C&Form 990-PF 058 Department of the Treasury

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.

OMB No. 1545-0052 2017

<u>In</u>	ternal F	Revenue Service	► Go to www.irs	.gov/Fori	<i>n990PF</i> for Instru	uctions and th	e latest infor	matic	on. Op	en to Public Inspection
F	or cal	endar year 2017	or tax year beginning			, 2017,	and ending	1	_	, 20
		of foundation			-				Employer identific	ation number
	LOW	RY BERTELSEN	N CHARITABLE TUW	63012	29013				35-	6020338
_			x number if mail is not delivere				Room/suite	В	Telephone numbe	-
	ם ו	BOX 207							01	2-464-1584
			e, country, and ZIP or foreign po	stal code				+	01.	104-1704
ì	J., J.	town, ototo or province	5,000 m, ,, and 2m or torong mpa	0.0.000				c	If exemption applicat	ion is
i i			45500						pending, check here	
3.	E VA	NSVILLE, IN	47702		11			\dashv		<u>~</u>
186	Cne	NSVILLE, IN ck all that apply:	Initial return		Initial return	•	ublic charity	/ D	1 Foreign organization	
7			Final return	<u> </u>	Amended ret				2. Foreign organization 85% test, check he	
√ _			Address change		Name change			4	computation	
₹ H	_	• • •	ation: X Section 501				Ch	_E	If private foundation	status was terminated
	<u>s</u>	section 4947(a)(1) n	onexempt charitable trust		ther taxable pri		ion	╝	under section 507(b)	
<u>_</u> 1	Fair	market value o	f all assets at JAcco	ounting I	method: X Ca	ash Acc	rual	F	If the foundation is in	a 60-month termination
	end	of year (from Pai	rt II, col. (c), line	Other (sp	ecify)			_	under section 507(b)	(1)(B), check here . 🕨
 	16)	▶ \$ 1,0	646,840. (Part I,	column (d) must be on ca	sh basis.)				
2019g	art l	Analysis of Rev	enue and Expenses (The	(a) [Revenue and					(d) Disbursements
1		total of amounts in	n columns (b), (c), and (d)	10/1	penses per	(b) Net inve incom		(c)	Adjusted net income	for charitable purposes
2		column (a) (see in	structions))		books	incoll	.			(cash basis only)
ノ	1	A . II								
	2	Check Y if the	e foundation is not required to							
1	3		ch Sch B	1						
	4	-	rest from securities		30,564.	3	0,519.		·····	
					50,551		7,020.			
			(loss)							
41	1		n sale of assets not on line 10	1	129,040.					
Ž	Ъ	Gross sales price for a			125,010.					
Revenue	,	assets on line 6a	come (from Part IV, line 2) .		•	12	9,040.			
Re	8						2,010.			
	l 🐧	•	ital gain							
	10a	Gross sales less return	ns							
	۱.	and allowances			····				····	
		Less: Cost of goods se	·	1						
			s) (attach schedule)							
	11 12		ch schedule) through 11		159,604.	7.5	9,559.			
-	T			 	18,126.	15	3,493.			14,633.
, v.	13		cers, directors, trustees, etc		10,120.				NONE	
Se	14		laries and wages	 			NONE		NONE	
) en	15	• • •	oloyee benefits				NONE		NONE	
Ä	16a		schedule)	-			370377		37037	
نه ا	Ь		ttach schedule)STMT 1	<u> </u>	900.		NONE		NONE	<u>900</u> .
; 😩	C		fees (attach schedule)	<u> </u>						
strative	17				1					
	18		dule) (see instructions). 2.	-	921.		250.			
Administrative Expenses	19		h schedule) and depletion.		<u>ې ر</u>					<u> </u>
Ad	20		· · · · · · · · · · · · · · · · · · ·	1 7 12 3	910 : 31					
2	21		, and meetings		91V		NONE		NONE	
2	22	Printing and public	ations	-	· ·		NONE		NONE	
פ	23	Other expenses (at	tach schedule)	<u> </u>	, , (·
ati	24	Total operating an	d administrative expenses.	1						
ě		Add lines 13 throu	gh 23	<u> </u>	19,947.		3,743.		NONE	
Ö	21 22 23 24 25	Contributions, gifts	, grants paid		62,000.					<u>62,000</u> .
_	26	Total expenses and dist	oursements Add lines 24 and 25	1	81,947.		3,743.		NONE	<u>77,533</u> .
	27	Subtract line 26 fro	om line 12:	1						
	a	Excess of revenue over	expenses and disbursements		77,657.					
	ь	Net investment in	come (if negative, enter -0-)			15	5,816.			
	C	Adjusted net incom	me (if negative, enter -0-).							

JSA For Paperwork Reduction Act Notice, see instructions.
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Form **990-PF** (2017)

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State Sta		11	Attached schedules and amounts in the	Beginning of year	End	of year
2 Savings and temporary cash investments		arc II	Balance Sheets description column should be for end-of-year amounts only (See instructions)	(a) Book Value	(b) Book Value	(c) Fair Market Value
a Accounts receivable ► Less: allowence for doubtful accounts ► 4 Pledges receivable ► Less: allowence for doubtful accounts ► 5 Grants receivable ■ Less: allowence for doubtful accounts ► 6 Receivables due from officers, directors, trustees, and other discussified persons fatted schedule) [see showence for doubtful accounts ► 1 NONE 1 Less: allowence for doubtful accounts ► 1 None 2 Prepaid dexpenses and deferred charges 1 None 2 Investments - corporate shoots (affacts schedule) 3 Investments - corporate shoots (affacts schedule) 4 Investments - corporate shoots (affacts schedule) 5 Investments - corporate shoots (affacts schedule) 6 Investments - corporate shoots (affacts schedule) 7 Investments - corporate shoots (affacts schedule) 8 Investments - corporate shoots (affacts schedule) 9 Investments - corporate schedule 9 Inve		1	Cash - non-interest-bearing			
Less: allowance for doubtful accounts	- 1	2	Savings and temporary cash investments			
1 Hedges receivable Less Blowmene for doubtful accounts S Grints receivable .	- 1	3	Accounts receivable			
S Grants payable and accrued expenses					· · · · · · · · · · · · · · · · · · ·	
Segments receivable — Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) is less: allowance for doubtril accounts ➤ NONE Segments despined by the segment of the s		4	Pledges receivable ▶			
6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions) 7 Other notes and loans receivable (attach schedule) ► 8 Inventroites for sale or use 10 Investments - corporate bonds (attach schedule) 10 Investments - corporate bonds (attach schedule) 11 Investments - corporate bonds (attach schedule) 12 Investments - corporate bonds (attach schedule) 13 Investments - corporate bonds (attach schedule) 14 Land, butlengs and expenses and deferred charges. 15 Investments - corporate bonds (attach schedule) 16 Investments - corporate bonds (attach schedule) 17 Accounts payable and scrude schedule) 18 Total assets (does not expense schedule) 19 Total reseases (does not expense schedule) 10 Total reseases (does not expense schedule) 10 Grants payable and accrude expenses 11 Grants payable and accrude expenses 12 Cotpies transfer filters, directors, trustees, and other dequalified persons. 19 Defarred revenue 20 Loans from officers, directors, trustees, and other dequalified persons. 21 Total risabilities (describe legal schedule) 22 Total fisibilities (describe legal schedule) 23 Total risabilities (add times 17 through 22). 24 Unrestricted 25 Temporarily restricted 26 Foundations that follow SFAS 117, check here 27 Capital stock, trust principal, or current funds 28 Patient accountly restricted 29 Foundations that do not follow SFAS 117, check here 20 Loans from officers, directors, trustees, and other dequalified persons. 26 Total risabilities (add times 27 through 31, check here 28 Patient accountly restricted 29 Foundations that follow SFAS 117, check here 20 Loans from officers, directors, trustees, and other dequalified persons. 20 Loans from officers, directors, trustees, and other dequalified persons. 20 Total risabilities (add times 27 through 31, check here 20 Loans from officers, directors, trustees, and other dequalified persons. 21 Loans from officers, directors, trustees, and other dequalified persons. 22 Co			Less: allowance for doubtful accounts			<u></u>
Columnitation Columnitati	1	5	Grants receivable			<u> </u>
Tother notes and loans receivable (attach schedule)		6	Receivables due from officers, directors, trustees, and other			
Less: allowance for doubtful accounts NONE			disqualified persons (attach schedule) (see instructions)			
8 Inventories for sale or use. 9 Prepaid expenses and deferred charges. 10 Investments: Us and sites bonds (attach schedule). 1 Investments: Cyp and steep bonds (attach schedule). 1 Investments: corporate bonds (attach schedule). 1 Investments: -inch, buildings, and equipment basis and complete lines 2 defense bonds. 1 Investments: -inch, buildings, and equipment basis and complete lines 2 defense bonds. 1 Investments: -inch dulie). 1 Investments: -inchedule). 1 Investments: -orborate bonds (attach schedule). 2 Investments: -orborate bonds (attach schedule). 3 Investments: -orborate bonds	ļ	7	· · · · · · · · · · · · · · · · · · ·			
Investments - corporate stock (attach schedule)			Less: allowance for doubtful accounts ▶NONE			
Investments - corporate stock (attach schedule)	ts.	8	Inventories for sale or use			<u></u>
Investments - corporate stock (attach schedule)	SS	9	Prepaid expenses and deferred charges			
c Investments - corporate bonds (attach schedule)	۹	10a	Investments - U S and state government obligations (attach schedule)			
Investments - land, buildings and equipment basis supported		b	Investments - corporate stock (attach schedule)	<u>_</u> .		
and equipment basis cherective chemical separation		11°	·	·		<u></u>
		''	and equipment basis			
13 Investments - other (attach schedule) 1,346,059 1,423,485 1,646,840	1		Less accumulated depreciation (attach schedule)			
adupment basis depreciation Cother assets (describe		12	Investments - mortgage loans			
adupment basis depreciation Cother assets (describe	ı		Land buildings and	1,346,059.	1,423,485	1,646,840
15 Other assets (describe 1 1 1 1 1 1 1 1 1	Į					
15 Other assets (describe 1 1 1 1 1 1 1 1 1			(attach schedule)		 	
instructions. Also, see page 1, item I)		15	Other assets (describe >)			<u> </u>
17 Accounts payable and accrued expenses						
Section Deferred revenue. Deferred reve	4			1,346,059.	1,423,485	1,646,840
Deferred revenue. Loans from officers, directors, trustees, and other disqualified persons. Mortgages and other notes payable (attach schedule) Total liabilities (describe) NONB Foundations that follow SFAS 117, check here X and complete lines 24 through 26, and lines 30 and 31. Unrestricted Foundations that do not follow SFAS 117, check here X and complete lines 27 through 31. Capital stock, trust principal, or current funds 1,346,059 1,423,485. Part III Analysis of Changes in Net Assets or Fund Balances (see instructions) 1,346,059 1,423,485. Part III Analysis of Changes in Net Assets or Fund Balances (see instructions) 1,346,059 1,423,485. Part III Analysis of Changes in Net Assets or Fund Balances (see instructions) 1,346,059 1,423,485. Part III Analysis of Changes in Net Assets or Fund Balances (see instructions) 1,346,059 1,423,485. Part III Analysis of Changes in Net Assets or Fund Balances (see instructions) 1,346,059 1,423,485. Part III Analysis of Changes in Net Assets or Fund Balances (see instructions) 1,346,059 1,423,485. Part III Analysis of Changes in Net Assets or Fund Balances 1,346,059 1,423,485. Part III Analysis of Changes in Net Assets or Fund Balances 1,346,059 1,423,485. Part III Analysis of Changes in Net Assets or Fund Balances 1,346,059 1,423,485. Part III Analysis of Changes in Net Assets or Fund Balances 1,346,059 1,423,485. Part III Analysis of Changes in Net Assets or Fund Balances 1,346,059 1,423,485. Part III Analysis of Changes in Net Assets or Fund Balances 1,346,059 1,423,485. Part III Analysis of Changes in Net Assets or Fund Balances 1,346,059 1,423,485. Part III Analysis of Changes in Net Assets or Fund Balances 1,346,059 1,423,485. Part III Analysis of Changes in Net Assets or Fund Balances 1,346,059 1,423,485. Part III Analysis of Changes in Net Assets or Fund Balances 1,346,059 1,423,485. Part III Ana						_
Total liabilities (add lines 17 through 22)	,,		· ·			4
Total liabilities (add lines 17 through 22)	<u>ë</u>		Deferred revenue			4
Total liabilities (add lines 17 through 22)	嵩					
Total liabilities (add lines 17 through 22)	į			·		4
Foundations that follow SFAS 117, check here		22	Other liabilities (describe			┥ .
Foundations that follow SFAS 117, check here		23	Total liabilities (add lines 17 through 22)		MON	, '
and complete lines 24 through 26, and lines 30 and 31. Unrestricted	┥				INOIN	4
Temporarily restricted Foundations that do not follow SFAS 117, check here Temporarily restricted Foundations that do not follow SFAS 117, check here Temporarily restricted Foundations that do not follow SFAS 117, check here Temporarily restricted Foundations that do not follow SFAS 117, check here X and complete lines 27 through 31. Capital stock, trust principal, or current funds Paid-in or capital surplus, or land, bldg., and equipment fund. Retained earnings, accumulated income, endowment, or other funds Total net assets or fund balances (see instructions). 1,346,059. 1,423,485. Part III Analysis of Changes in Net Assets or Fund Balances 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). 1,346,059. 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). 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). 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). 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). 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). 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). Total net assets or fund balances (see instructions). Total net assets or fund balances (see instructions). 1,346,059. 1,423,485. Total net assets or fund balances (see instructions). 1,346,059. 1,423,485. Total net assets or fund balances (see instructions).	Ş					
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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 1,346,059. 2 Enter amount from Part I, line 27a. 2 77,657. 3 Other increases not included in line 2 (itemize) ▶ 3 4 Add lines 1, 2, and 3. 4 1,423,716. 5 Decreases not included in line 2 (itemize) ▶ SEE STATEMENT 3 5 231.	_		instructions)	1,346,059.	1,423,485	
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). 2 Enter amount from Part I, line 27a	Ρ					<u> </u>
end-of-year figure reported on prior year's return) 1 1,346,059. 2 Enter amount from Part I, line 27a. 2 77,657. 3 Other increases not included in line 2 (itemize) ▶ 3 4 Add lines 1, 2, and 3. 4 1,423,716. 5 Decreases not included in line 2 (itemize) ▶ SEE STATEMENT 3 5 231.					nust agree with	
2 Enter amount from Part I, line 27a 2 77,657 3 Other increases not included in line 2 (itemize) ▶ 3 4 Add lines 1, 2, and 3 4 1,423,716 5 Decreases not included in line 2 (itemize) ▶ SEE STATEMENT 3 5 231						1,346,059.
3 Other increases not included in line 2 (itemize) ▶ 3 4 Add lines 1, 2, and 3	2					
4 Add lines 1, 2, and 3				_		
5 Decreases not included in line 2 (itemize) ► SEE STATEMENT 3 5 231.					4	1,423,716.
				ne 5) - Part II, column (b), line 30 6	1,423,485.

Day	t IV Capital Gains	and Losses for Tax on Inve	etment Income			1 280 0
rai		cribe the kind(s) of property sold (for ex		(b) How		
	•	ick warehouse; or common stock, 200 :	·	acquired P - Purchase	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo , day, yr.)
<u> </u>	PUBLICLY TRADED			D - Donation		
_ <u>a</u> b		BECONTILES				
d						
<u>-</u> e						
<u>`</u>		(f) Depreciation allowed	(g) Cost or other basis		(h) Gain or (lo	ss)
	(e) Gross sales price	(or allowable)	plus expense of sale		us (g))	
a	559,234.		430,194.			129,040.
b						
c					<u> </u>	
<u>d</u>						
е						
	Complete only for assets sh	owing gain in column (h) and owned by	y the foundation on 12/31/69.		Gains (Col. (h) ga	
	(i) FMV as of 12/31/69	(j) Adjusted basis	(k) Excess of col. (i)	col.	(k), but not less t Losses (from co	
		as of 12/31/69	over col. (j), if any		LUSSUS (ITOTIT CO	
a						129,040.
<u>b</u>						
<u>c</u>						
d						
<u>e</u>	·		in, also enter in Part I, line 7		·	
2	Capital gain net income	or (not canital loce)	oss), enter -0- in Part I, line 7	2		129,040.
3	Net short-term canital da	ain or (loss) as defined in sections 1	,	-		123,040.
•		art I, line 8, column (c). See ins				
				3		
Pai			uced Tax on Net Investment In	come		-
			section 4940(a) tax on net investn		me.)	
,					,	
If se	ection 4940(d)(2) applies,	leave this part blank.				
		·				_
Was	the foundation liable for	the section 4942 tax on the distrib	utable amount of any year in the b	ase perio	d?	Yes X No
If "Y	es," the foundation doesn'	t qualify under section 4940(e). Do	o not complete this part.			
1		nount in each column for each year	r; see the instructions before makir	ng any en		
	(a) Base period years	(b)	(c)	}	(d) Distribution ra	tio
Cal	endar year (or tax year beginning in)	Adjusted qualifying distributions	Net value of noncharitable-use assets		(col. (b) divided by	col (c))
	2016	78,659.	1,464,150.			0.053723
	2015	81,422.	1,555,394.			0.052348
	2014	76,724.	1,576,894.			0.048655
	2013	75,000.	1,504,904.			0.049837
	2012	127,756.	1,434,531.	 		0.089058
_		0				0.002601
2		d)		2		0.293621
3	-	o for the 5-year base period - divid	· · · · · · · · · · · · · · · · · · ·			0 050504
	the number of years the	foundation has been in existence i	if less than 5 years	3		0.058724
			5	.	-	FF0 (CF
4	Enter the net value of no	oncharitable-use assets for 2017 from	om Part X, line 5	4	<u></u>	550,665.
_				_		01 061
5	Multiply line 4 by line 3.		• • • • • • • • • • • • • • • • • • • •	5		91,061.
				اما		1 550
6	Enter 1% of net investme	ent income (1% of Part I, line 27b)	• • • • • • • • • • • • • • • • • • • •	6		1,558.
_	A 3 1 P = 1 =			,		02 610
7	Add lines 5 and 6			7		92,619.
	F. 4	dana fi ana Da a XIII. P		8		77,533.
8	If line 8 is equal to or a	tions from Part XII, line 4	in Part VI, line 1b, and complete		using a 1% to	
	Part VI instructions.	greater than time 7, theth the box	m rait vi, mie 15, and complete	mar part	. asniy a 1/0 to	1916. UGG IIII

• By state legislation that effectively amends the governing instrument so that no mandatory directions that

b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General

Enter the states to which the foundation reports or with which it is registered. See instructions.

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

Form 990-PF (2017)

X

Х

X

X

7

8b

Yes No No No No No No No N	Par	VII-A Statements Regarding Activities (continued)	
meaning of section 512bit 13ly if "Yes," attach schedule. See instructions			Yes No
12 Dut the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privilege? If "Yes," statch statement See instructions 13 Did the foundation comply with the public inspection requirements for its annual naturns and examption application? 14 The books are in care of ▶ QLD NATIONAL WEALTH NANAGEMENT 15 The books are in care of ▶ QLD NATIONAL WEALTH NANAGEMENT 16 Section 447-1811 nonexempt charitable trusts filing form 990-PF in lieu of Form 1041 chack here and enter the amount of tax-exempt interest received or accurate during the year. 16 At any time during calendar year 2017, did the foundation have an interest in or a signature or other authority 17 See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country? 18 Statements Regarding Activities for Which Form 4220 May Be Required 19 File Form 4220 if any item is checked in the "Yes" column, unless an exception applies. 19 During the year, did the foundation (either directly or indirectly): 11 Engage in the sale or exchange, or lessing of proparty with a disqualified person? 12 During the year, did the foundation (either directly or indirectly): 13 Furning phayer, did the foundation (either directly or indirectly): 14 During the year, did the foundation (either directly or indirectly): 15 Ent vite: 16 Borrow money from, lend money to, or otherwise extend credit to [or accept it from) a disqualified person? 17 Ent vite: 18 During the year, did the foundation (either directly or indirectly): 19 File Form 4220 if any item is checked in the "Yes" column, unless an exception against property to a government official for a pariod after termination of povernment service, it ferminating withis 90 days of the extended in ferminating the provision of section 4942/a) No (6) Agree to pay money or property to a government official for a pariod after termination of povernment service, it ferminating withis 90 days). 19 File	11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the	ıe {
Park VIE Statements Regarding Activities for Which Form 4720 May Be Required		meaning of section 512(b)(13)? If "Yes," attach schedule. See instructions	. 11 X
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? 13 X 14 The books are in care of ▶ OLD NATIONAL WEALTH MANAGEMENT 15 Section 497(a)(11) nonexempt charitable trusts filing form 990-PF in lieu of Form 1041 check here	12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualifie	
N/A The books are in care of ▶ OLD NATIONAL WEALTH MANAGEMENT Telephone no. ▶ (812) 464-1584 Located at ▶ PO BOX 207, EVANSVILLE IN 2074 ★ 47702 15 Section 4947(a)(1) nenexempt 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 2017, 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 ▶ Ext. VIE2 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. 1a During the year, did the foundation leither directly or Indirectly: (1) Engage in the sale or exchange, or leasing of property with a disqualified person? (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? (3) Furnesh goods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or reimburs the expenses of, a disqualified person? (5) Transfer any income or assets to a disqualified person for make any of either available for the henefit or use of a disqualified person? (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 amploy the official for a period affect termination of government service, if terminating within 90 days). b) if any answer is "Yes" to 1611/16), did 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 2017? 10 Yes, list the years ▶ 21 Taxes on failure to distribute income (section 4942(location) and the acceptance of the section 4942(location) and the section 4942(location) and the section 4942(locat			
14 The books are in care of ▶ OLD NATIONAL WEALTH MANAGEMENT Telephone no. ▶ (812) 464-1584 15 Section 947(9(1)) nonexempt charitable trusts filing form 990-PF in lieu of Form 1041 check here: 16 At any time during claindary year 2017, did the foundation have an interest in or a signature or other authority over bank, securities, or other financial account in a foreign country? 16 X x x x x x x x x x x x x x x x x x x	13	I-	7 13 X
tocated at ▶ PO BOX 207, EVANSVILLE, IN ZPL4 ▶ 47702 15 Section 49/18/11 nonexempt charitable trusts filing form 950-PF in lieu of Form 1041 check here			74 1504
15 Sacion 4947(a)(1) nonexempt charitable trusts filing Form 990-F in lieu of Form 1041 check here and enter the amount of tax-exempt interest received or accrued during the year. 16 At any time during calendar year 2017, 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 ▶ Sea the instructions for exceptions and filing requirements for FincEN Form 114. If "Yes," enter the name of the foreign country ▶ Sea the instructions for exceptions and filing requirements for FincEN Form 114. If "Yes," enter the name of the foreign country ▶ 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. 1a During the year, did the foundation (either directly or indurectly): (1) Engage in the sale or exchange, or leasing of proparty with a disqualified person?	14		
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(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	1a	·	
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(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.)	_		
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3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	C		
at any time during the year?	3a		
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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 2017?		foundation had excess business holdings in 2017.)	. 3b
charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2017?	4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes	3? 4a X
	b		
		charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2017	

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Part	t VII-B Statements Regarding Activi	ties for Which Form 4	720 May Be Req	uired (continued)			
5a	During the year, did the foundation pay or incur a	ny amount to:				Yes	No
	(1) Carry on propaganda, or otherwise attempt to	influence legislation (section	n 4945(e))?	Yes X No	•		
	(2) Influence the outcome of any specific put	olic election (see section 4	1955); or to carry on	,		ľ	
	directly or indirectly, any voter registration dri	ve?		Yes X No	,		
	(3) Provide a grant to an individual for travel, stud	ly, or other similar purposes?		. Yes X No	,		
	(4) Provide a grant to an organization other t	han a charitable, etc., org	anization described in				
	section 4945(d)(4)(A)? See instructions			Yes X No	,		
	(5) Provide for any purpose other than religion	ous, charitable, scientific,	literary, or educationa				İ
	purposes, or for the prevention of cruelty to ch	nildren or animals?		. Yes X No	,	'	
b	If any answer is "Yes" to 5a(1)-(5), did any	of the transactions fail to	qualify under the ex	cceptions described in	า 📗		
	Regulations section 53.4945 or in a current notice	e regarding disaster assistan	ce? See instructions.		<u>5b</u> _		
	Organizations relying on a current notice regarding	g disaster assistance, check	here				
C	If the answer is "Yes" to question 5a(4), does	es the foundation claim e	xemption from the t	x xe			
	because it maintained expenditure responsibility f	for the grant?		, Yes No	,		
	If "Yes," attach the statement required by Regulati	ons section 53.4945-5(d).					
6a	Did the foundation, during the year, receive a	any funds, directly or indir	ectly, to pay premiur	ns		<u> </u>	
	on a personal benefit contract?			Yes X No	,		
b	Did the foundation, during the year, pay premium:	s, directly or indirectly, on a	personal benefit contra	ct?	. 6b	<u></u>	X
	If "Yes" to 6b, file Form 8870.						
7a	At any time during the tax year, was the foundation	on a party to a prohibited tax	shelter transaction?.	. Yes X No	.		
b	If "Yes," did the foundation receive any proceeds						
Par	t VIII Information About Officers, Di and Contractors	rectors, Trustees, Fou	indation Manager	s, Highly Paid Em	ployees,		
1	List all officers, directors, trustees, foundati	on 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 other all		
OLD N	NATIONAL WEALTH MANAGEMENT	TRUSTEE					
PO BO	OX 207, EVANSVILLE, IN 47702		18,126.	-0-	<u> </u>		-0-
2	Compensation of five highest-paid emplo	oyees (other than thos	se included on line	e 1 - see instruction	ons). If n	one,	enter
1.1	Name and address of each continue and acceptance #50	(b) Title, and average hours per week	(c) Compensation	(d) Contributions to employee benefit	(e) Expen		
(a)	Name and address of each employee paid more than \$50,	devoted to position	(c) Compensation	plans and deferred compensation	other all	lowance	es
NON	E		NONE	NONE	N	IONE	
				-			
					İ		
							
				ļ			
						_	
					}		
Tota	number of other employees paid over \$50,0	00			T N	ONE	
					Form 99		/2017

3 Five highest-paid independent contractors for professional services. See instructions. If none, enter "NONE	П
(a) Name and address of each person paid more than \$50,000 (b) Type of service	(c) Compensation
ONE	NONE
otal number of others receiving over \$50,000 for professional services	NONE
art 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
1NONE	
2	
3	
4	
art 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. 1 NONE	Amount
2	
All other program-related investments See instructions.	
3 NONE	
	l
otal. Add lines 1 through 3	

Pan	see instructions.)	ign touna	ations,
1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc.,		
	purposes:	}	
	Average monthly fair market value of securities	1a	1,574,279.
	Average of monthly cash balances	1b	NONE
C	Fair market value of all other assets (see instructions)	1c	NONE
d	Total (add lines 1a, b, and c)	1d	1,574,279.
е	Reduction claimed for blockage or other factors reported on lines 1a and	[
	1c (attach detailed explanation)	1	
2	Acquisition indebtedness applicable to line 1 assets	2	NONE_
3	Subtract line 2 from line 1d	3	1,574,279.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see	1 1	
	instructions)	4	23,614.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	1,550,665.
6	Minimum investment return. Enter 5% of line 5	6	_77,533.
Par	Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating four and certain foreign organizations, check here and do not complete this part.)	dations	
1	Minimum investment return from Part X, line 6	1	77,533.
2a	Tax on investment income for 2017 from Part VI, line 5		
b	Income tax for 2017. (This does not include the tax from Part VI.) 2b	1	
C	Add lines 2a and 2b	2c	3,116.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	74,417.
4	Recoveries of amounts treated as qualifying distributions	4	NONE
5	Add lines 3 and 4	5	74,417.
6	Deduction from distributable amount (see instructions)	6	NONE
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII,		
-	line 1	7	74,417.
Par	Qualifying Distributions (see instructions)	 	
1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
а	Expenses, contributions, gifts, etc total from Part I, column (d), line 26	1a	77,533.
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	NONE
3	Amounts set aside for specific charitable projects that satisfy the:		
а	Suitability test (prior IRS approval required)	3a	NONE
b	Cash distribution test (attach the required schedule)	3b	NONE
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	77,533.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income.		,,,5551
•	Enter 1% of Part I, line 27b. See instructions	5	N/A
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	77,533.
-	Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when ca		
	qualifies for the section 4940(e) reduction of tax in those years.	noning (The local desired to the second desired to t

Form 990-PF (2017)

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b Excess from 2014 . . . c Excess from 2015 . . .

d Excess from 2016 . . .

e Excess from 2017 . . .

785.

5,884.

6,902. 3,116.

Dat	t XIV' Private Ope	erating Foundations	lego instructions a	nd Part VII-A guesti	on 91	NOT APPLICABLE
_						NOT APPLICABLE
1 a	If the foundation has	-			_	
	foundation, and the ruling	is effective for 2017, en	ter the date of the ruling		▶[
ь	Check box to indicate v	whether the foundation	is a private operating	foundation described in	section 4942(j)(3) or 4942(j)(5)
		Tax year		Prior 3 years		
2a	Enter the lesser of the ad-			r—————	1	(e) Total
	justed net income from Part	(a) 2017	(b) 2016	(c) 2015	(d) 2014	
	I or the minimum investment	Į.				2
	return from Part X for each	ł)		1	1
	year listed			 	 	
b	85% of line 2a				 	
c	Qualifying distributions from Part				1	1
	XII, line 4 for each year listed	ł			1	1
d	Amounts included in line 2c not				1	
	used directly for active conduct	i		ľ		1
	of exempt activities			<u></u>		
6	Qualifying distributions made	ĺ		(ì	İ
	directly for active conduct of			/		
	exempt activities Subtract line	[1	ĺ	
3	2d from line 2c			 		
•	alternative test relied upon			/		
а	"Assets" alternative test - enter	ļ			}	}
	(1) Value of all assets		,	'		1
	(2) Value of assets qualifying					
	under section		,′			1
	4942(j)(3)(B)(i)				ļ. —.—	
b	"Endowment" alternative test-		<i>"</i>			
	enter 2/3 of minimum invest-	ł	/		1	1
	ment return shown in Part X,			l .		
	line 6 for each year listed	<u> </u>	 /		 	
C	"Support" alternative test - enter	1	<i>,"</i>	1		
	(1) Total support other than	1	./	ł	1	ł
	gross investment income	,	ľ			
	(interest, dividends, rents, payments on securities	1	}	ł	ì	ł
	loans (section 512(a)(5)),	[1	
	or royalties)					<u> </u>
	(2) Support from general	,1				
	public and 5 or more exempt organizations as	/		Ì	İ	1
	provided in section 4942	1			1	
	(j)(3)(B)(m)					
	(3) Largest amount of sup-		l			1
	port from an exempt organization		ĺ			Í
	(4) Gross investment income .	1]		
Da		stant Information //	Complete this part	only if the founds	tion had \$5 000 o	r more in assets at
ГС		uring the year - see		omy ii tile louliua	tion had \$5,000 0	i illore ili assets at
1	Information Regarding					
а	List any managers of	the foundation who I	have contributed mor	e than 2% of the total	al contributions recei	ved by the foundation
	before the close of any	/ tax year (but only if tl	ney have contributed i	more than \$5,000). (S	ee section 507(d)(2).)	
	37 / 3					
	N/A	·				
b	List any managers of					ly large portion of the
	ownership of a partner	rship or other entity) o	f which the foundatior	n has a 10% or greater	interest.	
	37 / 3					
	N/A Information Regarding					
2	Information Regarding	Gontribution, Grant,	Gift, Loan, Scholarsh	ip, etc., Programs:		
	Check here ► X If 1	the foundation only	makes contributions	to preselected char-	itable organizations	and does not accept
	unsolicited requests f	or funds. If the found	ation makes gifts, gra	ents, etc., to individua	als or organizations u	nder other conditions,
	complete items 2a, b,			, 0.0., 10		
						
а	The name, address, an	id telephone number o	or email address of the	person to whom app	lications should be ad	dressed:
b	The form in which app	lications should be su	bmitted and information	on and materials they	should include:	
		onould be su				
C	Any submission deadli	nes:				
	•					
				_ ,,_,		
d	Any restrictions or I	imitations on awards	, such as by geogr	apnical areas, charita	able 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 or substantial contributor or substantial contributor. Purpose of grant or contribution Amount										
Recipient	show any relationship to	Foundation status of	Purpose of grent or contribution	Amount						
Name and address (home or business)	or substantial contributor	recipient	Contribution							
a Paid during the year		1	}							
	Ì	İ	(1						
PROTESTANT HOME INC		200	DROGRAM GERRORE	(2.000						
3701 WASHINGTON AVE EVANSVILLE IN 47714	NONE	PC	PROGRAM SUPPORT	62,000.						
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Total		· · · · · ·	▶ 3a	62,000.						
b Approved for future payment		Ì	1							
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Total		<u> </u>	▶ 3b	 						

(a) (b) (c) (d) function income	Part XVI-	A Analysis of Income-Production	ucing Act	ivities			
1 Program service revenue: Butiness code Amount Edudanceds Amount (See instructions. Butiness code Amount (See instructions. See instructions. Fedudanceds Amount (See instructions. See instructions. Program service revenue: Butiness code Amount (See instructions. See instructions. See instructions. See instructions. Program service revenue: Butiness code Amount (See instructions. See instructions			Unrela (a)	ated business income (b)	(c)	(d)	Related or exempt
b c d d e e e e e e e e e e e e e e e e e	1 Program	service revenue:	Business code	Amount	Exclusion code	Amount	(See instructions.)
g Fees and contracts from government agencies 2 Membership dues and assessments					 		
d e f g Fees and contracts from government agencies 2 Membership dues and assessments							-
Fees and contracts from government agencies 2 Membership dues and assessments 3 Interest on savings and temporary cash investments 4 Olividends and interest from securities 5 Not rental income or (loss) from real estate: a Debt-financed property 6 Not debt-financed property 7 Office investment income 9 Not debt-financed or (loss) from personal property 10 Gold or (loss) from sales of assets other than inventory 9 Not income or (loss) from sales of saves the than inventory 10 Office sprofit or (loss) from sales of inventory 11 Other revenue: a b c d d e 2 Subtotal. Add columns (b), (d), and (e) 2 Subtotal. Add columns (b), (d), and (e) 3 Total. Add line 12, columns (b), (d), and (e) 13 159,604. 3 Total. Add line 12, columns (b), (d), and (e) Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes). (See instruction							
g Fees and contracts from government agencies 2 Membership dues and assessments	_						
2 Membership dues and assessments	f						
Interest on savings and temporary cash investments 4 Dividends and interest from securities	g Fees	and contracts from government agencies					
4 Dividends and interest from securities		•	ļ			,	
5 Net rental income or (loss) from real estate a Debt-financed property			•		14	30.564	
a Debt-financed property			-		 -	30,301.	
b Not debt-financed property 5 Not rental income or (loss) from personal property 7 Other investment income 8 Gain or (loss) from sales of assets other than inventory 9 Not income or (loss) from special events 18 129,040 9 Not income or (loss) from special events 10 Gross profit or (loss) from sales of inventory 11							
7 Other investment income							
8 Gain or (loss) from sales of assets other than inventory 9 Net income or (loss) from special events 0 Gross profit or (loss) from sales of inventory 1 Other revenue: a b c d e 2 Subtotal. Add columns (b), (d), and (e) 1 159,604. 3 Total. Add line 12, columns (b), (d), and (e) 1 159,604. 3 Total. Add line 13 instructions to verify calculations.) Part XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes). (See instruction	6 Net renta	I income or (loss) from personal property	<u> </u>	ļ			
9 Net income or (loss) from special events	7 Other inv	vestment income	<u> </u>		+10	100.040	
O Gross profit or (loss) from sales of inventory . 1 Other revenue: a b c d e 2 Subtotal. Add columns (b), (d), and (e)		·	 		18	129,040.	
10 Other revenue: a b c d d e 2 Subtotal. Add columns (b), (d), and (e)		• - •	 	 			
Subtotal. Add columns (b), (d), and (e)					- 		
Subtotal. Add columns (b), (d), and (e)			-				
Subtotal. Add columns (b), (d), and (e)							
2 Subtotal. Add columns (b), (d), and (e)							
Total. Add line 12, columns (b), (d), and (e)						150 604	
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 accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes). (See instruction							150.60
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 accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes). (See instruction						13	159,604
Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes). (See instruction				ccomplishment of l	Exempt Pur	poses	
NOT APPLICABLE	V	accomplishment of the foundation	on's exemp	ot purposes (other than	by providing	g funds for such purpose	s). (See instructions.)
NOT APPLICABLE							
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Part :	XVII	Informat			ansfers to	and Transact	ions	and Relations		ith Nonc	harit		40 10
		Exempt									,		
								h any other orga			}	Yes	No
			(other	than section	501(c)(3) o	rganizations) o	r in s	section 527, re	lating to	political	1		ĺ
	_	ations?									}		
			_	•		ole exempt orga							v
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•	_,	er assets ransactions:	• • • •				• • • •		• • • • •	• • • • •	1a(2)		
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											1b(6)	<u> </u>	X
c S	o) ren Sharing	ormance of s	ervices	ent mailing lis	p or lunuraisii ts other asset	ng solicitations is or paid empl	vees						X
								ile. Column (b)				fair m	
								tion. If the found					
								lue of the good					
(a) Lin		(b) Amount inv			oncharitable exe		$\overline{}$	I) Description of trans					
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							7						
2a	s the	foundation di	rectiv	or indirectly af	filiated with.	or related to, of	ne or	more tax-exemp	t organiz	ations .			
)) or in section					Y	es 🔼	No
				ving schedule.									
		(a) Name of or	ganızatıo	n	(ь) т	ype of organization			(c) Descript	on of relation	ship		
	Under	penalties of perju-	ry, I decla	re that I have exam	ined this return, in	cluding accompanying	schedule	es and statements, and	to the best of	of my knowled	ge and	belief, it	is true,
Sign	U	o National"	weait	n ivianagem		n all information of whi				May the IR	S discou	es this	return
_	Dy:	L. Mu	cha	el Pitt	- 04/	24/2018	T	RUSTEE			epare <u>r</u>		
Here	Sign	ature of officer or	rtrustee		Date		Title			See instruction	ns X	Yes	N∘
	OL	D NATIONA	AL WE	ALTH MANAC)			·····		·			
Paid		Print/Type prep	arer's na	me	Jan Salar	Paty V	//	Date	Che	~~ └ "	PTIN		
		KELLY KO	<u> WALC</u>	ZYK	Tell	Ann	Up	04/24/	2018 self	-employed	P013	8768	36
Prepa		Firm's name		NST & YOU		LP		• 	Firm's EIN	▶ 34-	6565	596	
Use (Only	Firm's address		5 N. WACKI	R DRIVE				1				
		<u> </u>	CH	ICAGO, II		6	0606		Phone no	312-8			
										Fo	rm 99	0-PF	(2017)

FORM 990PF, PART I - ACCOUNTING FEES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME	ADJUST NET INCOM
TAX PREPARATION FEE (NON-ALLOC	900.		
TOTALS	900.	NONE	
	==========	*=*======	========

FORM 990PF, PART I - TAXES

	REVENUE AND	NET		
	EXPENSES	INVESTMENT		
DESCRIPTION	PER BOOKS	INCOME		
FEDERAL ESTIMATES - PRINCIPAL	671.			
FOREIGN TAXES ON QUALIFIED FOR	222.	222.		
FOREIGN TAXES ON NONQUALIFIED	28.	28.		
TOTALS	921.	250.		
10111110		250.		

FORM 990PF,	PART	III	-	DECREA						
DESCRIPTION									AMOUNT	1
ROC ADJUSTME	NT									229.
ROUNDING										2.
					TOT	AL				231.
									========	====