

Form **990-PF****Return of Private Foundation**
or Section 4947(a)(1) Trust Treated as Private Foundation

OMB No 1545-0052

2018

Open to Public Inspection

Department of the Treasury
Internal Revenue Service

▶ 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.

For calendar year 2018 or tax year beginning

, 2018, and ending

, 20

Name of foundation

THE ONEAMERICA FOUNDATION, INC

Number and street (or P O box number if mail is not delivered to street address)

ONE AMERICAN SQ, PO BOX 368

City or town, state or province, country, and ZIP or foreign postal code

INDIANAPOLIS, IN 46206-0368

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

H Check type of organization: ☒ Section 501(c)(3) exempt private foundation **04**
☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation

I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ▶ \$ **7,802,286**
J Accounting method: ☐ Cash ☒ Accrual
☐ Other (specify) _____ (Part I, column (d) must be on cash basis)

A Employer identification number**31-1146437****B** Telephone number (see instructions)**317-285-1057****C** If exemption application is pending, check here ▶ ☐ **0****D** 1. Foreign organizations, check here ▶ ☐2. Foreign organizations meeting the 85% test, check here and attach computation ▶ ☐**E** If private foundation status was terminated under section 507(b)(1)(A), check here ▶ ☐**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)

		(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	369,348	369,348		ATCH 1
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	134,152			
	b Gross sales price for all assets on line 6a 289,500				
	7 Capital gain net income (from Part IV, line 2)		134,152		
	8 Net short-term capital gain A8				
	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)				
	12 Total. Add lines 1 through 11	503,500	503,500		
	13 Compensation of officers, directors, trustees, etc.	0			
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)				
	c Other professional fees (attach schedule)				
	17 Interest				
	18 Taxes (attach schedule) (see instructions) ATCH 2	5,314			
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule) ATCH 3	316	158		158
	24 Total operating and administrative expenses. Add lines 13 through 23	5,630	158		158
	25 Contributions, gifts, grants paid	791,195			791,195
	26 Total expenses and disbursements. Add lines 24 and 25	796,825	158	0	791,353
	27 Subtract line 26 from line 12:				
	a Excess of revenue over expenses and disbursements	(293,325)			
	b Net investment income (if negative, enter -0-)		503,342		
	c Adjusted net income (if negative, enter -0-)				

For Paperwork Reduction Act Notice, see instructions.

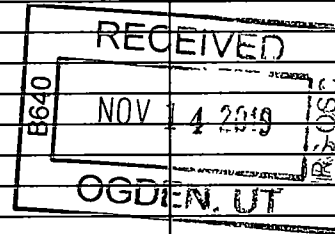
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Form **990-PF** (2018)

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Part II Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only. (See instructions.)		Beginning of year (a) Book Value	End of year (b) Book Value (c) Fair Market Value	
Assets	1 Cash—non-interest-bearing	3,710	48,597	48,597
	2 Savings and temporary cash investments	559,157	237,757	237,757
	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) ATCH 4	8,556,118	7,515,932	7,515,932
	14 Land, buildings, and equipment basis ▶ Less: accumulated depreciation (attach schedule) ▶			
15 Other assets (describe ▶)				
16 Total assets (to be completed by all filers—see the instructions. Also, see page 1, item I)	9,118,985	7,802,286	7,802,286	
Liabilities	17 Accounts payable and accrued expenses	1,306	1,620	
	18 Grants payable	33,750		
	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)	35,056	1,620	
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			
	28 Paid-in or capital surplus, or land, bldg., and equipment fund			
	29 Retained earnings, accumulated income, endowment, or other funds	9,083,929	7,800,666	
	30 Total net assets or fund balances (see instructions)	9,083,929	7,800,666	
31 Total liabilities and net assets/fund balances (see instructions)	9,118,985	7,802,286		

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	9,083,929
2 Enter amount from Part I, line 27a	2	(293,325)
3 Other increases not included in line 2 (itemize) ▶ ATCH 5	3	(989,938)
4 Add lines 1, 2, and 3	4	7,800,666
5 Decreases not included in line 2 (itemize) ▶	5	
6 Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	7,800,666

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (for example, real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo, day, yr)	(d) Date sold (mo, day, yr)
1a SEE PART IV SCHEDULE			
b			
c			
d			
e			
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) ((e) plus (f) minus (g))
a			
b			
c			
d			
e			
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69.			(i) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
a			
b			
c			
d			
e			
2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	134,152	
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	0	

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

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

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

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

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

(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	853,535	8,970,474	0.095149
2016	846,793	8,749,850	0.096778
2015	848,399	9,568,350	0.088667
2014	866,092	9,975,552	0.086821
2013	782,201	9,699,156	0.080646
2 Total of line 1, column (d)		2	0.448061
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	0.089612
4 Enter the net value of noncharitable-use assets for 2018 from Part X, line 5		4	8,742,050
5 Multiply line 4 by line 3		5	783,393
6 Enter 1% of net investment income (1% of Part I, line 27b)		6	5,033
7 Add lines 5 and 6		7	788,426
8 Enter qualifying distributions from Part XII, line 4 If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions.		8	791,353

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 checked="" type="checkbox"/> and enter 1% of Part I, line 27b		1	5,033	
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		
3 Add lines 1 and 2		3	5,033	
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	5,033	
6 Credits/Payments.				
a 2018 estimated tax payments and 2017 overpayment credited to 2018	6a	3,695		
b Exempt foreign organizations—tax withheld at source	6b			
c Tax paid with application for extension of time to file (Form 8868)	6c	2,000		
d Backup withholding erroneously withheld	6d			
7 Total credits and payments. Add lines 6a through 6d	7	5,695		
8 Enter any penalty for underpayment of estimated tax. Check here <input checked="" type="checkbox"/> if Form 2220 is attached	8			
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	662		
11 Enter the amount of line 10 to be Credited to 2019 estimated tax 662 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?		<input checked="" type="checkbox"/>
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition. If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.		<input checked="" type="checkbox"/>
c Did the foundation file Form 1120-POL for this year?		<input checked="" type="checkbox"/>
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.		<input checked="" type="checkbox"/>
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.		<input checked="" type="checkbox"/>
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		<input checked="" type="checkbox"/>
b If "Yes," has it filed a tax return on Form 990-T for this year?		<input checked="" type="checkbox"/>
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by <i>General Instruction T</i> .		<input checked="" type="checkbox"/>
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?	<input checked="" type="checkbox"/>	
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	<input checked="" type="checkbox"/>	
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 <i>General Instruction G</i> ? If "No," attach explanation	<input checked="" type="checkbox"/>	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2018 or the tax year beginning in 2018? See the instructions for Part XIV. If "Yes," complete Part XIV		<input checked="" type="checkbox"/>
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		<input checked="" type="checkbox"/>

Part VII-A Statements Regarding Activities (continued)

	Yes	No
11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule. See instructions	11	✓
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	✓
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► N/A	13	✓
14 The books are in care of ► CORPORATE TAX Telephone no. ► 317-285-1057 Located at ► ONE AMERICAN SQ, PO BOX 368 INDIANAPOLIS, IN ZIP+4 ► 46206-0368		
15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —check here N/A ► <input type="checkbox"/> and enter the amount of tax-exempt interest received or accrued during the year ► 15 N/A		
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	✓
See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country ►		

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required**File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.**

	Yes	No
1a During the year, did the foundation (either directly or indirectly):		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person? <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	1b	N/A
Organizations relying on a current notice regarding disaster assistance, check here ► <input type="checkbox"/>		
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	✓
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	N/A
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	N/A
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	✓
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	✓

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required (continued)**5a** During the year, did the foundation pay or incur any amount to:(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☒ No(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☒ No(3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☒ No(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions ☐ Yes ☒ No(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☒ No**b** If any answer is "Yes" to 5a(1)–(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance? See instructions ☐ Yes ☒ NoOrganizations relying on a current notice regarding disaster assistance, check here ☐ N/A ☒ **5b** N/A**c** If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? ☐ Yes ☒ No

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

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? ☐ Yes ☒ No**b** Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? ☐ Yes ☒ No
If "Yes" to 6b, file Form 8870. **6b** ✓**7a** At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☒ No**b** If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction? ☐ Yes ☒ No **7b** N/A**8** Is the foundation subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment(s) during the year? ☐ Yes ☒ No**Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors****1** List all officers, directors, trustees, and foundation managers and their compensation. See instructions.

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
ATCH 6		0	0	0

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 ☐ **Total**

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)**3 Five highest-paid independent contractors for professional services. See instructions. If none, enter "NONE."**

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		

Total number of others receiving over \$50,000 for professional services ▶**Part IX-A Summary of Direct Charitable Activities**

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

	Expenses
1 N/A	
2	
3	
4	

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

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.

	Amount
1 NONE	
2	
All other program-related investments. See instructions.	
3 NONE	
Total. Add lines 1 through 3 ▶	

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	8,465,306
b	Average of monthly cash balances	1b	409,872
c	Fair market value of all other assets (see instructions)	1c	
d	Total (add lines 1a, b, and c)	1d	8,875,178
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	
2	Acquisition indebtedness applicable to line 1 assets	2	
3	Subtract line 2 from line 1d	3	8,875,178
4	Cash deemed held for charitable activities. Enter 1½% of line 3 (for greater amount, see instructions)	4	133,128
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	8,742,050
6	Minimum investment return. Enter 5% of line 5	6	437,103

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	437,103
2a	Tax on investment income for 2018 from Part VI, line 5	2a	5,033
b	Income tax for 2018. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	5,033
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	432,070
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	432,070
6	Deduction from distributable amount (see instructions)	6	
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	432,070

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	791,353
b	Program-related investments—total from Part IX-B	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	791,353
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	5,033
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	796,386

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				432,070
2 Undistributed income, if any, as of the end of 2018:				
a Enter amount for 2017 only				
b Total for prior years: 20 <u>16</u> , 20 <u>15</u> , 20 <u>14</u>				
3 Excess distributions carryover, if any, to 2018:				
a From 2013 317,019				
b From 2014 385,708				
c From 2015 378,985				
d From 2016 418,878				
e From 2017 410,532				
f Total of lines 3a through e	1,911,122			
4 Qualifying distributions for 2018 from Part XII, line 4. ► \$ 791,353				
a Applied to 2017; but not more than line 2a				
b Applied to undistributed income of prior years (Election required—see instructions)				
c Treated as distributions out of corpus (Election required—see instructions)				
d Applied to 2018 distributable amount				432,070
e Remaining amount distributed out of corpus	359,283			
5 Excess distributions carryover applied to 2018 (If an amount appears in column (d), the same amount must be shown in column (a).)				
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	2,270,405			
b Prior years' undistributed income. Subtract line 4b from line 2b				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed				
d Subtract line 6c from line 6b. Taxable amount—see instructions				
e Undistributed income for 2017. Subtract line 4a from line 2a. Taxable amount—see instructions				
f Undistributed income for 2018. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2019				
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)				
8 Excess distributions carryover from 2013 not applied on line 5 or line 7 (see instructions)	317,019			
9 Excess distributions carryover to 2019. Subtract lines 7 and 8 from line 6a	1,953,386			
10 Analysis of line 9:				
a Excess from 2014 385,708				
b Excess from 2015 378,985				
c Excess from 2016 418,878				
d Excess from 2017 410,532				
e Excess from 2018 359,283				

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

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

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

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 $\frac{2}{3}$ 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).)

N/A

- 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.

N/A**2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:**

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

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

ATCH 7

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

ATCH 8

- c** Any submission deadlines:

ATCH 9

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

THERE ARE NO GEOGRAPHICAL OR OTHER RESTRICTIONS

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a <i>Paid during the year</i> SEE ATTACHED				791,195
Total			▶ 3a	791,195
b <i>Approved for future payment</i>				
Total			▶ 3b	

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.

		Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions)
		(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1	Program service revenue.					
a						
b						
c						
d						
e						
f						
g	Fees and contracts from government agencies					
2	Membership dues and assessments					
3	Interest on savings and temporary cash investments					
4	Dividends and interest from securities			14	369,348	
5	Net rental income or (loss) from real estate					
a	Debt-financed property					
b	Not debt-financed property					
6	Net rental income or (loss) from personal property					
7	Other investment income					
8	Gain or (loss) from sales of assets other than inventory			18	134,152	
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)				503,500	
13	Total. Add line 12, columns (b), (d), and (e)				503,500	503,500

(See worksheet in line 13 instructions to verify calculations.)

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

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

N/A

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

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

**Sign
Here**


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

Signature of officer or trustee

10-11-19
Date

Prosser, One from Four
Title

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

Paid 
Preparer
Use Only

Print/Type preparer's name

Preparer's signature

Date	
------	--

Check ☐ if
self-employed

PTIN

Firm's name ▶

Firm's EIN ▶

Firm's address ►

Phone no

ATTACHMENT 1FORM 990PF, PART I - DIVIDENDS AND INTEREST FROM SECURITIES

<u>DESCRIPTION</u>	<u>REVENUE AND EXPENSES PER BOOKS</u>	<u>NET INVESTMENT INCOME</u>
INTEREST INCOME	1,722	1,722
DIVIDEND INCOME	367,626	367,626
TOTAL	<u>369,348</u>	<u>369,348</u>

THE ONEAMERICA FOUNDATION, INC

2018 FORM 990-PF

31-1146437

ATTACHMENT 2

FORM 990PF, PART I - TAXES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME	ADJUSTED NET INCOME	CHARITABLE PURPOSES
FEDERAL EXCISE TAX	5,314			
TOTALS	5,314			

ATTACHMENT 3FORM 990PF, PART I - OTHER EXPENSES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME	ADJUSTED NET INCOME	CHARITABLE PURPOSES
MISCELLANEOUS EXPENSES	316	158		158
TOTALS	316	158		158

FORM 990PF, PART II - OTHER INVESTMENTSATTACHMENT 4

<u>DESCRIPTION</u>	<u>ENDING BOOK VALUE</u>	<u>ENDING FMV</u>
AMERICAN BEACON BRIDGEWAY LARGE CAP VALUE FUND	505,786	505,786
FIDELITY GROWTH COMPANY FUND	491,814	491,814
HOMESTEAD SMALL COMPANY STOCK FUND	230,130	230,130
ISHARES MSCI EAFE ETF	511,386	511,386
ISHARES TR RUSSELL MID-CAP GROWTH	68,226	68,226
ISHARES RUSSELL MID-CAP ETF	139,440	139,440
ISHARES RUSSELL 1000 ETF	226,065	226,065
JANUS HENDERSON FLEXIBLE BOND FUND T SHARES	1,030,579	1,030,579
MFS INTERNATIONAL NEW DISCOVERY	482,839	482,839
PARNASSUS CORE EQUITY - INST	97,625	97,625
SPDR S&P 500 ETF TRUST	224,928	224,928
VANGUARD EQUITY INCOME-INV	531,926	531,926
VANGUARD SHORT TERM FEDERAL - ADM	778,590	778,590
VANGUARD SHORT TERM CORP BOND ETF	1,071,675	1,071,675
VANGUARD GROWTH INDEX-INV	478,172	478,172
VANGUARD SMALL-CAP ETF	646,751	646,751
TOTALS	<u>7,515,932</u>	<u>7,515,932</u>

ATTACHMENT 5FORM 990PF, PART III - OTHER INCREASES IN NET WORTH OR FUND BALANCES

<u>DESCRIPTION</u>	<u>AMOUNT</u>
UNREALIZED GAIN ON INVESTMENTS	(989,938)
TOTALS	<u>(989,938)</u>

ATTACHMENT 6FORM 990PF, PART VIII - LIST OF OFFICERS, DIRECTORS, AND TRUSTEES

<u>NAME AND ADDRESS</u>	<u>TITLE AND AVERAGE HOURS PER WEEK DEVOTED TO POSITION</u>	<u>COMPENSATION</u>	<u>CONTRIBUTIONS TO EMPLOYEE BENEFIT PLANS</u>	<u>EXPENSE ACCT AND OTHER ALLOWANCES</u>
KELLY M HUNTINGTON ONE AMERICAN SQ, PO BOX 368 INDIANAPOLIS, IN 46206-0368	CHAIRMAN/DIRECTOR	0	0	0
DEBORAH K ROUITT ONE AMERICAN SQ, PO BOX 368 INDIANAPOLIS, IN 46206-0368	PRESIDENT/DIRECTOR	0	0	0
RICHARD M ELLERY ONE AMERICAN SQ, PO BOX 368 INDIANAPOLIS, IN 46206-0368	SECRETARY/DIRECTOR	0	0	0
J SCOTT DAVISON ONE AMERICAN SQ, PO BOX 368 INDIANAPOLIS, IN 46206-0368	DIRECTOR	0	0	0
NATALEE FULLER ONE AMERICAN SQ, PO BOX 368 INDIANAPOLIS, IN 46206-0368	DIRECTOR	0	0	0
CRAIG A LEHMAN ONE AMERICAN SQ, PO BOX 368 INDIANAPOLIS, IN 46206-0368	DIRECTOR	0	0	0
TONYA L LENGAR ONE AMERICAN SQ, PO BOX 368 INDIANAPOLIS, IN 46206-0368	DIRECTOR	0	0	0
TOTALS		0	0	0

THE ONEAMERICA FOUNDATION, INC

2018 FORM 990-PF

31-1146437

ATTACHMENT 7

FORM 990PF, PART XV - NAME, ADDRESS AND PHONE FOR APPLICATIONS

JAMIE JANSEN
ONE AMERICAN SQ, PO BOX 368
INDIANAPOLIS, IN 46206-0368
317-285-1609

ATTACHMENT 8

FORM 990PF, PART XV - FORM AND CONTENTS OF SUBMITTED APPLICATIONS

A LETTER DESCRIBING THE ORGANIZATION AND THE PROJECT OR PROGRAM TO WHICH THE REQUEST PERTAINS COPIES OF THE 501 (C)(3) AND 509(A) DETERMINATION LETTERS SHOULD ACCOMPANY THE REQUEST.

ATTACHMENT 9

FORM 990PF, PART XV - SUBMISSION DEADLINES

FOR BUDGETING PURPOSES THE PREFERRED DEADLINE IS SEPTEMBER 30
REQUESTS CAN BE SUBMITTED DURING THE YEAR.

The OneAmerica Foundation

EIN: 31-1146437

Tax Year Ending: December 31, 2018

Form 990-PF, Part XV - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	Address	show any relationship to any foundation manager or substantial contributor.	Foundation Status of recipient	Purpose of grant or contribution	Amount
United Way of Central Indiana	P O Box 88409, Indianapolis, IN 46208-0409	NA	PF	Health, Welfare, & Amateur Athletics	\$ 421,781
Achilles International, Inc	42 West 38th Street No 400, New York, NY 10018	NA	PF	Civic & Community	\$ 4,000
Alzheimers Association	225 N Michigan Ave Floor 17 Chicago, IL 60601	NA	PF	Health and Welfare	\$ 2,500
American Red Cross	431 18th Street, NW, Washington, DC 20006	NA	PF	Civic & Community	\$ 1,595
Assistance League of Indianapolis	1475 West 86th Street, Suite E, Indianapolis, IN 46260	NA	PF	Civic & Community	\$ 5,000
Autism Speaks Inc	1 East 33rd St 4th Floor, New York, NY 10016	NA	PF	Civic & Community	\$ 4,000
Barnraisers Inc	PO Box 293, Fishers, IN 46038	NA	PF	Civic & Community	\$ 2,500
Big Brothers Big Sisters	1433 N Meridian St, Indianapolis, IN 46202	NA	PF	Civic & Community	\$ 2,500
Central Indiana Community Foundation	615 N Alabama St #119, Indianapolis, IN 46204	NA	PF	Civic & Community	\$ 10,000
Christel House International, Inc	10 West Market Street, Suite 1990, Indianapolis, IN 46204-2973	NA	PF	Education	\$ 27,000
Damar Foundation	6067 Decatur Blvd, Indianapolis, IN 46241	NA	PF	Civic & Community	\$ 10,000
Dystonia Foundation	One East Wacker Drive, Suite 1730, Chicago, IL 60601-1980	NA	PF	Health and Welfare	\$ 3,000
EdChoice, Inc	111 Monument Circle Suite 2650 Indianapolis, IN 46204	NA	PF	Education	\$ 1,000
Family Aid Boston	727 Atlantic Avenue, Boston, MA 02111	NA	PF	Civic & Community	\$ 3,500
Freedom Communities	2225 Freedom Drive, Charlotte, NC 28208	NA	PF	Civic & Community	\$ 3,000
Gleaners Food Bank of Indiana, Inc	3737 Waldemere Avenue Indianapolis, IN 46241	NA	PF	Civic & Community	\$ 5,000
Icing Smiles	4725 Dorsey Hall Drive Suite A-807, Ellicott City, MD 21042	NA	PF	Civic & Community	\$ 2,500
Indiana Neighborhood Housing Partnership	3550 N Washington Blvd, Indianapolis, IN 46205	NA	PF	Civic & Community	\$ 10,000
Indiana Repertory Theatre	140 W Washington St, Indianapolis, IN 46204	NA	PF	Civic & Community	\$ 819

Indiana Sports Corporation	201 S Capitol Ave #1200, Indianapolis, IN 46225	NA	PF	Civic & Community	\$ 50,000
Indiana University Foundation	Showalter House, P O Box 500, Bloomington, IN 47402	NA	PF	Education	\$ 2,500
Indianapolis Marion County Public Library Foundation, Inc	PO Box 6134, Indianapolis, IN 46206	NA	PF	Civic & Community	\$ 5,000
Indianapolis Urban League	Sam H Jones Center 777 Indiana Ave, Indianapolis, IN 46202	NA	PF	Civic & Community	\$ 25,000
Jewish Community Foundation	1100 W 42nd St #240, Indianapolis, IN 46208	NA	PF	Civic & Community	\$ 2,500
Kwanis of Charlottesville Foundation	PO Box 6698, Charlottesville, VA 22906-6698	NA	PF	Civic & Community	\$ 2,500
Kokua Kalihi Valley Comprehensive Family Services	2239 North School Street, Honolulu, HI 96819	NA	PF	Civic & Community	\$ 2,500
Lions Park	1100 W Oak Street, Zionsville, IN 46077	NA	PF	Civic & Community	\$ 4,000
Madame Walker Legacy Center	617 Indiana Ave, Indianapolis, IN 46202	NA	PF	Civic & Community	\$ 25,000
March of Dimes Foundation	1550 Crystal Dr Suite 1300, Arlington, VA 22202	NA	PF	Health and Welfare	\$ 2,000
Marian University	Advancement Office, 3200 Cold Spring Road, Indianapolis, IN 46222	NA	PF	Education	\$ 25,000
National Fragile X Foundation	1861 International Drive Suite 200, McLean, VA 22102	NA	PF	Health and Welfare	\$ 2,500
Noble of Indiana	7701 E 21st Street, Indianapolis, IN 46219	NA	PF	Civic & Community	\$ 8,000
Outreach Inc	2416 E New York Street Indianapolis, IN 46201	NA	PF	Civic & Community	\$ 5,000
Providence High School	707 Providence Way, Clarksville, IN 47129	NA	PF	Education	\$ 4,000
Parkinson's Foundation	200 SE 1st Street, Ste 800, Miami, FL 33131	NA	PF	Health and Welfare	\$ 2,500
Sagamore Institute	2902 N Meridian Street, Indianapolis, IN 46208	NA	PF	Civic & Community	\$ 25,000
Shepherd Community	1625 East Washington St Indianapolis, IN 46201	NA	PF	Civic & Community	\$ 15,000
Susies Place	7519 Beechwood Centre Rd #500, Avon, IN 46123	NA	PF	Civic & Community	\$ 2,500
The Indiana Legal Foundation, Inc	465 N Meridian, P O Box 44034, Indianapolis, IN 46244	NA	PF	Civic & Community	\$ 1,000
The Mind Trust	1630 N Meridian Street, Indianapolis, IN 46202	NA	PF	Education	\$ 25,000
The Warren Center	320 Custer Road, Richardson, TX 75080	NA	PF	Education	\$ 2,500

Treasured Vessels Foundation	PO Box 2256, Frisco, TX 75034	NA	PF	Civic & Community	\$ -2,500
Wheeler Mission Ministries	245 North Delaware Street, PO Box 817, Indianapolis, IN 46206	NA	PF	Civic & Community	\$ 20,000
WFYI Public Media	1630 N Meridian Street, Indianapolis, IN 46202	NA	PF	Civic & Community	\$ 10,000

Total Contributions

\$ 791,195