

C&F
326

Form 990-PF

Department of the Treasury
Internal Revenue Service

EXTENDED TO NOVEMBER 16, 2020

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.

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OMB No 1545-0047

2019

Open to Public Inspection

For calendar year 2019 or tax year beginning

, and ending

Name of foundation

JOHN & LINDA ANDERSON CHARITABLE
FOUNDATION

A Employer identification number

36-4332910

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

4151 GULF SHORE BLVD N

Room/suite

404

B Telephone number

815-637-7619

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

NAPLES, FL 34103

C If exemption application is pending, check here ☐

G Check all that apply:

☐

Initial return

☐

Initial return of a former public charity

☐

Final return

☐

Amended return

☐

Address change

☐

Name change

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

H Check type of organization:

☒

Section 501(c)(3) exempt private foundation

☐

Section 4947(a)(1) nonexempt charitable trust

☐

Other taxable private foundation

I Fair market value of all assets at end of year

(from Part II, col. (c), line 16)

\$ 10,207,757.

J Accounting method:

☒

Cash

☐

Accrual

Other (specify)

(Part I, column (d), must be on cash basis.)

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

Part I

Analysis of Revenue and Expenses

(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a).)

(a) Revenue and expenses per books

(b) Net investment income

(c) Adjusted net income

(d) Disbursements for charitable purposes (cash basis only)

1 Contributions, gifts, grants, etc., received

200,045.

N/A

2 Check ☐ if the foundation is not required to attach Sch B

3 Interest on savings and temporary cash investments

166.

166.

STATEMENT 2

4 Dividends and interest from securities

171,155.

171,155.

STATEMENT 3

5a Gross rents

3.

3.

STATEMENT 4

b Net rental income or (loss)

3.

6a Net gain or (loss) from sale of assets not on line 10

273,746.

STATEMENT 1

b Gross sales price for all assets on line 6a

199,440.

7 Capital gain net income (from Part IV, line 2)

256,552.

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)

11 Other income

70,870.

70,870.

STATEMENT 5

12 Total Add lines 1 through 11

715,985.

498,746.

RECEIVED

13 Compensation of officers, directors, trustees, etc

0.

0.

14 Other employee salaries and wages

15 Pension plans, employee benefits

16a Legal fees

b Accounting fees

STMT 6

1,575.

0.

c Other professional fees

17 Interest

12,697.

8,316.

18 Taxes

STMT 7

19,807.

497.

19 Depreciation and depletion

20 Occupancy

21 Travel, conferences, and meetings

22 Printing and publications

23 Other expenses

STMT 8

80,594.

80,354.

24 Total operating and administrative expenses Add lines 13 through 23

114,673.

89,167.

25 Contributions, gifts, grants paid

464,654.

26 Total expenses and disbursements. Add lines 24 and 25

579,327.

89,167.

27 Subtract line 26 from line 12:

136,658.

a Excess of revenue over expenses and disbursements

b Net investment income (if negative, enter -0-)

409,579.

c Adjusted net income (if negative, enter -0-)

N/A

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Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only		
		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	20.	199,562.	199,562.
	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			
	7 Other notes and loans receivable ▶			
	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			
	b Investments - corporate stock			
	c Investments - corporate bonds			
	11 Investments - land, buildings, and equipment basis ▶			
Less: accumulated depreciation ▶				
12 Investments - mortgage loans				
13 Investments - other	STMT 9	7,572,630.	7,509,746.	10,008,195.
14 Land, buildings, and equipment: basis ▶				
Less: accumulated depreciation ▶				
15 Other assets (describe ▶)				
16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item I)		7,572,650.	7,709,308.	10,207,757.
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			
	22 Other liabilities (describe ▶)			
23 Total liabilities (add lines 17 through 22)		0.	0.	
Net Assets or Fund Balances	Foundations that follow FASB ASC 958, check here ▶ <input type="checkbox"/>			
	24 Net assets without donor restrictions			
	25 Net assets with donor restrictions			
	Foundations that do not follow FASB ASC 958, check here ▶ <input checked="" type="checkbox"/>			
	26 Capital stock, trust principal, or current funds	7,572,650.	7,709,308.	
	27 Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
	28 Retained earnings, accumulated income, endowment, or other funds	0.	0.	
	29 Total net assets or fund balances	7,572,650.	7,709,308.	
30 Total liabilities and net assets/fund balances		7,572,650.	7,709,308.	

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 29 (must agree with end-of-year figure reported on prior year's return)	1	7,572,650.
2 Enter amount from Part I, line 27a	2	136,658.
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	7,709,308.
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 29	6	7,709,308.

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Part IV Capital Gains and Losses for Tax on Investment Income SEE ATTACHED STATEMENT

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

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) ((e) plus (f) minus (g))
a			
b			
c			
d			
e	199,440.	138,709.	256,552.

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

(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a			
b			
c			
d			
e			256,552.

2 Capital gain net income or (net capital loss)	<div> <div>If gain, also enter in Part I, line 7</div> <div>If (loss), enter -0- in Part I, line 7</div> </div>	2	256,552.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6):	<div> <div>If gain, also enter in Part I, line 8, column (c).</div> <div>If (loss), enter -0- in Part I, line 8</div> </div>	3	N/A

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

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

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

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

☐ Yes ☒ No

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2018	527,601.	8,698,383.	.060655
2017	407,767.	8,459,485.	.048202
2016	413,298.	8,230,816.	.050213
2015	345,265.	8,345,781.	.041370
2014	198,433.	7,507,502.	.026431

2 Total of line 1, column (d)	2	.226871
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	.045374
4 Enter the net value of noncharitable-use assets for 2019 from Part X, line 5	4	9,195,105.
5 Multiply line 4 by line 3	5	417,219.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	4,096.
7 Add lines 5 and 6	7	421,315.
8 Enter qualifying distributions from Part XII, line 4	8	464,654.

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 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	ST ANDERSON FUND		VARIOUS	VARIOUS
b	LT ANDERSON FUND		VARIOUS	VARIOUS
c	SEC 1231		VARIOUS	VARIOUS
d	IRC SECTION 1202 STOCK GAIN EXCLUSION THRU ANDERS		VARIOUS	VARIOUS
e	1252 SHS VANGUARD SMALL CAP STOCK	P	10/24/14	11/04/19
f				
g				
h				
i				
j				
k				
l				
m				
n				
o				

(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			17,386.
b			255,575.
c			1,390.
d			<78,530.>
e	199,440.	138,709.	60,731.
f			
g			
h			
i			
j			
k			
l			
m			
n			
o			

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

(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
a			17,386.
b			255,575.
c			1,390.
d			<78,530.>
e			60,731.
f			
g			
h			
i			
j			
k			
l			
m			
n			
o			

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	256,552.
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). If (loss), enter "-0-" in Part I, line 8	3	N/A

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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	4,096.
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	4,096.
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	4,096.
6 Credits/Payments:			
a 2019 estimated tax payments and 2018 overpayment credited to 2019	6a	11,429.	
b Exempt foreign organizations - tax withheld at source	6b	0.	
c Tax paid with application for extension of time to file (Form 8868)	6c	9,000.	
d Backup withholding erroneously withheld	6d	0.	
7 Total credits and payments. Add lines 6a through 6d	7	20,429.	
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		
10 Overpayment If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	16,333.	
11 Enter the amount of line 10 to be: Credited to 2020 estimated tax	11	16,333.	Refunded

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?		X
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.		X
c Did the foundation file Form 1120-POL for this year?		X
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.		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?	X	
b If "Yes," has it filed a tax return on Form 990-T for this year?	X	
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV	X	
8a Enter the states to which the foundation reports or with which it is registered. See instructions. <u>IL</u>		
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	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2019 or the tax year beginning in 2019? See the instructions for Part XIV. If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

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Part VII-A Statements Regarding Activities *(continued)*

		Yes	No
11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule. See instructions	11		X
12 Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement. See instructions	12		X
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► <u>N/A</u>	13	X	
14 The books are in care of ► <u>KRISTIN L. PECORA</u> Telephone no. ► <u>815-637-7619</u> Located at ► <u>330 SPRING CREEK ROAD, ROCKFORD, IL</u> ZIP+4 ► <u>61107</u>			
15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - check here and enter the amount of tax-exempt interest received or accrued during the year	15	N/A	
16 At any time during calendar year 2019, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country ►	16		X

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 Organizations relying on a current notice regarding disaster assistance, check here	N/A ► <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 2019?		1c	X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):			
a At the end of tax year 2019, did the foundation have any undistributed income (Part XIII, lines 6d and 6e) for tax year(s) beginning before 2019? If "Yes," list the years ► _____, _____, _____	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
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.)	N/A	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. ► _____, _____, _____			
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 2019 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 Form 4720, Schedule C, to determine if the foundation had excess business holdings in 2019.)	N/A	3b	
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		4a	X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2019?		4b	X

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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

N/A

Organizations relying on a current notice regarding disaster assistance, check here

▶ ☐

c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?

N/A

☐ 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?

If "Yes" to 6b, file Form 8870.

☐ Yes ☒ No

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?

N/A

b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?

8 Is the foundation subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment(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.

(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
LINDA ANDERSON 4151 GULF SHORE BLVD N, UNIT 404 NAPLES, FL 34103	PRESIDENT & DIRECTOR 0.00	0.	0.	0.
JOHN R. ANDERSON 4151 GULF SHORE BLVD N, UNIT 404 NAPLES, FL 34103	VICE PRES, SECRETARY & DIR 0.00	0.	0.	0.
KRISTIN L PECORA 330 SPRING CREEK ROAD ROCKFORD, IL 61107	TREASURER & DIRECTOR 0.00	0.	0.	0.
DAVID ANDERSON 330 SPRING CREEK ROAD ROCKFORD, IL 61107	DIRECTOR 0.00	0.	0.	0.

2 Compensation of five highest-paid employees (other than those included on line 1). 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

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

Total number of others receiving over \$50,000 for professional services

Expenses

0.

Amount

0.

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

1 Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:			
a Average monthly fair market value of securities	1a		0.
b Average of monthly cash balances	1b		45,862.
c Fair market value of all other assets	1c		9,289,270.
d Total (add lines 1a, b, and c)	1d		9,335,132.
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		9,335,132.
4 Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4		140,027.
5 Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5		9,195,105.
6 Minimum investment return. Enter 5% of line 5	6		459,755.

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		459,755.
2a Tax on investment income for 2019 from Part VI, line 5	2a	4,096.	
b Income tax for 2019. (This does not include the tax from Part VI.)	2b		
c Add lines 2a and 2b	2c		4,096.
3 Distributable amount before adjustments. Subtract line 2c from line 1	3		455,659.
4 Recoveries of amounts treated as qualifying distributions	4		0.
5 Add lines 3 and 4	5		455,659.
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		455,659.

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		464,654.
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		464,654.
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	5		4,096.
6 Adjusted qualifying distributions. Subtract line 5 from line 4	6		460,558.

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.

Form 990-PF (2019)

**JOHN & LINDA ANDERSON CHARITABLE
FOUNDATION**

Form 990-PF (2019)

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Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2018	(c) 2018	(d) 2019
1 Distributable amount for 2019 from Part XI, line 7				455,659.
2 Undistributed income, if any, as of the end of 2019				
a Enter amount for 2018 only			316,648.	
b Total for prior years.		0.		
3 Excess distributions carryover, if any, to 2019:				
a From 2014				
b From 2015				
c From 2016				
d From 2017				
e From 2018				
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2019 from Part XII, line 4: ▶ \$ 464,654.				
a Applied to 2018, but not more than line 2a			316,648.	
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 2019 distributable amount				148,006.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2019 (If an amount appears in column (d), the same amount must be shown in column (a))	0.			0.
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	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 2018. Subtract line 4a from line 2a Taxable amount - see instr.			0.	
f Undistributed income for 2019. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2020				307,653.
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 2014 not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2020 Subtract lines 7 and 8 from line 6a	0.			
10 Analysis of line 9:				
a Excess from 2015				
b Excess from 2016				
c Excess from 2017				
d Excess from 2018				
e Excess from 2019				

N/A

b Check box to indicate whether the foundation is a private operating foundation described in section

☐ 4942(1)(3) or ☐ 4942(1)(5)

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).)

JOHN R. ANDERSON

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

NONE

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

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

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

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

c Any submission deadlines:

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

JOHN & LINDA ANDERSON CHARITABLE

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year				
SEE STATEMENT ATTACHED	NONE	PUBLIC	SEE STATEMENT ATTACHED	464,654.
Total			3a	464,654.
b Approved for future payment				
NONE				
Total			3b	0.

Form 990-PF (2019)



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)(3) (other than section 501(c)(3) organizations) or in section 527, relating to political organizations? | | |
| a | Transfers from the reporting foundation to a noncharitable exempt organization of: | | |
| | (1) Cash | 1a(1) | X |
| | (2) Other assets | 1a(2) | X |
| b | Other transactions: | | |
| | (1) Sales of assets to a noncharitable exempt organization | 1b(1) | X |
| | (2) Purchases of assets from a noncharitable exempt organization | 1b(2) | X |
| | (3) Rental of facilities, equipment, or other assets | 1b(3) | X |
| | (4) Reimbursement arrangements | 1b(4) | X |
| | (5) Loans or loan guarantees | 1b(5) | X |
| | (6) Performance of services or membership or fundraising solicitations | 1b(6) | X |
| c | Sharing of facilities, equipment, mailing lists, other assets, or paid employees | 1c | X |
| d | If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received. | | |

[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
N/A		

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.				May the IRS discuss this return with the preparer shown below? See instr.	
	 Signature of officer or trustee		08/26/2020 Date	Vice President Title		<input checked="checked" type="checkbox"/> Yes <input type="checkbox"/> No
Paid Preparer Use Only	Print/Type preparer's name		Preparer's signature	Date	Check <input type="checkbox"/> if self-employed	PTIN
	DAVID A. EMBERSON			8/25/2020		P00109339
	Firm's name ▶ LOESCHER & ASSOCIATES, LTD.				Firm's EIN ▶ 36-4038006	
	Firm's address ▶ 6845 WEAVER ROAD, SUITE 200 ROCKFORD, IL 61114				Phone no. 815-637-9584	

Schedule B(Form 990, 990-EZ,
or 990-PF)Department of the Treasury
Internal Revenue Service**Schedule of Contributors**

- ▶ Attach to Form 990, Form 990-EZ, or Form 990-PF.
▶ Go to www.irs.gov/Form990 for the latest information.

OMB No 1545-0047

2019

Name of the organization

**JOHN & LINDA ANDERSON CHARITABLE
FOUNDATION**

Employer identification number

36-4332910

Organization type (check one)

Filers of:

Section:

Form 990 or 990-EZ

☐

501(c)() (enter number) organization

☐

4947(a)(1) nonexempt charitable trust not treated as a private foundation

☐

527 political organization

Form 990-PF

☒

501(c)(3) exempt private foundation

☐

4947(a)(1) nonexempt charitable trust treated as a private foundation

☐

501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.**Note:** Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.**General Rule**☒

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

Special Rules☐

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

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

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

Name of organization

JOHN. & LINDA ANDERSON CHARITABLE
FOUNDATION

Employer identification number

36-4332910

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

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	JOHN R. ANDERSON 4151 GULF SHORE BLVD N UNIT 404 NAPLES, FL 34103	\$ 200,045.	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II for noncash contributions)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)

Employer identification number

36-4332910

Part II

[illegible]

Name of organization

JOHN. & LINDA ANDERSON CHARITABLE
FOUNDATION

Employer identification number

36-4332910

Part III

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

Use duplicate copies of Part III if additional space is needed.

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee

FORM 990-PF

GAIN OR (LOSS) FROM SALE OF ASSETS

STATEMENT 1

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) MANNER ACQUIRED PURCHASED	(F) DATE ACQUIRED VARIOUS	DATE SOLD VARIOUS
ST ANDERSON FUND	0.	0.	0.	0.	17,386.	

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) MANNER ACQUIRED PURCHASED	(F) DATE ACQUIRED VARIOUS	DATE SOLD VARIOUS
LT ANDERSON FUND	0.	0.	0.	0.	255,575.	

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) MANNER ACQUIRED PURCHASED	(F) DATE ACQUIRED VARIOUS	DATE SOLD VARIOUS
SEC 1231	0.	0.	0.	0.	1,390.	

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) MANNER ACQUIRED PURCHASED	(F) DATE ACQUIRED 10/24/14	DATE SOLD 11/04/19
1252 SHS VANGUARD SMALL CAP STOCK	199,440.	200,045.	0.	0.	<605.>	

CAPITAL GAINS DIVIDENDS FROM PART IV

0.

TOTAL TO FORM 990-PF, PART I, LINE 6A

273,746.

FORM 990-PF INTEREST ON SAVINGS AND TEMPORARY CASH INVESTMENTS STATEMENT 2

SOURCE	(A) REVENUE PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME
WELLS FARGO ADVISORS A/C# 5173-5446	166.	166.	
TOTAL TO PART I, LINE 3	166.	166.	

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 3

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
ANDERSON FUND LLC	171,155.	0.	171,155.	171,155.	
TO PART I, LINE 4	171,155.	0.	171,155.	171,155.	

FORM 990-PF RENTAL INCOME STATEMENT 4

KIND AND LOCATION OF PROPERTY	ACTIVITY NUMBER	GROSS RENTAL INCOME
THE ANDERSON FUND LLC	1	3.
TOTAL TO FORM 990-PF, PART I, LINE 5A		3.

FORM 990-PF OTHER INCOME STATEMENT 5

DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
ROYALTY INCOME	150.	150.	
OTHER INVESTMENT INCOME	70,720.	70,720.	
TOTAL TO FORM 990-PF, PART I, LINE 11	70,870.	70,870.	

FORM 990-PF

ACCOUNTING FEES

STATEMENT 6

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
TAX PREPARATION FEES	1,575.	0.		0.
TO FORM 990-PF, PG 1, LN 16B	1,575.	0.		0.

FORM 990-PF

TAXES

STATEMENT 7

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FOREIGN TAX	497.	497.		0.
FEDERAL EXCISE TAX	19,310.	0.		0.
TO FORM 990-PF, PG 1, LN 18	19,807.	497.		0.

FORM 990-PF

OTHER EXPENSES

STATEMENT 8

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ILLINOIS ANNUAL FILING FEE	25.	0.		0.
PORTFOLIO DEDUCTIONS	80,271.	80,271.		0.
NONDEDUCTIBLE EXPENSES	191.	0.		0.
SECTION 59 (E) (2) EXPENDITURES	64.	64.		0.
OTHER EXPENSES	43.	19.		0.
TO FORM 990-PF, PG 1, LN 23	80,594.	80,354.		0.

FORM 990-PF

OTHER INVESTMENTS

STATEMENT 9

DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
ANDERSON FUND LLC	COST	7,509,746.	10,008,195.
TOTAL TO FORM 990-PF, PART II, LINE 13		7,509,746.	10,008,195.

John and Linda Anderson Charitable Foundation
Form 990PF, Part XV, Line 3 - Grants and Contributions Paid During the Year
Tax Year Ending December 31, 2019

FEIN: 36-4332910

Date	Charity	Cause	Address	City	State	Zip	Total
1/29/2019	Audience of One (Lennox Barnett Ministries)	Religion	111 Lamplighter Loop SE	Poplar Grove	IL	61065	\$1,000
2/12/2019	Warner E. Sallman Art Collection, Inc	Cultural	5911 N. Bernard	Chicago	IL	60659	\$200
2/13/2019	Salvation Army	Social Welfare	500 S. Rockford Ave	Rockford	IL	61104	\$4,453
	Judicial Watch, Inc	Philanthropy	425 Third St., SW, Suite 800	Washington	DC	20024	\$2,000
	Lakeland Community Church	Religion	N3181 Hwy 67	Lake Geneva	WI	53147	\$8,250
	University of Illinois Foundation	Education	1601 Parkview Avenue	Rockford	IL	61107	\$10,000
	Lake Geneva Youth Camp & Conference Center	Youth Services	P O Box 575	Williams Bay	WI	53191	\$8,300
2/15/2019	The Pregnancy Care Center of Rockford	Philanthropy	4108 Morsay Dr	Rockford	IL	61107	\$2,000
2/27/2019	Aurora University	Education	P O Box 210	Williams Bay	WI	53191	\$26,000
3/12/2019	Gulf Community Church	Religion	P O Box 110343	Naples	FL	34108	\$5,000
3/20/2019	First Love International Ministries	Religion	P O Box 15836	Loves Park	IL	61132	\$1,000
3/27/2019	Anderson Japanese Gardens	Cultural	318 Spring Creek Rd	Rockford	IL	61107	\$20,000
	Naples Zoo	Conservation	1590 Goodlette Road N	Naples	FL	34102	\$5,000
4/12/2019	Man in the Mirror	Religion	1375 State Road 436	Casselberry	FL	32707	\$1,200
4/16/2019	Anderson Japanese Gardens	Cultural	318 Spring Creek Rd	Rockford	IL	61107	\$25,000
4/17/2019	Artis-Naples	Cultural	5833 Pelican Bay Blvd	Naples	FL	34108	\$2,500
	Gulfshore Playhouse	Cultural	1010 5th Ave. South, Suite 208	Naples	FL	34102	\$5,000
4/22/2019	Alpha Pi Alliance for the Preservation of Historic Places	Education	308 N. Main Street	Thiensville	WI	53092	\$5,000
5/1/2019	Open Arms Free Clinic	Health Services	205 Commerce Ct	Elkhorn	WI	53121	\$1,000
	Crossworld USA	Philanthropy	10000 N. Oak Trafficway	Kansas City	MO	64155	\$400
5/2/2019	The Box Car Foundation	Education	4151 Gulf Shore Blvd N Apt 604	Naples	FL	34103	\$2,000
5/7/2019	American Bird Conservancy	Conservation	P O Box 249	The Plains	VA	20198	\$1,200
5/22/2019	Medical Ambassadors International	Philanthropy	P O Box 1302	Salida	CA	95368	\$1,000
5/24/2019	First Love International Ministries	Religion	P O Box 15836	Loves Park	IL	61132	\$5,000
5/28/2019	Arizona's Children Association	Social Welfare	3636 N. Central Avenue, Suite 201	Phoenix	AZ	85012	\$500
5/31/2019	Children's Home and Aid Society	Social Welfare	424 7th Street	Rockford	IL	61104	\$2,000
6/4/2019	Committee for the Beautification of Lake Geneva	Philanthropy	P O Box 731	Lake Geneva	WI	53147	\$500
	Salvation Army	Social Welfare	500 S. Rockford Ave	Rockford	IL	61104	\$7,045
6/10/2019	Person Fellowship Ministries	Religion	P O Box 1550	Merrifield	VA	22116	\$2,000
6/18/2019	Geneva Lake Association	Conservation	P O Box 412	Lake Geneva	WI	53147	\$100
6/19/2019	Wesley Willows	Social Welfare	4141 North Rockton Ave	Rockford	IL	61103	\$1,000
7/12/2019	Anderson Japanese Gardens	Cultural	318 Spring Creek Rd	Rockford	IL	61107	\$10,000
7/23/2019	Rockford Christian Schools	Education	1401 Bell School Rd	Rockford	IL	61107	\$5,000
7/24/2019	Anderson Japanese Gardens	Cultural	318 Spring Creek Rd	Rockford	IL	61107	\$1,200
	Enchanted Backpack	Education	155 N. Wacker Drive, Suite 1680	Chicago	IL	60606	\$1,000
7/26/2019	Habitat for Humanity	Social Welfare	119 E. University Avenue	Champaign	IL	61820	\$200
8/6/2019	Friends of Kishwaukee	Conservation	P O Box 580	Williams Bay	WI	53191	\$3,000
8/9/2019	Freedom Alliance	Veteran Affairs	22570 Markey Court, Ste 240	Dulles	VA	20166	\$3,000
8/14/2019	Anderson Japanese Gardens	Cultural	318 Spring Creek Rd	Rockford	IL	61107	\$7,200
	Salvation Army	Social Welfare	500 S. Rockford Ave	Rockford	IL	61104	\$3,509
	Covenant Harbor	Social Welfare	1724 W. Main St	Lake Geneva	WI	53147	\$1,388
8/22/2019	Northern Illinois Food Bank	Social Welfare	273 Dearborn Court	Geneva	IL	60134	\$2,000
8/23/2019	Heartland Hospice Memorial Fund	Health Services	333 N. Summit St	Toledo	OH	43604	\$500
8/26/2019	Daniel King Memorial Fund, Inc	Medical Research	P O Box 289	Fontana	WI	53125	\$500
9/3/2019	Covenant Harbor	Social Welfare	1724 W. Main St	Lake Geneva	WI	53147	\$6,000
9/6/2019	Anderson Japanese Gardens	Cultural	318 Spring Creek Rd	Rockford	IL	61107	\$360
9/9/2019	Samantan's Purse	Social Welfare	P O Box 3000	Boone	NC	28607	\$2,000
9/16/2019	National Alliance on Mental Health	Medical Research	P O Box 49104	Baltimore	MD	21297	\$500
9/25/2019	Stig P. Orum Memorial Foundation	Philanthropy	P O Box 506	St. Charles	IL	60174	\$500
9/30/2019	Stateline Youth For Christ	Religion	1288 S. Alpine Rd	Rockford	IL	61108	\$3,000
10/8/2019	Faith Christian High School	Education	P O Box 1230	Williams Bay	WI	53191	\$6,000
	World Vision	Social Welfare	6277 E. Riverside Blvd	Rockford	IL	61114	\$1,000
10/16/2019	Pilchuck Glass School	Cultural	2402 2nd Ave. S., Suite 100	Seattle	WA	98104	\$5,000
	YMCA of Rock River Valley	Philanthropy	220 E. State Street	Rockford	IL	61104	\$5,000
	Prager University Foundation	Philanthropy	15021 Ventura Blvd #552	Sherman Oaks	CA	91403	\$2,000
10/21/2019	Harry & Della Burpee Museum Assoc	Cultural	737 North Main St	Rockford	IL	61103	\$3,000
10/22/2019	Geneva Lake Museum	Cultural	255 Mill Street	Lake Geneva	WI	53147	\$100
10/23/2019	American Bird Conservancy	Conservation	P O Box 249	The Plains	VA	20198	\$1,000
	Bradley Impact Fund	Philanthropy	1249 N. Franklin Place	Milwaukee	WI	53202	\$8,000
10/30/2019	Anderson Japanese Gardens	Cultural	318 Spring Creek Rd	Rockford	IL	61107	\$26,000
	Conservancy of Southwest Florida	Conservation	1495 Smith Preserve Way	Naples	FL	34102	\$3,000
	Deerfoot Lodge	Philanthropy	P O Box 228	Speculator	NY	12164	\$5,000
	Honor Flight Inc	Veteran Affairs	Box L-4016	Columbus	OH	43260	\$500
	Salvation Army	Social Welfare	500 S. Rockford Ave	Rockford	IL	61104	\$9,500
	Boys & Girls Club of Rockford	Youth Services	P O Box 1716	Rockford	IL	61110	\$1,000
	Geneva Lake Water Safety Committee, Inc	Philanthropy	P O Box 548	Williams Bay	WI	53191	\$500

	Gulf Community Church	Religion	P O Box 110343	Naples	FL	34108	\$2,000
	Audience of One (Lennox Barnett Ministries)	Religion	111 Lamplighter Loop SE	Poplar Grove	IL	61065	\$1,000
11/8/2019	Anderson Japanese Gardens	Cultural	318 Spring Creek Rd	Rockford	IL	61107	\$12,000
11/14/2019	Lake Geneva Symphony Orchestra	Cultural	P O Box 92	Lake Geneva	WI	53147	\$2,000
	Make A Wish Foundation	Philanthropy	640 N LaSalle Dr , Suite 280	Chicago	IL	60654	\$500
	Wisconsin Historical Foundation	Conservation	P O Box 260050	Madison	WI	53726	\$250
11/20/2019	The Nature Conservancy	Conservation	8 South Michigan Ave , Suite 900	Chicago	IL	60603	\$1,000
11/25/2019	Healthnetwork Foundation	Health Services	33 River Street	Chagrin Falls	OH	44022	\$1,000
	Rockford Rescue Mission	Social Welfare	P O Box 1958	Rockford	IL	61110	\$4,000
	Rosecrance Foundation	Health Services	1021 North Mulford Road	Rockford	IL	61107	\$5,000
	Safe Families for Children Wisconsin Inc	Social Welfare	P O Box 213	Elkhorn	WI	53121	\$2,000
11/26/2019	Man in the Mirror	Religion	1375 State Road 436	Casselberry	FL	32707	\$10,000
	Dixon Center for Military & Veteran Serv, Fedcap	Veteran Affairs	633 Third Ave , 6th Floor	New York	NY	10017	\$20,000
12/4/2019	Rockford Area Crime Stoppers	Philanthropy	P O Box 4535	Rockford	IL	61110	\$1,000
12/10/2019	Northern Illinois Hospice	Health Services	4215 Newburg Rd	Rockford	IL	61108	\$1,000
12/11/2019	Anderson Japanese Gardens	Cultural	318 Spring Creek Rd	Rockford	IL	61107	\$75,000
	Geneva Lake Conservancy	Conservation	P O Box 588	Fontana	WI	53125	\$4,000
12/12/2019	Anderson Japanese Gardens	Cultural	318 Spring Creek Rd	Rockford	IL	61107	\$39,800
GRAND TOTAL							\$464,653 90