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Form **990-PF**

Department of the Treasury
Internal Revenue Service

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

▶ Do not enter social security numbers on this form as it may be made public.
▶ Go to *www.irs.gov/Form990PF* for instructions and the latest information.

OMB No 1545-0052

2018

Open to Public Inspection

For calendar year 2018 or tax year beginning , 2018, and ending , 20

Name of foundation: National Life Group Charitable Foundation, Inc.

A Employer identification number: 20-4818866

Number and street (or P O box number if mail is not delivered to street address): 1 National Life Drive — Room/suite:

B Telephone number (see instructions): 802-229-3947

City or town, state or province, country, and ZIP or foreign postal code: Montpelier VT 05604

C If exemption application is pending, check here ▶ ☐

G Check all that apply: ☐ Initial return ☐ Initial return of a former public charity ☐ Final return ☐ Amended return ☐ Address change ☐ Name change

D 1. Foreign organizations, check here ▶ ☐
2. Foreign organizations meeting the 85% test, check here and attach computation ▶ ☐

H Check type of organization: ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation

E If private foundation status was terminated under section 507(b)(1)(A), check here ▶ ☐

I Fair market value of all assets at end of year (from Part II, col (c), line 16) ▶ $ 245,667

J Accounting method: ☐ Cash ☒ Accrual ☐ Other (specify) (Part I, column (d) must be on cash basis)

F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ▶ ☐

Part I **Analysis of Revenue and Expenses** (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))

		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)	2,056,164			
	2 Check ▶ ☐ if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities				
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10				
	b Gross sales price for all assets on line 6a				
	7 Capital gain net income (from Part IV, line 2)		0		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)	0			
	11 Other income (attach schedule)				
	12 **Total.** Add lines 1 through 11	2,056,164	0	0	
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc.				
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)				
	c Other professional fees (attach schedule)				
	17 Interest				
	18 Taxes (attach schedule) (see instructions)				
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule) Bank charges & Misc	456			
	24 **Total operating and administrative expenses.** Add lines 13 through 23	456	0	0	0
	25 Contributions, gifts, grants paid	1,942,518			1,941,518
	26 **Total expenses and disbursements.** Add lines 24 and 25	1,942,974	0	0	1,941,518
	27 Subtract line 26 from line 12:				
	a **Excess of revenue over expenses and disbursements**	113,190			
	b **Net investment income** (if negative, enter -0-)		0		
	c **Adjusted net income** (if negative, enter -0-)			0	

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For Paperwork Reduction Act Notice, see instructions.

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Part II	Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)	Beginning of year (a) Book Value	End of year (b) Book Value	(c) Fair Market Value
Assets	1 Cash—non-interest-bearing	47,663	245,667	245,667
	2 Savings and temporary cash investments			
	3 Accounts receivable ▶			
	Less: allowance for doubtful accounts ▶			
	4 Pledges receivable ▶			
	Less allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7 Other notes and loans receivable (attach schedule) ▶			
	Less allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments—U S and state government obligations (attach schedule)			
	b Investments—corporate stock (attach schedule)			
	c Investments—corporate bonds (attach schedule)			
	11 Investments—land, buildings, and equipment basis ▶			
	Less accumulated depreciation (attach schedule) ▶			
	12 Investments—mortgage loans			
	13 Investments—other (attach schedule)			
	14 Land, buildings, and equipment: basis ▶			
	Less accumulated depreciation (attach schedule) ▶			
	15 Other assets (describe ▶)			
	16 Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	47,663	245,667	245,667
Liabilities	17 Accounts payable and accrued expenses	241	85,055	
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable (attach schedule)			
	22 Other liabilities (describe ▶)			
	23 Total liabilities (add lines 17 through 22)	241	85,055	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ ☐ and complete lines 24 through 26, and lines 30 and 31.			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ ☒ and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds	47,422	160,612	
	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 (see instructions)	47,422	160,612	
	31 Total liabilities and net assets/fund balances (see instructions)	47,663	245,667	

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	47,422
2	Enter amount from Part I, line 27a	2	113,190
3	Other increases not included in line 2 (itemize) ▶	3	
4	Add lines 1, 2, and 3	4	160,612
5	Decreases not included in line 2 (itemize) ▶	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	160,612

Part IV Capital Gains and Losses for Tax on Investment Income

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

	(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) ((e) plus (f) minus (g))
a				
b				
c				
d				
e				

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

	(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
a				
b				
c				
d				
e				

2	Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7; If (loss), enter -0- in Part I, line 7 }	2	
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). See instructions If (loss), enter -0- in Part I, line 8	3	

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

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

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

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

If "Yes," the foundation doesn't 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))
2017	1,028,901	186,347	5.5214
2016	798,504	205,540	3.8849
2015	745,112	584,967	1.2738
2014	487,780	210,126	2.3214
2013	492,025	386,340	1.2736

2	**Total** of line 1, column (d)	2	14.2751
3	Average distribution ratio for the 5-year base period—divide the total on line 2 by 5 0, or by the number of years the foundation has been in existence if less than 5 years	3	2.85502
4	Enter the net value of noncharitable-use assets for 2018 from Part X, line 5	4	833,935
5	Multiply line 4 by line 3	5	2,380,901
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	0
7	Add lines 5 and 6	7	2,380,901
8	Enter qualifying distributions from Part XII, line 4	8	1,942,518

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

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

1a	Exempt operating foundations described in section 4940(d)(2), check here ▶ ☐ and enter "N/A" on line 1. Date of ruling or determination letter (attach copy of letter if necessary—see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ▶ ☐ and enter 1% of Part I, line 27b	1	0
c	All other domestic foundations enter 2% of line 27b Exempt foreign organizations, enter 4% of Part I, line 12, col (b)		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only, others, enter -0-)	2	0
3	Add lines 1 and 2	3	0
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only, others, enter -0-)	4	0
5	**Tax based on investment income.** Subtract line 4 from line 3 If zero or less, enter -0-	5	0
6	Credits/Payments		
a	2018 estimated tax payments and 2017 overpayment credited to 2018 — 6a: 4,205		
b	Exempt foreign organizations—tax withheld at source — 6b		
c	Tax paid with application for extension of time to file (Form 8868) — 6c		
d	Backup withholding erroneously withheld — 6d		
7	Total credits and payments Add lines 6a through 6d	7	4,205
8	Enter any **penalty** for underpayment of estimated tax Check here ☐ if Form 2220 is attached	8	0
9	**Tax due.** If the total of lines 5 and 8 is more than line 7, enter **amount owed** ▶	9	0
10	**Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶	10	4,205
11	Enter the amount of line 10 to be **Credited to 2019 estimated tax** ▶ 4,205 **Refunded** ▶	11	0

Part VII-A Statements Regarding Activities

			Yes	No
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a		X
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition	1b		X
	If the answer is "Yes" to **1a** or **1b**, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.			
c	Did the foundation file **Form 1120-POL** for this year?	1c		X
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: **(1)** On the foundation ▶ $ **(2)** On foundation managers. ▶ $			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ $			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities	2		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	3		X
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		X
b	If "Yes," has it filed a tax return on **Form 990-T** for this year?	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by *General Instruction T*	5		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?	6	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	7	X	
8a	Enter the states to which the foundation reports or with which it is registered. See instructions ▶ Vermont			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by *General Instruction G?* If "No," attach explanation	8b	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 2018 or the tax year beginning in 2018? See the instructions for Part XIV If "Yes," complete Part XIV	9		X
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10		X

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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?	13	X	
	Website address ▶ https://www.nationallife.com/OurStory-OurFoundation			
14	The books are in care of ▶ Beth Rusnock Telephone no ▶ 802-229-7214			
	Located at ▶ 1 National Life Drive, Montpelier, VT ZIP+4 ▶ 05604			
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			
			Yes	No
16	At any time during calendar year 2018, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?	16		X
	See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country ▶			

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

	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	1b		
	Organizations relying on a current notice regarding disaster assistance, check here ▶ ☐			
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2018?	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 2018, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2018? ☐ Yes ☒ No			
	If "Yes," list the years ▶ 20___ , 20___ , 20___ , 20___			
b	Are there any years listed in 2a for which the foundation is **not** applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to **all** years listed, answer "No" and attach statement—see instructions.)	2b		
c	If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here. ▶ 20___ , 20___ , 20___ , 20___			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☒ No			
b	If "Yes," did it have excess business holdings in 2018 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 2018)	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 2018?	4b		X

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

			Yes	No
5a	During the year, did the foundation pay or incur any amount to:			
	(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☒ No			
	(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☒ No			
	(3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☒ No			
	(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions ☐ Yes ☒ No			
	(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☒ No			
b	If any answer is "Yes" to 5a(1)–(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance? See instructions	5b		
	Organizations relying on a current notice regarding disaster assistance, check here ▶ ☐			
c	If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? ☐ Yes ☐ No			
	If "Yes," attach the statement required by Regulations section 53.4945–5(d).			
6a	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? ☐ Yes ☒ No			
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?	6b		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?	7b		
8	Is the foundation subject to the section 4960 tax on payment(s) of more than $1,000,000 in remuneration or excess parachute payment(s) during the year? ☐ Yes ☒ No			

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

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

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
See Statement #1				

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

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

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

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

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

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

Part IX-A **Summary of Direct Charitable Activities**

List the foundation's four largest direct charitable activities during the tax year Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc	Expenses
1 None	
2	
3	
4	

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

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1 None	
2	
All other program-related investments See instructions	
3	
Total. Add lines 1 through 3 ▶	0

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes		
a	Average monthly fair market value of securities	1a	0
b	Average of monthly cash balances	1b	846,635
c	Fair market value of all other assets (see instructions)	1c	
d	**Total** (add lines 1a, b, and c)	1d	846,635
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation) 1e		
2	Acquisition indebtedness applicable to line 1 assets	2	
3	Subtract line 2 from line 1d	3	846,635
4	Cash deemed held for charitable activities. Enter 1½% of line 3 (for greater amount, see instructions)	4	12,700
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3. Enter here and on Part V, line 4	5	833,935
6	**Minimum investment return.** Enter 5% of line 5	6	41,697

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	41,697
2a	Tax on investment income for 2018 from Part VI, line 5	2a	0		
b	Income tax for 2018 (This does not include the tax from Part VI)	2b	0		
c	Add lines 2a and 2b			2c	0
3	Distributable amount before adjustments. Subtract line 2c from line 1			3	41,697
4	Recoveries of amounts treated as qualifying distributions			4	0
5	Add lines 3 and 4			5	41,697
6	Deduction from distributable amount (see instructions)			6	
7	**Distributable amount** as adjusted. Subtract line 6 from line 5 Enter here and on Part XIII, line 1			7	41,697

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	1,942,518
b	Program-related investments—total from Part IX-B	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	**Qualifying distributions.** Add lines 1a through 3b Enter here and on Part V, line 8; and Part XIII, line 4	4	1,942,518
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b. See instructions	5	
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	1,942,518

Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years

Part XIII Undistributed Income (see instructions)

		(a) Corpus	(b) Years prior to 2017	(c) 2017	(d) 2018
1 Distributable amount for 2018 from Part XI, line 7					41,697
2 Undistributed income, if any, as of the end of 2018:					
a Enter amount for 2017 only					
b Total for prior years. 20___, 20___, 20___					
3 Excess distributions carryover, if any, to 2018					
a From 2013	472,708				
b From 2014	477,274				
c From 2015	715,864				
d From 2016	788,227				
e From 2017	1,019,584				
f **Total** of lines 3a through e		3,473,657			
4 Qualifying distributions for 2018 from Part XII, line 4. ▶ $ 1,942,518					
a Applied to 2017, but not more than line 2a				0	
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 2018 distributable amount					41,697
e Remaining amount distributed out of corpus		1,900,821			
5 Excess distributions carryover applied to 2018 (If an amount appears in column (d), the same amount must be shown in column (a).)		0			
6 **Enter the net total of each column as indicated below:**					
a Corpus Add lines 3f, 4c, and 4e Subtract line 5		5,374,478			
b Prior years' undistributed income Subtract line 4b from line 2b			0		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed					
d Subtract line 6c from line 6b Taxable amount—see instructions			0		
e Undistributed income for 2017 Subtract line 4a from line 2a Taxable amount—see instructions				0	
f Undistributed income for 2018. Subtract lines 4d and 5 from line 1 This amount must be distributed in 2019					0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required—see instructions)		0			
8 Excess distributions carryover from 2013 not applied on line 5 or line 7 (see instructions)		472,708			
9 **Excess distributions carryover to 2019.** Subtract lines 7 and 8 from line 6a		4,901,770			
10 Analysis of line 9					
a Excess from 2014	477,274				
b Excess from 2015	715,864				
c Excess from 2016	788,227				
d Excess from 2017	1,019,584				
e Excess from 2018	1,900,821				

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

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2018, enter the date of the ruling ▶

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

	Tax year	Prior 3 years			(e) Total
	(a) 2018	(b) 2017	(c) 2016	(d) 2015	
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					0
b 85% of line 2a	0	0	0	0	0
c Qualifying distributions from Part XII, line 4 for each year listed					0
d Amounts included in line 2c not used directly for active conduct of exempt activities					0
e Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c	0	0	0	0	0
3 Complete 3a, b, or c for the alternative test relied upon					
a "Assets" alternative test—enter (1) Value of all assets					0
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					0
b "Endowment" alternative test—enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed					0
c "Support" alternative test—enter (1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					0
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					0
(3) Largest amount of support from an exempt organization					0
(4) Gross investment income					0

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

1 Information Regarding Foundation Managers:

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

None

b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest

None

2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:

Check here ▶ ☐ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds If the foundation makes gifts, grants, etc , to individuals or organizations under other conditions, complete items 2a, b, c, and d See instructions

a The name, address, and telephone number or email address of the person to whom applications should be addressed:

Application must be submitted online. See attached paperwork - Statement #2

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

Application must be submitted online. See attached paperwork - Statement #2

c Any submission deadlines:

Application must be submitted online. See attached paperwork - Statement #2

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

Application must be submitted online. See attached paperwork - Statement #2

Part XV Supplementary Information *(continued)*

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
See attached list Statement #3				1,942,518
Total ▶ **3a**				1,942,518
b *Approved for future payment*				
Total ▶ **3b**				0

Part XVI-A Analysis of Income-Producing Activities

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

13 **Total.** Add line 12, columns (b), (d), and (e) 13 0

(See worksheet in line 13 instructions to verify calculations)

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

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

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

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

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

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

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) (other than section 501(c)(3)) or in section 527? ☐ Yes ☒ No

b If "Yes," complete the following schedule

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

Sign Here

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

▶ [signature] 3/13/19 ▶ VP Controller

Signature of officer or trustee | Date | Title

May the IRS discuss this return with the preparer shown below? See instructions ☐Yes ☐No

Paid Preparer Use Only	Print/Type preparer's name	Preparer's signature	Date	Check ☐ if self-employed	PTIN
	Firm's name ▶			Firm's EIN ▶	
	Firm's address ▶			Phone no	

Schedule B (Form 990, 990-EZ, or 990-PF) Department of the Treasury Internal Revenue Service	**Schedule of Contributors** ▶ Attach to Form 990, Form 990-EZ, or Form 990-PF. ▶ Go to *www.irs.gov/Form990* for the latest information.	OMB No 1545-0047 **2018**

Name of the organization	Employer identification number
National Life Group Charitable Foundation, Inc.	20-4818866

Organization type (check one):

Filers of:	**Section:**
Form 990 or 990-EZ	☐ 501(c)( ) (enter number) organization
	☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation
	☐ 527 political organization
Form 990-PF	☒ 501(c)(3) exempt private foundation
	☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation
	☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule.**

Note: Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions

General Rule

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

Special Rules

☐ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of **(1)** $5,000; or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h; or (ii) Form 990-EZ, line 1. Complete Parts I and II

☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than $1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals Complete Parts I (entering "N/A" in column (b) instead of the contributor name and address), II, and III.

☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than $1,000 If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose Don't complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling $5,000 or more during the year . . . . ▶ $ ______________

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

Name of organization	Employer identification number
National Life Group Charitable Foundation, Inc.	20-4818866

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

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	Life Insurance Company of the Southwest 1 National Life Drive Montpelier, VT 05604	$ 2,000,000	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
2	Vermont Community Foundation 3 Court Street Middlebury, VT 05753	$ 15,000	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)

Name of organization	Employer identification number
National Life Group Charitable Foundation, Inc.	20-4818866

Part II **Noncash Property** (see instructions) Use duplicate copies of Part II if additional space is needed.

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
		$	

Name of organization	Employer identification number
National Life Group Charitable Foundation, Inc.	20-4818866

Part III ***Exclusively*** **religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than $1,000 for the year from any one contributor.** Complete columns **(a)** through **(e)** and the following line entry For organizations completing Part III, enter the total of *exclusively* religious, charitable, etc , contributions of **$1,000 or less** for the year. (Enter this information once. See instructions) ▶ $

Use duplicate copies of Part III if additional space is needed

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

National Life Group Charitable Foundation, Inc.
EIN 20-4818866
12/31/2018

Statement #1

Part VIII

OFFICERS

(a) Name and Address	(b) Title and avg hrs per week	(c) Comp	(d) Benefits	(e) Expense
Beth Rusnock National Life Group	President & CEO Varies	0	0	0
Ross Sneyd National Life Group	Vice President Varies	0	0	0
Sarah VanBeck National Life Group	Treasurer Varies	0	0	0
Kerry A. Jung National Life Group	Secretary Varies	0	0	0
Catherine C. Fisk National Life Group	Assist Sec Varies	0	0	0
David B. Soccodato National Life Group	Tax Officer Varies	0	0	0
Jeffrey M. Kemp National Life Group	Tax Officer Varies	0	0	0

CORPORATE DIRECTORS

(a) Name and Address	(b) Title and avg hrs per week	(c) Comp	(d) Benefits	(e) Expense
Thomas H. MacLeay National Life Group	Chairman Varies	0	0	0
Mehran Assadi National Life Group	Director Varies	0	0	0
Christopher Graff National Life Group	Director Varies	0	0	0
Beth Rusnock National Life Group	Director Varies	0	0	0
David B. Soccodato National Life Group	Director Varies	0	0	0

National Life Group Charitable Foundation, Inc.
EIN 20-4818866

January 1, 2018 - December 31, 2018	**Date**	**Amount**
536009 - Contributions-General		
108th Griffon Associa	09/14/2018	$ 500.00
Addison County Humane Society	06/15/2018	1,000 00
Alliance for Children	06/15/2018	10,000 00
Alzheimer's Association	04/25/2018	500 00
American Cancer Society	10/08/2018	500 00
American Cancer Society, Inc	04/18/2018	500 00
American Cancer Society, Inc	06/15/2018	4,000 00
American Red Cross	06/15/2018	3,000 00
American Red Cross	12/06/2018	1,757 25
Arts Bus, Inc.	06/15/2018	2,500 00
Association of Africans Living in Vermont	06/15/2018	3,000 00
Audubon Vermont	06/15/2018	3,500 00
Awakening Sanctuary dba Living Well Group	06/15/2018	1,500 00
Barre Housing Services	06/15/2018	5,000 00
Barre Opera House	06/15/2018	100,000 00
Barre Scouting Monument	06/15/2018	5,000.00
Better Bennington Cor	03/07/2018	5,000 00
Better Bennington Cor	05/11/2018	500.00
Blue Caboose Children	09/25/2018	250 00
Boys and Girls Club of Burlington	06/15/2018	7,500 00
Brighter Tomorrows	06/15/2018	2,500.00
Brookfield Community Partnership	06/15/2018	750 00
Broward Strides Against Breast Cancer (American Cancer Society)	10/09/2018	500 00
Buck Lake PTO	04/18/2018	500 00
Burlington Chamber Orchestra	04/17/2018	1,000 00
Camp Daybreak	06/15/2018	5,000 00
Camp Ta-Kum-Ta	06/15/2018	10,000.00
Camp Thorpe Inc	06/15/2018	1,000 00
Carson's Crusaders Foundation	04/02/2018	7,500 00
Casting for Recovery	06/15/2018	500.00
CCTV Center for Media & Democracy	06/15/2018	10,000.00
Center for Arts and Learning	06/15/2018	10,000 00
Center for Health and Learning	06/15/2018	1,000 00
Center for Survivors of Torture	06/15/2018	3,000 00
Center for Sustainable Systems	06/15/2018	1,500 00
Central Vermont	06/15/2018	1,500 00
Central Vermont Adult	01/09/2018	5,000 00
Central Vermont Commu	01/09/2018	12,000 00
Central Vermont Home Health and Hospice	06/15/2018	6,000 00
Central Vermont Humane Society	06/15/2018	2,500 00
Central Vermont Humane Society	10/02/2018	500 00
Central Vermont Humane Society	12/06/2018	5,271.75
Central Vermont Medic	07/18/2018	35,747 00
Central Vermont Medic	08/21/2018	500 00
Champlain College	06/15/2018	15,000 00
Champlain Housing Trust	06/15/2018	100,000 00
Champlain Valley Office of Economic Opportunity	06/15/2018	3,500 00
Chandler Center for the Arts	06/15/2018	5,000 00
Changing Perspectives	06/15/2018	3,500 00
Chase's Place	06/15/2018	3,000 00
CHETNA	06/15/2018	7,500 00
ChildCareGroup	06/15/2018	5,000.00
Children's Craniofacial Association	06/15/2018	1,500 00
Chittenden Emergency Food Shelf	11/19/2018	10,000 00
City of Highland Village	10/09/2018	500.00
Clayton Dabney for Kids with Cancer	06/15/2018	3,000 00
Committee on Temporary Shelter (COTS)	01/09/2018	25,000 00
Committee on Temporary Shelter (COTS)	12/06/2018	2,928 75
Common Ground Center	06/15/2018	2,500 00
Common Roots	06/15/2018	1,000.00
Communities In Schools of the Dallas Region, Inc.	06/04/2018	50,000 00
Community Engagement Lab	06/15/2018	5,000 00

National Life Group Charitable Foundation, Inc.
EIN 20-4818866
January 1, 2018 - December 31, 2018

	Date	Amount
Community Harvest Of Central Vermont	06/15/2018	5,000 00
Community Health Centers of Burlington	06/15/2018	5,000 00
Community Justice Network of Vermont	06/15/2018	3,500 00
Community Resilience Organizations	06/15/2018	3,000 00
Corinth Baptist Church	09/28/2018	1,500 00
Cross-Cultural Solutions	01/23/2018	200 00
CVDART Central Vermont Disaster Animal Response Team, Inc	06/15/2018	1,000.00
Cystic Fibrosis Found	08/13/2018	500.00
Deerlake Middle School Parent Teacher Organization	03/14/2018	500.00
Denton County Friends of the Family	06/15/2018	3,000 00
Dome Financial Servic	09/14/2018	500 00
Dragonheart Vermont	01/09/2018	6,000 00
Drug Prevention Resources	06/15/2018	5,000 00
Easterseals Vermont	06/15/2018	1,000 00
Equest	06/15/2018	6,500 00
Essex CHIPS, Inc	06/15/2018	2,500 00
Faith in Action North Communities Partnership, Inc.	06/15/2018	7,000 00
Family Center of Washington County	06/04/2018	500 00
Family Compass	06/15/2018	5,000 00
Flynn Center for the Performing Arts	06/15/2018	5,000.00
Friends of Stowe Adaptive Sports	06/15/2018	2,500 00
Friends of the Morrill Homestead	06/15/2018	3,000 00
Friends of Veterans	06/15/2018	3,500 00
Friendship of Women, Inc	01/11/2018	500 00
Girl Scouts of the Green and White Mountains	06/15/2018	5,000.00
Girls/Boyz First Mentoring	06/15/2018	5,000 00
Global Campuses Foundation	06/15/2018	6,000 00
Global Connections Foundation	06/06/2018	7,500 00
Good Beginnings of Central VT	06/15/2018	5,000 00
Good Samaritan Haven	06/15/2018	10,000.00
Governor's Institutes of Vermont	06/15/2018	5,000 00
Grant Halliburton Foundation	06/15/2018	5,000 00
Greater Burlington YMCA	06/14/2018	35,000.00
Green Mountain Club	06/15/2018	2,500 00
Green Mountain Council, Boy Scouts of America	06/15/2018	1,000 00
Green Mountain Disc Golf Club	06/15/2018	3,000 00
Green Mountain Habitat for Humanity	06/15/2018	5,000 00
Green Up Vermont	01/09/2018	6,000.00
Guardian Angels	12/11/2018	250 00
Hannah's House Inc.	06/15/2018	10,000.00
Harlingen Area Education Foundation	10/01/2018	500 00
Helen Day Art Center	06/15/2018	1,000 00
Hope Supply Co	06/15/2018	5,000.00
Howard Center	06/15/2018	5,000.00
Humble ISD Education Foundation	02/06/2018	500 00
Hunger Free Vermont	06/15/2018	50,000.00
Intervale Center	06/15/2018	10,000 00
Just Basics, Inc.	09/14/2018	500 00
Kaits Angels-Friends of Mattituck Lions Club Inc	05/31/2018	500 00
Kellogg-Hubbard Library	02/22/2018	7,000 00
King Street Center	06/15/2018	5,000 00
Lamoille County Players	06/15/2018	2,700.00
Local Motion	06/15/2018	2,000.00
Lost Nation Theater	06/15/2018	10,000 00
Lund	06/15/2018	10,000 00
Make-A-Wish Central and Northern Florida	06/21/2018	500 00
Make-A-Wish Vermont	06/15/2018	3,500.00
Malavai Washington Youth Foundation	05/31/2018	500.00
MaliVai Washington Youth Foundation	06/21/2018	500 00
Manatee Memorial Foundation	01/23/2018	200.00
Mental Health America of Greater Dallas	06/15/2018	5,000 00
Montpelier Alive	03/07/2018	8,500 00
Montpelier Alive	05/11/2018	500 00

National Life Group Charitable Foundation, Inc.
EIN 20-4818866
January 1, 2018 - December 31, 2018

	Date	Amount
Montpelier Alive	06/15/2018	8,000 00
Montpelier Area Mountain Bike Association	06/15/2018	1,000.00
Montpelier ArtSynergy Project	06/15/2018	1,000 00
Montpelier Chamber Orchestra	06/15/2018	2,500 00
Montpelier Senior Activity Center	06/15/2018	15,000.00
Montshire Museum of Science	06/15/2018	5,000 00
Network of Community Ministries	06/15/2018	2,500 00
Never Quit Living Life Corp	04/06/2018	500 00
New England Foundation for the Arts (NEFA)	12/06/2018	7,500 00
North Texas Food Bank	01/23/2018	200 00
North Texas Food Bank	06/04/2018	50,000 00
Old North State Council, BSA	07/12/2018	2,000 00
Old Spokes Home	06/20/2018	500.00
Our Community Cares Camp, Inc	06/15/2018	5,000 00
OUR House of Central Vermont	06/15/2018	10,000.00
Outright Vermont	06/15/2018	6,000 00
PediPlace	06/15/2018	5,000.00
Pendergast Elementary Community Foundation	01/11/2018	1,500 00
People's Health & Wellness Clinic	06/15/2018	6,000 00
Preservation Trust Of	01/12/2018	3,000 00
Prevent Child Abuse Vermont	01/25/2018	2,000.00
Reading Partners	06/15/2018	2,500 00
ReSOURCE A Nonprofit Community Enterprise Inc.	06/15/2018	20,000 00
Respite Sailing for Cancer, Inc , dba Healing Winds Vermont	06/15/2018	2,500 00
Revitalizing Waterbury	03/07/2018	5,000 00
Revitalizing Waterbury	05/11/2018	500 00
Rhythm of the Rein	06/15/2018	1,000 00
Richard Gloria Memorial Scholarship Fund	06/15/2018	3,000 00
RISE Adventures DBA RISE Adaptive Sports	06/15/2018	3,500 00
River Arts of Morrisville, Inc	06/15/2018	5,000 00
Salvation Farms Inc.	06/15/2018	7,500 00
Sara Holbrook Community Center	06/15/2018	5,000 00
Save Our Pets, Inc	02/27/2018	500 00
Scrag Mountain Music	06/15/2018	3,000 00
Shader Croft School	06/15/2018	1,500.00
Shelburne Museum	06/15/2018	10,000 00
Simply Grace	06/15/2018	3,500 00
SKY-Skilled Knowledgeable Youth	10/16/2018	50,000 00
SlamT1D, Inc	06/15/2018	5,000 00
South Burlington Recreation & Parks	06/15/2018	7,500 00
South Royalton School-based Health Clinic dba HealthHUB	06/15/2018	1,000 00
Special Spaces Inc.	06/21/2018	1,000 00
Spectrum Youth &	03/16/2018	10,000 00
St Albans For The Fut	03/07/2018	12,000.00
St Albans For The Fut	05/11/2018	3,000 00
St Johnsbury Chamber	03/07/2018	15,000 00
St Johnsbury Chamber	05/11/2018	5,000.00
Streamline Miami Foundation	06/15/2018	2,500 00
Studio Place Arts (SPA)	06/15/2018	5,000.00
Sulzbacher Center	01/05/2018	250 00
Susan G. Komen Foundation	05/31/2018	500.00
Sustainable Montpelier Coalition	06/15/2018	10,000 00
T.W. Wood Gallery	06/15/2018	7,500 00
The Barre Partnership	03/07/2018	5,000 00
The Barre Partnership	05/11/2018	500 00
The Barre Partnership	06/15/2018	7,500 00
The Bridge Breast Network	06/15/2018	2,500 00
The Chocolate Mint Foundation	06/15/2018	2,500.00
The Circus Barn, Inc.	06/15/2018	2,500.00
The Community Restorative Justice Center, Inc	06/15/2018	1,500 00
The Donna Foundation	01/31/2018	500 00
The Family Place	06/04/2018	20,000 00
The First Congregational Church	10/01/2018	500.00

National Life Group Charitable Foundation, Inc.
EIN 20-4818866
January 1, 2018 - December 31, 2018

	Date	Amount
The Green Mountain CI	06/15/2018	2,500 00
The Green Mountain Youth Symphony, Inc.	06/15/2018	2,000 00
The Laura Kate Winterbottom Memorial Fund, Inc	06/15/2018	5,000 00
The Leukemia & Lymphoma Society	03/09/2018	2,500 00
The Orchid Giving Circle	06/15/2018	2,500 00
The Orchid Giving Circle	06/15/2018	500 00
The Permanent Fund	06/15/2018	50,000 00
The University of Vermont	10/17/2018	1,000 00
The Urban Institute	06/15/2018	60,000 00
The Vermont Agency Foundation	04/02/2018	4,600.00
The Green Mountain CI	04/12/2018	200 00
Trini Foundation	06/15/2018	1,000 00
Tri-Valley Transit, Inc. dba Stagecoach Transportation Services	06/15/2018	5,000 00
True North Classical Academy	02/23/2018	500 00
Turning Point Center of Chittenden County	06/15/2018	5,000.00
Twin Valley Seniors Inc.	06/15/2018	1,800 00
Tyler's Light	02/22/2018	500 00
UCLA Health Sciences	07/25/2018	500 00
United Way of Lamoille County	06/15/2018	7,500 00
Urban Institute grant	12/31/2018	60,000 00
Vermont Adaptive Ski and Sports	06/15/2018	5,000 00
Vermont Association	06/15/2018	5,000 00
Vermont Association for the Blind and Visually Impaired (VABVI)	06/15/2018	3,000 00
Vermont Cancer Survivor Network, Inc	06/15/2018	2,500 00
Vermont Children's Trust Foundation	02/23/2018	7,500 00
Vermont Committee for AIDS Resources, Education, & Services (Vermont CARES)	06/15/2018	3,500 00
Vermont Community Garden Network	06/15/2018	1,000 00
Vermont Council on Rural Development	06/15/2018	7,500 00
Vermont Energy Education Program	06/15/2018	100.00
Vermont Family Network	06/15/2018	2,500 00
Vermont Farm to School Inc DBA Green Mountain Farm To School	06/15/2018	1,000 00
Vermont Foodbank	01/23/2018	200 00
Vermont Foodbank	06/15/2018	75,000 00
Vermont Foodbank	12/10/2018	1,757 25
Vermont Humanities Council	06/15/2018	3,500 00
Vermont Lake Monsters	05/02/2018	6,000.00
Vermont Mountaineers - GMCB	01/25/2018	8,500 00
Vermont Odyssey of the Mind	06/15/2018	1,500 00
Vermont Philharmonic	06/15/2018	2,500.00
Vermont Refugee Resettlement Program	01/23/2018	200 00
Vermont Shakespeare Festival	06/15/2018	1,000 00
Vermont Works for Women	06/15/2018	5,000.00
Vermont Youth Orchestra Association	06/15/2018	3,500 00
Voices for Vermonts Children	06/15/2018	500 00
VSA Vermont	06/15/2018	2,000 00
Vt Youth Conservation	02/14/2018	15,000.00
Washington County Youth Service Bureau/Boys & Girls Club	06/15/2018	3,500.00
Washington County Youth Service Bureau/Boys & Girls Club	09/20/2018	1,500.00
Williamstown Fire Dept	06/15/2018	2,000.00
Williamstown Food Shelf	06/15/2018	6,240.00
Wilmington Works	03/07/2018	20,000 00
Wilmington Works	05/11/2018	5,000 00
Women in Need of Generous Support	06/15/2018	2,500 00
Working Communities Challenge	12/31/2018	25,000 00
Wounded Warrior Project	06/04/2018	1,500 00
		$ 1,666,102.00

536011 - Employee Education Matching Program

Lyndon State College	02/20/2018	$ 100 00
Middlebury College	01/09/2018	500.00
University of Colorado	11/14/2018	80 00
		$ 680.00

National Life Group Charitable Foundation, Inc.
EIN 20-4818866
January 1, 2018 - December 31, 2018

	Date	Amount
536013 - Life Changer Awards		
Alabama School Of Fin	03/06/2018	$ 1,500.00
Brian Copes	03/08/2018	6,410 26
Carrollton High Schoo	03/06/2018	1,500 00
Carsonville Port Sani	03/06/2018	1,500.00
Conniston Middle Scho	03/06/2018	2,500 00
Corona High School	03/06/2018	1,500 00
David Collins	03/06/2018	3,205 13
East High School	03/06/2018	1,500 00
Eastside Elementary S	03/06/2018	2,500.00
Elkview Middle School	03/06/2018	1,500.00
Florence Wilson Eleme	10/22/2018	2,500 00
Gail Dubois	03/08/2018	1,923 08
Ginn Academy	03/06/2018	1,500.00
Grand View Blvd Eleme	03/06/2018	1,500 00
Handy Elementary Scho	03/06/2018	1,500 00
Highland Goffe'S Fall	03/06/2018	1,500 00
James Davis	03/08/2018	3,205 13
Jemel Floyd	03/08/2018	1,923.08
Jenna Rycek	10/22/2018	3,205.13
Jose Nino	03/08/2018	1,923 08
Lauren Kennedy	03/08/2018	3,205.13
Logan Newman	03/08/2018	1,923.08
Mary Ann Ballestero	03/08/2018	1,923 08
Melanie Lee	03/08/2018	1,923.08
Melissa Lovejoy	03/08/2018	1,923 08
Michelle Campbell	03/08/2018	1,923 08
Olivia Benford	03/08/2018	3,205 13
Pharr San Juan Alamo	06/01/2018	2,500 00
Stephanie Killingswor	03/08/2018	3,205 13
Ted Ginn Sr	03/08/2018	1,923 08
Thomas Keith	03/08/2018	1,923 08
Thompson High School	03/06/2018	5,000 00
Union Elementary	03/06/2018	2,500 00
Ware Shoals School Di	03/05/2018	2,500 00
		$ 79,871.84
536014 - Community Giving Match		
2018 Community Giving Campaign	01/31/2018	$ 194,464 51
		$ 194,464.51
536015 - Contributions-Memorial		
American Cancer Society	10/08/2018	$ 100 00
Alzheimer's Association, Central New York Chapter	10/15/2018	100.00
Blue Mountain Union School	05/31/2018	100 00
Calais Recreation Association	12/11/2018	100.00
Central Vermont Humane Society	02/28/2018	100 00
Children's Medical Center Foundation	02/22/2018	100.00
Copley Hospital	12/06/2018	100 00
Galveston Historical Foundation	06/04/2018	100.00
Make-A-Wish Vermont	03/07/2018	100 00
Mogadore United Methodist Church	12/11/2018	100.00
Parkinson's Foundation	12/06/2018	100 00
Santa Fe Texas Education Foundation	05/31/2018	100 00
St. Martin of Tours Church	09/26/2018	100 00
The Diabetes Research Institute Foundation	05/03/2018	100 00
		$ 1,400.00
	Grand Total:	**$ 1,942,518.35**

Statement #2
EIN 20-4818866

National Life Group Foundation

Since its inception in 2006, the goal of the National Life Group Foundation is to do good in the communities in which we live and work by supporting nonprofit and educational organizations. We do this in a number of ways, including providing grants through our Foundation, giving our employees 40 hours of paid volunteer time annually, sponsoring events, and offering in-kind donations.

What We Fund

The Foundation's annual budget is $2,000,000; while this is substantial, there is a lot of need in our communities so our giving is focused. Our grants vary in size and we rarely fund an entire program.

We look for proposals that have:

- A well-planned approach to underlying issues or needs
- A base of support
- A committed and skilled leadership team

We do not fund new programs. We focus on proven programs with metrics to support success. We also favor programs that focus on children and families but we also consider those in health and human services, the environment, education and the arts and recreation. The vast majority of our funding is centered on central and northern Vermont and the Dallas, Texas, area, where our employees live and work.

What We Don't Fund

We don't make grants for endowments, scholarships, higher educational institutions (with the exception of our employee matching program), religious organizations, labor and fraternal groups, debt reduction or work that has already been completed. Additionally, we don't make grants to individuals, daycare facilities, or school trips. Finally we don't make grants to organizations that discriminate in any way on the basis of race, religion, gender, age, national origin, disability, or sexual orientation.

Who is Eligible?

To be considered for a grant, an organization must be a public charity which is exempt from income taxes under section 501(c)(3) of the Internal Revenue Code.

Enrollment Periods & Application Information:

Main Street Grants:

The enrollment period is now closed. Decisions will be made by the end of March 2019.

General Grants:

January 1st to March 31st, 2019. Decisions will be made by May 31st, 2019 and if approved, checks will be sent by June 30th, 2019.

To apply beginning January 1st, 2019, login or create an account with Foundant using this link:
https://www.grantinterface.com/Home/Logon?urlkey=nlgcf

Sponsorships:

Sponsorship applications are accepted and reviewed on a rolling basis.

Fill out the Corporate Sponsorship Request application to apply, using this link in Foundant:
https://www grantinterface.com/Home/Logon?urlkey=nlgcf