Form **990-PF**

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

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

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

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

OMB No 1545-0052

2015

Open to Public Inspection

For calendar year 2015 or tax year beginning , 2015, and ending , 20

Name of foundation: Anderson Foundation

A Employer identification number: 34-6528868

Number and street (or P O box number if mail is not delivered to street address): P O Box 119

Room/suite:

B Telephone number (see instructions): 419-893-5050

City or town, state or province, country, and ZIP or foreign postal code: Maumee, OH 43537-0119

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)* ▶ $ 10,743,026

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)	0			
	2	Check ▶ ☐ if the foundation is **not** required to attach Sch. B				
	3	Interest on savings and temporary cash investments	145,977	145,977		
	4	Dividends and interest from securities	167,874	167,874		
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10	48,268			
	b	Gross sales price for all assets on line 6a 6,847,199				
	7	Capital gain net income (from Part IV, line 2)		48,268		
	8	Net short-term capital gain				
	9	Income modifications				
	10a	Gross sales less returns and allowances				
	b	Less: Cost of goods sold				
	c	Gross profit or (loss) (attach schedule)				
	11	Other income (attach schedule)	0	0		
	12	**Total.** Add lines 1 through 11	362,119	362,119		
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)	120,866	118,466		2,400
	17	Interest				
	18	Taxes (attach schedule) (see instructions)	19,714	19,714		
	19	Depreciation (attach schedule) and depletion				
	20	Occupancy				
	21	Travel, conferences, and meetings				
	22	Printing and publications				
	23	Other expenses (attach schedule)	200	200		
	24	**Total operating and administrative expenses.** Add lines 13 through 23	140,780	138,380		2,400
	25	Contributions, gifts, grants paid	575,057			575,057
	26	**Total expenses and disbursements.** Add lines 24 and 25	715,837	138,380		577,457
	27	Subtract line 26 from line 12:				
	a	**Excess of revenue over expenses and disbursements**	(353,718)			
	b	**Net investment income** (if negative, enter -0-)		223,739		
	c	**Adjusted net income** (if negative, enter -0-)				

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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 (a) Book Value	End of year (b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing	74,658	36,001	36,001
	2	Savings and temporary cash investments	113,498	113,842	113,842
	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)			
	b	Investments—corporate stock (attach schedule)			
	c	Investments—corporate bonds (attach schedule)	83,300	83,300	160,020
	11	Investments—land, buildings, and equipment: basis ▶			
		Less. accumulated depreciation (attach schedule) ▶			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)	9,798,666	9,483,261	10,433,163
	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)	10,070,122	9,716,404	10,743,026
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)			
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	10,070,122	9,716,404	
	30	**Total net assets or fund balances** (see instructions)	10,070,122	9,716,404	
	31	**Total liabilities and net assets/fund balances** (see instructions)	10,070,122	9,716,404	

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	10,070,122
2	Enter amount from Part I, line 27a	2	(353,718)
3	Other increases not included in line 2 (itemize) ▶	3	
4	Add lines 1, 2, and 3	4	9,716,404
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	9,716,404

Part IV Capital Gains and Losses for Tax on Investment Income

	(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
1a				
b				
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	6,805,400		6,757,132	48,268
b				
c				
d				
e				

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

	(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	(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
a				48,268
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	48,268
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 the instructions before making any entries

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2014	551,446	11,224,613	0491
2013	507,619	10,241,090	0496
2012	318,967	9,802,457	0325
2011	274,817	9,638,558	0285
2010	413,065	9,021,064	0413

2	**Total** of line 1, column (d)	2	2010
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	0402
4	Enter the net value of noncharitable-use assets for 2015 from Part X, line 5	4	11,099,363
5	Multiply line 4 by line 3	5	446,194
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	2,237
7	Add lines 5 and 6	7	448,431
8	Enter qualifying distributions from Part XII, line 4	8	577,457

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

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

1a	Exempt operating foundations described in section 4940(d)(2), check here ▶ ☐ and enter "N/A" on line 1. Date of ruling or determination letter. ________ (attach copy of letter if necessary—see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ▶ ☑ and enter 1% of Part I, line 27b	1	2,237
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	2,237
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	2,237
6	Credits/Payments		
a	2015 estimated tax payments and 2014 overpayment credited to 2015 — 6a — 2,097		
b	Exempt foreign organizations—tax withheld at source — 6b		
c	Tax paid with application for extension of time to file (Form 8868) — 6c — 1,000		
d	Backup withholding erroneously withheld — 6d		
7	Total credits and payments. Add lines 6a through 6d	7	3,097
8	Enter any **penalty** for underpayment of estimated tax. Check here ☐ if Form 2220 is attached	8	
9	**Tax due.** If the total of lines 5 and 8 is more than line 7, enter **amount owed** ▶	9	
10	**Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶	10	860
11	Enter the amount of line 10 to be **Credited to 2016 estimated tax** ▶ 860 **Refunded** ▶	11	

Part VII-A Statements Regarding Activities

			Yes	No
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a		✓
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes (see Instructions for the definition)?	1b		✓
	*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. ▶ $ ________ **(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? *If "Yes," attach a detailed description of the activities.*	2		✓
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		✓
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		✓
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? *If "Yes," attach the statement required by General Instruction T.*	5		✓
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	✓	
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	✓	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) ▶			
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	✓	
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 2015 or the taxable year beginning in 2015 (see instructions for Part XIV)? *If "Yes," complete Part XIV*	9		✓
10	Did any persons become substantial contributors during the tax year? *If "Yes," attach a schedule listing their names and addresses*	10		✓

Part VII-A Statements Regarding Activities *(continued)*

			Yes	No
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		✓
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		✓
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	✓	
	Website address ▶ N/A			
14	The books are in care of ▶ Matthew C Anderson Telephone no. ▶ 419 893-5050 Located at ▶ 480 W Dussel Drive, Maumee, OH ZIP+4 ▶ 43537-0119			
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 2015, 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		✓
	See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country ▶			

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

			Yes	No
	File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			
1a	During the year did the foundation (either directly or indirectly):			
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☑ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☑ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☑ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☑ Yes ☐ No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☑ No			
	(6) Agree to pay money or property to a government official? (**Exception.** Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) ☐ Yes ☑ No			
b	If any answer is "Yes" to 1a(1)-(6), did **any** of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)?	1b		✓
	Organizations relying on a current notice regarding disaster assistance check here ▶ ☐			
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2015?	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 2015, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2015? ☐ 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 2015 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 2015.)*	3b		✓
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		✓
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 2015?	4b		✓

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
Matthew C Anderson	Chairman 2 hours	0 00		
Richard P Anderson, Michael J Anderson John P Kraus, Jeffery W Anderson	Trustees 1 Hour	0 00		
Lu Stauffer, Richard M Anderson	Trustees 1 Hour	0 00		
All located at 480 W Dussel Drive Maumee, OH 43537-0119				

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 ▶				0

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

3 Five highest-paid independent contractors for professional services (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	
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	10,574,400
b	Average of monthly cash balances	1b	693,989
c	Fair market value of all other assets (see instructions)	1c	
d	**Total** (add lines 1a, b, and c)	1d	11,268,389
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	11,268,389
4	Cash deemed held for charitable activities. Enter 1½% of line 3 (for greater amount, see instructions)	4	169,026
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3. Enter here and on Part V, line 4	5	11,099,363
6	**Minimum investment return.** Enter 5% of line 5	6	554,968

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	554,968
2a	Tax on investment income for 2015 from Part VI, line 5	2a	2,237		
b	Income tax for 2015. (This does not include the tax from Part VI.)	2b			
c	Add lines 2a and 2b			2c	2,237
3	Distributable amount before adjustments. Subtract line 2c from line 1			3	557,205
4	Recoveries of amounts treated as qualifying distributions			4	
5	Add lines 3 and 4			5	557,205
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	557,205

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	577,457
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	577,457
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	2,237
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	575,220

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 2014	(c) 2014	(d) 2015
1 Distributable amount for 2015 from Part XI, line 7					557,205
2 Undistributed income, if any, as of the end of 2015:					
a Enter amount for 2014 only					
b Total for prior years: 20___,20___,20___					
3 Excess distributions carryover, if any, to 2015:					
a From 2010					
b From 2011					
c From 2012					
d From 2013	15,126				
e From 2014	15,779				
f **Total** of lines 3a through e		30,905			
4 Qualifying distributions for 2015 from Part XII, line 4: ▶ $ 577,457					
a Applied to 2014, 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 2015 distributable amount					577,457
e Remaining amount distributed out of corpus					
5 Excess distributions carryover applied to 2015 *(If an amount appears in column (d), the same amount must be shown in column (a).)*		(20,252)			(20,252)
6 **Enter the net total of each column as indicated below:**					
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5		51,157			
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 2014. Subtract line 4a from line 2a. Taxable amount—see instructions					
f Undistributed income for 2015. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2016					
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 2010 not applied on line 5 or line 7 (see instructions)					
9 **Excess distributions carryover to 2016.** Subtract lines 7 and 8 from line 6a		51,157			
10 Analysis of line 9:					
a Excess from 2011					
b Excess from 2012					
c Excess from 2013	15,126				
d Excess from 2014	15,779				
e Excess from 2015	20,252				

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 2015, enter the date of the ruling . . . . ▶

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

	Tax year	Prior 3 years			
	(a) 2015	(b) 2014	(c) 2013	(d) 2012	(e) Total
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon:					
a "Assets" alternative test—enter: (1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test—enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed					
c "Support" alternative test—enter: (1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

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

1 Information Regarding Foundation Managers:

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

N/A

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.

N/a

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 ATTACHED STATEMENT

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

SEE ATTACHED STATEMENT

c Any submission deadlines:

SEE ATTACHED STATEMENT

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

SEE ATTACHED STATEMENT

Part XV Supplementary Information *(continued)*

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
SEE ATTACHED STATEMENT				575,057
Total ▶ 3a				575,057
b *Approved for future payment*				
SEE ATTACHED STATEMENT				48,000
Total ▶ 3b				48,000

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.	Unrelated business income (a) Business code	(b) Amount	Excluded by section 512, 513, or 514 (c) Exclusion code	(d) Amount	(e) Related or exempt function income (See instructions.)
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	145,977	
4 Dividends and interest from securities			14	167,874	
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			18	48,268	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue: a					
b					
c					
d					
e					
12 Subtotal. Add columns (b), (d), and (e)				362,119	

13 **Total.** Add line 12, columns (b), (d), and (e) . . . 13 362,119

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

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

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

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

			Yes	No
1	Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?			
a	Transfers from the reporting foundation to a noncharitable exempt organization of:			
	(1) Cash	1a(1)		✓
	(2) Other assets	1a(2)		✓
b	Other transactions:			
	(1) Sales of assets to a noncharitable exempt organization	1b(1)		✓
	(2) Purchases of assets from a noncharitable exempt organization	1b(2)		✓
	(3) Rental of facilities, equipment, or other assets	1b(3)		✓
	(4) Reimbursement arrangements	1b(4)		✓
	(5) Loans or loan guarantees	1b(5)		✓
	(6) Performance of services or membership or fundraising solicitations	1b(6)		✓
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c		✓

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

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

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.

▶ Julie B. Kraus 8/11/16 ▶ Trustee

Signature of officer or trustee Date Title

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

Paid Preparer Use Only

Print/Type preparer's name	Preparer's signature	Date	Check ☐ if self-employed	PTIN
Firm's name ▶ The Andersons, Inc			Firm's EIN ▶	34-1562374
Firm's address ▶ 480 W Dussel Drive, Maumee, OH 43537			Phone no	419 893-5050

ANDERSON FOUNDATION # 34-6528868
TAX SCHEDULE - FORM 990-PF
CALENDAR YEAR 2015

Line 16c - Other Professional Fees

DESCRIPTION	TOTAL EXPENSE	%	INVESTMENT RELATED	%	EXEMPT PURPOSE
Mill Creek Capital Advisors	91,569	100%	91,569		
Toledo Community Foundation	5,635	100%	5,635		
Midpoint	3,662	100%	3,662	**	
General Accounting	2,000	40%	800	60%	1,200
Finance	16,000	100%	16,000		
Administration	2,000	40%	800	60%	1,200
Total	120,866		118,466		2,400

**limited by investment income

ANDERSON FOUNDATION #34-6528868
TAX SCHEDULE - FORM 990-PF
CALENDAR YEAR 2015

Part I, Line 18 - Taxes

Foreign taxes	6,714
Federal excise taxes	13,000
Total	19,714

Part I, Line 23 - Other Expenses

Filing fees - Ohio Attorney General	200
Total	200

ANDERSON FOUNDATION #34-6528868
TAX SCHEDULE - FORM 990-PF
CALENDAR YEAR 2015

Part II, line 10b - Investments - corporate stock

Description	(b) Book value	(c) Fair market value
2,000 shares Waterford Bank	50,000	106,000
740 shares Signature Bancorp	33,300	54,020
	83,300	160,020

Part II, line 13 - Investments - other

Description	(b) Book value	(c) Fair market value
Midpoint BPD-003663	711,802	663,948
Mill Creek FXD Inc. MF/ETF	2,425,773	2,707,589
Agincourt AGIN CFI Fund	2,453,964	2,695,216
Confluence Investment Management	626,886	674,146
Fred Alger Small Growth Fund	202,946	191,915
Alta Large Cap Growth Fund	487,826	648,872
MFS Large Cap Value Fund	563,586	683,406
AIM Int'l Growth Fund	372,964	437,153
Moody Aldrich Small Cap Value Fund	188,045	210,990
Alger All Cap Growth Fund	633,888	688,831
Alliance Bernstein BPH-011177	456,897	472,413
Mill Creek Funding Fund	223,718	223,718
Midpoint Food And Ag Fund, L.P.	134,966	134,966
	9,483,261	10,433,163

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

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

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

(a) Description of property sold	(c) Date acquired	# of Shares	(d) Date sold	(e) Gross sales price	(g) Cost or other basis	(h) Gain or (loss)
National Financial Services, LLC						
Agincourt Core Fixed	various	various	various	2,371,406	2,997,525	(626,119)
AIM INTL Growth	various	various	various	128,677	108,968	19,709
Alger All Cap Growth	various	various	various	1,142,369	1,067,204	75,165
Alger Sm. Growth FRDALG	various	various	various	263,851	232,256	31,595
Alliance Bernstein	various	various	various	197,882	214,018	(16,136)
Alta Large Cap Growth	various	various	various	417,993	320,528	97,465
Confluence Invst Mgmt	various	various	various	142,882	122,048	20,834
MFS Large Cap Value	various	various	various	213,164	160,335	52,829
Midpoint Food and AG Fund	various	various	various	41,799	-	41,799
Mill Creek	various	various	various	292,749	313,974	(21,225)
Mill Creek MF/ETF	various	various	various	1,513,369	1,155,162	358,207
Moody Sm Cap SCV	various	various	various	121,058	106,913	14,145
		GRAND TOTAL		6,847,199	6,798,931	48,268

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

THE ANDERSONS FOUNDATION
JANUARY 1, 2015 - DECEMBER 31, 2015
TAX YEAR 2015
TAX ID# 34-6528868

Grantee Name & Address	Purpose of Grant	Grant Amount
4-H - Jay County IN P.O. Box 501 Portland, IN 47371	Educational	$5,000.00
American Foundation For Suicide Prevention - Central Ohio Chapter 2783 Martin Road, # 314 Dublin, OH 43017	Human Services	$2,500.00
Army Emergency Relief 200 Stovall St. Alexandria, VA 22332	Human Services	$250.00
ASSETS Toledo 2200 Jefferson Ave. Toledo, OH 43604	Educational	$5,000.00
Believe Center 1 Aurora Gonzalez Drive Toledo, OH 43609	Educational	$5,000.00
Big Brothers Big Sisters of NW Ohio 4 Seagate Ste 660 Toledo, OH 43604	Educational	$2,500.00
Bittersweet Farms 12660 Archbold Whitehouse Road Whitehouse, OH 43571	Human Services	$5,000.00
Bittersweet Farms 12660 Archbold Whitehouse Road Whitehouse, OH 43571	Human Services	$300.00
Boy Scouts - Erie Shores Council P.O. Box 8728 Toledo, OH 43623	Educational	$250.00
Catholic Diocese of Toledo - Catholic Charities 1933 Spielbusch Avenue Toledo, OH 43604	Religion	$5,000.00
Catholic Diocese of Toledo - Catholic Charities 1933 Spielbusch Avenue Toledo, OH 43604	Religion	$300.00
Central City Ministries of Toledo (CCMT) 1933 Spielbusch Ave. Toledo, OH 43604	Religion	$5,000.00
Central City Ministries of Toledo (CCMT) 1933 Spielbusch Ave. Toledo, OH 43604	Religion	$1,000.00

THE ANDERSONS FOUNDATION
JANUARY 1, 2015 - DECEMBER 31, 2015
TAX YEAR 2015
TAX ID# 34-6528868

Grantee Name & Address	Purpose of Grant	Grant Amount
Diabetes Youth Services 2100 W. Central Ave., Ste. 110 Toledo, OH 43606	Human Services	$2,500.00
Educational Service Center of Lake Erie West (Collingwood Center) 2275 Collingwood Blvd Toledo, OH 43620	Educational	$2,500.00
Farm Bureau - Van Wert 1206 E 2nd St, Suite 1 Ottawa, OH 45875	Educational	$7,500.00
Foundation For Life 5726 Southwyck Blvd. Suite 120 Toledo, OH 43614	Human Services	$2,500.00
Foundation For Life 5726 Southwyck Blvd. Suite 120 Toledo, OH 43614	Human Services	$700.00
Fulton County Historical Society 229 Monroe Street Wauseon, OH 43567	Educational	$15,000.00
Goodwill Industries of Northwest Ohio, Inc. 626 Huron Toledo, OH 43604	Human Services	$2,500.00
Habitat for Humanity - Minneapolis 2401 Lowry Ave. NE #210 Minneapolis, MN 55418	Human Services	$500.00
Historic Church of St. Patrick's 130 Avondale Ave. Toledo, OH 4604	Religion	$2,500.00
Hospice of Northwest Ohio 30000 East River Road Perrysburg, OH 43551	Human Services	$2,500.00
Kids Unlimited 5813 Monroe St. Suite 120 #235 Sylvania, OH 43560	Educational	$5,000.00
Library Legacy Foundation 325 Michigan Street Toledo, OH 43604	Educational	$15,403.00

THE ANDERSONS FOUNDATION
JANUARY 1, 2015 - DECEMBER 31, 2015
TAX YEAR 2015
TAX ID# 34-6528868

Grantee Name & Address	Purpose of Grant	Grant Amount
Little Sisters of the Poor Sacred Heart Home 930 South Wynn Road Oregon, OH 43616-3599	Religion	$2,500.00
Lucas County Family and Children First Council 2275 Collingwood Blvd, Room 101 Toledo, OH 43620	Human Services	$5,000.00
Martin Luther King Kitchen for the Poor 650 Vance Toledo, OH 43604	Human Services	$2,500.00
Mercy Foundation 2213 Cherry Street ACC 307 Toledo, OH 43608	Human Services	$5,000.00
Michigan State University; College of Agriculture and Natural Resources, Saginaw Valley Research and Education Center 446 West Circle Drive, Suite 319 East Lansing, MI 48824	Educational	$15,000.00
Michigan State University; College of Agriculture and Natural Resources, Saginaw Valley Research and Education Center 446 West Circle Drive, Suite 319 East Lansing, MI 48824	Educational	$15,000.00
Minds Incorporated 47 Girard St. NE Washington, DC 20002	Educational	$250.00
Mobile Meals of Toledo, Inc. 2200 Jefferson Ave Toledo, OH 43604	Human Services	$5,000.00
Mom's House 2505 Franklin Avenue Toledo, OH 43610	Human Services	$250.00
Mom's House 2505 Franklin Avenue Toledo, OH 43610	Human Services	$20,000.00
Network for Good 1140 Connecticut Ave Nw Ste 700 Washington, DC 20036	Human Services	$8,691.25

THE ANDERSONS FOUNDATION
JANUARY 1, 2015 - DECEMBER 31, 2015
TAX YEAR 2015
TAX ID# 34-6528868

Grantee Name & Address	Purpose of Grant	Grant Amount
Network for Good 1140 Connecticut Ave Nw Ste 700 Washington, DC 20036	Human Services	$2,045.00
Network for Good 1140 Connecticut Ave Nw Ste 700 Washington, DC 20036	Human Services	$2,045.00
Network for Good 1140 Connecticut Ave Nw Ste 700 Washington, DC 20036	Human Services	$1,022.50
Northwest Ohio SCORE 2200 Jefferson Ave Toledo, OH 43604	Educational	$2,500.00
Notre Dame Academy 3535 W. Sylvania Avenue Toledo, OH 43623	Educational	$700.00
Read for Literacy 325 N. Michigan Read for Literacy Toledo, OH 43604	Educational	$2,500.00
Read for Literacy 325 N. Michigan Read for Literacy Toledo, OH 43604	Educational	$500.00
Read for Literacy 325 N. Michigan Read for Literacy Toledo, OH 43604	Educational	$5,000.00
Rutherford B. Hayes Presidential Center Spiegel Grove Fremont, OH 43420-2796	Educational	$10,000.00
Rutherford B. Hayes Presidential Center Spiegel Grove Fremont, OH 43420-2796	Educational	$10,000.00
Saint Louis Center 16195 Old U.S. 12 Chelsea, MI 48118-9646	Human Services	$5,000.00
Salvation Army - Toledo Area 620 N. Erie Street Toledo, OH 43604	Human Services	$5,000.00

THE ANDERSONS FOUNDATION
JANUARY 1, 2015 - DECEMBER 31, 2015
TAX YEAR 2015
TAX ID# 34-6528868

Grantee Name & Address	Purpose of Grant	Grant Amount
Sauder Village P.O. Box 235 Archbold, OH 43502	Educational	$2,500.00
Savory Institute Org Inc 637 S Broadway St B Ste 124 Boulder, CO 80305-5961	Educational	$250.00
Servant Leadership Center of Toledo 1618 Sylvania Toledo, OH 43612	Human Services	$2,500.00
Sisters in Shelter PO Box 384 Tiffin, OH 44883	Educational	$2,500.00
Sisters of Notre Dame 3837 Secor Road Toledo, OH 43623	Religion	$25,000.00
Sisters of Notre Dame 3837 Secor Road Toledo, OH 43623	Religion	$25,000.00
St. Ignatius College Prep 1076 W. Roosevelt Rd. Chicago, IL 60608	Educational	$1,000.00
St. Joseph Catholic Church - Maumee (School) 104 W. Broadway Maumee, OH 43537	Religion	$300.00
St. Joseph Catholic Church - Maumee (School) 104 W. Broadway Maumee, OH 43537	Religion	$300.00
Stranahan Theater Foundation/Trust 4645 Heatherdowns Boulevard Toledo, OH 43614	Educational	$25,000.00
Stratford Ecological Center Inc. 3083 Liberty Rd Delaware, OH 43015	Educational	$2,500.00
Sunshine Foundation, Inc. 7223 Maumee Western Rd. Maumee, OH 43537	Human Services	$2,500.00
Sunshine Foundation, Inc. 7223 Maumee Western Rd. Maumee, OH 43537	Human Services	$25,000.00

THE ANDERSONS FOUNDATION
JANUARY 1, 2015 - DECEMBER 31, 2015
TAX YEAR 2015
TAX ID# 34-6528868

Grantee Name & Address	Purpose of Grant	Grant Amount
Sunshine Foundation, Inc. 7223 Maumee Western Rd. Maumee, OH 43537	Human Services	$7,000.00
The GlobalGiving Foundation 1110 Vermont Ave. NW, Suite 550 Washington, DC 20005	Educational	$250.00
The Sight Center 1002 Garden Lake Parkway Toledo, OH 43614	Human Services	$5,000.00
Toledo Bikes 1114 Washington St. Toledo, OH 43604	Educational	$250.00
Toledo Community Foundation 300 Madison Ave., Suite 1300 Toledo, OH 43604	Human Services	$10,000.00
Toledo Community Foundation 300 Madison Ave., Suite 1300 Toledo, OH 43604	Human Services	$4,000.00
Toledo Day Nursery 2211 Jefferson Avenue Toledo, OH 43624	Human Services	$15,000.00
Toledo GROWs c/o Toledo Botanical Garden 5403 Elmer Drive Toledo, OH 43615	Educational	$500.00
Toledo School for the Arts 333 - 14Th Street Toledo, OH 43604	Educational	$5,000.00
Toledo Symphony Orchestra 1838 Parkwood Ave, Suite 310 P.O. Box 407 Toledo, OH 43697	Educational	$500.00
Toledo/Lucas County CareNet 3231 Central Park West, Suite 200 Toledo, OH 43617	Human Services	$2,500.00
Toledoans United for Social Action (TUSA) 3613 Monroe Street Toledo, OH 43606	Human Services	$2,500.00
United Way of Greater Toledo 424 Jackson St. Toledo, OH 43604	Human Services	$75,000.00

THE ANDERSONS FOUNDATION
JANUARY 1, 2015 - DECEMBER 31, 2015
TAX YEAR 2015
TAX ID# 34-6528868

Grantee Name & Address	Purpose of Grant	Grant Amount
United Way of Greater Toledo 424 Jackson St. Toledo, OH 43604	Human Services	$75,000.00
University of Toledo Foundation 2801 W. Bancroft St., MS#318 Toledo, OH 43606-3328	Educational	$20,000.00
Walsh Jesuit High School 4550 Wyoga Lake Rd. Cuyahoga Falls, OH 44224	Educational	$500.00
Water for Ishmael 3925 W. Central Ave. Toledo, OH 43606	Human Services	$10,000.00
YMCA and JCC of Greater Toledo 1500 N. Superior, 2nd Floor Toledo, OH 43604	Educational	$5,000.00
YMCA and JCC of Greater Toledo 1500 N. Superior, 2nd Floor Toledo, OH 43604	Educational	$1,000.00
		$575,056.75

Anderson Foundation
Tax Year 2015
Tax ID #34-6528868

Part XV: Grants and Contributions Approved for Future Payment in 2016

Grantee Name	Address	Program Area	Grant Amount Balance
Kids Unlimited	5813 Monroe St. Suite 120 #235 Sylvania, OH 43560	Educational	$5,000.00
Stranahan Theater Foundation/Trust	4645 Heatherdowns Boulevard Toledo, OH 43614	Educational	$25,000.00
Sunshine Foundation	7223 Maumee Western Rd. Maumee, OH 43537	Educational	$18,000.00
	Grand Total		**$48,000.00**

Anderson Foundation

Information for Applicants

General Policies

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

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

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

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

Grant Inquiry

The foundation accepts grant inquiries at any time. Email a grant inquiry to julie_payeff@andersonsinc.com.

Please include the following in the email:

- Copy of the **501(c)(3) tax-exempt status letter** including the EIN number
- **Project/program summary paragraph**, including the total project budget amount and amount requested. Also include the total amount that has been secured from other donors.
- **Andersons Location** – If your organization is located outside of the Toledo metropolitan area, please include the name of the The Andersons location located in your community. Also include any Andersons employees or customers that are familiar with your organization. A letter of support will be required for the grant application.

We will review the details of the inquiry and determine if an application will meet our criteria for consideration noted above.

Updated: November 2015

Grant Application

Grant proposals are accepted at any time. Foundation meetings are held three times per year. 2016 deadlines are as follows: **January 25, June 10, and October 14**.

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

Required Application Documents

The Foundation uses an on-line application process to accept requests. A link is provided once the inquiry is approved to proceed.

The required information for an application includes the following:

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