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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 01-01-2018

, and ending 12-31-2018

Name of foundation CLARENCE E CUSTER & INEZ R CUSTER FOUNDATION INC		A Employer identification number 31-1130385	
Number and street (or P O box number if mail is not delivered to street address) 125 3RD STREET		Room/suite	B Telephone number (see instructions) (812) 376-1981
City or town, state or province, country, and ZIP or foreign postal code COLUMBUS, IN 47201		C If exemption application is pending, check here ▶ <input type="checkbox"/>	
G Check all that apply <div><input type="checkbox"/> Initial return</div> <div><input type="checkbox"/> Initial return of a former public charity</div> <div><input type="checkbox"/> Final return</div> <div><input type="checkbox"/> Amended return</div> <div><input type="checkbox"/> Address change</div> <div><input type="checkbox"/> Name change</div>		D 1. Foreign organizations, check here ▶ <input type="checkbox"/> 2 Foreign organizations meeting the 85% test, check here and attach computation ▶ <input type="checkbox"/>	
H Check type of organization <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here ▶ <input type="checkbox"/>	
I Fair market value of all assets at end of year (from Part II, col (c), line 16) ▶ \$ 6,395,419		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ▶ <input type="checkbox"/>	
J Accounting method <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) (Part I, column (d) must be on cash basis)			

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 Check ▶ <input checked="" type="checkbox"/> If the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities	88,145	88,145		
	5a Gross rents	251,780	251,780		
	b Net rental income or (loss) 109,489				
	6a Net gain or (loss) from sale of assets not on line 10	418,578			
	b Gross sales price for all assets on line 6a 1,386,689				
	7 Capital gain net income (from Part IV, line 2)		418,553		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
b Less Cost of goods sold					
c Gross profit or (loss) (attach schedule)					
11 Other income (attach schedule)					
12 Total. Add lines 1 through 11	758,503	758,478			
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	41,306	0		0
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)	1,000	1,000		0
	b Accounting fees (attach schedule)	2,575	2,575		0
	c Other professional fees (attach schedule)				
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	5,305	5,305		0
	19 Depreciation (attach schedule) and depletion	50,608	50,608		
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	93,151	91,898		1,253
	24 Total operating and administrative expenses. Add lines 13 through 23	193,945	151,386		1,253
	25 Contributions, gifts, grants paid	290,800			290,800
	26 Total expenses and disbursements. Add lines 24 and 25	484,745	151,386		292,053
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	273,758			
	b Net investment income (if negative, enter -0-)		607,092		
	c Adjusted net income (if negative, enter -0-)				

For Paperwork Reduction Act Notice, see instructions.

Cat No 11289X

Form 990-PF (2018)

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	158,269	85,534	85,534		
	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)	3,474,077	3,718,090	3,755,451		
	14	Land, buildings, and equipment basis ▶ <u>2,866,705</u> Less accumulated depreciation (attach schedule) ▶ <u>1,367,816</u>	1,396,409	1,498,889	2,554,434		
15	Other assets (describe ▶ _____)						
16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	5,028,755	5,302,513	6,395,419			
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 ▶ _____)	10,519	10,519			
	23	Total liabilities (add lines 17 through 22)	10,519	10,519			
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/> 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 ▶ <input checked="" type="checkbox"/> and complete lines 27 through 31.						
	27	Capital stock, trust principal, or current funds	4,099,567	4,373,325			
	28	Paid-in or capital surplus, or land, bldg, and equipment fund	0	0			
	29	Retained earnings, accumulated income, endowment, or other funds	918,669	918,669			
	30	Total net assets or fund balances (see instructions)	5,018,236	5,291,994			
31	Total liabilities and net assets/fund balances (see instructions) .	5,028,755	5,302,513				

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	5,018,236
2	Enter amount from Part I, line 27a	2	273,758
3	Other increases not included in line 2 (itemize) ▶ _____	3	0
4	Add lines 1, 2, and 3	4	5,291,994
5	Decreases not included in line 2 (itemize) ▶ _____	5	0
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30 .	6	5,291,994

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
1a 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			(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	
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	418,553
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	394,134	7,574,915	0 052031
2016	444,958	7,504,681	0 059291
2015	349,434	7,800,416	0 044797
2014	377,519	8,078,314	0 046732
2013	245,139	6,316,115	0 038812
2 Total of line 1, column (d)			2 0 241663
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 048333
4 Enter the net value of noncharitable-use assets for 2018 from Part X, line 5			4 7,584,240
5 Multiply line 4 by line 3			5 366,569
6 Enter 1% of net investment income (1% of Part I, line 27b)			6 6,071
7 Add lines 5 and 6			7 372,640
8 Enter qualifying distributions from Part XII, line 4			8 292,053

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 <input type="checkbox"/> 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 <input type="checkbox"/> and enter 1% of Part I, line 27b	1	12,142
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	12,142
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	12,142
6	Credits/Payments		
a	2018 estimated tax payments and 2017 overpayment credited to 2018	6a	3,000
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	3,000
8	Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> 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	9,142
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid ▶	10	
11	Enter the amount of line 10 to be Credited to 2019 estimated tax ▶ Refunded ▶	11	

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a	No
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? (see Instructions for definition). If the answer is "Yes" to 1a or 1b , attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities	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? If "Yes," attach a detailed description of the activities	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? If "Yes," attach a conformed copy of the changes	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? If "Yes," attach the statement required by General Instruction T	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? If "Yes," complete Part II, col (c), and Part XV	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? If "No," attach explanation .	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. If "Yes," complete Part XIV	9	No
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	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 ► N/A	13	Yes	
14	The books are in care of ► FIRST FINANCIAL BANK Telephone no ► (812) 376-1981			

Located at **►** 125 3RD STREET COLUMBUS IN ZIP+4 **►** 47201

15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —check here ► <input type="checkbox"/>			
	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?	16	Yes	No
	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.

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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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). <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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. <input type="checkbox"/>	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? <input type="checkbox"/>	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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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)

		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))?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(2)	Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(3)	Provide a grant to an individual for travel, study, or other similar purposes?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(4)	Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions.	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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.	<input type="checkbox"/>	
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)	<input type="checkbox"/> Yes <input type="checkbox"/> No	
6a	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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	6b	No
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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 during the year?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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	290,800
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	4,271,866
b	Average of monthly cash balances.	1b	91,870
c	Fair market value of all other assets (see instructions).	1c	3,336,000
d	Total (add lines 1a, b, and c).	1d	7,699,736
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	7,699,736
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	115,496
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4.	5	7,584,240
6	Minimum investment return. Enter 5% of line 5.	6	379,212

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	379,212
2a	Tax on investment income for 2018 from Part VI, line 5.	2a	12,142
b	Income tax for 2018 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	12,142
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	367,070
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	367,070
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	367,070

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	292,053
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	292,053
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	0
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	292,053

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				367,070
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.				
b From 2014.				
c From 2015.				
d From 2016.				
e From 2017.				6,685
f Total of lines 3a through e.	6,685			
4 Qualifying distributions for 2018 from Part XII, line 4 ▶ \$ 292,053				
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.				292,053
e Remaining amount distributed out of corpus	0			
5 Excess distributions carryover applied to 2018 (If an amount appears in column (d), the same amount must be shown in column (a))	6,685			6,685
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	0			
b Prior years' undistributed income Subtract line 4b from line 2b		0		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.		0		
d Subtract line 6c from line 6b Taxable amount—see instructions		0		
e Undistributed income for 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				68,332
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). . . .	0			
9 Excess distributions carryover to 2019. Subtract lines 7 and 8 from line 6a	0			
10 Analysis of line 9				
a Excess from 2014.				
b Excess from 2015.				
c Excess from 2016.				
d Excess from 2017.				
e Excess from 2018.				

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 <input type="checkbox"/> 4942(j)(3) or <input type="checkbox"/> 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 <input type="checkbox"/> 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 WILLIAM HELMBRECHT TRUST DEPARTMENT 125 3RD STREET COLUMBUS, IN 47201 (812) 376-1718 WILLIAM HELMBRECHT@BANKATFIRST.COM	
b The form in which applications should be submitted and information and materials they should include THERE IS A PRESET GRANT APPLICATION	
c Any submission deadlines NONE THE BOARD OF DIRECTORS MEET ON A CALLED BASIS ONLY, APPROXIMATELY FOUR TIMES A YEAR GRANT REQ	
d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors APPLICANTS MUST BE A 501(C)(3) ORGANIZATION, PREFERABLY WITHIN A FIFTY MILE RADIUS OF COLUMBUS, IN NO CHURCHES ARE CURRENTLY CONSIDERED THE BENEFIT TO BARTHOLOMEW COUNTY CITIZENS IS GIVEN PREFERENCE WHEN CONSIDERING GRANT APPROVAL	

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		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. . . .			14	88,145		
5 Net rental income or (loss) from real estate						
a Debt-financed property.						
b Not debt-financed property.						109,489
6 Net rental income or (loss) from personal property						
7 Other investment income.						
8 Gain or (loss) from sales of assets other than inventory			14	418,578		
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		506,723		109,489
13 Total. Add line 12, columns (b), (d), and (e).			13			616,212

[illegible]

Part XVII 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.			

(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.

*****	2019-05-06	*****
Signature of officer or trustee	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 <input type="checkbox"/>	PTIN
	ERIN BUSHOUSE CPA		2019-05-06		P00259374
	Firm's name ▶ KEMPER CPA GROUP LLP				Firm's EIN ▶ 37-0818432
	Firm's address ▶ 726 WASHINGTON ST SUITE 200 COLUMBUS, IN 472011912				Phone no (812) 376-3061

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 BAIRD CORE PLUS BOND INST	P	2018-01-22	2018-07-05
1 BAIRD CORE PLUS BOND INST	P	2018-01-22	2018-12-27
BLACKROCK MULTI ASSET INCOME INSTL	P	2018-01-22	2018-07-05
BLACKROCK MULTI ASSET INCOME INSTL	P	2018-01-22	2018-12-27
BLACKROCK STRATEGIC INC OPPORTUNITIES	P	2018-01-22	2018-07-05
CREDIT SUISSE COMM RET STRATEGY INSTL	P	2018-01-22	2018-07-05
DREYFUS INTERNATIONAL BOND FUND CLASS I	P	2018-01-22	2018-07-05
DREYFUS INTERNATIONAL BOND FUND CLASS I	P	2018-12-18	2018-12-27
GOLDMAN SACHS TR EMG MKTS INSTL	P	2018-01-22	2018-05-08
ISHARES RUSSELL 2000 INDEX FUND	P	2018-05-08	2018-12-27

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)
8,796		9,050	-254
228		235	-7
9,110		9,587	-477
3,704		4,118	-414
3,411		3,499	-88
6,444		6,695	-251
1,872		1,971	-99
1,289		1,289	0
5,597		6,002	-405
2,095		2,095	0

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	
			-254
			-7
			-477
			-414
			-88
			-251
			-99
			0
			-405
			0

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)
LAZARD INTERNATIONAL STRATEGIC EQUITY		P	2018-10-02	2018-12-27
1	LAZARD INTERNATIONAL STRATEGIC EQUITY	P	2018-10-02	2018-12-27
METROPOLITAN WEST T/R BOND		P	2017-11-21	2018-07-05
METROPOLITAN WEST T/R BOND		P	2018-01-22	2018-12-27
OPPENHEIMER DEVELOPING MARKET		P	2017-11-21	2018-07-05
OPPENHEIMER DEVELOPING MARKET		P	2018-11-19	2018-12-27
PRINCIPAL REAL ESTATE SECURITIES		P	2017-07-21	2018-01-22
ROBECO BOSTON PRTNS LONG/SHORT RESEARCH INSTL		P	2018-01-22	2018-07-05
ROBECO BOSTON PRTNS LONG/SHORT RESEARCH INSTL		P	2018-01-22	2018-12-27
T ROWE PRICE DIVIDEND GROWTH FD		P	2018-10-02	2018-12-27

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

(e) Gross sales price	Depreciation allowed (f) (or allowable)	Cost or other basis (g) plus expense of sale	Gain or (loss) (h) (e) plus (f) minus (g)
3,125		3,883	-758
1,171		1,171	0
10,293		10,561	-268
4,453		4,535	-82
10,012		10,278	-266
6,025		6,184	-159
6,916		7,073	-157
6,821		7,337	-516
2,530		2,533	-3
5,731		6,530	-799

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			(I) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	Adjusted basis (j) as of 12/31/69	Excess of col (i) (k) over col (j), if any	
			-758
			0
			-268
			-82
			-266
			-159
			-157
			-516
			-3
			-799

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)
T ROWE PRICE OVERSEAS STOCK FD INSTL	P	2018-01-22	2018-07-05
1 T ROWE PRICE OVERSEAS STOCK FD INSTL	P	2018-01-22	2018-12-27
T ROWE PRICE OVERSEAS STOCK FD INSTL	P	2018-01-22	2018-12-27
VANGUARD S-T FEDERAL FUND CL ADM	P	2018-12-18	2018-12-27
VIRTUS SEIX FLOATING RT HIGH INC	P	2018-05-08	2018-12-18
BAIRD CORE PLUS BOND INST	P	2016-08-18	2018-12-27
BLACKROCK STRATEGIC INC OPPORTUNITIES	P	2014-10-14	2018-12-27
BROWN ADVISORY SMALL CAP FUNDAMENTAL	P	2015-10-27	2018-01-22
BROWN ADVISORY SMALL CAP FUNDAMENTAL	P	2017-02-18	2018-07-05
BROWN ADVISORY SMALL CAP FUNDAMENTAL	P	2017-02-18	2018-12-27

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)
9,701		10,452	-751
1,265		1,649	-384
2,808		2,808	0
192		192	0
13,497		14,044	-547
3,571		3,789	-218
1,454		1,556	-102
634		487	147
5,526		4,978	548
1,664		1,664	0

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			(I) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			-751
			-384
			0
			0
			-547
			-218
			-102
			147
			548
			0

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)
GOLDMAN SACHS TR EMG MKTS INSTL		P	2016-09-20	2018-05-08
1	GOLDMAN SACHS TR EMG MKTS INSTL	P	2016-09-20	2018-07-05
GOLDMAN SACHS TR EMG MKTS INSTL		P	2016-09-20	2018-12-27
ISHARES EDGE MSCI USA QUALITY FACTOR		P	2016-08-18	2018-01-22
ISHARES EDGE MSCI USA QUALITY FACTOR		P	2016-08-18	2018-07-05
ISHARES EDGE MSCI USA QUALITY FACTOR		P	2016-08-18	2018-12-27
ISHARES RUSSELL 2000 INDEX FUND		P	2017-01-02	2018-01-22
ISHARES RUSSELL 2000 INDEX FUND		P	2017-01-03	2018-07-05
ISHARES RUSSELL 2000 INDEX FUND		P	2017-01-03	2018-10-02
ISHARES RUSSELL 2000 INDEX FUND		P	2017-01-03	2018-11-19

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)
8,447		9,034	-587
1,404		1,524	-120
585		665	-80
875		684	191
10,946		8,963	1,983
4,246		3,900	346
635		541	94
15,539		13,016	2,523
91,342		75,054	16,288
136,083		106,941	29,142

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			(I) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			-587
			-120
			-80
			191
			1,983
			346
			94
			2,523
			16,288
			29,142

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)
JOHN HANCOCK III DISCIPLINED VALUE FUND	P	2015-07-23	2018-01-22
1 JOHN HANCOCK III DISCIPLINED VALUE FUND	P	2015-07-23	2018-07-05
JOHN HANCOCK III DISCIPLINED VALUE FUND	P	2015-07-23	2018-10-02
JOHN HANCOCK III DISCIPLINED VALUE FUND	P	2015-07-23	2018-12-27
LAZARD INTERNATIONAL STRATEGIC EQUITY	P	2015-07-23	2018-01-22
LAZARD INTERNATIONAL STRATEGIC EQUITY	P	2015-07-23	2018-07-05
MFS GROWTH I	P	2014-10-14	2018-01-22
MFS GROWTH I	P	2014-10-14	2018-07-05
MFS GROWTH I	P	2014-10-14	2018-10-02
OPPENHEIMER DEVELOPING MARKET	P	2014-10-14	2018-01-22

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)
889		732	157
9,926		8,853	1,073
69,948		58,032	11,916
2,535		2,535	0
807		707	100
10,524		9,860	664
686		446	240
8,940		5,554	3,386
245,763		142,755	103,008
334		274	60

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			(I) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			157
			1,073
			11,916
			0
			100
			664
			240
			3,386
			103,008
			60

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)
OPPENHEIMER DEVELOPING MARKET	P	2014-10-14	2018-05-08
1 PRINCIPAL REAL ESTATE SECURITIES FUND	P	2015-09-11	2015-01-22
PRINCIPAL REAL ESTATE SECURITIES	P	2015-09-11	2018-07-05
PRINCIPAL REAL ESTATE SECURITIES	P	2015-09-11	2018-12-27
VANGUARD 500 INDEX FUND CL ADM	P	2017-11-21	2018-12-27
VANGUARD VALUE ETF	P	2016-11-21	2018-01-22
VANGUARD VALUE ETF	P	2016-11-21	2018-10-02
VIRTUS SEIX FLOATING RT HIGH INC	P	2014-10-14	2014-10-14
VIRTUS SEIX FLOATING RT HIGH INC	P	2014-10-14	2018-12-18
HARBOUR INTERNATIONAL INSTITUTIONAL FUND	P	2005-04-01	2018-01-22

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)
80,358		70,165	10,193
46,562		44,769	1,793
4,369		3,892	477
1,677		1,658	19
6,619		6,933	-314
890		678	212
85,526		64,678	20,848
80		81	-1
27,763		29,419	-1,656
283,383		138,382	145,001

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			(I) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			10,193
			1,793
			477
			19
			-314
			212
			20,848
			-1
			-1,656
			145,001

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 500 INDEX FUND CL ADM		P	2005-04-01	2018-01-22
1	VANGUARD 500 INDEX FUND CL ADM	P	2005-04-01	2018-07-05
CREDIT SUISSE COMM RET STRATEGY INSTL		P	2018-01-22	2018-12-27
CAPITAL GAIN DISTRIBUTIONS		P		

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

(e) Gross sales price	Depreciation allowed (f) (or allowable)	Cost or other basis (g) plus expense of sale	Gain or (loss) (h) (e) plus (f) minus (g)
1,778		734	1,044
17,625		7,537	10,088
2,524		2,870	-346
67,121			67,121

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	Adjusted basis (j) as of 12/31/69	Excess of col (i) (k) over col (j), if any	
			1,044
			10,088
			-346
			67,121

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
DIANE BRADLEY 2584 CHESTNUT ST COLUMBUS, IN 47203	DIRECTOR 2 00	650	0	0
STEVE CAROTHERS 13470 W OLD NASHVILLE RD COLUMBUS, IN 47201	DIRECTOR 2 00	650	0	0
WILLIAM HELMBRECHT 5138 IMPERIAL DRIVE COLUMBUS, IN 47203	DIRECTOR, PRESIDENT/TREAS 2 00	650	0	0
JAMES HOLLAND 201 WASHINGTON STREET COLUMBUS, IN 47201	DIRECTOR, SECRETARY 2 00	650	0	0
FIRST FINANCIAL BANK 125 3RD STREET COLUMBUS, IN 47201	TRUSTEE 2 00	37,081	0	0
RICHARD H WEAVER 2750 SYCAMORE ST COLUMBUS, IN 47203	DIRECTOR 2 00	650	0	0
ROBERT L SPURGIN 3660 CENTRAL AVE APT 114 COLUMBUS, IN 47203	DIRECTOR 2 00	325	0	0
SAM PENTZER 5135 SANIBEL DRIVE COLUMBUS, IN 47203	DIRECTOR 2 00	650	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>				
ADVOCATES FOR CHILDREN 1531 13TH ST COLUMBUS, IN 47201	NONE	CHARITABLE	VARIOUS CHARITABLE	1,750
AGING & COMMUNITY SERVICES 1531 13TH ST SUITE G900 COLUMBUS, IN 47201	NONE	CHARITABLE	VARIOUS CHARITABLE	4,000
ALZHEIMER'S ASSOCIATION 50 E 91ST ST 100 INDIANAPOLIS, IN 46240	NONE	CHARITABLE	VARIOUS CHARITABLE	10,000
Total ▶ 3a				290,800

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>				
AMERICAN CANCER SOCIETY 4567 PROGRESS DRIVE COLUMBUS, IN 47201	NONE	CHARITABLE	VARIOUS CHARITABLE	800
AMERICAN RED CROSS931 REPP DRIVE COLUMBUS, IN 47201	NONE	CHARITABLE	VARIOUS CHARITABLE	4,000
BARTHOLOMEW COUNTY HISTORICAL SOCIETY 524 3RD STREET COLUMBUS, IN 47201	NONE	CHARITABLE	VARIOUS CHARITABLE	5,500
Total ► 3a				290,800

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>				
BARTHOLOMEW COUNTY HUMANE SOCIETY 4110 E 200 S COLUMBUS, IN 47201	NONE	CHARITABLE	VARIOUS CHARITABLE	3,000
BCSF1200 CENTRAL AVE COLUMBUS, IN 47201	NONE	CHARITABLE	VARIOUS CHARITABLE	500
BULLDOG ALUMNI ASSOCIATION 1400 25TH ST COLUMBUS, IN 47201	NONE	CHARITABLE	VARIOUS CHARITABLE	2,500
Total ► 3a				290,800

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>				
CASA100 WEST HARRISON STREET SEATTLE, WA 98119	NONE	CHARITABLE	VARIOUS CHARITABLE	5,500
CENTERSTONE 720 N MARR ROAD SUITE 100 COLUMBUS, IN 47201	NONE	CHARITABLE	VARIOUS CHARITABLE	2,700
CITY OF COLUMBUS 123 WASHINGTON STREET COLUMBUS, IN 47201	NONE	CHARITABLE	VARIOUS CHARITABLE	1,500
Total ▶ 3a				290,800

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>				
CLARITY732 SMITH ST COLUMBUS, IN 47201	NONE	CHARITABLE	VARIOUS CHARITABLE	3,000
COLUMBUS AREA ARTS COUNCIL 431 6TH STREET COLUMBUS, IN 47201	NONE	CHARITABLE	VARIOUS CHARITABLE	4,000
COLUMBUS FIREMAN'S CHEER FUND 1101 JACKSON ST COLUMBUS, IN 47201	NONE	CHARITABLE	VARIOUS CHARITABLE	28,750
Total ▶ 3a				290,800

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 INDIANA ARCHITECTURAL ARCHIVES 536 5TH STREET COLUMBUS, IN 47201	NONE	CHARITABLE	VARIOUS CHARITABLE	3,750
COLUMBUS POLICE DEPARTMENT - SHOP WITH A COP 123 WASHINGTON STREET COLUMBUS, IN 47201	NONE	CHARITABLE	VARIOUS CHARITABLE	2,500
COLUMBUS SCOTTISH FESTIVAL 750 W 200 S COLUMBUS, IN 47201	NONE	CHARITABLE	VARIOUS CHARITABLE	1,500
Total ▶ 3a				290,800

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 SYMPHONY ORCHESTRA PO BOX 1992 COLUMBUS, IN 472021992	NONE	CHARITABLE	VARIOUS CHARITABLE	5,000
EASTER SEALS - ACCESS-ABILITY 233 SOUTH WACKER DRIVE STE 2400 CHICAGO, IL 60606	NONE	CHARITABLE	VARIOUS CHARITABLE	5,500
ECUMENICAL ASSEMBLY OF BARTHOLOMEW COUNTY CHURCHES 292 CENTER STREET COLUMBUS, IN 47201	NONE	CHARITABLE	VARIOUS CHARITABLE	15,000
Total ▶ 3a				290,800

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>				
FAMILY SERVICES 1531 13TH STREET 2540 COLUMBUS, IN 47201	NONE	CHARITABLE	VARIOUS CHARITABLE	20,000
FIRST CHRISTIAN CHURCH 531 5TH STREET COLUMBUS, IN 472016224	NONE	CHARITABLE	VARIOUS CHARITABLE	2,900
FOUNDATION FOR YOUTH405 HOPE AVE COLUMBUS, IN 47201	NONE	CHARITABLE	VARIOUS CHARITABLE	5,000
Total ▶ 3a				290,800

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>				
GLEANERS FOOD BANK OF INDIANA 3737 WALDEMERE AVE INDIANAPOLIS, IN 46241	NONE	CHARITABLE	VARIOUS CHARITABLE	5,000
HAPPY HOLLOW CHILDREN'S CAMP 3049 HAPPY HOLLOW ROAD NASHVILLE, IN 47448	NONE	CHARITABLE	VARIOUS CHARITABLE	2,250
HOOSIER TRAILS COUNCIL 5625 STATE ROAD 46 BLOOMINGTON, IN 47401	NONE	CHARITABLE	VARIOUS CHARITABLE	5,000
Total ► 3a				290,800

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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>				
HOSPICE OF SOUTH CENTRAL INDIANA 2626 E 17TH ST COLUMBUS, IN 47201	NONE	CHARITABLE	VARIOUS CHARITABLE	2,600
IUPUC4601 CENTRAL AVENUE COLUMBUS, IN 47203	NONE	CHARITABLE	VARIOUS CHARITABLE	75,000
IVY TECH FOUNDATION 2357 CHESTER BOULEVARD RICHMOND, IN 47374	NONE	CHARITABLE	VARIOUS CHARITABLE	9,000
Total ▶ 3a				290,800

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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>				
KINDERGRTNERS COURT 1430 NATIONAL RD COLUMBUS, IN 47201	NONE	CHARITABLE	VARIOUS CHARITABLE	2,000
LOVE CHAPEL311 CENTER ST COLUMBUS, IN 47201	NONE	CHARITABLE	VARIOUS CHARITABLE	5,000
MALACHI CLOSET5570 TREELINE DR COLUMBUS, IN 47201	NONE	CHARITABLE	VARIOUS CHARITABLE	3,500
Total ▶ 3a				290,800

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>				
ORPHAN GRAIN TRAIN 2807 CLIFFWOOD LN FORT WAYNE, IN 46825	NONE	CHARITABLE	VARIOUS CHARITABLE	2,500
PAL330 S MAPLETON STREET COLUMBUS, IN 47201	NONE	CHARITABLE	VARIOUS CHARITABLE	2,500
RILEY CHILDREN'S HOSPITAL 705 RILEY HOSPITAL DRIVE INDIANAPOLIS, IN 46202	NONE	CHARITABLE	VARIOUS CHARITABLE	5,500
Total ▶ 3a				290,800

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>				
RONALD MCDONALD HOUSE OF INDIANA 435 LIMESTONE STREET INDIANAPOLIS, IN 46202	NONE	CHARITABLE	VARIOUS CHARITABLE	5,000
SALVATION ARMY2525 ILLINOIS AVE COLUMBUS, IN 47201	NONE	CHARITABLE	VARIOUS CHARITABLE	5,000
SANS SOUCI1526 13TH STREET COLUMBUS, IN 47201	NONE	CHARITABLE	VARIOUS CHARITABLE	2,500
Total ▶ 3a				290,800

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>				
SONS OF AMERICAN LEGION PO BOX 1055 INDIANAPOLIS, IN 462061055	NONE	CHARITABLE	VARIOUS CHARITABLE	1,000
ST PETER'S LUTHERAN CHURCH 719 5TH STREET COLUMBUS, IN 47201	NONE	CHARITABLE	VARIOUS CHARITABLE	1,300
ST VINCENT HOSPITAL FOUNDATION 8402 HARCOURT RD INDIANAPOLIS, IN 46260	NONE	CHARITABLE	VARIOUS CHARITABLE	5,000
Total ▶ 3a				290,800

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>				
TURNING POINTPO BOX 103 COLUMBUS, IN 472020103	NONE	CHARITABLE	VARIOUS CHARITABLE	10,000
UNITED CEREBRAL PALSY 6270 CORPORATE DR INDIANAPOLIS, IN 46278	NONE	CHARITABLE	VARIOUS CHARITABLE	2,500
Total ▶ 3a				290,800

TY 2018 Accounting Fees Schedule

Name: CLARENCE E CUSTER & INEZ R CUSTER
FOUNDATION INC

EIN: 31-1130385

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING FEES	2,575	2,575		0

Note: To capture the full content of this document, please select landscape mode (11" x 8.5") when printing.

TY 2018 Gain/Loss from Sale of Other Assets Schedule

Name: CLARENCE E CUSTER & INEZ R CUSTER
FOUNDATION INC

EIN: 31-1130385

Gain Loss Sale Other Assets Schedule

Name	Date Acquired	How Acquired	Date Sold	Purchaser Name	Gross Sales Price	Basis	Basis Method	Sales Expenses	Total (net)	Accumulated Depreciation
RETURN OF PRINCIPAL		PURCHASED			25			0	25	

TY 2018 Investments - Other Schedule

Name: CLARENCE E CUSTER & INEZ R CUSTER
FOUNDATION INC

EIN: 31-1130385

Investments Other Schedule 2

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
VARIOUS MUTUAL FUNDS & INVESTMENTS	AT COST	3,718,090	3,755,451

TY 2018 Legal Fees Schedule

Name: CLARENCE E CUSTER & INEZ R CUSTER
FOUNDATION INC

EIN: 31-1130385

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LEGAL FEES	1,000	1,000		0

TY 2018 Other Expenses Schedule

Name: CLARENCE E CUSTER & INEZ R CUSTER
FOUNDATION INC

EIN: 31-1130385

Other Expenses Schedule

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
DUES	215	215		0
DIRECTORS INSURANCE	1,245	0		1,245
PUBLICATION	8	0		8
UTILITIES	5,464	5,464		0
REPAIRS & MAINTENANCE	27,008	27,008		0
CLEANING	10,663	10,663		0
INSURANCE	12,032	12,032		0
TRASH PICK UP	4,526	4,526		0
PROPERTY TAXES	23,128	23,128		0
TELEPHONE	2,902	2,902		0

Other Expenses Schedule

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
MANAGEMENT FEES	5,960	5,960		0
FARM PRODUCTION EXPENSE	0	0		0
PROPERTY TAXES	0	0		0
MANAGEMENT FEES	0	0		0

TY 2018 Other Liabilities Schedule

Name: CLARENCE E CUSTER & INEZ R CUSTER
FOUNDATION INC

EIN: 31-1130385

Description	Beginning of Year - Book Value	End of Year - Book Value
SECURITY DEPOSITS FROM TENANTS	10,519	10,519

TY 2018 Taxes Schedule

Name: CLARENCE E CUSTER & INEZ R CUSTER
FOUNDATION INC

EIN: 31-1130385

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
EXCISE TAXES	3,374	3,374		0
FOREIGN TAXES	1,931	1,931		0