9/2014	10/20/2014	111,724 08	0	120,024 91	(8,300 83)
UNION PAC CORP	P	6/21/2012	4/14/2014	148,220 08	0	92,694 88	55,525 20
UNION PAC CORP	P	6/22/2012	4/14/2014	213,066 37	0	131,046 07	82,020 30
UNION PAC CORP	P	1/7/2013	4/14/2014	333,495 19	0	233,458 02	100,037 17
UNION PAC CORP	P	3/27/2014	4/14/2014	805,946 71	0	797,398 50	8,548 21
UNION PAC CORP	P	3/27/2014	4/14/2014	111,185 08	0	109,986 00	1,179 08
UNION PAC CORP	P	3/27/2014	5/28/2014	19,526 07	0	18,331 00	1,195 07
UNION PAC CORP	P	3/27/2014	6/25/2014	95,992 71	0	87,072 25	8,920 46
UNION PAC CORP	P	3/27/2014	10/7/2014	95,138 89	0	82,489 50	12,647 39
UNITED STATES TREAS NTS	P	8/29/2012	9/17/2014	2,202,664 07	0	2,197,712 83	4,951 14
UNITED STATES TREAS NTS	P	8/29/2012	5/27/2014	750,410 18	0	749,959 40	450 78
UNITED STATES TREAS NTS	P	8/29/2012	8/27/2014	2,050,000 00	0	2,049,990 20	9 80
UNITED STATES TREAS NTS	P	8/29/2012	9/18/2014	23,916 99	0	24,734 30	(817 31)
UNITED STATES TREAS NTS	P	8/29/2012	9/17/2014	171,136 91	0	180,433 97	(9,297 06)
UNITED STATES TREAS NTS	P	12/27/2012	9/17/2014	1,800,375 01	0	1,599,357 36	1,017 65
UNITED STATES TREAS NTS	P	12/27/2012	9/17/2014	3,443,871 88	0	3,502,626 62	(58,954 74)
UNITED STATES TREAS NTS	P	12/27/2012	9/18/2014	872,875 00	0	699,082 26	(26,187 26)
UNITED STATES TREAS NTS	P	12/27/2012	9/17/2014	658,683 59	0	695,022 45	(36,338 86)
UNITED STATES TREAS NTS	P	2/13/2013	9/17/2014	301,112 50	0	310,892 95	(9,780 45)
UNITED STATES TREAS NTS	P	4/23/2013	9/18/2014	1,434,375 00	0	1,500,000 00	(65,625 00)
UNITED STATES TREAS NTS	P	11/15/2013	9/17/2014	698,742 19	0	689,883 32	8,858 87
UNITED STATES TREAS NTS	P	12/9/2013	9/18/2014	354,726 56	0	356,555 28	(1,828 72)
UNITED STATES TREAS NTS	P	4/28/2014	9/18/2014	1,650,272 47	0	1,646,220 40	4,052 07
UNITED STATES TREAS NTS	P	8/22/2014	9/18/2014	1,195,849 61	0	1,202,608 33	(6,758 72)
UNITED STATES TREAS NTS	P	9/12/2014	9/19/2014	499,828 91	0	499,378 49	450 42
UNITED STATES TREAS NTS	P	9/12/2014	12/9/2014	3,298,582 03	0	3,296,359 00	2,223 03
UNITED STATES TREAS NTS	P	9/17/2014	12/9/2014	1,199,484 37	0	1,198,666 70	817 67
UNITED STATES TREAS NTS	P	9/12/2014	12/9/2014	3,510,527 34	0	3,492,158 44	18,368 90
UNITED STATES TREAS NTS	P	9/15/2014	12/9/2014	5,553,918 75	0	5,517,398 48	36,520 27
UNITED STATES TREAS NTS	P	9/12/2014	12/5/2014	1,203,298 79	0	1,182,245 12	21,053 67
UNITED STATES TREAS NTS	P	9/12/2014	9/22/2014	888,027 34	0	885,443 20	2,584 14
UNITED STATES TREAS NTS	P	9/16/2014	9/22/2014	196,007 81	0	196,219 66	(211 85)
UNITED STATES TREAS NTS	P	9/16/2014	12/5/2014	302,765 63	0	294,433 33	8,332 30
WHIRLPOOL CORP	P	8/21/2013	5/28/2014	29,243 43	0	26,554 70	2,688 73
WHIRLPOOL CORP	P	8/21/2013	6/3/2014	118,195 97	0	109,538 14	8,657 83
WHIRLPOOL CORP	P	8/21/2013	8/4/2014	118,246 86	0	109,538 14	8,708 72
WHIRLPOOL CORP	P	8/23/2013	8/4/2014	288,659 07	0	269,790 60	16,868 47
WHIRLPOOL CORP	P	8/23/2013	8/5/2014	107,512 45	0	101,171 48	6,340 97
WHIRLPOOL CORP	P	8/29/2013	8/5/2014	78,842 46	0	71,918 50	6,923 96
WHIRLPOOL CORP	P	2/7/2014	8/5/2014	71,874 96	0	67,551 40	4,123 56
WHIRLPOOL CORP	P	4/15/2014	8/5/2014	88,009 96	0	89,865 60	(3,855 64)
YAHOO INC	P	4/2/2014	5/28/2014	20,693 54	0	22,057 44	(1,363 90)
YAHOO INC	P	4/2/2014	9/18/2014	358,905 49	0	309,723 22	49,182 27
YAHOO INC	P	4/2/2014	9/19/2014	84,057 49	0	72,605 74	11,451 75
YAHOO INC	P	4/15/2014	9/19/2014	43,824 78	0	34,339 88	9,284 90
YAHOO INC	P	4/15/2014	9/28/2014	80,580 22	0	69,517 27	11,062 95
YAHOO INC	P	5/2/2014	9/28/2014	196,110 90	0	184,108 88	12,002 04
YAHOO INC	P	5/7/2014	9/28/2014	78,696 83	0	87,903 66	(8,793 17)

TOTAL CAPITAL GAINS & LOSSES	68,614,584	0	65,199,603	3,414,981
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Independence Blue Cross Foundation
EIN 36-4685801
December 31, 2014

Form 990-PF, Part VIII - List of Officers, Directors, and Trustees

(A)	(B)	(C)	(D)	(E)
<u>Name and Address</u>	<u>Title and Average Hours Per Week Devoted to Position</u>	<u>Compensation</u>	<u>Contribution to Employee Health Plan</u>	<u>Expense Accounts</u>
Patrick B Gillespie 4170 Woodhaven Road Philadelphia, PA 19154	Chairman of Board of Directors Less than one hour per week average	None	None	None
Lorina L Marshall-Blake 1901 Market Street Philadelphia, PA 19103	President Greater than one hour per week average	None	None	None
Alan Krigstein 1901 Market Street Philadelphia, PA 19103	Treasurer Less than one hour per week average	None	None	None
Lilton R Taliaferro, Jr, Esq 1901 Market Street Philadelphia, PA 19103	Secretary Greater than one hour per week average	None	None	None
Joan Hilferty 1901 Market Street Philadelphia, PA 19103	Director Less than one hour per week average	None	None	None
Paul A Tufano 1901 Market Street Philadelphia, PA 19103	Director Less than one hour per week average	None	None	None
I Steven Udvarhelyi, MD 1901 Market Street Philadelphia, PA 19103	Director Less than one hour per week average	None	None	None
Christopher Cashman 1901 Market Street Philadelphia, PA 19103	Director Less than one hour per week average	None	None	None
Plato Marnakos 500 Berwyn Baptist Road #11 Chamond Devon, PA 19333	Director Less than one hour per week average	None	None	None

Independence Blue Cross Foundation
EIN 36-4685801
December 31, 2014

Form 990-PF, Part XV – Supplementary Information

Lines 2(a), 2(b) and 2(c)

Applications are submitted to the Foundation through its website (www.ibxfoundation.org), which describes several categories of grant applications that may be accepted by the Foundation. These include applications for grants to support “safety net clinics” that provide medical services to vulnerable populations in underserved areas of the community, grants to nursing schools to fund student scholarships, and “innovation grants” supporting innovative projects and initiatives that seek to advance the practice and delivery of healthcare. The form of application, the information and materials required to be included, submission deadlines, grant criteria, and the form of grant agreement to be entered into with the Foundation may vary depending on the type of grant sought by the applicant. The website includes contact information if additional information is needed.

Line 2(d)

In general, the Foundation seeks to support, advance, and raise funds for health care, health education, wellness, medical training and medical research. More specifically, the Foundation is interested in making grants that further its core mission of enhancing the delivery of healthcare and improving health, wellness and quality of life in communities throughout southeastern Pennsylvania. The Foundation’s goals include improving access to quality, affordable healthcare; supporting education in health-related vocations; and supporting programs to improve health and wellness. At present, grant awards are generally limited to recipients located in, or carrying out grant purposes in, the following Pennsylvania counties: Philadelphia, Montgomery, Delaware, Bucks and Chester.

Independence Blue Cross Foundation
EIN 36-4685801
December 31, 2014

<u>Recipient Name</u>	<u>Recipient Address</u>	<u>Foundation Status of Recipient</u>	<u>Purpose of Grant or Contribution</u>	<u>Amount</u>
9th Street Youth and Community Center	2 W 9th Street, P O Box 256 Chester, PA 19016	PC	Wellness Learning Center	5,000
11th Street Family Health Services of Drexel	850 N 11th Street Philadelphia, PA 19123	PC	Nurse Intern	5,738
11 th Street Family Health Services of Drexel University	850 N 11th Street Philadelphia, PA 19123	PC	General Operating Support	100,000
Abington Memorial Hospital Dixon School of Nursing	1200 Old York Road Abington, PA 19001	PC	Undergraduate Scholarship Grant	7,444
Abington Health	1200 Old York Road Abington, PA 19001	PC	General Operating Support	150,000
Abington Health Children's Center	51 Medical Campus Drive Lansdale, PA 19446	PC	General Operating Support	50,000
Albert Einstein Healthcare	5501 Old York Road Philadelphia, PA 19141	PC	General Operating Support	50,000
Ann Silverman Community Health Clinic	595 West State Street Doylestown, PA 18901	PC	General Operating Support	68,087
Aria Health Center Clinic	5000 Frankford Avenue Philadelphia, PA 19124	PC	Nurse Intern	4,613
Aria Health Center Clinic	5000 Frankford Avenue Philadelphia, PA 19124	PC	Staffing and Supplies	50,000
Aria Health School of Nursing	4918 Penn Street Philadelphia, PA 19124	PC	Undergraduate Scholarship Grant	4,887
Augustinian Defenders of the Rights	1400 Lombard Street Philadelphia, PA 19146	PC	General Operating Support	20,000
Boy Scouts of America	1485 Valley Forge Road Wayne, PA 19087	PC	To support developmental program for young men (11-18), emphasis on health, nutrition and fitness	25,000
Bucks County Community College Foundation	275 Swamp Road Newtown, PA 18940	PC	Undergraduate Scholarship Grant	6,767
Bucks County Health Improvement Partnership	Bensalem Sq Shopping Center Bensalem, PA 19020	PC	General Operating Support	75,000
Center in the Park	5818 Germantown Avenue Philadelphia, PA 19144	PC	To support wellness model providing low income older adults with resources to maintain independence and manage chronic conditions	15,000
ChesPenn Health Services	2600 West 9th Street, 2 North Chester, PA 19013	PC	Nurse Intern	4,763
ChesPenn Health Services/Center for Family Health at Coatesville	744 East Lincoln Hwy, Suite 110 Coatesville, PA 19320	PC	General Operating Support	75,000
ChesPenn Health Services/Center for Family Health at Eastside & Center for Family Health	2600 W 9th Street & 125 E 9th Street Chester, PA 19013	PC	General Operating Support	100,000
ChesPenn Health Services/Center for Family Health at Upper Darby	5 South State Road Upper Darby PA 19082	PC	General Operating Support	50,000
Center for Arts & Technology CCU Practical Nursing Program	443 Boot Road Downington, PA 19335	PC	Undergraduate Scholarship Grant	4,511
Children's Health Center of VNA, Inc	1421 Highland Avenue Abington, PA 19001	PC	Nurse Intern	5,738
Citizens Acting Together Can Help, Inc. (CATCH)	1409 Lombard Street Philadelphia, PA 19146	PC	Patriot House homeless veterans program	20,000
The Clinic	143 Church Street Phoenixville, PA 19460	PC	General Operating Support	75,000
The Clinic	143 Church Street Phoenixville, PA 19460	PC	Nurse Intern	4,988
Community College of Philadelphia Foundation	1700 Spring Garden Street Philadelphia, PA 19130	PC	Undergraduate Scholarship Grant	8,647
Community Volunteers in Medicine (CVM)	300 B Lawrence Drive Chester PA 19380	PC	General Operating Support	100,000
Congreso de Latinos Unidos / Congreso Community Health Center	216 West Somerset Street Philadelphia, PA 19133	PC	General Operating Support	50,000
Covenant House Pennsylvania / CHOP Connections Clinic	31 East Armist Street Philadelphia, PA 19144	PC	General Operating Support	50,000
Cranleith Spiritual Center	13475 Proctor Road Philadelphia, PA 19116	PC	To support therapeutic retreats for veterans and families	10,000
Delaware County Community College Nursing Program	901 South Media Line Road Media, PA 19063	PC	Undergraduate Scholarship Grant	11,880
Delaware Valley Community Health, Inc. /Fairmount Primary Care Center	1412 22 Fairmont Avenue Philadelphia, PA 19130	PC	General Operating Support	75,000
Delaware Valley Community Health, Inc. /Maria de los Santos Health Center	401-405 W Allegheny Avenue Philadelphia, PA 19130	PC	General Operating Support	75,000
Delaware Valley Community Health, Inc. /Norristown Regional Health Center	1401 DeKalb Pike Norristown, PA 19401	PC	General Operating Support	100,000
Drexel University Department of Nutrition Sciences	245 N 15th Street, MS 501 Philadelphia, PA 19102	PC	Program evaluation for Healthy Futures	106,988
Drexel University College of Nursing and Health Professions	245 N 15th Street, MS 501 Philadelphia, PA 19102	PC	Undergraduate Scholarship Grant	27,068
Drexel University College of Nursing and Health Professions	245 N 15th Street, MS 501 Philadelphia, PA 19102	PC	Graduate Scholarship Grant	253,350
Eagles Charitable Foundation	NovaCare Complex Philadelphia, PA 19145	PC	To fund operating costs of the Eagles Eye Mobile	50,000
Eastern Center for Arts & Technology Practical Nursing Program	3075 Terwood Road Willow Grove PA 19090	PC	Undergraduate Scholarship Grant	7,444
Eastern University Department of Nursing	1300 Eagle Road St. Davids, PA 19087	PC	Undergraduate Scholarship Grant	7,368
The Enterprise Center Community Development Center	4548 Market Street Philadelphia, PA 19139	PC	To support low income families with food assistance and nutrition education	10,000
Esperanza Health Center	3156 Kensington Avenue Philadelphia, PA 19134	PC	Nurse Intern	6,113
Esperanza Health Center, Inc.	900 East Penn Drive West Chester, PA 19380	PC	Salary support	100,000
Free Clinic Association of Pennsylvania	3157 Kensington Avenue Philadelphia, PA 19134	PC	Capacity and infrastructure development	25,000

Garces Foundation	2401 Walnut St Philadelphia, PA 19103	PC	To provide field trips to Luna Farm for Healthy Futures schools	42,339
Greener Partners	3215 Stump Hall Road Collegeville, PA 19426	PC	To provide the Farm Explorer program for Health Futures program	50,000
Gwynedd-Mercy College/ Adult Health Center	51 Medical Campus Drive Lansdale, PA 19437	PC	General Operating Support	75,000
Gwynedd-Mercy College, Frances M. Maguire School of Nursing	1325 Sumnerstown Pike Gwynedd Valley, PA 19437	PC	Undergraduate Scholarship Grant	23,383
Gwynedd-Mercy College, Frances M. Maguire School of Nursing	1325 Sumnerstown Pike Gwynedd Valley, PA 19437	PC	Graduate Scholarship Grant	14,486
Health Link Medical Center	1775 Street Road Southampton, PA 18966	PC	General operating support	75,000
Healthy NewsWorks	P O Box 483 Drexel Hill, PA 19026	PC	Promoting health and wellness through student produced meals	15,000
Holy Family University	9801 Frankford Ave Philadelphia, PA 19114	PC	Graduate Scholarship Grant	13,204
Holy Family University School of Nursing and Allied Health Professions	9801 Frankford Ave Philadelphia, PA 19114	PC	Undergraduate Scholarship Grant	8,346
Immaculate University	1145 King Road P O Box 691 Immaculate, PA 19345-691	PC	Graduate Scholarship Grant	23,040
Immaculate University Division of Nursing	1145 King Road, P O Box 691 Immaculate, PA 19345	PC	Undergraduate Scholarship Grant	22,180
Kids Smiles, Inc. / West Philadelphia Dental Center	3751 Island Avenue 2nd Floor Philadelphia, PA 19153	PC	General operating support	50,000
La Comunidad Hispana	731 West Cypress Street Kennett Square, PA 19348	PC	Nurse Intern	6,113
La Comunidad Hispana, Inc. / La Comunidad Hispana Health Center	731 West Cypress Street Kennett Square, PA 19348	PC	General operating support	75,000
La Salle University	1900 West Olney Avenue Box 808 Philadelphia, PA 19141	PC	To support Mature Health Connections program for older adults in Germantown/Olney	15,000
La Salle University School of Nursing and Health Sciences	1900 West Olney Avenue Box 808 Philadelphia, PA 19141	PC	Graduate Scholarship Grant	77,550
La Salle University School of Nursing and Health Sciences	1900 West Olney Avenue Box 808 Philadelphia, PA 19141	PC	Undergraduate Scholarship Grant	17,744
Legal Clinic for the Disabled	1513 Race Street Philadelphia, PA 19103	PC	Medical legal partnership initiative serving people with disabilities	25,000
Linda Creed Breast Cancer	P O Box 40607 Philadelphia, PA 19107	PC	To provide women with free breast screenings and diagnostic tests regardless of insurance status	10,000
Living Beyond Breast Cancer	354 West Lancaster Avenue, Suite 224 Haverford PA 19041	PC	Workshops on hereditary traits for breast and ovarian cancer	10,000
Mazzoni Center Family and Community Medicine	21 S 12th Street, 12th Floor Philadelphia, PA 19107	PC	General operating support	50,000
Metropolitan Area Neighborhood Nutrition Alliance (MANNA)	2323 Rarstead Street Philadelphia, PA 19103	PC	Medically appropriate home delivered meals for people at acute nutritional risk from life-threatening illnesses	15,000
Montgomery County Community College Nursing Program	340 Dekalb Pike Blue Bell, PA 19422	PC	Undergraduate Scholarship Grant	10,977
The Moyer Foundation	Penn Center House, Inc. 1617 John F. Kennedy Blvd #580 Philadelphia, PA 19103	PC	General Operating Support	200,000
National Nursing Centers Consortium	260 South Broad Street, Suite 1800 Philadelphia, PA 19102	PC	Nurse Intern	4,613
Neumann University, Department of Nursing	One Neumann Drive Aston, PA 19014	PC	Graduate Scholarship Grant	12,150
Neumann University, Department of Nursing	One Neumann Drive Aston, PA 19014	PC	Undergraduate Scholarship Grant	4,737
Northeastern Hospital School of Nursing	2301 E. Allegheny Avenue Philadelphia, PA 19134	PC	Undergraduate Scholarship Grant	2,030
Pathways to Housing PA	5201 Old York Road 8th floor Philadelphia, PA 19141	PC	Medical navigation services	10,000
Philadelphia 76ers	3 Crescent Drive, Suite 300 Philadelphia, PA 19112	NC	To provide basketball clinics to support the Health Futures initiative	50,000
Philadelphia Chinatown Development Corp	301 North 9th Street Philadelphia, PA 19107	PC	To support a health information center	10,000
Philadelphia College of Osteopathic Medicine / PCOM Healthcare Center Lancaster Ave Philadelphia Freedoms	4180 City Avenue Philadelphia, PA 19131 1895	PC	General Operating Support	50,000
Philadelphia Union Foundation	P O Box 268 Gwynedd, PA 19436	NC	To provide tennis clinics to support the Health Futures initiative	40,000
Philadelphia Union Foundation	2501 Seaport Drive Chester, PA 19013	NC	To provide pop-up soccer clinics to support the Health Futures initiative	100,000
Pennsylvania Horticultural Society	100 N. 20th Street Philadelphia, PA 19103	PC	To support student education to grow and sustain a community garden, bringing hands-on gardening into schools	10,000
Pennsylvania Professional Soccer LLC	2501 Seaport Drive Suite 500 Chester, PA 19013	NC	To provide soccer clinics to support the Health Futures initiative	100,000
Playworks Pennsylvania	1518 Walnut Street Philadelphia, PA 19102	PC	Play education and recess support to encourage an active lifestyle	10,000
Project H O M E.	1845 North 23rd Street Philadelphia, PA 19121	PC	To expand and deepen health care services for homeless at St. Elizabeth's Health Center. Recommendation based on prior support.	100,000
Public Health Management Corporation / Care Clinic	1200 Callowhill Street, Suite 101 Philadelphia, PA 19123	PC	General Operating Support	40,000
Public Health Management Corporation / PHMC Health Connections	1035 W. Berks Street Philadelphia, PA 19102	PC	General Operating Support	40,000
Public Health Management Corporation / Mary Howard Health Center	125 South 9th Street Philadelphia, PA 19102	PC	General Operating Support	50,000
Public Health Management Corporation / Rising Sun Health Center	500 Adams Avenue Philadelphia, PA 19120	PC	General Operating Support	50,000
Public Health Management Corporation	260 South Broad Street, Suite 1800 Philadelphia, PA 19102	PC	Nurse Intern	23,327
Puentes de Salud	2029 South 8th Street Philadelphia, PA 19148	PC	General operating support	50,000
Puentes de Salud	2029 South 8th Street Philadelphia, PA 19148	PC	Nurse Intern	4,613

Ralston Center	3615 Chestnut Street Philadelphia, PA 19104	PC	To support the My Way program which helps seniors remain independent in their own homes	10,000
Resources for Human	4700 Wissahickon Avenue Philadelphia, PA 19144	PC	General Operating Support	100,000
Sacred Heart School	205 Church Road Oxford, PA 19363	PC	Healthy Future study	3,000
Sahas University: The Eye Institute	1200 West Godfrey Avenue Philadelphia, PA	PC	To provide vision and ocular health services to uninsured adults. Recommendation based on other vision care provider grant levels and patient volume	50,000
Schuylkill Center for Environmental Education	8480 Hag's Mill Road Philadelphia, PA 19128	PC	To support the Nature Rx. Go Out and Play program	10,000
Shriners Hospital for Children	3551 North Broad Street Philadelphia, PA 19140	PC	To support a cooking basics and nutrition program for disabled children	5,000
Southwest Leadership Academy	7101 Paschall Avenue Philadelphia, PA 19142	PC	To support the Health Futures Initiative	3,000
Speak Up! AIDS Alive	528 East Lancaster Avenue, Suite 50 St. David's, PA 19087	PC	To provide innovative programming to prevent youth suicide, decrease drop out rates and identify students in need	10,000
Spectrum Health Services	1415 N. Broad Street Philadelphia, PA 19122	PC	To provide general operating support for the new center serving West Philadelphia. Recommendation amount consistent with other grantees	75,000
St. Charles Borromeo School	1704 Bristol Pike Bensalem, PA 19020	PC	Healthy Future study	3,000
St. Elizabeth's Wellness Center	1845 North 23rd Street Philadelphia, PA 19121	PC	Nurse Intern	6,113
St. Mary Medical Center Foundation - Mother Bachmann Maternity Center/Children's Health Center	One Summit Square, Suite 300 1717 Langhorne-Newton Rd Langhorne, PA 19047	PC	General operating support	75,000
Stearns Elementary School	1665 Unity Street Philadelphia, PA 19124	PC	Healthy Futures study	3,000
Supportive Older Women's Network	4100 Main Street, Suite 200 Philadelphia, PA 19127	PC	To support a Grand Family Resource Center	10,000
Temple University	Department of Nursing 3307 N. Broad Street Philadelphia, PA 19140	PC	Graduate Scholarship Grant	15,274
Temple University	Department of Nursing 3307 N. Broad Street Philadelphia, PA 19140	PC	Undergraduate Scholarship Grant	5,113
The Veterans Group	3209 Baring Street Philadelphia, PA 19104	PC	Expanding access through transportation for veterans wellness and education program	25,000
Thomas Jefferson University	130 S. 9th Street Suite 1314 Philadelphia, PA 19107	PC	Graduate Scholarship Grant	116,412
Thomas Jefferson University	130 S. 9th Street Suite 1314 Philadelphia, PA 19107	PC	Undergraduate Scholarship Grant	21,504
Travis Manion Foundation	P O Box 1485 Doylestown, PA 18901	PC	To support a mentorship and advocacy program for veterans	20,000
Trustees of the University of PA/Heart Health Bridge to Care	3701 Locust Walk Philadelphia, PA 19104	PC	General Operating Support	7,000
University of Pennsylvania	418 Curie Boulevard Philadelphia, PA 19104	PC	Doctoral Scholarship Grant	150,000
University of Pennsylvania	418 Curie Boulevard Philadelphia, PA 19104	PC	Doctoral Scholarship Grant	150,000
University of Pennsylvania	418 Curie Boulevard Philadelphia, PA 19104	PC	Graduate Scholarship Grant	122,072
University of Pennsylvania	418 Curie Boulevard Philadelphia, PA 19104	PC	Undergraduate Scholarship Grant	12,180
University of Pennsylvania, School of Nursing	418 Curie Boulevard Philadelphia, PA 19104	PC	To support Healthy Women Healthy Cities Program	50,000
Villanova University	800 Lancaster Avenue Villanova, PA 19085	PC	Doctoral Scholarship Grant	75,000
Villanova University	800 Lancaster Avenue Villanova, PA 19085	PC	Doctoral Scholarship Grant	75,000
Villanova University	800 Lancaster Avenue Villanova, PA 19085	PC	Graduate Scholarship Grant	47,148
Villanova University	800 Lancaster Avenue Villanova, PA 19085	PC	Undergraduate Scholarship Grant	16,466
VNA Community Services, Inc.	1421 Highland Avenue Abington, PA 19001	PC	General operating support	40,000
West Chester University, Department of Nursing	Sturzebecker Health Sciences Center 855 South New Street West Chester, PA 19383	PC	Graduate Scholarship Grant	8,168
West Chester University, Department of Nursing	Sturzebecker Health Sciences Center 855 South New Street West Chester, PA 19383	PC	Undergraduate Scholarship Grant	19,839
Widener University School of Nursing	One University Place Founders Hall Chester, PA 19013	PC	Graduate Scholarship Grant	47,802
Widener University School of Nursing	One University Place Founders Hall Chester, PA 19013	PC	Undergraduate Scholarship Grant	8,571
Youth Mentoring Partnership	20 Liberty Boulevard Suite A9 Malvern, PA 19355	PC	To support a health and well being mentoring program for youth	5,000
Youth Services, Inc	410 N. 34th St Philadelphia, PA 19104	PC	General operating support	25,000
Prior Accrued Adjustments				(161,925)

Total Grants & Contributions Paid During the Year, Line 3a

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