

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.

2016

Open to Public Inspection

For calendar year 2016 or tax year beginning

, and ending

Name of foundation JOHN W. ANDERSON FOUNDATION		A Employer identification number 35-6070695
Number and street (or P.O. box number if mail is not delivered to street address) 402 WALL STREET	Room/suite	B Telephone number 219-462-4611
City or town, state or province, country, and ZIP or foreign postal code VALPARAISO, IN 46383		C If exemption application is pending, check here ☐
G Check all that apply: ☐ Initial return ☐ Final return ☐ Address change ☐ Initial return of a former public charity ☐ Amended return ☐ Name change		D 1. Foreign organizations, check here ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ☐
H Check type of organization: ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here ☐
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 245,265,040.	J Accounting method: ☐ Cash ☒ Accrual ☐ Other (specify) _____	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))		(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	0.		N/A	
	2 Check ☒ if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments	1,896,798.	1,896,798.		STATEMENT 1
	4 Dividends and interest from securities	3,179,697.	3,179,697.		STATEMENT 2
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	11,554,813.			
	b Gross sales price for all assets on line 6a	43,148,604.			
	7 Capital gain net income (from Part IV, line 2)		11,554,813.		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
b Less Cost of goods sold					
c Gross profit or (loss)					
11 Other income	67,551.	67,551.		STATEMENT 3	
12 Total. Add lines 1 through 11	16,698,859.	16,698,859.			
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc.	521,668.	0.		521,668.
	14 Other employee salaries and wages	53,400.	0.		53,400.
	15 Pension plans, employee benefits	41,413.	0.		41,447.
	16a Legal fees STMT 4	11,035.	0.		12,739.
	b Accounting fees STMT 5	37,515.	0.		35,565.
	c Other professional fees STMT 6	716,685.	716,685.		0.
	17 Interest				
	18 Taxes STMT 7	159,385.	0.		0.
	19 Depreciation and depletion	3,513.	0.		
	20 Occupancy	48,438.	0.		44,359.
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses STMT 8	76,237.	43,669.		32,474.
	24 Total operating and administrative expenses. Add lines 13 through 23	1,669,289.	760,354.		741,652.
	25 Contributions, gifts, grants paid	10,139,200.			10,864,200.
26 Total expenses and disbursements. Add lines 24 and 25	11,808,489.	760,354.		11,605,852.	
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements	4,890,370.				
b Net investment income (if negative, enter -0-)		15,938,505.			
c Adjusted net income (if negative, enter -0-)			N/A		

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value		
Assets	1	Cash - non-interest-bearing		1,243,459.	1,046,426.	1,046,426.
	2	Savings and temporary cash investments		1,991,332.	11,796,610.	11,796,610.
	3	Accounts receivable ▶				
		Less: allowance for doubtful accounts ▶				
	4	Pledges receivable ▶				
		Less: allowance for doubtful accounts ▶				
	5	Grants receivable				
	6	Receivables due from officers, directors, trustees, and other disqualified persons				
	7	Other notes and loans receivable ▶				
		Less: allowance for doubtful accounts ▶				
	8	Inventories for sale or use				
	9	Prepaid expenses and deferred charges		4,577.	4,319.	4,319.
	10a	Investments - U.S. and state government obligations				
	b	Investments - corporate stock STMT 9	169,534,635.	171,272,028.	171,272,028.	
	c	Investments - corporate bonds STMT 10	45,018,326.	45,346,541.	45,346,541.	
	Liabilities	11	Investments - land, buildings, and equipment basis ▶			
		Less accumulated depreciation ▶				
12		Investments - mortgage loans				
13		Investments - other STMT 11	41,059,192.	15,597,798.	15,597,798.	
14		Land, buildings, and equipment: basis ▶ 105,287.				
		Less accumulated depreciation STMT 12 ▶ 102,812.	3,870.	2,475.	2,475.	
15		Other assets (describe ▶ STATEMENT 13)	326,006.	198,843.	198,843.	
16		Total assets (to be completed by all filers - see the instructions. Also, see page 1, item i)	259,181,397.	245,265,040.	245,265,040.	
17		Accounts payable and accrued expenses	60,841.	61,349.		
18		Grants payable	725,000.			
Net Assets or Fund Balances	19	Deferred revenue				
	20	Loans from officers, directors, trustees, and other disqualified persons				
	21	Mortgages and other notes payable				
	22	Other liabilities (describe ▶ STATEMENT 14)	31,447,427.	15,597,798.		
	23	Total liabilities (add lines 17 through 22)	32,233,268.	15,659,147.		
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	226,948,129.	229,605,893.		
	25	Temporarily restricted				
	26	Permanently restricted				
	Foundations that do not follow SFAS 117, check here ▶ ☐ and complete lines 27 through 31.					
	27	Capital stock, trust principal, or current funds				
	28	Paid-in or capital surplus, or land, bldg., and equipment fund				
	29	Retained earnings, accumulated income, endowment, or other funds				
30	Total net assets or fund balances	226,948,129.	229,605,893.			
31	Total liabilities and net assets/fund balances	259,181,397.	245,265,040.			

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	226,948,129.
2	Enter amount from Part I, line 27a	2	4,890,370.
3	Other increases not included in line 2 (itemize) ▶	3	0.
4	Add lines 1, 2, and 3	4	231,838,499.
5	Decreases not included in line 2 (itemize) ▶ UNREALIZED LOSS ON INVESTMENTS	5	2,232,606.
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	229,605,893.

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)		(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a PUBLICLY TRADED SECURITIES				
b CF MESIROW ABSOLUTE RETUREN FD LTD CL S				
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 33,782,388.		25,099,999.	8,682,389.
b 9,366,216.		6,493,792.	2,872,424.
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			8,682,389.
b			2,872,424.
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	11,554,813.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8		3	N/A

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?

☐ Yes ☒ No

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

1 Enter the appropriate amount in each column for each year; see the instructions before making any entries.

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2015	10,713,957.	232,737,688.	.046034
2014	9,718,809.	235,874,195.	.041203
2013	9,433,569.	214,950,772.	.043887
2012	9,289,634.	193,897,531.	.047910
2011	8,716,251.	190,863,466.	.045667

2 Total of line 1, column (d)	2	.224701
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	.044940
4 Enter the net value of noncharitable-use assets for 2016 from Part X, line 5	4	222,395,895.
5 Multiply line 4 by line 3	5	9,994,472.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	159,385.
7 Add lines 5 and 6	7	10,153,857.
8 Enter qualifying distributions from Part XII, line 4 If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions.	8	11,605,852.

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)		1	159,385.
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☒ and enter 1% of Part I, line 27b			
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b).		2	0.
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		3	159,385.
3 Add lines 1 and 2		4	0.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		5	159,385.
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-			
6 Credits/Payments:			
a 2016 estimated tax payments and 2015 overpayment credited to 2016	6a 199,605.	7	199,605.
b Exempt foreign organizations - tax withheld at source	6b	8	
c Tax paid with application for extension of time to file (Form 8868)	6c	9	
d Backup withholding erroneously withheld	6d	10	40,220.
7 Total credits and payments. Add lines 6a through 6d		11	0.
8 Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached			
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed			
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid			
11 Enter the amount of line 10 to be: Credited to 2017 estimated tax ☒ 40,220. Refunded ☐			

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for the definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. \$ 0. (2) On foundation managers. \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ☒ IN		
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	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2016 or the taxable year beginning in 2016 (see instructions for Part XIV)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

N/A

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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	X
12 Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12	X
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► <u>N/A</u>	13	X
14 The books are in care of ► <u>BRUCE W. WARGO</u> Telephone no. ► <u>219-462-4611</u> Located at ► <u>402 WALL STREET, VALPARAISO, IN</u> ZIP+4 ► <u>46383</u>		
15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year ► 15 <u>N/A</u>		
16 At any time during calendar year 2016, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country ►	16	X

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

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.

	Yes	No
1a During the year did the foundation (either directly or indirectly): (1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☒ No (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☒ Yes ☐ No (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☒ No (6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) ☐ Yes ☒ No		
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here ► ☐	1b	X
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2016?	1c	X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)): a At the end of tax year 2016, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2016? ☐ Yes ☒ No If "Yes," list the years ► _____, _____, _____ b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.) <u>N/A</u> c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ► _____, _____, _____	2b	
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 2016 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 2016.) <u>N/A</u>	3b	
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2016?	4b	X

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

5a During the year did the foundation pay or incur any amount to:

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?

☐ Yes ☒ No

(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?

☐ Yes ☒ No

(3) Provide a grant to an individual for travel, study, or other similar purposes?

☐ Yes ☒ No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? (see instructions)

☐ Yes ☒ No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?

☐ Yes ☒ No

b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?

N/A

5b

Organizations relying on a current notice regarding disaster assistance check here

☒

c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?

N/A

☐ Yes ☐ No

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

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?

☐ Yes ☒ No

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

6b

X

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

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?

☐ Yes ☒ No

b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?

N/A

7b

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

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

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
SEE STATEMENT 15		521,668.	0.	0.

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

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

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

0

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

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

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
SANDS CAPITAL MANAGEMENT LLC - 1100 WILSON BLVD., SUITE 3050, ARLINGTON, VA 22209	INVESTMENT COUNSELOR	204,833.
BARROW HANLEY MEWHINNEY & STRAUSS 2200 ROSS AVE., 31ST FLOOR, DALLAS, TX 75201	INVESTMENT COUNSELOR	173,875.
CHAMPLAIN INVESTMENT PARTNERS 180 BATTERY ST., BURLINGTON, VT 05401	INVESTMENT COUNSELOR	102,938.
NORTHERN TRUST COMPANY 50 S. LASALLE ST., CHICAGO, IL 60675	CUSTODIAL BANK	101,345.
SEGAL MARCO ADVISORS - 101 N. WACKER DRIVE, SUITE 500, CHICAGO, IL 60606	INVESTMENT COUNSELOR	88,993.
Total number of others receiving over \$50,000 for professional services		0

Part IX-A Summary of Direct Charitable Activities

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

Part IX-B Summary of Program-Related Investments

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.		Amount
1	N/A	
2		
All other program-related investments. See instructions.		
3		
Total. Add lines 1 through 3		0

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

1 Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a Average monthly fair market value of securities	1a	225,102,911.
b Average of monthly cash balances	1b	672,930.
c Fair market value of all other assets	1c	6,794.
d Total (add lines 1a, b, and c)	1d	225,782,635.
e Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.
2 Acquisition indebtedness applicable to line 1 assets	2	0.
3 Subtract line 2 from line 1d	3	225,782,635.
4 Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	3,386,740.
5 Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	222,395,895.
6 Minimum investment return. Enter 5% of line 5	6	11,119,795.

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	11,119,795.
2a Tax on investment income for 2016 from Part VI, line 5	2a	159,385.
b Income tax for 2016. (This does not include the tax from Part VI.)	2b	
c Add lines 2a and 2b	2c	159,385.
3 Distributable amount before adjustments. Subtract line 2c from line 1	3	10,960,410.
4 Recoveries of amounts treated as qualifying distributions	4	0.
5 Add lines 3 and 4	5	10,960,410.
6 Deduction from distributable amount (see instructions)	6	0.
7 Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	10,960,410.

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 11,605,852.
b Program-related investments - total from Part IX-B	1b 0.
2 Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2
3 Amounts set aside for specific charitable projects that satisfy the:	
a Suitability test (prior IRS approval required)	3a
b Cash distribution test (attach the required schedule)	3b
4 Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4 11,605,852.
5 Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5 159,385.
6 Adjusted qualifying distributions. Subtract line 5 from line 4	6 11,446,467.

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.

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Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2015	(c) 2015	(d) 2016
1 Distributable amount for 2016 from Part XI, line 7				10,960,410.
2 Undistributed income, if any, as of the end of 2016				
a Enter amount for 2015 only			11,378,360.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2016:				
a From 2011				
b From 2012				
c From 2013				
d From 2014				
e From 2015				
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2016 from Part XII, line 4: ► \$ 11,605,852.				
a Applied to 2015, but not more than line 2a			11,378,360.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2016 distributable amount				227,492.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2016 (If an amount appears in column (d), the same amount must be shown in column (a).)	0.			0.
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	0.			
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 2015. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2016. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2017				10,732,918.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions)	0.			
8 Excess distributions carryover from 2011 not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2017. Subtract lines 7 and 8 from line 6a	0.			
10 Analysis of line 9:				
a Excess from 2012				
b Excess from 2013				
c Excess from 2014				
d Excess from 2015				
e Excess from 2016				

N/A

- ☐ 4942(I)(3) or ☐ 4942(I)(5)

- (4) Gross investment income**

[illegible]

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

Part XV Supplementary Information (continued)**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient	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				
AFRICAN AMERICAN ACHIEVERS YOUTH CORPS, INC. P.O. BOX 64622 GARY, IN 46401		PC	CAPITAL	2,500.
ALPHA CHI CHAPTER OF KAPPA ALPHA THETA EDUCATIONAL FOUNDATION, INC. 2521 GALA DR. WEST LAFAYETTE, IN 47906		PC	OPERATING/CAPITAL	10,000.
ALZHEIMER'S ASSOCIATION 919 N. MICHIGAN STE. 1000 CHICAGO, IL 60611		PC	OPERATING	5,000.
AMERICAN CANCER SOCIETY, LAKESHORE DIVISION 130 RED COACH DR. MISHAWAKA, IN 46545		PC	OPERATING	30,000.
AMERICAN CANCER SOCIETY, LAKESHORE DIVISION 20450 CIVIC CENTER DR. SOUTHFIELD, MI 48076		PC	OPERATING	20,000.
Total			SEE CONTINUATION SHEET(S)	▶ 3a 10,864,200.
b Approved for future payment				
BOYS & GIRLS CLUBS OF NORTHWEST INDIANA, INC. 8392 MISSISSIPPI ST. 2ND FL. MERRILLVILLE, IN 46410		PC	OPERATING	2,298,000.
BOYS & GIRLS CLUBS OF PORTER COUNTY, INC. 354 W. JEFFERSON ST. P.O. BOX 254 VALPARAISO, IN 46384		PC	OPERATING	1,548,000.
Total			▶ 3b	3,846,000.

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

- | | | |
|--|--------------|-----|
| <p>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?</p> <p>a Transfers from the reporting foundation to a noncharitable exempt organization of:</p> <p>(1) Cash</p> <p>(2) Other assets</p> <p>b Other transactions:</p> <p>(1) Sales of assets to a noncharitable exempt organization</p> <p>(2) Purchases of assets from a noncharitable exempt organization</p> <p>(3) Rental of facilities, equipment, or other assets</p> <p>(4) Reimbursement arrangements</p> <p>(5) Loans or loan guarantees</p> <p>(6) Performance of services or membership or fundraising solicitations</p> <p>c Sharing of facilities, equipment, mailing lists, other assets, or paid employees</p> <p>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.</p> | | Yes |
| | 1a(1) | |
| | 1a(2) | |
| | | |
| | 1b(1) | |
| | 1b(2) | |
| | 1b(3) | |
| | 1b(4) | |
| | 1b(5) | |
| | 1b(6) | |
| | 1c | |

[illegible]

- 2a** Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527?

☐ Yes ☒ No

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

(a) Name of organization	(b) Type of organization	(c) Description of relationship
N/A		

**Sign
Here**

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

Signature of officer or trustee

Date _____

CHAIRMAN

Title

May the IRS discuss this return with the preparer shown below (see instr)?

☒ Yes ☐ No

**Paid
Preparer
Use Only**

Print/Type preparer's name

Parent's signature _____

Date

Check ☐ self-employed

PTIN

SCOTT A. SCHUSTER

SCOTT A. SCHUSTER

03/14/17

P00019243

Firm's name ► **KSM BUSINESS SERVICES, INC.**

Firm's EIN ▶ 35-2123203

Firm's address ► P.O. BOX 40857

INDIANAPOLIS, IN 46240-0857

Phone no. (317) 580-2000

Form **990-PF** (2016)

Part XV Supplementary Information (continued)**3a** Grants and Contributions Paid During the Year

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
AMERICAN DIABETES ASSOC., INDIANA AREA 8604 ALLISONVILLE RD. STE. 140 INDIANAPOLIS, IN 46250		PC	OPERATING	5,000.
AMERICAN HEART ASSOCIATION, MIDWEST AFFILIATE 208 S. LASALLE ST. STE. 900 CHICAGO, IL 60604		PC	OPERATING	15,000.
AMERICAN RED CROSS OF NORTHWEST INDIANA 791 E. 83RD AVE. MERRILLVILLE, IN 46410		PC	OPERATING	55,000.
ANDREAN HIGH SCHOOL 5959 BROADWAY MERRILLVILLE, IN 46410		PC	OPERATING	5,000.
ANSWER FOR PREGNANCY AID P.O. BOX 157 HOBART, IN 46342		PC	OPERATING	5,000.
ASSISTANCE LEAGUE OF TUCSON 1307 N. ALVERNON WAY TUCSON, AZ 85712		PC	OPERATING	10,000.
ASSOCIATION OF ARTISTS & CRAFTSMEN OF PORTER COUNTY, INC. 115 S. 4TH ST. CHESTERTON, IN 46304		PC	OPERATING	3,000.
Total from continuation sheets				10,796,700.

Part XV Supplementary Information (continued)**3a** Grants and Contributions Paid During the Year

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
AUTISM SOCIETY OF INDIANA 1800 N. MERIDIAN ST., STE 600 INDIANAPOLIS, IN 46202		PC	OPERATING	5,000.
BALL STATE UNIVERSITY 2000 W UNIVERSITY AVE. MUNCIE, IN 47306		PC	OPERATING	75,000.
BEACHFRONT DANCE SCHOOL 427 S. LAKE ST. GARY, IN 46403		PC	OPERATING	5,000.
BISHOP NOLL INSTITUTE 1519 HOFFMAN ST. HAMMOND, IN 46327		PC	EQUIPMENT	5,000.
BOONE GROVE HIGH SCHOOL 260 S. 500 W. VALPARAISO, IN 46383		PC	OPERATING	5,000.
BOY SCOUTS OF AMERICA, LASALLE COUNCIL 1340 SOUTH BEND AVE. SOUTH BEND, IN 46617		PC	OPERATING	15,000.
BOY SCOUTS OF AMERICA, PATHWAYS TO ADVENTURE COUNCIL 8751 CALUMET AVE. MUNSTER, IN 46321		PC	OPERATING	75,000.
Total from continuation sheets				15

Part XV Supplementary Information (continued)**3a** Grants and Contributions Paid During the Year

Name and address (home or business)		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
BOYS & GIRLS CLUB OF MICHIGAN CITY, INC. 321 DETROIT ST. MICHIGAN CITY, IN 46360				PC	OPERATING	100,000.
BOYS & GIRLS CLUBS OF AMERICA 1275 PEACHTREE ST. NE ATLANTA, GA 30309				PC	OPERATING	10,000.
BOYS & GIRLS CLUBS OF NORTHWEST INDIANA, INC. 8392 MISSISSIPPI ST. 2ND FL. MERRILLVILLE, IN 46410				PC	OPERATING	2,400,000.
BOYS & GIRLS CLUBS OF PORTER COUNTY, INC. 354 W. JEFFERSON ST. P.O. BOX 254 VALPARAISO, IN 46384				PC	OPERATING	1,389,000.
BOYS & GIRLS CLUBS OF PORTER COUNTY, INC. 354 W. JEFFERSON ST. P.O. BOX 254 VALPARAISO, IN 46384				PC	CAPITAL	400,000.
BOYS & GIRLS CLUBS OF PORTER COUNTY, INC. 354 W. JEFFERSON ST. P.O. BOX 254 VALPARAISO, IN 46384				PC	CAPITAL	325,000.
BOYS & GIRLS CLUBS OF PORTER COUNTY, INC. 354 W. JEFFERSON ST. P.O. BOX 254 VALPARAISO, IN 46384				PC	CAPITAL	250,000.

Total from continuation sheets

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Part XV Supplementary Information (continued)**3a** Grants and Contributions Paid During the Year

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
Recipient				
BROTHERS' KEEPER, INC. 2120 BROADWAY GARY, IN 46407		PC	OPERATING/CAPITAL	100,000.
BULLDOG ATHLETIC BOOSTERS, INC. 1500 S. MAIN ST. CROWN POINT, IN 46307		PC	OPERATING	10,000.
CALL A RIDE, INC. 624 E. SIGLAR ST. HEBRON, IN 46341		PC	OPERATING	5,000.
CALUMET COLLEGE OF ST. JOSEPH'S 2400 NEW YORK AVE. WHITING, IN 46394		PC	OPERATING	50,000.
CAMPAGNA ACADEMY 7403 CLINE AVE. SCHERERVILLE, IN 46375		PC	OPERATING/CAPITAL	75,000.
CARING PLACE, INC. 102 N. WASHINGTON VALPARAISO, IN 46383		PC	OPERATING	50,000.
CATHOLIC CHARITIES, DIOCESE OF GARY 176 S. WEST ST. CROWN POINT, IN 46307		PC	OPERATING	30,000.
Total from continuation sheets				17

Part XV Supplementary Information (continued)**3a Grants and Contributions Paid During the Year**

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
CENTER FOR THE HOMELESS, INC. 813 S. MICHIGAN ST. SOUTH BEND, IN 46601	PC	OPERATING		10,000.
CEREBRAL PALSY OF NORTHWEST INDIANA, INC. 22 TYLER AVE. HOBART, IN 46342	PC	OPERATING		150,000.
CHALLENGER LEARNING CENTER OF NORTHWEST INDIANA C/O PURDUE UNIVERSITY CALUMET 2300 173RD ST HAMMOND, IN 46323	PC	SCHOLARSHIP		10,000.
CHASING DREAMS P.O. BOX 1513 VALPARAISO, IN 46384	PC	OPERATING		5,000.
CHESTERTON HIGH SCHOOL 2125 S. 11TH ST. CHESTERTON, IN 46304	PC	OPERATING		1,500.
CHICAGO LIGHTHOUSE 1850 W. ROOSEVELT RD. CHICAGO, IL 60608	PC	OPERATING		10,000.
CHILDREN'S HOSPITAL OF CHICAGO FOUNDATION 225 E. CHICAGO AVE. BOX 4 CHICAGO, IL 60611	PC	OPERATING		50,000.

Total from continuation sheets

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Part XV Supplementary Information (continued)**3a** Grants and Contributions Paid During the Year

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)					
CHILDREN'S ORGAN TRANSPLANT ASSOCIATION, INC. 2501 COTA DR. BLOOMINGTON, IN 47403			PC	OPERATING	10,000.
CHILDREN'S TREE HOUSE (LCCAPC) 5261 FOUNTAIN DR., STE. 1 CROWN POINT, IN 46307			PC	OPERATING	10,000.
CHRIST CHILD SOCIETY P.O. BOX 1286 SOUTH BEND, IN 46624			PC	OPERATING	5,000.
COMMUNITY ACTION DRUG COALITION OF PORTER COUNTY P.O. BOX 2421 VALPARAISO, IN 46384			PC	OPERATING	5,000.
COMMUNITY CANCER RESEARCH FOUNDATION 901 MACARTHUR BLVD. MUNSTER, IN 46321			PC	OPERATING	10,000.
COMMUNITY THEATER GUILD, INC. P.O. BOX 167 VALPARAISO, IN 46384			PC	OPERATING	5,000.
CONCERT ASSOCIATION OF VALPARAISO P.O. BOX 1355 VALPARAISO, IN 46384			PC	OPERATING	2,000.
Total from continuation sheets					

Part XV Supplementary Information (continued)**3a Grants and Contributions Paid During the Year**

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)					
CONGREGATIONS OF MERRILLVILLE P. O. BOX 10372 MERRILLVILLE, IN 46411			PC	OPERATING	1,000.
CONSUMER CREDIT COUNSELING SERVICES OF NORTHWEST INDIANA 800 E. 86TH AVE. STE. B MERRILLVILLE, IN 46410			PC	OPERATING	5,000.
CRISIS CENTER, INC. 101 N. MONTGOMERY ST. GARY, IN 46403			PC	OPERATING/CAPITAL	100,000.
CROSSROADS YMCA 201 N. GRIFFITH BLVD. GRIFFITH, IN 46319			PC	OPERATING	70,000.
CROWN POINT COMMUNITY FOUNDATION, INC. P.O. BOX 522 CROWN POINT, IN 46308			PC	OPERATING	10,000.
CYSTIC FIBROSIS FOUNDATION, GREATER ILLINOIS CHAPTER 150 N. MICHIGAN AVE. STE. 1550 CHICAGO, IL 60601			PC	OPERATING	5,000.
DIABETES YOUTH FOUNDATION OF INDIANA, INC. 817 S. TIBBS INDIANAPOLIS, IN 46241			PC	OPERATING	5,000.

Total from continuation sheets

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Part XV Supplementary Information (continued)**3a Grants and Contributions Paid During the Year**

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)					
DISMAS OF MICHIANA, INC. 521 S. ST. JOSEPH ST. P.O. BOX 4571 SOUTH BEND, IN 46634			PC	OPERATING	27,000.
DUNEBROOK 7451 W. JOHNSON RD. MICHIGAN CITY, IN 46360			PC	OPERATING/EQUIPMENT	
DUNELAND FAMILY YMCA 215 ROOSEVELT CHESTERTON, IN 46304			PC	OPERATING	12,000.
EDgewater Systems for Balanced Living 1100 W. SIXTH AVE. GARY, IN 46402			PC	OPERATING	40,000.
ELKA CHILD EDUCATIONAL CENTER, INC. 1953 GEORGIA ST. GARY, IN 46407			PC	EQUIPMENT	5,000.
EXCEPTIONAL EQUESTRIANS 5307B 61ST AVE. HOBART, IN 46342			PC	OPERATING	25,000.
EXPONENT PHILANTHROPY 1720 N ST. NW WASHINGTON, DC 20036			PC	OPERATING	5,000.
					2,500.

Total from continuation sheets

Part XV Supplementary Information (continued)

3a Grants and Contributions Paid During the Year

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
FAMILY & YOUTH SERVICES BUREAU OF PORTER COUNTY, INC. 253 W. LINCOLNWAY VALPARAISO, IN 46383		PC	OPERATING	50,000.
FAMILY HOUSE, INC. P.O. BOX 2000 VALPARAISO, IN 46384		PC	OPERATING	5,000.
FELLOWSHIP OF CHRISTIAN ATHLETES 576 GEIGER DRIVE STE. A-1 ROANOKE, IN 46783		PC	OPERATING	5,000.
FIRST CONTACT, INC. 61 INDIANA AVE. STE. D VALPARAISO, IN 46383		PC	OPERATING	7,500.
FIRST PRESBYTERIAN CHURCH 218 S. COURT ST. CROWN POINT, IN 46307		PC	CAPITAL	5,000.
FIRST TEE OF VALPARAISO 2355 CLIFFORD RD. VALPARAISO, IN 46385		PC	OPERATING	5,000.
FIRST UNITED METHODIST CHURCH OF CROWN POINT 352 S. MAIN ST. CROWN POINT, IN 46307		PC	EQUIPMENT	5,000.
Total from continuation sheets				22

Part XV Supplementary Information (continued)**3a** Grants and Contributions Paid During the Year

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)					
FOOD BANK OF NORTHWEST INDIANA 2248 W. 35TH ST. GARY, IN 46408			PC	CAPITAL	250,000.
FOOD BANK OF NORTHWEST INDIANA 2248 W. 35TH ST. GARY, IN 46408			PC	OPERATING/CAPITAL	35,000.
FOREST RIDGE ACADEMY, INC. 7300 FOREST RIDGE DR. SCHERERVILLE, IN 46375			PC	EQUIPMENT	5,000.
FRANCISCAN ALLIANCE FOUNDATION 2050 N. MAIN ST. CROWN POINT, IN 46307			PC	OPERATING	30,000.
FRANCISCAN ST. MARGARET HEALTH 5454 HOHMAN AVE. HAMMOND, IN 46320			PC	OPERATING	10,000.
FRONTLINE FOUNDATIONS P.O. BOX 922 CHESTERTON, IN 46304			PC	OPERATING	25,000.
FUND FOR HOOSIER EXCELLENCE P.O. BOX 97 INDIANAPOLIS, IN 46206			PC	SCHOLARSHIP	5,000.
Total from continuation sheets					

Part XV Supplementary Information (continued)**3a** Grants and Contributions Paid During the Year

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
GARY BATHING BEACH AQUATORIUM SOCIETY 607 S. LAKE ST. GARY, IN 46403		PC	CAPITAL	5,000.
GARY LITERACY COALITION 650 GRANT ST. STE. 8 GARY, IN 46404		PC	OPERATING	5,000.
GIBAULT, INC. 6401 S. U.S. HWY. 41 TERRE HAUTE, IN 47802		PC	OPERATING	5,000.
GIRL SCOUTS OF GREATER CHICAGO AND NORTHWEST INDIANA 8699 BROADWAY MERRILLVILLE, IN 46410		PC	OPERATING	75,000.
GIRL SCOUTS OF NORTHERN INDIANA-MICHIANA 3620 DEAHL CT. SOUTH BEND, IN 46628		PC	OPERATING	10,000.
GLENWOOD SCHOOL 18700 S. HALSTED ST. GLENWOOD, IL 60425		PC	OPERATING	10,000.
GOODWILL INDUSTRIES OF MICHIANA, INC. 1805 WESTERN AVE. SOUTH BEND, IN 46619		PC	OPERATING	5,000.
Total from continuation sheets				

Part XV Supplementary Information (continued)**3a** Grants and Contributions Paid During the Year

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
GRACE BEYOND BORDERS 4331 STEWART CT. EAST CHICAGO, IN 46312		PC	OPERATING	10,000.
GRAND TOTS, INC. 13209 SCHNEIDER ST. CEDAR LAKE, IN 46303		PC	OPERATING	15,000.
HABITAT FOR HUMANITY OF NORTHWEST INDIANA 6114 W. RIDGE RD. GARY, IN 46408		PC	OPERATING	19,000.
HABITAT FOR HUMANITY OF PORTER COUNTY 360 INDIANA AVE. STE. A VALPARAISO, IN 46383		PC	CAPITAL	20,000.
HAROLD "HAL" KELLEY RESPITE FOUNDATION, INC. 1408 E. CHICAGO ST. VALPARAISO, IN 46383		PC	OPERATING	20,000.
HEALTHLINC 951 TRANSPORT DR. VALPARAISO, IN 46383		PC	OPERATING	5,000.
HEALTHY COMMUNITIES OF LAPORTE COUNTY 115 EAST 4TH ST. MICHIGAN CITY, IN 46360		PC	OPERATING	3,000.
Total from continuation sheets				

Part XV Supplementary Information (continued)**3a** Grants and Contributions Paid During the Year

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
HILLTOP NEIGHBORHOOD HOUSE, INC. 460 S. COLLEGE AVE. VALPARAISO, IN 46383	PC		SCHOLARSHIP	35,000.
HOBART FAMILY YMCA, INC. 601 W. 40TH PL. HOBART, IN 46342	PC		OPERATING	40,000.
HOBART SCHOOL, CITY OF HOBART 32 EAST 7TH ST. HOBART, IN 46342	PC		OPERATING	5,000.
HOOSIERS FEEDING THE HUNGRY 0505 CR 32 CORUNNA, IN 46730	PC		OPERATING	1,000.
HORACE MANN-AMBRIDGE NEIGHBORHOOD IMPROVEMENT ORGANIZATION, INC. P.O. BOX 64273 GARY, IN 46401	PC		OPERATING	40,000.
HOSPICE OF THE CALUMET AREA, INC. 600 SUPERIOR AVE. MUNSTER, IN 46321	PC		OPERATING	25,000.
HOUSING OPPORTUNITIES 2001 CALUMET AVE. VALPARAISO, IN 46383	PC		OPERATING	15,000.
Total from continuation sheets				

Part XV Supplementary Information (continued)**3a** Grants and Contributions Paid During the Year

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
Recipient				
HUMANE SOCIETY CALUMET AREA, INC. 421 - 45TH ST. MUNSTER, IN 46321		PC	CAPITAL	5,000.
HUMANE SOCIETY OF HOBART, INC. P.O. BOX 108 HOBART, IN 46342		PC	OPERATING/EQUIPMENT	5,000.
HUMANE SOCIETY OF NORTHWEST INDIANA, INC. P.O. BOX 2697 GARY, IN 46403		PC	OPERATING	5,000.
ILLINOIS SPINA BIFIDA ASSOCIATION 8765 W. HIGGINS STE. 403 CHICAGO, IL 60631		PC	OPERATING	3,000.
IMMANUEL LUTHERAN CHURCH 1700 MONTICELLO PARK DR. VALPARAISO, IN 46383		PC	OPERATING	27,000.
IN-PACT, INC. 12300 MARSHALL ST. CROWN POINT, IN 46307		PC	EQUIPMENT	10,000.
INDEPENDENT CAT SOCIETY, INC. P.O. BOX 735 WESTVILLE, IN 46391		PC	OPERATING	2,000.
Total from continuation sheets				27

Part XV Supplementary Information (continued)**3a** Grants and Contributions Paid During the Year

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
INDEPENDENT COLLEGES OF INDIANA, INC. 30 S. MERIDIAN ST. INDIANAPOLIS, IN 46204		SO I	SCHOLARSHIP	100,000.
INDIANA ASSOCIATION OF SCHOOL PRINCIPALS 11025 E. 25TH ST. INDIANAPOLIS, IN 46229		PC	OPERATING	4,000.
INDIANA BALLET THEATRE NORTHWEST 7305 GRAND BLVD. HOBART, IN 46340		PC	OPERATING/CAPITAL	10,000.
INDIANA BAR FOUNDATION 615 N. ALABAMA ST. #122 INDIANAPOLIS, IN 46202		PC	OPERATING	10,000.
INDIANA COUNCIL FOR ECONOMIC EDUCATION 403 W. STATE ST. KRANNERT BLDG. RM. 607 WEST LAFAYETTE, IN 47907		PC	OPERATING	20,000.
INDIANA DUNES ENVIRONMENTAL LEARNING CENTER, INC. 700 HOWE RD. CHESTERTON, IN 46304		PC	OPERATING	10,000.
INDIANA FOUNDATION OF DENTISTRY FOR THE HANDICAPPED 6110 TECHNOLOGY CENTER DR. STE. 100 INDIANAPOLIS, IN 46278		PC	OPERATING	3,000.
Total from continuation sheets				

Part XV Supplementary Information (continued)**3a** Grants and Contributions Paid During the Year

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
INDIANA GOLF FOUNDATION P.O. BOX 516 2625 HURRICANE RD. FRANKLIN, IN 46131		PC	OPERATING	15,000.
INDIANA LEGAL SERVICES, INC. 151 N. DELAWARE ST. INDIANAPOLIS, IN 46204		PC	OPERATING	28,500.
INDIANA PHILANTHROPY ALLIANCE, INC. 32 E. WASHINGTON ST. INDIANAPOLIS, IN 46204-3583		PC	OPERATING	2,500.
INDIANA STATE UNIVERSITY FOUNDATION 30 N. FIFTH ST. TERRE HAUTE, IN 47809		PC	OPERATING	75,000.
INDIANA UNIVERSITY CENTER ON REPRESENTATIVE GOVERNMENT 201 N. INDIANA AVE. BLOOMINGTON, IN 47405		PC	OPERATING	10,000.
INDIANA UNIVERSITY FOUNDATION P.O. BOX 500 BLOOMINGTON, IN 47402		PC	OPERATING	150,000.
INDIANA UNIVERSITY NORTHWEST 3400 BROADWAY GARY, IN 46408		PC	OPERATING	150,000.
Total from continuation sheets				29

Part XV Supplementary Information (continued)**3a Grants and Contributions Paid During the Year**

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
Recipient				
INDIANA UNIVERSITY SCHOOL OF LAW 211 S. INDIANA AVE. BLOOMINGTON, IN 47405		PC	SCHOLARSHIP	20,000.
INDIANA UNIVERSITY SCHOOL OF MEDICINE (CANCER RESEARCH) 1110 W. MICHIGAN ST. LO 506 INDIANAPOLIS, IN 46202		PC	OPERATING	35,000.
INTERNATIONAL INSTITUTE OF LACASA 4433 BROADWAY GARY, IN 46409		PC	OPERATING	10,000.
IVY TECH FOUNDATION 3100 IVY TECH DR. VALPARAISO, IN 46383		PC	SCHOLARSHIP	75,000.
JACOB'S LADDER PEDIATRIC REHABILITATION CENTER, INC. 1595 S. CALUMET RD. STE. 3 CHESTERTON, IN 46304		PC	OPERATING	15,000.
JDRF 1 N. LASALLE ST. STE. 1200 CHICAGO, IL 60602		PC	OPERATING	10,000.
JEWISH FEDERATION OF NORTHWEST INDIANA, INC. 585 PROGRESS AVE. MUNSTER, IN 46321		PC	OPERATING	15,000.

Total from continuation sheets

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Part XV Supplementary Information (continued)**3a** Grants and Contributions Paid During the Year

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)					
JUNIOR ACHIEVEMENT OF CHICAGO 651 W. WASHINGTON ST. STE. 404 CHICAGO, IL 60661			PC	OPERATING	5,000.
JUNIOR ACHIEVEMENT SERVING LAPORTE COUNTY 613 FRANKLIN ST. MICHIGAN CITY, IN 46360			PC	OPERATING	1,200.
KAIROS PRISON MINISTRY OF INDIANA 1223 CENTER ROSS RD. CROWN POINT, IN 46307			PC	OPERATING	5,000.
LAKE AREA UNITED WAY, INC. 221 W. RIDGE RD. THE COLBY BLDG. GRIFFITH, IN 46319			PC	OPERATING	500,000.
LAKE COUNTY DOMESTIC RELATIONS COUNSELING BUREAU 2293 N. MAIN ST. CROWN POINT, IN 46307			PC	OPERATING	10,000.
LAKE COURT HOUSE FOUNDATION, INC. P.O. BOX 556 CROWN POINT, IN 46308			PC	CAPITAL	5,000.
LAKESHORE PUBLIC TELEVISION 8625 INDIANA PL. MERRILLVILLE, IN 46410			PC	OPERATING/CAPITAL	100,000.

Total from continuation sheets

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Part XV Supplementary Information (continued)

3a Grants and Contributions Paid During the Year

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
Recipient				
LEGACY FOUNDATION, INC. 1000 E. 80TH PL. 420 N. TOWER MERRILLVILLE, IN 46410		PC	SCHOLARSHIP	300,000.
LEGACY FOUNDATION, INC. 1000 E. 80TH PL. 420 N. TOWER MERRILLVILLE, IN 46410		PC	OPERATING	25,000.
LEGACY FOUNDATION, INC. 1000 E. 80TH PL. 420 N. TOWER MERRILLVILLE, IN 46410		PC	OPERATING	10,000.
LES TURNER ALS FOUNDATION 5550 W. TOUHY AVE. STE. 302 SKOKIE, IL 60077		PC	OPERATING	5,000.
LET'S TALK ABOUT IT, LET'S DO IT COMMUNITY OUTREACH 1375 GERRY ST. GARY, IN 46406		PC	OPERATING	6,000.
LIFE TREATMENT CENTERS, INC. 1402 S. MICHIGAN ST. SOUTH BEND, IN 46613		PC	OPERATING	5,000.
LIFELINE PILOTS BYERLY TERMINAL SUITE 302, 6100 W. EVERETT DIRKSEN PKWY., PEORIA, IL 61607		PC	OPERATING	3,000.

Total from continuation sheets

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Part XV Supplementary Information (continued)**3a** Grants and Contributions Paid During the Year

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
LORY'S PLACE (HOSPICE AT HOME) 4025 HEALTH PK. LN. ST. JOSEPH, MI 49085		PC	OPERATING	5,000.
LUBEZNIK CENTER FOR THE ARTS 101 AVENUE OF THE ARTS MICHIGAN CITY, IN 46360		PC	OPERATING	5,000.
MAYO FOUNDATION 200 FIRST ST. SW ROCHESTER, MN 55905		PC	OPERATING	50,000.
MEALS ON WHEELS OF NORTHWEST INDIANA 8446 VIRGINIA ST. MERRILLVILLE, IN 46410		PC	OPERATING	50,000.
MEMORIAL OPERA HOUSE FOUNDATION 104 INDIANA AVE. VALPARAISO, IN 46383		PC	OPERATING/EQUIPMENT	20,000.
MENTAL HEALTH AMERICA OF LAKE COUNTY 5311 HOHMAN AVE. HAMMOND, IN 46320		PC	OPERATING	15,000.
MENTAL HEALTH ASSOCIATION IN PORTER COUNTY, INC. 402 E. INDIANA AVE. VALPARAISO, IN 46383		PC	OPERATING	10,000.

Total from continuation sheets

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Part XV Supplementary Information (continued)

3a Grants and Contributions Paid During the Year

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
MERRILLVILLE ROTARY CLUB CHARITIES, INC. P.O. BOX 11001 MERRILLVILLE, IN 46411	PC	OPERATING		4,000.
METHODIST HOSPITALS 600 GRANT ST. GARY, IN 46402	PC	EQUIPMENT		40,000.
MILLER BEACH ARTS AND CREATIVE DISTRICT P.O. BOX 2405 540 S. LAKE ST. GARY, IN 46403	PC	OPERATING		10,000.
MONTROSSI ACADEMY IN THE OAKS 2109 E. 57TH ST. HOBART, IN 46342	PC	EQUIPMENT		2,500.
MUSCULAR DYSTROPHY FAMILY FOUNDATION P.O. BOX 776 CARMEL, IN 46082	PC	OPERATING		5,000.
NATIONAL CHILDREN'S CANCER SOCIETY 500 N. BROADWAY STE. 1850 ST. LOUIS, MO 63102	PC	OPERATING		5,000.
NATIONAL FIRE SAFETY COUNCIL C/O VALPARAISO FIRE DEPARTMENT 2605 CUMBERLAND DR. VALPARAISO, IN 46383	PC	OPERATING		1,000.

Total from continuation sheets

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Part XV Supplementary Information (continued)**3a** Grants and Contributions Paid During the Year

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)					
NAZARETH HOME 4325 ELM ST. EAST CHICAGO, IN 46312		PC	OPERATING		20,000.
NORTH COAST CULTURAL ASSOCIATION, INC. P.O. BOX 2281 CHESTERTON, IN 46304		PC	OPERATING		2,000.
NORTHERN INDIANA HISTORICAL SOCIETY 808 W. WASHINGTON SOUTH BEND, IN 46601		PC	OPERATING		5,000.
NORTHWEST INDIANA CATHOLIC YOUTH ORGANIZATION, INC. 7725 BROADWAY STE. G MERRILLVILLE, IN 46410		PC	OPERATING/CAPITAL		25,000.
NORTHWEST INDIANA FORUM FOUNDATION, INC. 6100 SOUTHPORT RD. PORTAGE, IN 46368		PC	OPERATING		25,000.
NORTHWEST INDIANA SPECIAL EDUCATION COOPERATIVE 2150 W. 97TH ST. CROWN POINT, IN 46307		PC	OPERATING		10,000.
NORTHWEST INDIANA SYMPHONY SOCIETY, INC. 1040 RIDGE RD. MUNSTER, IN 46321		PC	OPERATING		50,000.
Total from continuation sheets					

Part XV Supplementary Information (continued)**3a** Grants and Contributions Paid During the Year

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
Recipient				
NW INDIANA CONCERT ASSOCIATION P.O. BOX 9313 HIGHLAND, IN 46322		PC	OPERATING	1,000.
ONE REGION 601 W. 45TH AVENUE MUNSTER, IN 46321		PC	OPERATING	10,000.
OPPORTUNITY ENTERPRISES, INC. 2801 EVANS AVE. VALPARAISO, IN 46383		PC	OPERATING	100,000.
OPPORTUNITY ENTERPRISES, INC. 2801 EVANS AVE. VALPARAISO, IN 46383		PC	CAPITAL	25,000.
PINES VILLAGE RETIREMENT COMMUNITIES, INC. 3303 PINES VILLAGE CIR. VALPARAISO, IN 46383		PC	EQUIPMENT	20,000.
PINEY WOODS SCHOOL P.O. BOX 57 PINEY WOODS, MS 39148		PC	OPERATING	2,000.
PLANNED PARENTHOOD OF INDIANA, INC. 200 S. MERIDIAN ST. STE. 400, PO BOX 397 INDIANAPOLIS, IN 46208		PC	OPERATING	15,000.
Total from continuation sheets				

Part XV Supplementary Information (continued)**3a** Grants and Contributions Paid During the Year

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)					
PORTAGE RESALE SHOP, INC. 6450 EVERGREEN AVE. PORTAGE, IN 46368			PC	OPERATING	5,000.
PORTAGE TOWNSHIP LIVE ENTERTAINMENT ASSOCIATION P.O. BOX 1111 PORTAGE, IN 46368			PC	OPERATING	1,500.
PORTAGE TOWNSHIP YMCA 3100 WILLOWCREEK RD. PORTAGE, IN 46368			PC	OPERATING	40,000.
PORTER COUNTY AGING & COMMUNITY SERVICES, INC. 1005 CAMPBELL VALPARAISO, IN 46385			PC	CAPITAL	5,000.
PORTER COUNTY ASSOCIATION FOR HANDICAPPED CHILDREN AND ADULTS, INC. 53 E. ENGEL DR. VALPARAISO, IN 46383			PC	OPERATING	2,000.
PORTER COUNTY COMMUNITY FOUNDATION, INC. 1401 CALUMET AVE. VALPARAISO, IN 46383			PC	OPERATING	10,000.
PORTER COUNTY EDUCATION SERVICES 750 RANSOM RD. VALPARAISO, IN 46385			PC	OPERATING	5,000.

Total from continuation sheets

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Part XV Supplementary Information (continued)**3a** Grants and Contributions Paid During the Year

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)					
PORTER COUNTY FAMILY COURT 1660 S. SR 2 VALPARAISO, IN 46385		PC	OPERATING		10,000.
PORTER COUNTY MUSEUM FOUNDATION 153 S. FRANKLIN ST. VALPARAISO, IN 46383		PC	OPERATING		12,000.
PORTER COUNTY FACT, INC 1356 W. LINCOLNWAY VALPARAISO, IN 46385		PC	OPERATING		30,000.
PORTER COUNTY PARKS FOUNDATION, INC. P.O. BOX 428 VALPARAISO, IN 46384		PC	CAPITAL		10,000.
PORTER STARKE SERVICES FOUNDATION 601 WALL ST. VALPARAISO, IN 46383		PC	OPERATING		5,000.
PURDUE UNIVERSITY DANCE TEAM 2080 ASPEN DR. AVON, IN 46123		PC	OPERATING		2,500.
PURDUE UNIVERSITY NORTHWEST CALUMET CAMPUS 2200 169TH ST. HAMMOND, IN 46323		PC	OPERATING		150,000.

Total from continuation sheets

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Part XV Supplementary Information (continued)**3a** Grants and Contributions Paid During the Year

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)					
PURDUE UNIVERSITY 610 PURDUE MALL WEST LAFAYETTE, IN 47907			PC	OPERATING	150,000.
REAL SERVICES P.O. BOX 1835 SOUTH BEND, IN 46634			PC	OPERATING	3,000.
REBUILDING TOGETHER DUNELAND P.O. BOX 644 CHESTERTON, IN 46304			PC	OPERATING	5,000.
REBUILDING TOGETHER HEBRON P.O. BOX 825 HEBRON, IN 46341			PC	OPERATING	5,000.
REBUILDING TOGETHER PORTAGE P.O. BOX 2511 PORTAGE, IN 46368			PC	OPERATING	5,000.
REBUILDING TOGETHER VALPARAISO P.O. BOX 36 VALPARAISO, IN 46384			PC	CAPITAL	5,000.
REGIONAL MENTAL HEALTH CARE CENTER 8555 TAFT ST. MERRILLVILLE, IN 46410			PC	OPERATING	5,000.
Total from continuation sheets					

Part XV **Supplementary Information** (continued)**3a Grants and Contributions Paid During the Year**

Name and address (home or business)	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
RESPIRE CARE SERVICES, INC. 9000 INDIANAPOLIS BLVD. HIGHLAND, IN 46322			PC	OPERATING	6,000.
RESTORING THE PRIDE EDUCATIONAL FOUNDATION, SIGMA ALPHA EPSILON 406 LITTLETON ST. WEST LAFAYETTE, IN 47906			PC	OPERATING/CAPITAL	15,000.
RILEY CHILDREN'S FOUNDATION 30 S. MERIDIAN ST. STE. 200 INDIANAPOLIS, IN 46204			PC	OPERATING	5,000.
RONALD McDONALD HOUSE OF INDIANA, INC. 435 LIMESTONE INDIANAPOLIS, IN 46202			PC	OPERATING	10,000.
ROYAL FAMILY KID'S CAMP C/O 352 S. MAIN ST. CROWN POINT, IN 46307			PC	OPERATING	2,000.
SALVATION ARMY OF GARY-MERRILLVILLE 4800 HARRISON ST. GARY, IN 46408			PC	OPERATING	35,000.
SALVATION ARMY OF MICHIGAN CITY P.O. BOX 14 MICHIGAN CITY, IN 46361			PC	OPERATING	15,000.

Total from continuation sheets

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Part XV Supplementary Information (continued)**3a** Grants and Contributions Paid During the Year

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)					
SALVATION ARMY OF PORTER COUNTY P.O. BOX 828 PORTAGE, IN 46368	PC		OPERATING		35,000.
SAMARITAN COUNSELING CENTER 8955 COLUMBIA AVE. MUNSTER, IN 46321	PC		OPERATING		20,000.
SAMARITAN COUNSELING CENTERS, INC. 340 COMMERCE SQ. MICHIGAN CITY, IN 46360	PC		OPERATING		3,000.
SAND CASTLE SHELTER 120 W. NINTH ST. MICHIGAN CITY, IN 46360	PC		OPERATING		7,000.
SHARE FOUNDATION FOR THE HANDICAPPED P.O. BOX 400 ROLLING PRAIRIE, IN 46371	PC		OPERATING		20,000.
SHIRLEY HEINZ LAND TRUST 109 W. 700 N. VALPARAISO, IN 46385	PC		OPERATING		5,000.
SHRINERS HOSPITALS FOR CHILDREN 2211 N. OAK PARK AVE. CHICAGO, IL 60707	PC		OPERATING		5,000.
Total from continuation sheets					41

Part XV Supplementary Information (continued)**3a** Grants and Contributions Paid During the Year

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)					
SHULTS-LEWIS CHILD & FAMILY SERVICES P.O. BOX 471 VALPARAISO, IN 46384		PC	OPERATING		20,000.
SINAI FORUM 1401 S. US HWY. 421 WESTVILLE, IN 46391		PC	OPERATING		10,000.
SOJOURNER TRUTH HOUSE 410 W. 13TH AVE. GARY, IN 46407		PC	OPERATING		25,000.
SOUTH BEND CIVIC THEATRE P. O. BOX 1146 SOUTH BEND, IN 46624		PC	OPERATING		10,000.
SOUTH SHORE ARTS 1040 RIDGE RD. MUNSTER, IN 46321		PC	OPERATING		15,000.
SOUTH SHORE LEADERSHIP CENTER 410 E. LINCOLNWAY VALPARAISO, IN 46383		PC	OPERATING		10,000.
SOUTHLAKE CHILDREN'S CHOIR P.O. BOX 36 CROWN POINT, IN 46308		PC	OPERATING		2,000.
Total from continuation sheets					42

Part XV Supplementary Information (continued)

3a Grants and Contributions Paid During the Year

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
SPECIAL OLYMPICS INDIANA 6200 TECHNOLOGY CENTER DR., STE. 105 INDIANAPOLIS, IN 46278	PC	OPERATING		5,000.
SPORT YOUTH FOUNDATION 4801 WALSH AVE. EAST CHICAGO, IN 46312	PC	OPERATING		4,000.
ST. AGNES ADULT DAY SERVICE CENTER 1859 HARRISON BLVD. VALPARAISO, IN 46385	PC	OPERATING		5,000.
ST. BEDE ABBEY & ACADEMY 24 W. US HWY. 6 PERU, IL 61354	PC	OPERATING		10,000.
ST. JOSEPH'S CARMELITE HOME 4840 GRASSELLI AVE. EAST CHICAGO, IL 46312	PC	OPERATING		15,000.
ST. JOSEPH'S COLLEGE P.O. BOX 870 RENSSELAER, IN 47978	PC	OPERATING/EQUIPMENT		15,000.
ST. JUDE HOUSE, INC. 12490 MARSHALL ST. CROWN POINT, IN 46307	PC	OPERATING		50,000.

Total from continuation sheets

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Part XV Supplementary Information (continued)**3a** Grants and Contributions Paid During the Year

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)					
ST. MARY MEDICAL CENTER 1500 S. LAKE PARK AVE. HOBART, IN 46342			PC	OPERATING	15,000.
ST. TERESA OF AVILA CATHOLIC STUDENT CENTER 1511 LAPORTE AVE. VALPARAISO, IN 46383			PC	OPERATING	5,000.
SUSAN B. KOMEN BREAST CANCER FOUNDATION C/O NW INDIANA RALLY COMMITTEE 628 N. 700 W. HOBART, IN 46342			PC	OPERATING	2,000.
TALTREE ARBORETUM AND GARDENS 450 W. 100 N. VALPARAISO, IN 46384			PC	OPERATING	5,000.
THE ARC NORTHWEST INDIANA 2650 W. 35TH AVE. GARY, IN 46408			PC	EQUIPMENT	10,000.
THE FOUNDATION CENTER 32 OLD SLIP 24TH FL. NEW YORK, NY 10005			PC	OPERATING	2,000.
THE PHILANTHROPY ROUNDTABLE 1730 M ST. NW STE. 601 WASHINGTON, DC 20036			PC	OPERATING	3,000.
Total from continuation sheets					44

Part XV Supplementary Information (continued)**3a** Grants and Contributions Paid During the Year

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)					
THE PUBLIC EDUCATION FOUNDATION OF VALPARAISO, INDIANA 3801 N. CAMPBELL ST. VALPARAISO, IN 46385			PC	SCHOLARSHIP	10,000.
THE UNIVERSITY OF CHICAGO COMPREHENSIVE CANCER CENTER 5841 S. MARYLAND AVE. MC 1140 CHICAGO, IL 60637			PC	OPERATING	10,000.
THEATRE AT THE CENTER 1040 RIDGE RD. MUNSTER, IN 46321			PC	OPERATING	5,000.
TRADEWINDS REHABILITATION CENTER, INC. 3198 E. 83RD PL. MERRILLVILLE, IN 46410			PC	OPERATING/CAPITAL	100,000.
TRADEWINDS REHABILITATION CENTER, INC. 3198 E. 83RD PL. MERRILLVILLE, IN 46410			PC	CAPITAL	25,000.
UNION TOWNSHIP MIDDLE SCHOOL 599 W. 300 N. VALPARAISO, IN 46385			PC	EQUIPMENT	2,000.
UNION TOWNSHIP SCHOOL CORP. (DOLLARS FOR SCHOLARS) 599 W. 300 N. STE. A VALPARAISO, IN 46385			PC	SCHOLARSHIP	4,000.
Total from continuation sheets					

Part XV **Supplementary Information** (continued)**3a Grants and Contributions Paid During the Year**

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)					
UNITED NEGRO COLLEGE FUND 3737 N. MERIDIAN ST. STE. 502 INDIANAPOLIS, IN 46208			PC	SCHOLARSHIPS	10,000.
UNITED WAY OF PORTER COUNTY, INC. 951 EASTPORT CENTRE DR. VALPARAISO, IN 46383			PC	OPERATING	125,000.
UNIVERSITY OF CHICAGO MEDICAL CENTER 5841 S. MARYLAND AVE. CHICAGO, IL 60637			PC	OPERATING	20,000.
VALPARAISO FAMILY YMCA 1201 CUMBERLAND CROSSING DR. VALPARAISO, IN 46383			PC	OPERATING	50,000.
VALPARAISO KIWANIS CLUB FOUNDATION, INC. P.O. BOX 1661 VALPARAISO, IN 46384			PC	OPERATING	2,000.
VALPARAISO PARKS FOUNDATION 3210 CAMPBELL ST. VALPARAISO, IN 46385			PC	OPERATING	2,500.
VALPARAISO UNIVERSITY 1700 CHAPEL DR VALPARAISO, IN 46383			PC	OPERATING	100,000.
Total from continuation sheets					

Part XV Supplementary Information (continued)

3a Grants and Contributions Paid During the Year		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
Recipient	Name and address (home or business)				
VISITING NURSE ASSOCIATION OF PORTER COUNTY 2401 VALLEY DR. VALPARAISO, IN 46383			PC	OPERATING	50,000.
WEST SIDE HIGH SCHOOL 900 GERRY ST. GARY, IN 46406			PC	OPERATING	5,000.
WHITING UNITED METHODIST CHURCH 1920 CLARK ST. WHITING, IN 46394			PC	EQUIPMENT	5,000.
WNIT PUBLIC TELEVISION P.O. BOX 7034 SOUTH BEND, IN 46634			PC	OPERATING	10,000.
WOODLAND CHILD DEVELOPMENT CENTER 3027 J. F. MAHONEY DR. HAMMOND, IN 46323			PC	EQUIPMENT	10,000.
YOUTH FAMILY COMMUNITY RENEWAL INC. 2700 JACKSON ST. GARY, IN 46407			PC	OPERATING	5,000.
YOUTH FOR CHRIST SOUTH POINTE P.O. BOX 1064 VALPARAISO, IN 46384			PC	OPERATING	5,000.
Total from continuation sheets					

Part XV Supplementary Information (continued)

3a Grants and Contributions Paid During the Year		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
Recipient	Name and address (home or business)				
YOUTH SERVICE BUREAU OF LAPORTE COUNTY 906 MICHIGAN AVE. LAPORTE, IN 46350		PC	OPERATING		18,000.
YOUTH SERVICE BUREAU OF ST. JOSEPH COUNTY, INC. 2222 LINCOLNWAY W. SOUTH BEND, IN 46628		PC	OPERATING		15,000.
YWCA OF NORTHWEST INDIANA 150 W. 15TH AVE. GARY, IN 46407		PC	OPERATING		100,000.
Total from continuation sheets					48

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

SOURCE	(A) REVENUE PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME
INTEREST INCOME	1,896,798.	1,896,798.	
TOTAL TO PART I, LINE 3	1,896,798.	1,896,798.	

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
DIVIDENDS AND INTEREST FROM SECURITIES	3,179,697.	0.	3,179,697.	3,179,697.	
TO PART I, LINE 4	3,179,697.	0.	3,179,697.	3,179,697.	

FORM 990-PF OTHER INCOME STATEMENT 3

DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
SECURITIES LENDING INCOME	67,551.	67,551.	
TOTAL TO FORM 990-PF, PART I, LINE 11	67,551.	67,551.	

FORM 990-PF LEGAL FEES STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
LEGAL	11,035.	0.		12,739.
TO FM 990-PF, PG 1, LN 16A	11,035.	0.		12,739.

FORM 990-PF	ACCOUNTING FEES	STATEMENT	5
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING	37,515.	0.		35,565.
TO FORM 990-PF, PG 1, LN 16B	37,515.	0.		35,565.

FORM 990-PF	OTHER PROFESSIONAL FEES	STATEMENT	6
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
INVESTMENT COUNSELING	569,969.	569,969.		0.
CUSTODIAL FEES	51,887.	51,887.		0.
CONSULTING FEES	88,993.	88,993.		0.
TRUSTEE EXPENSE	5,836.	5,836.		0.
TO FORM 990-PF, PG 1, LN 16C	716,685.	716,685.		0.

FORM 990-PF	TAXES	STATEMENT	7
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FEDERAL EXCISE TAX	159,385.	0.		0.
TO FORM 990-PF, PG 1, LN 18	159,385.	0.		0.

FORM 990-PF	OTHER EXPENSES			STATEMENT	8
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
OFFICE SUPPLIES	22,304.	11,152.		11,441.	
INSURANCE	11,679.	0.		11,421.	
UTILITIES	3,112.	0.		3,112.	
SECURITIES LENDING	32,517.	32,517.		0.	
JANITOR	6,625.	0.		6,500.	
TO FORM 990-PF, PG 1, LN 23	76,237.	43,669.		32,474.	

FORM 990-PF	CORPORATE STOCK		STATEMENT	9
DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE		
ABIOMED INC COM	39,432.	39,432.		
ACTUANT CORP CL A NEW	0.	0.		
ADOBE SYS INC COM	1,405,268.	1,405,268.		
ADR ALIBABA GROUP HLDG LTD-SP A	1,497,161.	1,497,161.		
ADR BAIDU INC SPONSORED ADR	1,080,996.	1,080,996.		
ADR BP P L C SPONSORED ADR	1,199,748.	1,199,748.		
ADR CRH PLC ADR	0.	0.		
ADR TEVA PHARMACEUTICAL INDS	688,170.	688,170.		
ADVANCE AUTO PTS INC COM	295,960.	295,960.		
AIR PROD & CHEM INC COM	1,006,309.	1,006,309.		
AKAMAI TECHNOLOGIES INC COM STK	146,696.	146,696.		
ALEXION PHARMACEUTICALS INC COM	1,101,150.	1,101,150.		
ALIGN TECHNOLOGY INC COM	197,067.	197,067.		
ALLIED WORLD ASSURANCE COMPANYHOLDINGS AG COMMON	440,422.	440,422.		
ALPHABET INC CAP STK CL A CAP STK CL A	1,616,598.	1,616,598.		
ALPHABET INC CAP STK CL C CAP STK CL C	717,793.	717,793.		
ALTRIA GROUP INC COM	943,029.	943,029.		
AMAZON COM INC COM	1,949,662.	1,949,662.		
AMERICAN EXPRESS CO	676,054.	676,054.		
AMERICAN INTERNATIONAL GROUP INC COM	868,623.	868,623.		
AMETEK INC NEW COM	204,120.	204,120.		
ANSYS INC COM	182,668.	182,668.		
ANTHEM INC COM	921,278.	921,278.		
APTARGROUP INC COM	213,005.	213,005.		
AT&T INC COM	379,878.	379,878.		
ATHENAHEALTH INC COM MON STOCK	457,490.	457,490.		
BANK OF AMERICA CORP	756,660.	756,660.		
BIOGEN IDEC INC COM STK	687,682.	687,682.		
BIOMARIN PHARMACEUTICAL INC COM ISIN	815,974.	815,974.		
BLACKBAUD INC COM	153,600.	153,600.		

C R BARD	202,194.	202,194.
CABELAS INC COM STK	0.	0.
CAP 1 FNCL COM	322,439.	322,439.
CARDINAL HLTH INC	741,291.	741,291.
CARNIVAL CORP COM PAIRED	493,529.	493,529.
CEPHEID INC COM	0.	0.
CERNER CORP COM	0.	0.
CHEVRON CORP COM	470,800.	470,800.
CHIPOTLE MEXICAN GRILL INC COM STK	726,341.	726,341.
CITIGROUP INC COM NEW COM NEW	805,930.	805,930.
CLARCOR INC COM	239,163.	239,163.
COMM BANCSHARES IN COM	206,382.	206,382.
CONOCOPHILLIPS COM	990,566.	990,566.
COOPER COS INC COM NEW	297,381.	297,381.
CORE LABORATORIES NV NLG0.03	177,059.	177,059.
CST BRANDS INC	81,855.	81,855.
CULLEN/FROST BANKERS INC COM	255,867.	255,867.
CVS HEALTH CORP COM	1,112,631.	1,112,631.
DEERE & CO COM	298,816.	298,816.
DELPHI AUTOMOTIVE PLC	0.	0.
DENBURY RES INC HLDG CO COM NEW	59,984.	59,984.
DENTSPLY SIRONA INC COM	265,558.	265,558.
DONALDSON INC COM	132,552.	132,552.
DOVER CORP COM	348,425.	348,425.
EDWARDS LIFESCIENCES CORP COM	740,230.	740,230.
ENDURANCE SPECIALTY HOLDINGS LTD COM USD1	392,700.	392,700.
ENTERGY CORP NEW COM	226,067.	226,067.
EXPRESS SCRIPTS HLDG CO COM	707,505.	707,505.
FACEBOOK INC CL A CL A	2,047,890.	2,047,890.
FASTENAL CO COM	133,893.	133,893.
FLOWERS FOODS INC COM	359,460.	359,460.
FMC TECHNOLOGIES INC COM	0.	0.
FORD MTR CO DEL COM PAR \$0.01 COM PAR \$0.01	0.	0.
FORTINET INC COM	105,420.	105,420.
FRANKS INTERNATIONAL NVRY5H0	0.	0.
GALLAGHER ARTHUR J & CO COM	259,800.	259,800.
GENERAL DYNAMICS CORP COM	642,986.	642,986.
GRAINGER W W INC COM	308,893.	308,893.
GUIDEWIRE SOFTWARE INC COM USD0.0001	125,792.	125,792.
HENRY SCHEIN INC COMMON STOCK	159,296.	159,296.
HONEYWELL INTL INC COM STK	544,495.	544,495.
IDEX CORP COM	202,635.	202,635.
ILLUMINA INC COM	758,637.	758,637.
INCYTE CORP COM	591,593.	591,593.
INTEL CORP COM	214,475.	214,475.
JOHNSON & JOHNSON COM USD1	907,164.	907,164.
JOHNSON CTL INC COM	975,132.	975,132.
JPMORGAN CHASE & CO COM	1,109,689.	1,109,689.
LAB CORP AMER HLDGS COM NEW	285,646.	285,646.
LENDINGCLUB CORP COM	241,631.	241,631.
LINKEDIN CORP CL A	0.	0.
LOWES COS INC COM	484,967.	484,967.
LUMENIS LTD COM STK	0.	0.
MARATHON PETE CORP COM	317,205.	317,205.

MC CORMICK & CO INC COM NON-VTG		0.	0.
MEAD JOHNSON NUTRITION COM	USD0.01	198,128.	198,128.
MEDIDATA SOLUTIONS INC COM		89,406.	89,406.
MEDTRONIC PLC COMMON STOCK	STOCK	1,002,206.	1,002,206.
MERCK & CO INC NEW COM		657,166.	657,166.
METTLER-TOLEDO INTL INC COM		0.	0.
MFB NTGI COM DAILY S&P 500 EQTY		36,096,039.	36,096,039.
MFB NTGI-QM COMMON DAILY ALL CTRY WORLD EX-US			
EQTY INDEX FD - LENDING		16,443,581.	16,443,581.
MFO GMO BENCHMARK-FREE ALLOC FD CL III		11,871,098.	11,871,098.
MFO IRONBRIDGE FDS SMALL CAP FD FRONTEGRA SMALL		13,248,364.	13,248,364.
MFO TEMPLETON INSTL FDS FOREIGN EQUITY SER -			
PRIMARY		16,599,758.	16,599,758.
MICROSOFT CORP COM		832,055.	832,055.
MOBILEYE NV EUR0.01		506,043.	506,043.
MOLSON COORS BREWING CO CL B CL B		189,755.	189,755.
MONSANTO CO NEW COM		0.	0.
MONSTER BEVERAGE CORP NEW COM		928,967.	928,967.
MORNINGSTAR INC COM STK		22,068.	22,068.
NETFLIX INC COM STK		1,293,710.	1,293,710.
NORFOLK SOUTHN CORP COM		248,561.	248,561.
NORTHERN TR CORP COM		340,616.	340,616.
NUVASIVE INC COM		161,664.	161,664.
OCCIDENTAL PETROLEUM CORP		864,020.	864,020.
ORACLE CORP COM		939,795.	939,795.
PALO ALTO NETWORKS INC COM USD0.0001		1,003,526.	1,003,526.
PANERA BREAD CO CL A		0.	0.
PARKER-HANNIFIN CORP COM		0.	0.
PFIZER INC COM		890,667.	890,667.
PHILIP MORRIS INTL COM STK NPV		993,215.	993,215.
PHILLIPS 66 COM		576,355.	576,355.
PNC FINANCIAL SERVICES GROUP COM STK		423,044.	423,044.
PROSPERITY BANCSHARES INC COM		200,984.	200,984.
PTC INC COM		143,437.	143,437.
QUALCOMM INC COM		840,558.	840,558.
RAYTHEON CO		302,176.	302,176.
RED HAT INC COM		287,513.	287,513.
REGENERON PHARMACEUTICALS INC COM		816,775.	816,775.
ROCKWELL AUTOMATION		356,160.	356,160.
SALESFORCE COM INC COM STK		1,803,921.	1,803,921.
SALLY BEAUTY HLDGS INC COM STK		258,916.	258,916.
SANOFI SPONSORED ADI		650,235.	650,235.
SCHULMBERGER LTF COM COM		713,575.	713,575.
SCHWAB CHARLES CORP COM NEW		1,061,743.	1,061,743.
SEADRILL LTD COM STK		0.	0.
SERVICENOW INC		459,050.	459,050.
SIRONA DENTAL SYS INC COM		0.	0.
SMUCKERS J M CO COM NEW COM		243,314.	243,314.
SOLARWINDS INC COM		0.	0.
SNYDERS-LANCE INC COM		220,455.	220,455.
SPLUNK INC COMSTK COM USD0.001		823,515.	823,515.
SPLUNK INC COMSTK COM USD0.001		186,698.	186,698.
ST JUDE MED INC COM		0.	0.
STANLEY BLACK & DECKER INC COM		0.	0.

STATE STR CORP COM	428,082.	428,082.
STERICYCLE INC COM	200,304.	200,304.
STERIS PLC NEW STERIS LTD COMSTK	252,713.	252,713.
SVB FINANCIAL GROUP COMMON STOCK	171,660.	171,660.
SYNOPSIS INC COM	113,306.	113,306.
TABLEAU SOFTWARE INC CL A CL A	166,493.	166,493.
TARGET CORP COM STK	379,424.	379,424.
TELEFLEX INC COM	0.	0.
TEXAS INSTRUMENTS INC COM	743,126.	743,126.
THE PRICELINE GROUP INC	1,993,842.	1,993,842.
TREEHOUSE FOODS INC COM	302,476.	302,476.
TUPPERWARE BRANDS CORPORATION	0.	0.
TWENTY-FIRST CENTURY FOX INC CL A	468,268.	468,268.
UNDER ARMOR INC CL A	246,925.	246,925.
UNDER ARMOUR INC CL C COM	215,455.	215,455.
UNITED TECHNOLOGIES CORP COM	865,998.	865,998.
UNITEDHEALTH GROUP INC COM	495,644.	495,644.
VERIZON COMMUNICATIONS COM	983,900.	983,900.
VISA INC COM CL A STK	2,914,047.	2,914,047.
WATERS CORP COM	336,596.	336,596.
WELLS FARGO & CO NEW COM STK	1,107,821.	1,107,821.
WEX INC	306,900.	306,900.
WHOLE FOODS MKT INC COM	253,770.	253,770.
WILEY JOHN & SONS INC CL A	193,475.	193,475.
WORKDAY INC CL A COM USD0.001	155,312.	155,312.
XILINX INC COM	0.	0.
XL GROUP LTD XL GROUP LTD COM NPV	473,202.	473,202.
TOTAL TO FORM 990-PF, PART II, LINE 10B	171,272,028.	171,272,028.

FORM 990-PF	CORPORATE BONDS	STATEMENT 10
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
CF JP MORGAN CORE BOND TRUST	30,318,778.	30,318,778.
MFO STONE HARBOR LOCAL MARKET FD	223,898.	223,898.
MFO STONE HBR INVT FDS EMERGING MARKETS DEBT FD INSTL CL	7,874,198.	7,874,198.
MFO STONE HBR INVT FDS HIGH YIELD BD FUND INSTL CL	6,929,667.	6,929,667.
TOTAL TO FORM 990-PF, PART II, LINE 10C	45,346,541.	45,346,541.

FORM 990-PF	OTHER INVESTMENTS	STATEMENT	11
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DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
CF MESIROW ABSOLUTE RETURN FD LTD CL S	FMV	0.	0.
SECURITIES LENDING PROGRAM INVESTMENTS	FMV	15,597,798.	15,597,798.
TOTAL TO FORM 990-PF, PART II, LINE 13		15,597,798.	15,597,798.

FORM 990-PF	DEPRECIATION OF ASSETS NOT HELD FOR INVESTMENT	STATEMENT	12
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DESCRIPTION	COST OR OTHER BASIS	ACCUMULATED DEPRECIATION	BOOK VALUE
OFFICE FURNITURE AND FIXTURES	105,287.	102,812.	2,475.
TOTAL TO FM 990-PF, PART II, LN 14	105,287.	102,812.	2,475.

FORM 990-PF	OTHER ASSETS	STATEMENT	13
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DESCRIPTION	BEGINNING OF YR BOOK VALUE	END OF YEAR BOOK VALUE	FAIR MARKET VALUE
ACCRUED INTEREST AND DIVIDENDS	161,401.	158,623.	158,623.
PREPAID TAXES	164,605.	40,220.	40,220.
TO FORM 990-PF, PART II, LINE 15	326,006.	198,843.	198,843.

FORM 990-PF	OTHER LIABILITIES	STATEMENT	14
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DESCRIPTION	BOY AMOUNT	EOY AMOUNT
PAYABLE UNDER SECURITIES LENDING PROGRAM	31,447,427.	15,597,798.
TOTAL TO FORM 990-PF, PART II, LINE 22	31,447,427.	15,597,798.

FORM 990-PF PART VIII - LIST OF OFFICERS, DIRECTORS STATEMENT 15
 TRUSTEES AND FOUNDATION MANAGERS

NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN CONTRIB	EXPENSE ACCOUNT
WILLIAM N. VINOVIK 402 WALL STREET VALPARAISO, IN 46383	VICE CHAIRMAN AND TRUSTEE 20.00	138,290.	0.	0.
BRUCE W. WARGO 402 WALL STREET VALPARAISO, IN 46383	CHAIRMAN AND TRUSTEE 20.00	140,324.	0.	0.
CHARLES W. CONOVER 402 WALL STREET VALPARAISO, IN 46383	TRUSTEE 20.00	78,488.	0.	0.
CLYDE D. COMPTON 402 WALL STREET VALPARAISO, IN 46383	SECRETARY AND TRUSTEE 20.00	115,093.	0.	0.
JOHN J. DIEDERICH 402 WALL STREET VALPARAISO, IN 46383	TRUSTEE 20.00	49,473.	0.	0.
TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII		521,668.	0.	0.

FORM 990-PF	GRANT APPLICATION SUBMISSION INFORMATION	STATEMENT 16
	PART XV, LINES 2A THROUGH 2D	

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

THE BOARD OF TRUSTEES, C/O WILLIAM N. VINOVICH, JOHN W. ANDERSON FOUNDATION
402 WALL STREET
VALPARAISO, IN 46383

TELEPHONE NUMBER

219-462-4611

FORM AND CONTENT OF APPLICATIONS

APPLICATIONS FOR GRANTS SHOULD INCLUDE BUT NOT NECESSARILY BE LIMITED TO THE FOLLOWING INFORMATION:

1. PURPOSE OR ORGANIZATION AND PROPOSED USE OF GRANT
2. LIST OF OFFICERS OF THE ORGANIZATION
3. STATEMENT OF BUDGET: FINANCIAL STATEMENTS
4. COPY OF INTERNAL REVENUE SERVICE LETTER APPROVING TAX-EXEMPT STATUS UNDER SECTION 501(C)(3)
5. CERTIFICATION OF 509(A)(1) OR 509(A)(2) STATUS

ANY SUBMISSION DEADLINES

THERE ARE NO SUBMISSION DEADLINES. EACH APPLICATION IS REVIEWED ON A TIMELY BASIS.

RESTRICTIONS AND LIMITATIONS ON AWARDS

AWARDS ARE RESTRICTED TO TAX-EXEMPT, NONPROFIT ORGANIZATIONS WHICH ARE NOT CLASSIFIED AS PRIVATE FOUNDATIONS UNDER SECTION 509(A). THEY ARE ALSO LIMITED PRIMARILY TO ORGANIZATIONS SERVING LAKE AND PORTER COUNTIES OF NORTHWEST INDIANA.