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Form **990-PF**

Department of the Treasury  
Internal Revenue Service

Return of Private Foundation

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

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▶ Information about Form 990-PF and its instructions is at [www.irs.gov/form990pf](http://www.irs.gov/form990pf).

OMB No 1545-0052

2014

Open to Public Inspection

For calendar year 2014, or tax year beginning 01-01-2014, and ending 12-31-2014

Name of foundation BAIARDI FAMILY FOUNDATION INC		<b>A Employer identification number</b>  38-3430867	
Number and street (or P O box number if mail is not delivered to street address) 2328 PINECREST ST		<b>B Telephone number</b> (see instructions)  (231) 526-8395	
City or town, state or province, country, and ZIP or foreign postal code HARBOR SPRINGS, MI 497409261		<b>C</b> If exemption application is pending, check here <input type="checkbox"/>	
<b>G</b> Check all that apply <input type="checkbox"/> Initial return <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Final return <input type="checkbox"/> Amended return <input type="checkbox"/> Address change <input type="checkbox"/> Name change		<b>D 1.</b> Foreign organizations, check here <input type="checkbox"/> <b>2.</b> Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>	
<b>H</b> Check type of organization <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		<b>E</b> If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>	
<b>I</b> Fair market value of all assets at end of year (from Part II, col. (c), line 16)▶\$ 8,245,565		<b>F</b> If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>	
<b>J</b> Accounting method <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> 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) (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	<b>1</b> Contributions, gifts, grants, etc , received (attach schedule) . . . . .				
	<b>2</b> Check <input checked="" type="checkbox"/> if the foundation is <b>not</b> required to attach Sch B . . . . .				
	<b>3</b> Interest on savings and temporary cash investments	41	41		
	<b>4</b> Dividends and interest from securities. . . . .	183,118	183,118		
	<b>5a</b> Gross rents . . . . .				
	<b>b</b> Net rental income or (loss) _____				
	<b>6a</b> Net gain or (loss) from sale of assets not on line 10 	160,976			
	<b>b</b> Gross sales price for all assets on line 6a <u>477,547</u>				
	<b>7</b> Capital gain net income (from Part IV, line 2) . . .		45,547		
	<b>8</b> Net short-term capital gain . . . . .				
	<b>9</b> Income modifications . . . . .				
	<b>10a</b> Gross sales less returns and allowances				
Operating and Administrative Expenses	<b>b</b> Less Cost of goods sold . . . . .				
	<b>c</b> Gross profit or (loss) (attach schedule) . . . . .				
	<b>11</b> Other income (attach schedule) . . . . .				
	<b>12 Total.</b> Add lines 1 through 11 . . . . .	344,135	228,706		
	<b>13</b> Compensation of officers, directors, trustees, etc				
	<b>14</b> Other employee salaries and wages . . . . .				
	<b>15</b> Pension plans, employee benefits . . . . .				
	<b>16a</b> Legal fees (attach schedule) . . . . .				
	<b>b</b> Accounting fees (attach schedule) . . . . . 	3,230			
	<b>c</b> Other professional fees (attach schedule) . . . . .				
	<b>17</b> Interest . . . . .				
	<b>18</b> Taxes (attach schedule) (see instructions) . . . 	3,365			
	<b>19</b> Depreciation (attach schedule) and depletion . . .				
	<b>20</b> Occupancy . . . . .				
	<b>21</b> Travel, conferences, and meetings . . . . .				
	<b>22</b> Printing and publications . . . . .	1,223			1,223
	<b>23</b> Other expenses (attach schedule) . . . . . 	1,091			
	<b>24 Total operating and administrative expenses.</b>				
	Add lines 13 through 23 . . . . .	8,909	0		1,223
	<b>25</b> Contributions, gifts, grants paid . . . . .	362,787			362,787
	<b>26 Total expenses and disbursements.</b> Add lines 24 and 25	371,696	0		364,010
	<b>27</b> Subtract line 26 from line 12				
	<b>a Excess of revenue over expenses and disbursements</b>	-27,561			
	<b>b Net investment income</b> (if negative, enter -0-)		228,706		
	<b>c Adjusted net income</b> (if negative, enter -0-)				

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 . . . . .	1,564	8,835	8,835
	2	Savings and temporary cash investments . . . . .	391,367	461,374	461,375
	3	Accounts receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	4	Pledges receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	5	Grants receivable . . . . .			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions) . . . . .			
	7	Other notes and loans receivable (attach schedule) ▶ _____ Less allowance for doubtful accounts ▶ _____			
	8	Inventories for sale or use . . . . .			
	9	Prepaid expenses and deferred charges . . . . .			
	10a	Investments—U S and state government obligations (attach schedule)	30,686	15,859	15,859
	b	Investments—corporate stock (attach schedule) . . . . .	6,153,687	6,063,675	7,759,496
	c	Investments—corporate bonds (attach schedule). . . . .			
	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)	6,577,304	6,549,743	8,245,565	
Liabilities	17	Accounts payable and accrued expenses . . . . .			
	18	Grants payable . . . . .			
	19	Deferred revenue . . . . .			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule) . . . . .			
	22	Other liabilities (describe ▶ _____)			
	23	Total liabilities (add lines 17 through 22) . . . . .		0	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/> 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 ▶ <input checked="" type="checkbox"/> 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	6,577,304	6,549,743	
	30	Total net assets or fund balances (see instructions) . . . . .	6,577,304	6,549,743	
31	Total liabilities and net assets/fund balances (see instructions) . . . . .	6,577,304	6,549,743		

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 6,577,304
2	Enter amount from Part I, line 27a . . . . .	2 -27,561
3	Other increases not included in line 2 (itemize) ▶ _____	3
4	Add lines 1, 2, and 3 . . . . .	4 6,549,743
5	Decreases not included in line 2 (itemize) ▶ _____	5
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30 . . . . .	6 6,549,743

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				
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)	
a				
b				
c				
d				
e				
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))	
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any		
a				
b				
c				
d				
e				
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	45,547
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6)  If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8 . . . . . }		3	

Part V

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☒ No

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

1 Enter the appropriate amount in each column for each year, see 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	375,580	7,326,435	0 051264	
2012	362,395	6,860,121	0 052826	
2011	318,939	6,802,411	0 046886	
2010	157,199	5,990,524	0 026241	
2009	135,296	5,618,087	0 024082	
2	Total of line 1, column (d). . . . .		2	0 201299
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	0 040260
4	Enter the net value of noncharitable-use assets for 2014 from Part X, line 5. . . . .		4	7,907,801
5	Multiply line 4 by line 3. . . . .		5	318,368
6	Enter 1% of net investment income (1% of Part I, line 27b). . . . .		6	2,287
7	Add lines 5 and 6. . . . .		7	320,655
8	Enter qualifying distributions from Part XII, line 4. . . . .		8	364,010
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 page 18 of the instructions)

1a		Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1			
b		Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b . . . . .		12,287	
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. . . . .		32,287	
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- . . . . .		52,287	
6		Credits/Payments			
a		2014 estimated tax payments and 2013 overpayment credited to 2014		6a	2,500
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. . . . .		72,500	
8		Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached.		8	
9		Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed . . . . .		9	
10		Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid. . . . .		10213	
11		Enter the amount of line 10 to be Credited to 2015 estimated tax <input checked="" type="checkbox"/> 213 Refunded <input type="checkbox"/>		11	

Part VII-A

Statements Regarding Activities

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	Yes	No
b		Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for definition)? . . . . .		1b		No
		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		
d		Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation <input checked="" type="checkbox"/> \$ (2) On foundation managers <input checked="" type="checkbox"/> \$				
e		Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input checked="" type="checkbox"/> \$				
2		Has the foundation engaged in any activities that have not previously been reported to the IRS? . . . . .		2		No
		If "Yes," attach a detailed description of the activities.				
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		No
4a		Did the foundation have unrelated business gross income of \$1,000 or more during the year? . . . . .		4a		No
b		If "Yes," has it filed a tax return on Form 990-T for this year? . . . . .		4b		
5		Was there a liquidation, termination, dissolution, or substantial contraction during the year? . . . . .		5		No
		If "Yes," attach the statement required by General Instruction T.				
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	Yes	
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	Yes	
8a		Enter the states to which the foundation reports or with which it is registered (see instructions) <input checked="" type="checkbox"/> MI				
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	Yes	
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		No
10		Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses. . . . .		10		No

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		No
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		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Yes	
Website address ▶ WWW.BAIARDIFOUNDATION.ORG				
14	The books are in care of ▶ CHRIS BAIARDI Telephone no ▶ (231) 526-8395			
	Located at ▶ 2328 PINECREST ST HARBOR SPRINGS MI ZIP +4 ▶ 49740			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of <b>Form 1041</b> —Check here . . . . . ▶ <input type="checkbox"/>			
	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?	16	Yes	No
See instructions for exceptions and filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR) If "Yes", enter the name of the foreign country ▶				

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			Yes	No
1a	During the year did the foundation (either directly or indirectly)			
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? . . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? . . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	(6) Agree to pay money or property to a government official? ( <b>Exception.</b> Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days ). . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
b	If any answer is "Yes" to 1a(1)–(6), did <b>any</b> 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)? . . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	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? . . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	1c		
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2014, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2014? . . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	If "Yes," list the years ▶ 20____, 20____, 20____, 20____			
b	Are there any years listed in 2a for which the foundation is <b>not</b> 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 <b>all</b> years listed, answer "No" and attach statement—see instructions ). . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	2b		
c	If the provisions of section 4942(a)(2) are being applied to <b>any</b> of the years listed in 2a, list the years here ▶ 20____, 20____, 20____, 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? . . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
b	If "Yes," did it have excess business holdings in 2014 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? ( <i>Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2014.</i> ) . . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
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		No

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))?		<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?		<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
(3) Provide a grant to an individual for travel, study, or other similar purposes?		<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
(4) Provide a grant to an organization other than a charitable, etc , organization described in section 4945(d)(4)(A)? (see instructions).		<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> 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?		<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
b If any answer is "Yes" to 5a(1)–(5), did <b>any</b> 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.				<input type="checkbox"/>
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?				<input type="checkbox"/> Yes <input type="checkbox"/> 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?		<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?		6b		No
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?		<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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
CHRIS A BAIARDI	PRESIDENT	0	0	0
2328 PINECREST ST HARBOR SPRINGS, MI 49740	10 00			
CINDY J BAIARDI	SEC, TREAS	0	0	0
2328 PINECREST ST HARBOR SPRINGS, MI 49740	10 00			
SUZANNE M BAIARDI	VICE PRES	0	0	0
7330 CRACKLING CREEK CIRCLE WEST BLOOMFIELD, MI 48322	2 00			
KRISTEN L BAIARDI	VICE PRES	0	0	0
2152 MANCHESTER BIRMINGHAM, MI 48009	2 00			
2 Compensation of five highest-paid employees (other than those included on line 1—see instructions). If none, enter "NONE."				
(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				
Total number of other employees paid over \$50,000.				

Part VIII

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

3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE".		
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
Total number of others receiving over \$50,000 for professional services. . . . .		

Part IX-A

Summary of Direct Charitable Activities

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

Part IX-B

Summary of Program-Related Investments (see instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1 N/A	
2	
All other program-related investments. See instructions.	
3	
Total. Add lines 1 through 3. . . . .	



Part X

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes		
a	Average monthly fair market value of securities. . . . .	1a	7,760,551
b	Average of monthly cash balances. . . . .	1b	267,673
c	Fair market value of all other assets (see instructions). . . . .	1c	0
d	Total (add lines 1a, b, and c). . . . .	1d	8,028,224
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	8,028,224
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions). . . . .	4	120,423
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	7,907,801
6	Minimum investment return. Enter 5% of line 5. . . . .	6	395,390

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	395,390
2a	Tax on investment income for 2014 from Part VI, line 5. . . . .	2a	2,287
b	Income tax for 2014 (This does not include the tax from Part VI ). . . . .	2b	
c	Add lines 2a and 2b. . . . .	2c	2,287
3	Distributable amount before adjustments Subtract line 2c from line 1. . . . .	3	393,103
4	Recoveries of amounts treated as qualifying distributions. . . . .	4	
5	Add lines 3 and 4. . . . .	5	393,103
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	393,103

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	364,010
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	364,010
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	2,287
6	Adjusted qualifying distributions. Subtract line 5 from line 4. . . . .	6	361,723

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				393,103
2 Undistributed income, if any, as of the end of 2014				
a Enter amount for 2013 only. . . . .				
b Total for prior years 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2014				
a From 2009. . . . .				
b From 2010. . . . .				
c From 2011. . . . .				
d From 2012. . . . .				
e From 2013. . . . .				4,778
f Total of lines 3a through e. . . . .	4,778			
4 Qualifying distributions for 2014 from Part XII, line 4 ▶ \$ 364,010				
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. . . . .				364,010
e Remaining amount distributed out of corpus				
5 Excess distributions carryover applied to 2014 (If an amount appears in column (d), the same amount must be shown in column (a).)	4,778			4,778
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5				
b Prior years' undistributed income Subtract line 4b from line 2b. . . . .				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed. . . . .				
d Subtract line 6c from line 6b Taxable amount—see instructions . . . . .				
e Undistributed income for 2013 Subtract line 4a from line 2a Taxable amount—see instructions . . . . .				
f Undistributed income for 2014 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2015 . . . . .				24,315
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions). . . . .				
8 Excess distributions carryover from 2009 not applied on line 5 or line 7 (see instructions). . .				
9 Excess distributions carryover to 2015. Subtract lines 7 and 8 from line 6a . . . . .				
10 Analysis of line 9				
a Excess from 2010. . . .				
b Excess from 2011. . . .				
c Excess from 2012. . . .				
d Excess from 2013. . . .				
e Excess from 2014. . . .				

Part XIV

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

1a

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

b

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

☐ 4942(j)(3) or ☐ 4942(j)(5)

2a

Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed.

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

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

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

BAIARDI FAMILY FOUNDATION  
2328 PINECREST  
HARBOR SPRINGS, MI 49740  
(231) 526-8395  
CJBAIARDI@BAIARDIFOUNDATION.ORG

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

Form 990-PF (2014)

Part XV

Supplementary Information (continued)

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year See Additional Data Table				
Total . . . . .			3a	362,787
b Approved for future payment				
Total . . . . .			3b	

Enter gross amounts unless otherwise indicated

Enter gross amounts unless otherwise indicated		Unrelated business income		Excluded by section 512, 513, or 514		(e)
		(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	Related or exempt function income (See instructions )
<b>1</b>	Program service revenue					
<b>a</b>	_____					
<b>b</b>	_____					
<b>c</b>	_____					
<b>d</b>	_____					
<b>e</b>	_____					
<b>f</b>	_____					
<b>g</b>	Fees and contracts from government agencies					
<b>2</b>	Membership dues and assessments. . . . .					
<b>3</b>	Interest on savings and temporary cash investments . . . . .			14	41	
<b>4</b>	Dividends and interest from securities. . . . .			14	183,118	
<b>5</b>	Net rental income or (loss) from real estate					
<b>a</b>	Debt-financed property. . . . .					
<b>b</b>	Not debt-financed property. . . . .					
<b>6</b>	Net rental income or (loss) from personal property . . . . .					
<b>7</b>	Other investment income. . . . .					
<b>8</b>	Gain or (loss) from sales of assets other than inventory . . . . .			25	45,547	115,429
<b>9</b>	Net income or (loss) from special events					
<b>10</b>	Gross profit or (loss) from sales of inventory. . .					
<b>11</b>	Other revenue <b>a</b> _____					
<b>b</b>	_____					
<b>c</b>	_____					
<b>d</b>	_____					
<b>e</b>	_____					
<b>12</b>	Subtotal Add columns (b), (d), and (e). . . . .				228,706	115,429
<b>13</b>	<b>Total.</b> Add line 12, columns (b), (d), and (e). . . . . (See worksheet in line 13 instructions to verify calculations )			<b>13</b>		<b>344,135</b>

[illegible]

## Part XVII

**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)	No
-------------------	-------	----

(2) Other assets. . . . .	1a(2)	No
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**b Other transactions**

<b>(1)</b> Sales of assets to a noncharitable exempt organization. . . . .	<b>1b(1)</b>	<b>No</b>
--	--------------	-----------

<b>(2)</b> Purchases of assets from a noncharitable exempt organization. . . . .	<b>1b(2)</b>		<b>No</b>
--	--------------	--	-----------

<b>(3)</b> Rental of facilities, equipment, or other assets. . . . .	<b>1b(3)</b>	<b>No</b>
--	--------------	-----------

<b>(4)</b> Reimbursement arrangements. . . . .	<b>1b(4)</b>	<b>No</b>
--	--------------	-----------

(5) Loans or loan guarantees. . . . .	1b(5)		No
---------------------------------------	-------	--	----

<b>(6)</b> Performance of services or membership or fundraising solicitations. . . . .	<b>1b(6)</b>	<b>No</b>
--	--------------	-----------

<b>c</b> Sharing of facilities, equipment, mailing lists, other assets, or paid employees. . . . .	<b>1c</b>	<b>No</b>
--	-----------	-----------

**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 property at the time of the transfer.

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

**2a** Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations

described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? . . . . . ☐ Yes ☒ No

**b** If "Yes," complete the following schedule

(a) Name of organization	(b) Type of organization	(c) Description of relationship
--------------------------	--------------------------	---------------------------------

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

\*\*\*\*\* 2015-05-09 \*\*\*\*\*

Signature of officer or trustee Date Title

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


Print/Type preparer's name PAULA R YOUNG-KOZLOWSKI	Preparer's Signature	Date 2015-05-14	Check if self-employed <input checked="checked" type="checkbox"/>	PTIN P00507353
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<b>Paid Preparer Use Only</b>	Firm's name ▶ PR YOUNG CPA PC	Firm's EIN ▶ 27-0437570
	Firm's address ▶ 8585 P G A DR STE 205    WALLED LAKE, MI 483901604	Phone no (248) 668-1500

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment


Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
ALANSON AREA PUBLIC LIBRARY ALANSON AREA PUBLIC LIBRARY 7631 BURR AVE 7631 BURR AVE ALANSON,MI 49706	N/A	PUBLIC	PURCHASE OF BOOKS	1,000
AL LITZENBURGER RUFFED GROUSE SCTY AL LITZENBURGER RUFFED GROUSE SCTY 3844 LORRAINE DR 3844 LORRAINE DR PETOSKEY,MI 49770	N/A	PRIVATE ORG	YOUTH ACTIVITIES	1,500
ALLIED EMS SYSTEMS INC ALLIED EMS SYSTEMS INC 3407 M-119 3407 M-119 HARBOR SPRINGS,MI 49740	N/A	PUBLIC	UPGRADE CURRENT A E D PER REQUEST	3,619
AMERICAN LEGION AUXILLARY AMERICAN LEGION AUXILLARY 3025 S PLEASANTVIEW RD 3025 S PLEASANT VIEW RD HARBOR SPRINGS,MI 49740	N/A	PUBLIC	FAMILY ASSISTANCE & MILK PROGRAM	6,000
AMERICAN TREE FARM SYSTEM AMERICAN TREE FARM SYSTEM PO BOX 79423 PO BOX 79423 BALTIMORE,MD 21298	N/A	PUBLIC	GENERAL OPERATIONS	1,000
BARAGA BROADCASTING INC BARAGA BROADCASTING INC PO BOX 1109 PO BOX 1109 INDIAN RIVER,MI 49749	N/A	PUBLIC	GNERAL SUPPORT	1,000
BAY BLUFFS AUXILIARY BAY BLUFFS AUXILIARY 750 EAST MAIN STREET 750 EAST MAIN ST HARBOR SPRINGS,MI 48740	N/A	PUBLIC	GENERAL OPERATIONS	1,000
BLUMS LANDING BLUMS LANDING 7460 OCQUEOC LAKE RD 7460 OCQUEOC LAKE RD MILLERSBURG,MI 49759	N/A	PUBLIC	GENERAL SUPPORT	2,500
BOTTOMLESS TOY CHEST BOTTOMLESS TOY CHEST PO BOX 623 PO BOX 623 BLOOMFIELD HILLS,MI 48303	N/A	PUBLIC	PURCHASE TOYS	2,500
BROTHER DAN'S FOOD PANTRY BROTHER DAN'S FOOD PANTRY 415 STATE ST 415 STATE ST PETOSKEY,MI 49770	N/A	PUBLIC	FOOD PURCHASE	2,000
CHILD SAFE MICHIGAN CHILD SAFE MICHIGAN 30680 MONTPELIER 30680 MONTPELIER MADISON HEIGHTS,MI 48071	N/A	PUBLIC	HOLIDAY GIVING PROGRAM	2,500
CHRIST CHILD SOCIETY CHRIST CHILD SOCIETY OF NORTHERN MICHIGAN PO BOX 132 PO BOX 132 HARBOR SPRINGS,MI 49740	N/A	RELIGIOUS	LAYETTE PROGRAM	5,000
CONSERVATION RESOURCE ALLIANCE CONSERVATION RESOURCE ALLIANCE 10850 TRAVERSE HIGHWAY 10850 TRAVERSE HIGHWAY TRAVERSE CITY,MI 49684	N/A	PUBLIC	MAPLE RIVER RESTORATION PROJECT	10,000
COUNCIL OF MI FOUNDATIONS COUNCIL OF MICHIGAN FOUNDATION 333 WEST FORT ST STE 2010 333 WEST FORT ST STE 2010 DETROIT,MI 48226	N/A	PUBLIC	2014 MEMBERSHIP RENEWAL	2,000
DIOCESE OF GAYLORD DIOCESE OF GAYLORD 611 WEST NORTH ST 611 WEST NORTH ST GAYLORD,MI 49735	N/A	RELIGIOUS	DIOCESAN SEMINARIAN EDUCATION FUND	2,000
Total . . . . . 3a				362,787

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a</b> Paid during the year				
ELKS NATIONAL FOUNDATION ELKS NATIONAL FOUNDATION 5365 AINTREE 5365 AINTREE OAKLAND TOWNSHIP,MI 48306	N/A	PUBLIC	HEALTHY MINDS & BODIES PROGRAM	4,300
EMMET CONSERVATION DISTRICT EMMET CONSERVATION DISTRICT 3434 M-119 3434 M-119 HARBOR SPRINGS,MI 49740	N/A	PUBLIC	WATER RESOURCE EDUCATION PRG	1,000
EMMET COUNTY EMMET COUNTY 200 DIVISION ST 200 DIVISION ST PETOSKEY,MI 49770	N/A	PUBLIC	EMMET HISTORICAL MAG	4,000
EMMET COUNTY RD COMM EMMET COUNTY RD COMM 200 DIVISION ST 200 DIVISION ST PETOSKEY,MI 49770	N/A	PUBLIC	TIMBER BRIDGE	15,000
EMMET COUNTY 4-H EMMET COUNTY 4-H 3434 HARBOR-PETOSKEY RD 3434 HARBOR-PETOSKEY RD HARBOR SPRINGS,MI 49740	N/A	PUBLIC	ACTIVITIES	2,200
EMMET CHARLEVOIX 4-H EMMET CHARLEVOIX 4-H 4583 LINTLONG RD 4583 LINTLONG RD PETOSKEY,MI 49770	N/A	PUBLIC	LIVESTOCK AUCTION	3,396
HARBOR INC HARBOR INC PO BOX 112 PO BOX 112 HARBOR SPRINGS,MI 49740	N/A	PUBLIC	GENERAL OPERATIONS	2,500
HARBOR HALL FOUNDATION HARBOR HALL FOUNDATION PO BOX 376 PO BOX 376 HARBOR SPRINGS,MI 49740	N/A	PUBLIC	GENERAL SUPPORT	7,500
HARBOR PETOSKEY AREA AIRPORT AUTHOR HARBOR PETOSKEY AREA AIRPORT AUTHORITY PO BOX 274 PO BOX 274 CONWAY,MI 49722	N/A	PUBLIC	MACGREGOR PROP PURCHASE	10,000
HARBOR SPRINGS COMMUNITY FOOD PANTR HARBOR SPRNGS FOOD PANTRY PO BOX 23 PO BOX 23 HARBOR SPRINGS,MI 49740	N/A	PUBLIC	LIVESTOCK PURCHASE	1,800
HARBOR SPRINGS COMMUNITY FOOD PANTR HARBOR SPRINGS FOOD PANTRY PO BOX 23 PO BOX 23 HARBOR SPRINGS,MI 49740	N/A	PUBLIC	BOOK FUND FOR CHILDREN	500
HARBOR SPRINGS FIRE AUTHORITY HARBOR SPRINGS FIRE AUTHORITY 160 ZOLL ST 160 ZOLL ST HARBOR SPRINGS,MI 49740	N/A	PUBLIC	WASHER/EXTRACTOR & DRYERS	5,967
HARBOR SPRINGS HISTORICAL HARBOR SPRINGS HISTORICAL SOCIETY 349 E MAIN ST 349 E MAIN ST HARBOR SPRINGS,MI 49740	N/A	PUBLIC	GENERAL OPERATIONS	1,500
HARBOR SPRINGS PUBLIC SCHOOLS HARBOR SPRINGS PUBLIC SCHOOLS 800 STATE ST 800 STATE ST HARBOR SPRINGS,MI 49740	N/A	PUBLIC	SENIOR ALL NIGHT CELEBRATION	1,000
HOLY CHILDHOOD OF JESUS CHURCH HOLY CHILDHOOD OF JESUS CHURCH 150 W MAIN ST 150 W MAIN ST HARBOR SPRINGS,MI 49740	N/A	PRIVATE ORG	GENERAL OPERATIONS	5,000
<b>Total . . . . .</b>  <b>3a</b>				362,787



Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a</b> Paid during the year				
HOLY CHILDHOOD OF JESUS CHURCH HOLY CHILDHOOD OF JESUS CHURC 150 W MAIN ST 150 W MAIN ST HARBOR SPRINGS, MI 49740	N/A	PRIVATE ORG	CARE AND MAINTENANCE DR FOR CEMETERY	2,615
ICEBREAKER MACKINAW MARITIME MUSEUM ICEBREAKER MACKINAW MARITIME MUSEUM 131 S HURON AVE 131 S HURON AVE MACKINAW CITY, MI 49701	N/A	PUBLIC	GENERAL OPERATIONS	2,000
LITTLE TRAVERSE CONSERVANCY LITTLE TRAVERSE CONSERVANCY 3264 POWELL ROAD 3264 POWELL ROAD HARBOR SPRINGS, MI 49740	N/A	PUBLIC	SAVE THE TREES FUNDRAISER	5,000
LITTLE TRAVESE CONSERVANCY LITTLE TRAVERSE CONSERVANCY 3264 POWELL ROAD 3264 POWELL ROAD HARBOR SPRINGS, MI 49740	N/A	PUBLIC	MEEKS PROPERTY PURCHASE	20,000
MAKE-A-WISH FOUNDATION OF MICHIGAN MAKE-A-WISH FOUNDATION OF MICHIGAN 2300 GENOA BUSINESS PARK 2300 GENOA BUSINESS PARK BRIGHTON, MI 481147369	N/A	PUBLIC	SUPPORT WISH-GRANTING PROGRAM	3,000
MANNA FOOD PROJECT MANNA FOOD PROJECT 8791 MCBRIDE PARK COURT 8791MCBRIDE PARK COURT HARBOR SPRINGS, MI 49740	N/A	PUBLIC	FOOD PURCHASE	3,000
MCLAREN NORTHERN MICHIGAN FOUNDATIO MCLAREN NORTHERN MICHIGAN FOUNDATION 360 CONNABLE AVE 360 CONNABLE AVE PETOSKEY, MI 49770	N/A	PUBLIC	GUARDIAN ANGEL PROGRAM	10,000
MCLAREN NORTHERN MICHIGAN FOUNDATIO MCLAREN NORTHERN MICHIGAN FOUNDATION 360 CONNABLE AVE 360 CONNABLE AVE PETOSKEY, MI 49770	N/A	PUBLIC	NURSING SCHOLARSHIPS	4,500
MCLAREN NORTHERN MICHIGAN FOUNDATIO MCLAREN NORTHERN MICHIGAN FOUNDATION 360 CONNABLE AVE 360 CONNABLE AVE PETOSKEY, MI 49770	N/A	PUBLIC	HYBRID SURGICAL SUITE	56,440
MCLAREN NORTHERN MICHIGAN FOUNDATIO MCLAREN NORTHERN MICHIGAN FOUNDATION 360 CONNABLE AVE 360 CONNABLE AVE PETOSKEY, MI 49770	N/A	PUBLIC	ROFIN LIGHT FOR ER	4,537
MCLAREN NORTHERN MICHIGAN FOUNDATIO MCLAREN NORTHERN MICHIGAN FOUNDATION 360 CONNABLE AVE 360 CONNABLE AVE PETOSKEY, MI 49770	N/A	PUBLIC	JULIE JAREMA & DAWN BEHLING DIRECTED	5,000
MIM SCHOLARSHIP FUND MIM SCHOLARSHIP FUND 24725 W 12 MILE RD ST388 24725 W 12 MILE RD STE388 SOUTHFIELD, MI 48034	N/A	PUBLIC	SCHOLARSHIP SUPPORT	2,000
NATIONAL FEDERATION FOR BLIND NATIONAL FEDERATION FOR BLIND 6919 W BERWYN 6919 W BERWYN CHICAGO, IL 60656	N/A	PUBLIC	YOUTH PROGRAMS	2,500
NO FENCE TOO HIGH MINISTRIES INC NO FENCE TOO HIGH MINISTRIES INC 4505 S STATE RD 4505 S STATE RD HARBOR SPRINGS, MI 49740	N/A	PUBLIC	PURCHASE BOOKS AND BIBLES	950
NORTH CENTRAL MICHIGAN NORTH CENTRAL MICHIGAN COLLEGE FOUNDATION 1515 HOWARD STREET 1515 HOWARD STREET PETOSKEY, MI 49770	N/A	PUBLIC	SCHOLARSHIP PROGRAM	2,500
<b>Total . . . . .</b>  <b>3a</b>				362,787

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
NORTH CENTRAL MICHIGAN NORTH CENTRAL MICHIGAN 1515 HOWARD STREET 1515 HOWARD STREET PETOSKEY,MI 49770	N/A	PUBLIC	STUDENT EMERGENCY FUND	1,500
PELLSTON PUBLIC SCHOOLS PELLSTON PUBLIC SCHOOLS 172 N PARK ST 172 N PARK ST PELLSTON,MI 49769	N/A	PUBLIC	CAMP DAGGETT TRIP	3,319
PELLSTON PUBLIC SCHOOLS PELLSTON PUBLIC SCHOOLS 172 N PARK ST 172 N PARK ST PELLSTON,MI 49769	N/A	PUBLIC	2ND GRD READING PROGRAM	250
PETOSKEY-HARBOR SPRINGS PETOSKEY-HARBOR SPRINGS 616 PETOSKEY ST 616 PETOSKEY ST PETOSKEY,MI 49770	N/A	PUBLIC	NORTHER MI EQUINE THERAPY	9,200
PETOSKEY-HARBOR SPRINGS PETOSKEY-HARBOR SPRINGS COMMUNITY FOUNDATION 616 PETOSKEY STREET 616 PETOSKEY STREET PETOSKEY,MI 49770	N/A	PUBLIC	SCHOLARSHIPS	11,850
PETOSKEY-HARBOR SPRINGS PETOSKEY-HARBOR SPRINGS COMMUNITY FOUNDATION 616 PETOSKEY STREET 616 PETOSKEY STREET PETOSKEY,MI 49770	N/A	PUBLIC	EMMET COUNTY SHERIFF	4,537
PETOSKEY-HARBOR SPRINGS PETOSKEY-HARBOR SPRINGS COMMUNITY FOUNDATION 616 PETOSKEY STREET 616 PETOSKEY STREET PETOSKEY,MI 49770	N/A	PUBLIC	GRANTS	13,500
PETOSKEY-HARBOR SPRINGS PETOSKEY-HARBOR SPRINGS COMMUNITY FOUNDATION 616 PETOSKEY STREET 616 PETOSKEY STREET PETOSKEY,MI 49770	N/A	PUBLIC	FALL CYCLE	16,000
PETOSKEY PUBLIC LIBRARY PETOSKEY PUBLIC LIBRARY 500 E MITCHELL ST 500 E MITCHELL ST PETOSKEY,MI 49770	N/A	PUBLIC	PURCHASE OF BOOKS	1,000
RFC FIRERESCUE RFC FIRE/RESCUE 8338 W ROBINSON RD 8338 W ROBINSON RD HARBOR SPRINGS,MI 49740	N/A	PUBLIC	REPLACEMENT HOSES	13,443
RAVEN HILL DISCOVERY CENTER RAVEN HILL DISCOVERY CENTER 4737 FULLER RD 4737 FULLER RD EAST JORDAN,MI 49727	N/A	PUBLIC	BUILDING PROJECT	7,500
ROTARY OF LITTLE TRAVERSE BAY ROTARY OF LITTLE TRAVERSE BAY PO BOX 844 PO BOX 844 PETOSKEY,MI 49770	N/A	PUBLIC	SCHOLARSHIPS	10,000
ST FRANCIS XAVIER SCHOOL ST FRANCIS XAVIER SCHOOL 414 MICHIGAN 414 MICHIGAN PETOSKEY,MI 49770	N/A	PRIVATE ORG	GENERAL OPERATIONS	2,500
ST FRANCIS XAVIER SCHOOL ST FRANCIS XAVIER SCHOOL 414 MICHIGAN 414 MICHIGAN PETOSKEY,MI 49770	N/A	PUBLIC	CAMERAS, PROJECTORS	2,364
ST SCHOLASTICA PRIORY ST SCHOLASTICA PRIORY 271 N MAIN ST PO BOX 606 271 N MAIN ST PO BOX 606 PETERSHAM,MA 01366	N/A	PUBLIC	GENERAL OPERATIONS	2,500
Total . . . . . 3a				362,787

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
UNIV OF MICH MEDICAL SCHO UNIVERSITY OF MICH MEDICAL SCHOOL 2110 TAUBMAN CENTER 2110 TAUBMAN CENTER ANN ARBOR,MI 48109	N/A	HOSPITAL	GRANT ENDOWMENT FUND	30,000
<b>Total . . . . . ▶ 3a</b>				362,787

## TY 2014 Accounting Fees Schedule

**Name:** BAIARDI FAMILY FOUNDATION INC

**EIN:** 38-3430867

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
TAX RETURN FEES	3,230			

Note: To capture the full content of this document, please select landscape mode (11" x 8.5") when printing.

TY 2014 Gain/Loss from Sale of Other Assets Schedule

Name: BAIARDI FAMILY FOUNDATION INC

EIN: 38-3430867

Name	Date Acquired	How Acquired	Date Sold	Purchaser Name	Gross Sales Price	Basis	Basis Method	Sales Expenses	Total (net)	Accumulated Depreciation
VANGUARD STAR FUND	2008-01	PURCHASE	2014-11		34,000	26,272			7,728	
VANGUARD BALANCED INDEX FUND	2008-01	PURCHASE	2014-11		100,000	71,841			28,159	
VANGUARD BALANCED INDEX FUND	2008-01	PURCHASE	2014-11		100,000	71,792			28,208	
VANGUARD BALANCED INDEX FUND	2008-01	PURCHASE	2014-11		50,000	35,896			14,104	
VANGUARD BALANCED INDEX FUND	2008-01	PURCHASE	2014-12		50,000	35,487			14,513	
VANGUARD BALANCED INDEX FUND	2008-01	PURCHASE	2014-12		30,000	21,221			8,779	
WELLINGTON FUND ADMIRAL	2008-01	PURCHASE	2014-11		34,000	26,270			7,730	
WELLESLEY INCOME FUND	2010-08	PURCHASE	2014-11		34,000	27,792			6,208	

**TY 2014 Investments Corporate  
Stock Schedule****Name:** BAIARDI FAMILY FOUNDATION INC**EIN:** 38-3430867

<b>Name of Stock</b>	<b>End of Year Book Value</b>	<b>End of Year Fair Market Value</b>
VANGUARD-BAL INDEX FD ADMIRAL	3,709,271	5,123,120
VANGUARD-WELLINGTON FD ADMIRAL	733,622	889,557
VANGUARD-STAR FUND	687,461	850,770
VANGUARD-WELLESLEY	237,061	277,526
VANGUARD-TOTAL INTL STK IDX ADMIRAL	696,260	618,523

# TY 2014 Investments Government Obligations Schedule

**Name:** BAIARDI FAMILY FOUNDATION INC

**EIN:** 38-3430867

**US Government Securities - End of  
Year Book Value:**

15,859

**US Government Securities - End of  
Year Fair Market Value:**

15,859

**State & Local Government  
Securities - End of Year Book  
Value:**

**State & Local Government  
Securities - End of Year Fair  
Market Value:**

**TY 2014 Other Expenses Schedule****Name:** BAIARDI FAMILY FOUNDATION INC**EIN:** 38-3430867

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
EXPENSES				
INSURANCE	1,091			



**TY 2014 Taxes Schedule****Name:** BAIARDI FAMILY FOUNDATION INC**EIN:** 38-3430867

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FEDERAL INCOME TAX PAID	2,028			
FOREIGN TAXES	1,337			