

For calendar year 2018, or tax year beginning 01-01-2018, and ending 12-31-2018

Name of foundation ROBERT & HELEN HADDAD FOUNDATION		A Employer identification number 30-0127786	
Number and street (or P.O. box number if mail is not delivered to street address) 1503 WASHINGTON STREET		Room/suite	B Telephone number (see instructions) (812) 552-5206
City or town, state or province, country, and ZIP or foreign postal code COLUMBUS, IN 47201		C If exemption application is pending, check here ☐	
G Check all that apply ☐ Initial return ☐ Final return ☐ Address change ☐ Initial return of a former public charity ☐ Amended return ☐ Name change		D 1. Foreign organizations, check here ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ☐	
H Check type of organization ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here ☐	
I Fair market value of all assets at end of year (from Part II, col (c), line 16) \$ 6,610,384	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)	461,574			
	2 Check ☐ if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments	63	63		
	4 Dividends and interest from securities	139,293	139,293		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10 _____	262,472			
	b Gross sales price for all assets on line 6a _____ 1,833,677				
	7 Capital gain net income (from Part IV, line 2)		262,472		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances _____				
Operating and Administrative Expenses	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)	-54,346	-54,336		
	12 Total. Add lines 1 through 11	809,056	347,492		
	13 Compensation of officers, directors, trustees, etc	0	0		0
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)	8,589	8,589		0
	b Accounting fees (attach schedule)				
	c Other professional fees (attach schedule)	29,996	29,996		0
	17 Interest	43	43		0
	18 Taxes (attach schedule) (see instructions)	14,719	14,719		0
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	4,487	0		0
	24 Total operating and administrative expenses. Add lines 13 through 23	57,834	53,347		0
	25 Contributions, gifts, grants paid	412,400			412,400
	26 Total expenses and disbursements. Add lines 24 and 25	470,234	53,347		412,400
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	338,822			
	b Net investment income (if negative, enter -0-)		294,145		
c Adjusted net income (if negative, enter -0-)					

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions.)			Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value			
Assets	1	Cash—non-interest-bearing					
	2	Savings and temporary cash investments	215,581	833,179	833,179		
	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)	6,059,861	5,804,441	5,765,685		
	14	Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____					
15	Other assets (describe ▶ _____)	0	11,520	11,520			
16	Total assets (to be completed by all filers—see the instructions. Also, see page 1, item I)	6,275,442	6,649,140	6,610,384			
Liabilities	17	Accounts payable and accrued expenses					
	18	Grants payable					
	19	Deferred revenue					
	20	Loans from officers, directors, trustees, and other disqualified persons					
	21	Mortgages and other notes payable (attach schedule)					
	22	Other liabilities (describe ▶ _____)					
	23	Total liabilities (add lines 17 through 22)	0	0			
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	6,275,442	6,649,140			
	25	Temporarily restricted					
	26	Permanently restricted					
	Foundations that do not follow SFAS 117, check here ☐ and complete lines 27 through 31.						
	27	Capital stock, trust principal, or current funds					
	28	Paid-in or capital surplus, or land, bldg, and equipment fund					
	29	Retained earnings, accumulated income, endowment, or other funds					
	30	Total net assets or fund balances (see instructions)	6,275,442	6,649,140			
	31	Total liabilities and net assets/fund balances (see instructions) .	6,275,442	6,649,140			

Part III Analysis of Changes in Net Assets or Fund Balances

1	Total net assets or fund balances at beginning of year—Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	6,275,442
2	Enter amount from Part I, line 27a	2	338,822
3	Other increases not included in line 2 (itemize) ▶ _____	3	37,817
4	Add lines 1, 2, and 3	4	6,652,081
5	Decreases not included in line 2 (itemize) ▶ _____	5	2,941
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30 .	6	6,649,140

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

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

(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
a See Additional Data Table			
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	262,472
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8		3	

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

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

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

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

☐ Yes ☒ No

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))	
2017	383,495	6,048,131	0 063407	
2016	441,140	5,318,958	0 082937	
2015	219,249	5,278,408	0 041537	
2014	320,864	5,077,741	0 063190	
2013	283,351	4,459,343	0 063541	
2 Total of line 1, column (d)			2	0 314612
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	0 062922
4 Enter the net value of noncharitable-use assets for 2018 from Part X, line 5			4	6,350,213
5 Multiply line 4 by line 3			5	399,568
6 Enter 1% of net investment income (1% of Part I, line 27b)			6	2,941
7 Add lines 5 and 6			7	402,509
8 Enter qualifying distributions from Part XII, line 4			8	412,400

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

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

1a	Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1 Date of ruling or determination letter _____ (attach copy of letter if necessary—see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☒ and enter 1% of Part I, line 27b	1	2,941
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	2,941
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	2,941
6	Credits/Payments		
a	2018 estimated tax payments and 2017 overpayment credited to 2018	6a	11,520
b	Exempt foreign organizations—tax withheld at source	6b	
c	Tax paid with application for extension of time to file (Form 8868)	6c	0
d	Backup withholding erroneously withheld	6d	0
7	Total credits and payments. Add lines 6a through 6d.	7	11,520
8	Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached	8	42
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	8,537
11	Enter the amount of line 10 to be Credited to 2019 estimated tax ☐ 8,537 Refunded ☐	11	0

Part VII-A Statements Regarding Activities

1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a	Yes	No
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? (see Instructions for definition). <i>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</i>	1b		No
c	Did the foundation file Form 1120-POL for this year?	1c		No
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation ☐ \$ 0 (2) On foundation managers ☐ \$ 0			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ☐ \$ 0			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If "Yes," attach a detailed description of the activities</i>	2		No
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? <i>If "Yes," attach a conformed copy of the changes</i>	3		No
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a		No
b	If "Yes," has it filed a tax return on Form 990-T for this year?	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If "Yes," attach the statement required by General Instruction T</i>	5		No
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	Yes	
7	Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col (c), and Part XV</i>	7	Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) ☐ IN			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? <i>If "No," attach explanation</i> .	8b	Yes	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2018 or the taxable year beginning in 2018? See the instructions for Part XIV. <i>If "Yes," complete Part XIV</i>	9		No
10	Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses</i>	10		No

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule. See instructions.	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement. See instructions.	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address WWW.THEHADDADFOUNDATION.ORG	13	Yes	
14	The books are in care of TAMMY BURTON Telephone no (812) 552-5206			

Located at **1503 WASHINGTON ST COLUMBUS IN** ZIP+4 **47201**

15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —check here ☐ and enter the amount of tax-exempt interest received or accrued during the year 15			
16	At any time during calendar year 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? See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes", enter the name of the foreign country ▶	16	Yes	No

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.

1a	During the year did the foundation (either directly or indirectly)		Yes	No
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☒ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☒ No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☒ No			
	(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days). ☐ Yes ☒ No			
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions. Organizations relying on a current notice regarding disaster assistance check here. ☐	1b		
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		No
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		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2018?	4b		No

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

5a	During the year did the foundation pay or incur any amount to		Yes	No
(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? If "Yes," attach the statement required by Regulations section 53.4945–5(d)	☐ Yes ☐ No		
6a	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	☐ Yes ☒ No	6b	No
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? 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	7b	
b	If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?			
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 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, 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 Additional Data Table				
2 Compensation of five highest-paid employees (other than those included on line 1—see instructions). If none, enter "NONE."				
(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				
Total number of other employees paid over \$50,000.				0

Part VIII

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

3

Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE".

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
Total number of others receiving over \$50,000 for professional services.		0

Part IX-A

Summary of Direct Charitable Activities

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

	Expenses
1 DIRECT SUPPORT TO VARIOUS ORGANIZED CHARITIES SEE PART XV	412,400
2	
3	
4	

Part IX-B

Summary of Program-Related Investments (see instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1	
2	
All other program-related investments See instructions	
3	
Total. Add lines 1 through 3	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	6,197,794
b	Average of monthly cash balances.	1b	249,123
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	6,446,917
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	0
2	Acquisition indebtedness applicable to line 1 assets.	2	0
3	Subtract line 2 from line 1d.	3	6,446,917
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	96,704
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4.	5	6,350,213
6	Minimum investment return. Enter 5% of line 5.	6	317,511

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	317,511
2a	Tax on investment income for 2018 from Part VI, line 5.	2a	2,941
b	Income tax for 2018 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	2,941
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	314,570
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	314,570
6	Deduction from distributable amount (see instructions).	6	0
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1.	7	314,570

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	412,400
b	Program-related investments—total from Part IX-B.	1b	0
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes.	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required).	3a	
b	Cash distribution test (attach the required schedule).	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4.	4	412,400
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b. See instructions.	5	2,941
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	409,459

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				314,570
2 Undistributed income, if any, as of the end of 2018				
a Enter amount for 2017 only.			0	
b Total for prior years 20____, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2018				
a From 2013. 64,316				
b From 2014. 69,343				
c From 2015.				
d From 2016. 177,064				
e From 2017. 104,098				
f Total of lines 3a through e.	414,821			
4 Qualifying distributions for 2018 from Part XII, line 4 ▶ \$ <u>412,400</u>				
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.				314,570
e Remaining amount distributed out of corpus	97,830			
5 Excess distributions carryover applied to 2018 (If an amount appears in column (d), the same amount must be shown in column (a))	0			0
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	512,651			
b Prior years' undistributed income Subtract line 4b from line 2b		0		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.		0		
d Subtract line 6c from line 6b Taxable amount—see instructions		0		
e Undistributed income for 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).	64,316			
9 Excess distributions carryover to 2019. Subtract lines 7 and 8 from line 6a	448,335			
10 Analysis of line 9				
a Excess from 2014. 69,343				
b Excess from 2015.				
c Excess from 2016. 177,064				
d Excess from 2017. 104,098				
e Excess from 2018. 97,830				

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

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

1 Information Regarding Foundation Managers:	
a List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000) (See section 507(d)(2))	
b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest	
2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:	
Check here ☐ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. to individuals or organizations under other conditions, complete items 2a, b, c, and d. See instructions.	
a The name, address, and telephone number or e-mail address of the person to whom applications should be addressed TAMMY BURTON 1503 WASHINGTON STREET COLUMBUS, IN 47201 (812) 376-9301	
b The form in which applications should be submitted and information and materials they should include GRANT APPLICATIONS CAN BE SUBMITTED IN WRITING OR VIA THE FOUNDATION'S WEBSITE. WRITTEN APPLICATIONS ARE TO BE SUBMITTED TO TAMMY BURTON AT 3460 COMMERCE DRIVE, COLUMBUS, IN 47201. A COPY OF EACH APPLICANT'S FEDERAL DETERMINATION LETTER, WHICH STATES THAT THE ORGANIZATION IS A CODE SECTION 501 (C) (3) ORGANIZATION, SHOULD BE SUBMITTED AS WELL.	
c Any submission deadlines PRIOR TO QUARTERLY MEETINGS	
d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors NO RESTRICTIONS OTHER THAN GENERAL PURPOSE OUTLINED AS FOLLOWS. THE FOUNDATION IS OPERATED SOLELY TO PROVIDE FUNDING FOR CHARITABLE, RELIGIOUS, SCIENTIFIC, LITERARY, AND EDUCATIONAL PURPOSES. ALSO TESTING FOR PUBLIC SAFETY AS DESCRIBED IN CODE SECTION 501 (C) (3). THE FOUNDATION WILL ACCOMPLISH SUCH PURPOSE BY MAKING GRANTS AND CONTRIBUTIONS TO QUALIFIED CHARITABLE ORGANIZATIONS TO SUPPORT SUCH ACTIVITIES. THE FOUNDATION'S GRANT-MAKING ACTIVITIES WILL BE CONDUCTED ON AN ONGOING BASIS BY MAKING GRANTS TO ORGANIZATIONS THE FOUNDATION'S BOARD OF DIRECTORS FEEL ARE IN NEED OF FUNDS.	

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

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

Enter gross amounts unless otherwise indicated

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

[illegible]

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

- | | | | | |
|---|--|--------------|------------|-----------|
| 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? | | | Yes | No |
| a Transfers from the reporting foundation to a noncharitable exempt organization of | | | | |
| (1) Cash. | | 1a(1) | | No |
| (2) Other assets. | | 1a(2) | | No |
| b Other transactions | | | | |
| (1) Sales of assets to a noncharitable exempt organization. | | 1b(1) | | No |
| (2) Purchases of assets from a noncharitable exempt organization. | | 1b(2) | | No |
| (3) Rental of facilities, equipment, or other assets. | | 1b(3) | | No |
| (4) Reimbursement arrangements. | | 1b(4) | | No |
| (5) Loans or loan guarantees. | | 1b(5) | | No |
| (6) Performance of services or membership or fundraising solicitations. | | 1b(6) | | No |
| c Sharing of facilities, equipment, mailing lists, other assets, or paid employees. | | 1c | | No |
| 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. | | | | |

[illegible]

- 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

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.		
***** _____ Signature of officer or trustee	2019-11-09 _____ Date	***** _____ Title

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

Paid Preparer Use Only	Print/Type preparer's name	Preparer's Signature	Date	Check if self-employed ☐	PTIN
	SARA JACOBI CPA		2019-11-09		P00450897
	Firm's name ► BLUE & CO LLC				Firm's EIN ► 35-1178661
	Firm's address ► 627 WASHINGTON STREET COLUMBUS, IN 47201				Phone no (812) 669-2800

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d			
List and describe the kind(s) of property sold (e g , real estate, (a) 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)
1 ARTISAN INTERNATIONAL ADV	P	2018-04-27	2018-09-18
1 ISHARES CORE S&P 500 ETF	P	2017-08-09	2018-07-23
T ROWE PRICE INSTL FLOATING RATE	P	2018-04-27	2018-11-12
ARTISAN INTERNATIONAL ADV	P	2011-08-08	2018-09-18
DOUBLELINE TOTAL RETURN BOND	P	2012-03-16	2018-04-27
HARDING LOEVNER INST EMERGING MRKTS	P	2013-05-13	2018-04-27
ISHARES CORE S&P 500 ETF	P	2016-12-29	2018-11-12
ISHARES RUSSELL 2000 ETF	P	2010-08-04	2018-11-12
LAZARD INTL STRATEGY EQUITY PORT INTL	P	2016-09-12	2018-11-12
THE OSTERWEIS STRATEGIC INCOME	P	2010-08-04	2018-11-12

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
9,799		10,000	-201
218,114		194,829	23,285
9,985		10,071	-86
312,216		229,495	82,721
243,985		258,152	-14,167
214,970		176,895	38,075
325,617		290,351	35,266
82,222		39,465	42,757
29,985		27,515	2,470
239,970		246,484	-6,514

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			-201
			23,285
			-86
			82,721
			-14,167
			38,075
			35,266
			42,757
			2,470
			-6,514

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

List and describe the kind(s) of property sold (e g , real estate, (a) 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)
VANGUARD INTL EQUITY INDEX FUND	P	2014-12-29	2018-04-27
1 VANGUARD SCOTTSDALE FDS	P	2017-08-09	2018-11-12
CAPITAL GAINS DIVIDENDS	P		

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
76,964		67,358	9,606
19,950		20,590	-640
49,900			49,900

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			9,606
			-640
			49,900

Form 990PF Part VIII Line 1 - List all officers, directors, trustees, foundation managers and their compensation

(a) Name and address	Title, and average hours per week (b) devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances
ROBERT W HADDAD JR 14415 CHERRY TREE ROAD CARMEL, IN 46033	PRESIDENT 0 00	0	0	0
TAMARA L BURTON 1016 HUMMINGBIRD LANE COLUMBUS, IN 47201				
HAYDEN L BISHOP 510 WEST 63RD STREET INDIANAPOLIS, IN 46260	SECRETARY 0 00	0	0	0
TRACY L HADDAD 2754 WASHINGTON STREET COLUMBUS, IN 47201				
KEVIEN ALERDING ONE AMERICAN SQUARE SUITE 3100 INDIANAPOLIS, IN 46282	DIRECTOR 0 00	0	0	0

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
COLUMBUS PHILARMONIC 315 FRANKLIN ST COLUMBUS, IN 47201	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	19,000
COLUMBUS ROTARY CLUBPO BOX 1091 COLUMBUS, IN 47201	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	3,000
DOVE RECOVERY HOUSE FOR WOMEN 3351 N MERIDIAN ST STE 110 INDIANAPOLIS, IN 46208	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	3,500
Total ▶ 3a				412,400

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
EARLY LEARNING INDIANA 1776 N MERIDIAN ST STE A INDIANAPOLIS, IN 46202	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	5,000
FAIR HAVEN FOUNDATION PO BOX 441683 INDIANAPOLIS, IN 46244	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	5,000
INDIANAPOLIS PUBLIC LIBRARY FOUNDATION 2450 N MERIDIAN ST INDIANAPOLIS, IN 46206	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	15,000
Total ▶ 3a				412,400

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
INDIANAPOLIS SYMPHONY ORCHESTRA 32 E WASHINGTON ST STE 600 INDIANAPOLIS, IN 46204	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	7,500
LANDMARK COLUMBUS408 6TH ST COLUMBUS, IN 47201	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	50,000
LAWRENCE COUNTY CANCER PATIENT SERVICES 3019 W 390 N BROWNSTOWN, IN 47220	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	900
Total ► 3a				412,400

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
LITTLE RED DOOR CANCER AGENCY 1801 N MERIDIAN ST INDIANAPOLIS, IN 46201	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	10,000
REINS TO RECOVERY9920 W 990 N ELIZABETHTOWN, IN 47232	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	3,500
RILEY CHILDREN'S FOUNDATION 30 S MERIDIAN ST INDIANAPOLIS, IN 462043509	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	200,000
Total ▶ 3a				412,400

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
STARFISH INITIATIVE 6958 HILLSDALE CT INDIANAPOLIS, IN 46250	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	10,000
YOUTH MENTORING INITIATIVE 7771 GARRICK ST FISHERS, IN 46038	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	7,500
HOOSIER TRAILS COUNCIL 5625 STATE RD 46 BLOOMINGTON, IN 47401	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	10,000
Total ► 3a				412,400

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
INDIANAPOLIS FREEDOM SCHOOL 5805 E 56TH ST INDIANAPOLIS, IN 46226	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	5,000
BIG GREEN3650 COLD SPRING RD INDIANAPOLIS, IN 46222	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	5,000
BEST BUDDIES INTERNATIONAL 100 SOUTHEAST SECOND ST SUITE 2200 MIAMI, FL 33131	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	5,000
Total ▶ 3a				412,400

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
CENTER FOR THE HOMELESS 813 S MICHIGAN ST SOUTH BEND, IN 46601	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	2,500
DOMESTIC VIOLENCE NETWORK 9245 N MERIDIAN ST 235 INDIANAPOLIS, IN 46260	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	5,000
SALVATION ARMY 2525 ILLINOIS STREET COLUMBUS, IN 47201	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	5,000
Total ► 3a				412,400

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
BRIGHTWOOD COMMUNITY CENTER 3130 E 30TH ST INDIANAPOLIS, IN 46218	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	7,000
VISUALLY IMPAIRED PRESCHOOL SERVICES 1906 GOLDSMITH LANE LOUISVILLE, KY 40218	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	3,000
HAMILTON COUNTY VESTA FOUNDATION 1118 W MAIN STREET CARMEL, IN 46032	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	5,000
Total ▶ 3a				412,400

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
SERVANTS AT WORK INC 8811 ROBBINS RD INDIANAPOLIS, IN 46268	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	5,000
TRINITY HIGH SCHOOL 7120 NORTH COUNTY ROAD 875 EAST SEYMOUR, IN 47274	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	15,000
Total ▶ 3a				412,400

Form 990PF Part XVI-A Line 11 - Other revenue:

Enter gross amounts unless otherwise indicated	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See the instructions)
11 Other revenue	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
a WATERMARK K-1 RENTAL RE LOSS			16	-11,036	
b LAKESHORE INDY K-1 RENTAL RE LOSS			16	-9,578	
c WOODBRIDGE K-1 RENTAL RE LOSS			16	-23,386	
d LOCKERBIE K-1 RENTAL RE LOSS			16	-1,034	
e CITIMARK TAMPA K-1 RENTAL RE INCOME			16	3,469	
f CITIMARK INVESTORS 2018 RENTAL RE LOSS			16	-12,771	
g GREENSPRING K-1 ORDINARY LOSS				-10	

TY 2018 Investments - Other Schedule**Name:** ROBERT & HELEN HADDAD FOUNDATION**EIN:** 30-0127786**Investments Other Schedule 2**

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
FIDELITY INVESTMENTS	AT COST	5,288,266	5,249,510
LOCKERBIE INVESTORS, LLC	AT COST	47,147	47,147
GREENSPRING GLOBAL PARTNERS VII-B, L.P.	AT COST	136,901	136,901
BH LAKESHORE INDY, LLC	AT COST	39,255	39,255
BH WOODBRIDGE, LLC	AT COST	34,633	34,633
CITIMARK TAMPA INVESTORS, LLC	AT COST	53,371	53,371
WATERMARK FUND 2016, LLC	AT COST	66,594	66,594
CITIMARK INVESTORS 2018, LLC	AT COST	86,274	86,274
LBG	AT COST	52,000	52,000

TY 2018 Legal Fees Schedule**Name:** ROBERT & HELEN HADDAD FOUNDATION**EIN:** 30-0127786

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ATTORNEY FEES	8,589	8,589		0

TY 2018 Other Assets Schedule

Name: ROBERT & HELEN HADDAD FOUNDATION

EIN: 30-0127786

Other Assets Schedule

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
PREPAID FEDERAL TAXES - 2018 ESTIMATE	0	11,520	11,520

TY 2018 Other Decreases Schedule

Name: ROBERT & HELEN HADDAD FOUNDATION

EIN: 30-0127786

Description	Amount
UNREALIZED GAIN / (LOSS) ON INVESTMENTS	2,941

TY 2018 Other Expenses Schedule**Name:** ROBERT & HELEN HADDAD FOUNDATION**EIN:** 30-0127786**Other Expenses Schedule**

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
MISCELLANEOUS EXPENSES	4,487	0		0

TY 2018 Other Income Schedule

Name: ROBERT & HELEN HADDAD FOUNDATION

EIN: 30-0127786

Other Income Schedule

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
WATERMARK K-1 RENTAL RE LOSS	-11,036	-11,036	-11,036
LAKESHORE INDY K-1 RENTAL RE LOSS	-9,578	-9,578	-9,578
WOODBRIIDGE K-1 RENTAL RE LOSS	-23,386	-23,386	-23,386
LOCKERBIE K-1 RENTAL RE LOSS	-1,034	-1,034	-1,034
CITIMARK TAMPA K-1 RENTAL RE INCOME	3,469	3,469	3,469
CITIMARK INVESTORS 2018 RENTAL RE LOSS	-12,771	-12,771	-12,771
GREENSPRING K-1 ORDINARY LOSS	-10		-10

TY 2018 Other Increases Schedule

Name: ROBERT & HELEN HADDAD FOUNDATION
EIN: 30-0127786

Description	Amount
K-1 BOOK/TAX DIFFERENCES	37,817

TY 2018 Other Professional Fees Schedule**Name:** ROBERT & HELEN HADDAD FOUNDATION**EIN:** 30-0127786

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT ADVISORY FEES	23,461	23,461		0
WIRE FEES	320	320		0
PARTNERSHIP PORTFOLIO FEES	6,215	6,215		0

TY 2018 Taxes Schedule**Name:** ROBERT & HELEN HADDAD FOUNDATION**EIN:** 30-0127786

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOREIGN TAXES	4,193	4,193		0
FEDERAL TAXES PAID FOR 2017	10,526	10,526		0

Schedule B (Form 990, 990-EZ, or 990-PF) Department of the Treasury Internal Revenue Service	Schedule of Contributors ▶ Attach to Form 990, 990-EZ, or 990-PF ▶ Go to <u>www.irs.gov/Form990</u> for the latest information	OMB No 1545-0047 2018
	Name of the organization ROBERT & HELEN HADDAD FOUNDATION	Employer identification number 30-0127786

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 other 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 33¹/₃% 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, 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 990PF, 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
ROBERT & HELEN HADDAD FOUNDATION**Employer identification number**
30-0127786**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	ROBERT W HADDAD & HELEN HADDAD IRREVOC CHARIT LEAD TRUST PO BOX 929 COLUMBUS, IN 47201	\$ 461,574	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)
-		\$	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)

Employer identification number

30-0127786

Part II	Noncash Property
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Schedule B (Form 990, 990-EZ, or 990-PF) (2018)

Name of organization ROBERT & HELEN HADDAD FOUNDATION	Employer identification number 30-0127786
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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
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(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