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2019

OMB No. 1545-0052

Form 990-PF Department of the Treasury

Internal Revenue Service

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

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

Open to Public

						Inspection
For	caler	ndar year 2019, or tax year beginning 01-01-20)19 , ar	nd ending 12-31	-2019	
		indation oundation INC		A Employer id	lentification numbe	r
		SCHLUGE		35-2122763		
Num	ber and	of street (or P.O. box number if mail is not delivered to street address) SINIA AVENUE	Room/suite	B Telephone nu	ımber (see instructior	ns)
2.	20 1110	NINO OVERVEE		(317) 488-600	0	
		n, state or province, country, and ZIP or foreign postal code LIS, IN 46204	•	C If exemption	application is pending	g, check here
		<u> </u>				▶ ⊔
G Cł	neck al		former public charity	_	ganizations, check he	▶ ⊔
		☐ Final return ☐ Amended return ☐ Address change ☐ Name change			rganizations meeting ck here and attach cor	
H C	aeck ty	rpe of organization: ✓ Section 501(c)(3) exempt private	foundation		undation status was t	
			e private foundation	under section	on 507(b)(1)(A), chec	k here
			☐ Cash ☑ Accru	al F If the found	ation is in a 60-month	n termination
		rom Part II, col. (c), ▶\$ 106,324,121 ☐ Other (specify) _			on 507(b)(1)(B), chec	k here 🕨 🗀
	2 20)	(Part I, column (d) must	be on cash basis.)			
Pa	rt I	Analysis of Revenue and Expenses (The total	(a) Revenue and	(h) Not investment	(a) Adjusted not	(d) Disbursements for charitable
		of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions).)	expenses per books	(b) Net investment income	(c) Adjusted net income	purposes
	1	Contributions, gifts, grants, etc., received (attach				(cash basis only)
	-	schedule)	18,345			
	2	Check ► ✓ if the foundation is not required to attach				
	3	Sch. B Interest on savings and temporary cash investments				
	4	Dividends and interest from securities	2,588,719	3,420,681	l	
	5a	Gross rents				
	ь	Net rental income or (loss)				
KIE	6a	Net gain or (loss) from sale of assets not on line 10	8,486,364			
Revenue	b	Gross sales price for all assets on line 6a 12,849,956				
Re	7	Capital gain net income (from Part IV, line 2)		9,332,495	5	
	8	Net short-term capital gain				
	9	Income modifications				
	10a	Gross sales less returns and allowances				
	b	Less: Cost of goods sold				
	11	Other income (attach schedule)	9 529,298	-14,305	5	
	12	Total. Add lines 1 through 11	11,622,726			
	13	Compensation of officers, directors, trustees, etc.	0			
	14	Other employee salaries and wages				
Sè	15	Pension plans, employee benefits				
nse	16a	Legal fees (attach schedule)				
×	b	Accounting fees (attach schedule)	9 40,000	12,100	0	27,900
e E	C	Other professional fees (attach schedule)	34,640			34,640
and Administrative Expenses	17	Interest				
Str	18	Taxes (attach schedule) (see instructions)	207,531	89,328	3	
	19	Depreciation (attach schedule) and depletion				
AG	20	Occupancy				
חַ	21	Travel, conferences, and meetings				
e 6	23	Other expenses (attach schedule)	1,341,925	373,543	3	983,221
Operating	24	Total operating and administrative expenses.			+	
pera		Add lines 13 through 23	1,624,096	474,971	o o	1,045,761
ō	25	Contributions, gifts, grants paid	6,775,778			11,816,490
	26	Total expenses and disbursements. Add lines 24 and				
	27	Subtract line 26 from line 12:	8,399,874	474,971	0	12,862,251
	a	Excess of revenue over expenses and				
		disbursements	3,222,852			
	b	Net investment income (if negative, enter -0-) Adjusted net income (if negative, enter -0-)		12,263,900)	
	С	Aujusted net income (il negative, effter -0-)				<u> </u>

Attached schedules and amounts in the description column

Beginning of year

Page 2

End of year

Form 990-PF (2019)

		Savings and temporary cash investments		304,279	7,000	7,000
	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 ▶				
S	8	Inventories for sale or use				
Assets	9	Prepaid expenses and deferred charges				
As	10a	Investments—U.S. and state government obligations (attach schedule)				
	b	Investments—corporate stock (attach schedule)				
	С	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)		100,683,921	106,151,785	106,151,785
	14	Land, buildings, and equipment: basis ▶				
		Less: accumulated depreciation (attach schedule) ▶				
	15	Other assets (describe)	% J	183,680	164,650	164,650
	16	Total assets (to be completed by all filers—see the				
		instructions. Also, see page 1, item I)		101,231,880	106,324,121	106,324,121
	17	Accounts payable and accrued expenses		153,410	125,256	
	18	Grants payable		9,978,885	4,940,601	
ies	19	Deferred revenue				
Liabilities	20	Loans from officers, directors, trustees, and other disqualified persons				
jat	21	Mortgages and other notes payable (attach schedule)				
_	22	Other liabilities (describe	% J	616,857	297,699	
	23	Total liabilities(add lines 17 through 22)		10,749,152	5,363,556	
Ş		Foundations that follow FASB ASC 958, check here ▶ ✓				
Ce		and complete lines 24, 25, 29 and 30.				
<u>la</u>	24	Net assets without donor restrictions		90,482,728	100,960,565	
d Balances	25	Net assets with donor restrictions				
핕		Foundations that do not follow FASB ASC 958, check here				
Fun		and complete lines 26 through 30.				
ŏ						
ets (26	-				
ets	26 27	Capital stock, trust principal, or current funds				
Assets	27	Capital stock, trust principal, or current funds				
Net Assets		Capital stock, trust principal, or current funds		90,482,728	100,960,565	

persons		
)	9 616,85	7 🔧 297,699
	10,749,15	2 5,363,556
✓		
	90,482,72	8 100,960,565
ere 🕨 🗌		
	d persons	d persons

101,231,880

column (a), line 29 (must agree with end-

106,324,121

90,482,728

3,222,852

7,254,985

100,960,565

100,960,565

Form **990-PF** (2019)

1

2

3

4

5

6

Total net assets or fund balances at beginning of year—Part II,

of-year figure reported on prior year's return)

Decreases not included in line 2 (itemize) ▶

Other increases not included in line 2 (itemize)

Enter amount from Part I, line 27a

Add lines 1, 2, and 3

Total liabilities and net assets/fund balances (see instructions) .

Analysis of Changes in Net Assets or Fund Balances

Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 29

30

Part III

2

3

• •	pe the kind(s) of property sold (e.g., arehouse; or common stock, 200 sh	•	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1 a MARKETABLE SECURITI	ES .				
b WESTERN TRU					
c WELLINGTON					
d WESTERN MACRO					
e HARRISON STREET					
(e) Gross sales price	(f) Depreciation allowed (or allowable)	Cost or	(g) other basis ense of sale	Gain o	h) r (loss)) minus (g)
a 12,84	19,956	ріаз схр	4,363,592	· · · · ·	8,486,36 ⁴
	59,046		.,,,,,,,,,,		69,046
	21,731				821,73
d	-1,731		54,759)	-54,759
-	10,113		31,733		10,113
	· ·	rand by the foundation	an 12/21/60		•
(i) F.M.V. as of 12/31/69	s showing gain in column (h) and ow (j) Adjusted basis as of 12/31/69	Excess	(k) s of col. (i)	Gains (Col. (col. (k), but not	l) h) gain minus less than -0-) or om col.(h))
	as 01 12/31/09	over co	l. (j), if any	203363 (11	8,486,364
a b					69,046
-					821,73
d d					-54,759
					10,113
e		If gain, also enter in F	Dank T. Lina 7		10,11.
If gain, also enter in Pa in Part I, line 8	gain or (loss) as defined in sections art I, line 8, column (c) (see instructi	ions). If (loss), enter -0	}	3	9,332,495
	Under Section 4940(e) for Re				
(For optional use by domestic	private foundations subject to the se	ction 4940(a) tax on ne	et investment incon	ne.)	
	eave this part blank. ne section 4942 tax on the distributa ot qualify under section 4940(e). Do			? \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \	es 🔽 No
	nount in each column for each year;			S.	
(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitab	ple-use assets	(d) Distribution rat (col. (b) divided by c	
2018	20,052,694		118,850,783	•	0.168722
2017	14,707,538		120,329,377		0.122227
2016	11,381,501		114,529,142		0.099376
2015	13,126,252		127,091,661		0.103282
2014	12,800,037		136,294,926		0.093914
2 Total of line 1, column (d)		2		0.587521
number of years the fou	o for the 5-year base period—divide ndation has been in existence if less oncharitable-use assets for 2019 fror	than 5 years	3		0.117504 103,449,992
		•	5		12,155,788
	ent income (1% of Part I, line 27b)		6		122,639
			7		12,278,427
	ions from Part XII, line 4 ,				12,862,251
	eater than line 7, check the box in P			ng a 1% tax rate. Se	

Page **6**

5a	During the year did the foundation p	oay o	r incur any amount to:							Yes	No
	(1) Carry on propaganda, or otherw	vise a	ttempt to influence legisl	ation (section 4945(e))?		☐ Yes	✓	Nο			
	(2) Influence the outcome of any sp		•								
	on, directly or indirectly, any vo		-			Yes	✓	No			
	(3) Provide a grant to an individual		, ,,			☐ Yes	✓	No			
	(4) Provide a grant to an organizati						_				
	in section 4945(d)(4)(A)? See in					☐ Yes	✓	No			
	(5) Provide for any purpose other the		- ·	* **			_				
h	educational purposes, or for the If any answer is "Yes" to $5a(1)-(5)$,	•	•		· · centions des	Yes	✓	No			
b	Regulations section 53.4945 or in a		•	· ·		cribed iii			5b		
	Organizations relying on a current n								36		
С	If the answer is "Yes" to question 5a										
_	tax because it maintained expenditu					П.,					
	If "Yes," attach the statement requir					☐ Yes	Ш	No			
6a	Did the foundation, during the year,		-		ıms on						
	a personal benefit contract?					п.,	. 🗷				
b	Did the foundation, during the year,					Yes	. Y	No	6b		No
	If "Yes" to 6b, file Form 8870.		,	,,							
7a	At any time during the tax year, was	s the	foundation a party to a p	orohibited tax shelter tran	saction?	☐ Yes		N.			
b	If "Yes", did the foundation receive a	any p	roceeds or have any net	income attributable to th	e transaction	1?		NO	7b		
8	Is the foundation subject to the sect	tion 4	960 tax on payment(s) o	of more than \$1,000,000	in remunerat	tion or					
	excess parachute payment during th	ne ye	ar?			☐ Yes	✓	No			
	Information About C	Offic	ers, Directors, Trust	tees, Foundation Ma	nagers, H				yees,		
Pal	and Contractors			•				-	•		
1	List all officers, directors, trustee	es, fo	undation managers ar	nd their compensation.	See instru	tions					
		(b) Title, and average	(c) Compensation (If		tributions t		(e)	Expen	se acc	ount
	(a) Name and address		hours per week devoted to position	not paid, enter -0-)	employee be	enefit plans compensati				lowand	
See	Additional Data Table		devoted to position	-0-7	deletted	.ompensac	1011	1			
,	tuditional Bata Table	1									
		1									
		1									
		1									
2	Compensation of five highest-pai	id en	ployees (other than t	hose included on line 1	.—see instri	ıctions). I	[f no	ne, e	nter "	NONE.	"
			(b) Title, and average		(d) Con	tributions t	:0				
(a)	Name and address of each employee	paid	hours per week	(c) Compensation		ee benefit				se acco	
	more than \$50,000		devoted to position			nd deferred sensation	1	ot	ner all	owance	25
					'						
Tota	I number of other employees paid over	er \$5	0,000	.		. ▶					
								For	m 99 0	D-PF (2019)

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

Form 990-PF (2019)		Page 7
Part VIII Information About Officers, Directors, Trus and Contractors (continued)	stees, Foundation Managers, Highly Paid E	Employees,
3 Five highest-paid independent contractors for professiona	l services (see instructions). If none, enter "NO	NE".
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
SUNSHINE AVENUE	CONSULTING	74,665
PO BOX 1539 SANTA ROSA BEACH, FL 32459		
ANTHEM INC	MANAGEMENT SERVICES	950,400
220 VIRGINIA AVENUE INDIANAPOLIS, IN 46204		
WELLINGTON TRUST COMPANY NA	INVESTMENT MANAGER	120,615
280 CONGRESS STREET BOSTON, MA 02210		
WESTERN ASSET MANAGEMENT COMPANY LLC	INVESTMENT MANAGER	62,634
385 EAST COLORADO BLVD PASADENA, CA 91101		
ARROWSTREET CAPITAL	INVESTMENT MANAGER	84,432
200 CLARENDON STREET 30TH FLOOR BOSTON, MA 02116		
Total number of others receiving over \$50,000 for professional service	es	
2 Part IX-B Summary of Program-Related Investments		Expenses
Describe the two largest program-related investments made by the foundation		Amount
2		
All other program-related investments. See instructions. 3		
Total. Add lines 1 through 3	<u> </u>	<u> </u>
		Form 990-PF (2019)

Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1. . .

Expenses, contributions, gifts, etc.—total from Part I, column (d), line 26.

Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4

income. Enter 1% of Part I, line 27b. See instructions.

Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for

Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:

Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc.,

Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment

Qualifying Distributions (see instructions)

Amounts set aside for specific charitable projects that satisfy the:

the section 4940(e) reduction of tax in those years.

5,049,861

5.049.861

5.049.861

12,862,251

12,862,251

12,739,612

Form 990-PF (2019)

122,639

4

5

6

7

1a

1b

2

За 3h

4

5

3

4 5

6

1

2

3

4

5

Part XII

5,049,861

Form **990-PF** (2019)

Page 9

t XIII	

Par

Form	990-PF	(20	019))
Da	-L VIII		- 11	-

a From 2014.

b From 2015. c From 2016. . . .

d From 2017.

e From 2018.

indicated below:

f Total of lines 3a through e.

4 Qualifying distributions for 2019 from Part XII, line 4: ► \$ 12,862,251 a Applied to 2018, 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).

(If an amount appears in column (d), the

a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5

applied on line 5 or line 7 (see instructions) . . .

Subtract lines 7 and 8 from line 6a

9 Excess distributions carryover to 2020.

10 Analysis of line 9:

a Excess from 2015. . .

c Excess from 2017. . . .

d Excess from 2018. . .

e Excess from 2019. . .

b Excess from 2016. .

b Prior years' undistributed income. Subtract 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 2018. Subtract line 4a from line 2a. Taxable amount—see instructions f Undistributed income for 2019. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2020 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 2014 not

same amount must be shown in column (a).)

- Undistributed Income (see instructions) 1 Distributable amount for 2019 from Part XI, line 7 2 Undistributed income, if any, as of the end of 2019:
- a Enter amount for 2018 only.
- **b** Total for prior years: 2017, 2016, 2015

5.887.739

8.908.475 14,258,444

6.862.957 5,887,739

8.908.475

14,258,444

7.812.390

- 3 Excess distributions carryover, if any, to 2019: 6.191.415
- 6,862,957

(a)

Corpus

42,109,030

7,812,390

49,921,420

6.191.415

43,730,005

(b)

Years prior to 2018

(c)

2018

d Applied to 2019 distributable amount. e Remaining amount distributed out of corpus **5** Excess distributions carryover applied to 2019. 6 Enter the net total of each column as

For	m 990-PF (2019)					Page 10
	Part XIV Private Operating Fou	ndations (see instru	uctions and Part \	VII-A, question 9)		
1a	If the foundation has received a ruling or foundation, and the ruling is effective for			erating •		
b	Check box to indicate whether the organiz	zation is a private opera	ating foundation de	scribed in section] 4942(j)(3) or □] 4942(j)(5)
2a	Enter the lesser of the adjusted net	Tax year		Prior 3 years		(e) Total
	income from Part I or the minimum investment return from Part X for each year listed	(a) 2019	(b) 2018	(c) 2017	(d) 2016	(e) local
b	85% of line 2a	1				
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					
е	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:					
а	"Assets" alternative test—enter:					
	(1) Value of all assets(2) Value of assets qualifying					
b	under section 4942(j)(3)(B)(i) "Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed					
c						
	(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					
Da	Supplementary Information			foundation had	\$5,000 or more	in
1	assets at any time during Information Regarding Foundation M		ructions.)			
_	List any managers of the foundation who lefore the close of any tax year (but only	nave contributed more				n
b	List any managers of the foundation who	own 10% or more of th	e stock of a corpora	ation (or an equally l		
2	ownership of a partnership or other entity Information Regarding Contribution,					
_			• • • • •	_		
	Check here ► ☐ if the foundation only munsolicited requests for funds. If the four other conditions, complete items 2a, b, c	dation makes gifts, gra	ants, etc. to individu			
а	The name, address, and telephone number	er or e-mail address of	the person to whon	n applications should	be addressed:	
	GRANT PROGRAM 220 VIRGINIA AVENUE INDIANAPOLIS, IN 46204 WWW.ANTHEMCORPORATERESPONSIBIL	ITY.COM				
b	The form in which applications should be			they should include:		
_	ONLY ONLINE APPLICATIONS WILL BE AC	CEPTED FOR GRANT C	ONSIDERATION.			
_	Any submission deadlines: NONE					
d	Any restrictions or limitations on awards, factors: NONE	such as by geographica	al areas, charitable	fields, kinds of instit	utions, or other	
	HOME					000 PE (2010)

FOLLOWING SEE ATTACHED Inidianapolis, IN 46204

Supplementary informe	ation (continued)							
3 Grants and Contributions Paid During the Year or Approved for Future Payment								
Recipient	If recipient is an individual, show any relationship to	Foundation status of	Purpose of grant or					
Name and address (home or business)	any foundation manager or substantial contributor	recipient	contribution					
a Paid during the year SEE STATEMENT ATTACHED IMMEDIATELY	NONE	PC	SEE ATTACHED					

SEE ATTACHED

ıtion 11,816,490

▶ 3a

11,816,490 4,940,601

Page **11**

Amount

nter gross	amounts unless otherwise indicated.	Unrelated bu	usiness income	Excluded by section	512, 513, or 514	(e) Related or exempt
L Program	service revenue:	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	function income (See instructions.)
-						
Membe	and contracts from government agencies rship dues and assessments.					
investm						
	ds and interest from securities			14	2,588,719	
Net ren	tal income or (loss) from real estate:					
	financed property					
	ebt-financed property					
	tal income or (loss) from personal property					
	nvestment income.					
	(loss) from sales of assets other than					
	•			18	8,486,364	
	ome or (loss) from special events:					
	profit or (loss) from sales of inventory					
	evenue: ERSHIP DISTRIBUTIONS				F20, 200	
	EKSHIP DISTRIBUTIONS				529,298	
	al. Add columns (b), (d), and (e).			 	11 604 301	
	Add line 12, columns (b), (d), and (e).			1 1 2	11,604,381	l 11,604,381
	orksheet in line 13 instructions to verify calcu				l	11,004,301
art XVI			ment of Exem	pt Purposes		
ne No. ▼	Explain below how each activity for which the accomplishment of the foundation's expression instructions.)					
	instructions.)					
	1					

Form 9	90-PF (20)19)			Pa	ge 13
Part	: XVII	Information Re Exempt Organi	garding Transfers To and Transactions and Relationships With Noncharit zations	able		
			directly engage in any of the following with any other organization described in section 501 organizations) or in section 527, relating to political organizations?		Yes	No
a Tra	ansfers fro	m the reporting foun	dation to a noncharitable exempt organization of:			
(1)) Cash.			1a(1)		No
(2)) Other a	ssets		1a(2)		No
b Oth	her transa	ctions:				
(1)) Sales o	f assets to a nonchar	itable exempt organization	1b(1)		No
	-		noncharitable exempt organization	1b(2)		No
(3)) Rental	of facilities, equipme	nt, or other assets	1b(3)		No
(4)) Reimbu	rsement arrangemer	ts	1b(4)		No
		-		1b(5)		No
			embership or fundraising solicitations	1b(6)		No
	_		nailing lists, other assets, or paid employees	1c		No
	any transa		vices given by the reporting foundation. If the foundation received less than fair market valu ngement, show in column (d) the value of the goods, other assets, or services received. (c) Name of noncharitable exempt organization (d) Description of transfers, transactions, and sha		ngemen	ts
	-					

2a Is the fo	oundation directly or indire	ectly affiliated with	, or related to, one or moi	e tax-exem	pt organizations
describe	ed in section 501(c) (other	r than section 501(c)(3)) or in section 527?		□ Yes ☑ No
	" complete the following s		,,,,		
					(a) December of veletionship
	(a) Name of organization	חכ	(b) Type of organiza	ition	(c) Description of relationship
	·				

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best

of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of

which preparer has any knowledge. May the IRS discuss this 2020-11-15 return with the preparer shown Signature of officer or trustee Title Date (see instr.) 🗹 Yes 🗆 No

Sign Here PTIN Print/Type preparer's name Preparer's Signature Date Check if selfemployed ▶ 🔲 NICOLE B FISHBACK 2020-11-15 Paid **Preparer** Firm's name ▶ BKD LLP Firm's EIN ▶ **Use Only** Firm's address ▶ 201 N Illinois Street

Indianapolis, IN 46204

P01279475

Phone no. (317) 383-4000

Form 990PF Part VIII Line 1 - List all officers, directors, trustees, foundation managers and their compensation (a) Name and address Title, and average (c) Compensation (If (d) Expense account, hours per week not paid, enter Contributions to (e) other allowances -0-) (b) devoted to position employee benefit plans and deferred compensation LANCE CHRISMAN EXECUTIVE DIRECTOR O 36.0 220 VIRGINIA AVENUE INDIANAPOLIS, IN 46204 KATHLEEN KIEFER SECRETARY n 0.05 220 VIRGINIA AVENUE INDIANAPOLIS.IN 46204 GAIL BOUDREAUX CHAIRPERSON 0.2 220 VIRGINIA AVENUE INDIANAPOLIS, IN 46204 CATHY KELAGHAN END 53119 FORMER DIRECTOR 0 0.08 220 VIRGINIA AVENUE INDIANAPOLIS, IN 46204 RICK NOBLE ASSISTANT **TREASURER** 220 VIRGINIA AVENUE 0.05 INDIANAPOLIS, IN 46204 PRAKASH PATEL DIRECTOR n 0.05

0

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1				i
JOHN GALLINA	CFO & DIRECTOR	0	0	0
220 VIRGINIA AVENUE INDIANAPOLIS, IN 46204	0.25			
VINCE SCHER	TREASURER	0	0	0
220 VIRGINIA AVENUE INDIANAPOLIS, IN 46204	0.25			
CATL BOUDBEAUV	CHAIRREDCON			

DIRECTOR

0.05

220 VIRGINIA AVENUE INDIANAPOLIS, IN 46204 LEAH STARK BEG 53119

220 VIRGINIA AVENUE INDIANAPOLIS, IN 46204

efile GRAPHIC print - DO NOT PR	OCESS As Filed D	ata -		LN: 93491310000090					
TY 2019 Accounting Fees Schedule									
Name: Anthem Foundation INC									
	EIN: 35-2122763								
1		<u> </u>		1					
Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes					
ACCOUNTING FEES	40,000	12,100		27,900					

efile GRAPHIC print - DO NOT PROCESS | As Filed Data -DLN: 93491310000090 Note: To capture the full content of this document, please select landscape mode (11" x 8.5") when printing. TY 2019 Depreciation Schedule Name: Anthem Foundation INC

EIN: 35-2122763

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Name: Anthem Foundation INC

EIN: 35-2122763								
Investments Other Schedule 2								
Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value					
VANGUARD	FMV	26,239,252	26,239,252					
WESTERN ASSET	FMV	8,436,646	8,436,646					
HARRISON STREET	FMV	11,416,759	11,416,759					
WELLINGTON	FMV	15,231,702	15,231,702					
ARROWSTREET	FMV	14,387,508	14,387,508					
DFA US LARGE CAP VALUE	FMV	16,518,653	16,518,653					
BAIRD	FMV	13,921,265	13,921,265					

TY	2019	Other	Assets	Schedule

efile GRAPHIC print - DO NOT PROCESS | As Filed Data -

Name: Anthem Foundation INC **EIN:** 35-2122763

Other Assets Schedule						
Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value			
DIST RECEIVABLE-PARTNERSHIPS	144,700	144,023	144,023			
BROKER RECEIVABLE	38,980	0	0			
RECEIVABLE FROM PARTNERSHIP	0	20,627	20,627			

DLN: 93491310000090

As Filed Data -		DLN	: 93491310000090					
TY 2019 Other Expenses Schedule								
: Anthem Founda	ation INC							
EIN: 35-2122763								
			,					
Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes					
	edule : Anthem Founda : 35-2122763 Revenue and Expenses per	edule : Anthem Foundation INC : 35-2122763 Revenue and Expenses per Net Investment Income	edule : Anthem Foundation INC : 35-2122763 Revenue and Expenses per Net Income Adjusted Net Income					

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Charitable Purposes
OTHER ADMINISTRATIVE EXPENSES	979,225			979,225
BANK/INVESTMENT CHARGES	358,704	358,704		
PARTNERSHIP EXPENSES		14,839		

3,996

3,996

INSURANCE EXPENSE

Description

efile GRAPHIC print - DO NOT PROCESS

As Filed Data -

Name: Anthem Foundation INC.

Other Income Schedule

Partnership Distributions

EIN: 35-2122763

529,298

Revenue And

Expenses Per Books

Net Investment

-14,305

Income

DLN: 93491310000090

Adjusted Net Income

efile GRAPHIC print - DO NOT PROCESS	As Filed Data -		DLN: 93491310000090				
TY 2019 Other Increases Schedule							
Name:	Anthem Found	dation INC					
EIN:	35-2122763						
De	escription		Amount				
UNREALIZED GAIN FROM INVESTMENTS			7,254,985				

efile GRAPHIC print - DO NOT PROCESS As Filed Data - DLN: 9349131000009								
TY 2019 Other Liabilities Schedule								
Name:	Anthem Found	dation INC						
EIN:	35-2122763							
Description	n		Beginning of Year - Book Value	End of Year - Book Value				
DEFERRED FEDERAL EXCISE TAXES		·	206,077	278,627				
ASSOC GIVING CAMPAIGN PLEDGES			278,345	0				
FEDERAL EXCISE TAX PAYABLE			93,935	-20,868				
ACCRUED PROFESSIONAL SERVICE			38,500	39,940				

efile GRAPHIC print - DO NOT PROCESS	S As Filed Data	<u>-T</u>	DLI	N: 93491310000090			
TY 2019 Other Professional Fees Schedule							
Name	Name: Anthem Foundation INC						
	N: 35-2122763			l			
				 			
Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes			
BCBS LICENSE FEE	1,500		· · · · · · · · · · · · · · · · · · ·	1,500			

33,140

33,140

CONSULTING FEE

efile GRAPHIC print - DO NOT PROCESS	As Filed Data	=	DL	N: 93491310000090						
TY 2019 Taxes Schedule				· · · · · · · · · · · · · · · · · · ·						
Name:	Income Income for Charitable									
FTN:	35-2122763	\								
Category	7 1 1 1 1 1 1 1 1 1 1 1 1 1									
		111001110	1	Purposes						
CURR AND DEFERRED TAX(BENEFIT)	207,531									
FOREIGN TAXES PAID		89,328								

Anthem Foundation, Inc. EIN 35-2122763 Form 990-PF 12/31/2019

Part VII-A – Statements Regarding Activities

Line 11 The following disregarded entities information are included in and made part of this tax Form 990PF:

Name Name	EIN
Anthem Blue Cross Foundation, LLC	20-0348642
Anthem Blue Cross and Blue Shield Foundation, LLC	35-2122763
Amerigroup Charitable Foundation LLC	N/A
CareMore Foundation, LLC	N/A
WellPoint Military Care Foundation, LLC	N/A
UniCare Foundation, LLC	N/A
National Government Services Foundation, LLC	N/A
Simply Healthcare Foundation, LLC	N/A

Anthem Foundation, Inc. EIN 35-2122763 Form 990-PF 12/31/2019

Part XV - Supplementary Information Line 3b - Grants and contributions approved for future payment

					Recipient an	Fdn	Purpose of grant or	
Recipient	Address	City	State	Zip	Individual?	Status	Contribution	Amount
National Council on Aging	1225 19th Street, NW Suite 710	Washington	20	20036	No	PC	Rare Diseases Database Expansion	1,779,212.00
Don't Quit! Foundation d/b/a National Foundation for								
Governors' Fitness Councils	11611 San Vicente Blvd. Suite 515	Beverly Hills	CA	90210	No	PC	The National Champion School Campaign	262,500.00
American Heart Association	2300 Centrepark West Drive	West Palm Beach	님	33409	No	PC	Hands-OnlyTM CPR	61,498.64
Trustees of Dartmouth College	11 Rope Ferry Road #6210	Hanover	¥	03755	No	PC	Improving Value in Neonatal care	196,138.50
CANCER SUPPORT COMMUNITY CENTRAL OHIO	1200 Old Henderson	Columbus	ᆼ	43220	No	PC	Distress Screening and Referral for Cancer Survivors and Caregivers program	50,000.00
Centering Healthcare Institute	89 SOUTH ST STE 404	Boston	MA	02111	No	PC	Increasing Access to CenteringPregnancy in St. Louis, MO	27,750.00
Community Health Charities of America	1199 North Fairfax Road	Alexandria	۸A	22314	No	PC	Anthem Social Determinants of Health Action Framework program	181,125.00
Corporation for Supportive Housing	61 Broadway 23rd Floor	New York	λ	10006	No	PC	Expanding Access to Housing	117,110.00
Direct Relief	27 S La Patera Lane	Santa Barbara	CA	93117	No	PC	US Emergency Preparedness and Response program	37,500.00
Dunk Cancer	240 Grand Central Parkway, Suite 12 Orlando	12 Orlando	님	32839	No	PC	IM program	50,000.00
GREATER RICHMOND FIT4KIDS	PO Box 1092	Richmond	٧A	23218	No	PC	Fit4Kids Learning Gardens and Fruti and Veggie Week program	45,000.00
Kentucky Hospital Research and Education Foundation	2501 Nelson Miller Parkway	Louisville	₹	40253	No	PC	Improve management of complex patients that present to an emergency departmen	62,500.00
March of Dimes	1550 Crystal Drive; Suite 1300	Arlington	۸A	22202	No	PC	Healthy Moms, Strong Babies	825,000.00
Michael Phelps Foundation	7 Ocean Street	South Portland	ME	04106	No	PC	IM program funding	35,500.00
NY Dept of Parks and Rec	1234 Fifth Avenue, Room 310	New York	Ž	10029	No	PC	Shape Up NYC	50,000.00
United Negro College Fund	1805 7th Street NW	Washington	20	20001	No	PC	UNCF/Anthem Corporate Scholars Program - Gap Funding	229,938.00
United States Association for Blind Athletes	1 Olympic Plaza	Colorado Springs	8	60608	No	PC	National Fitness Challenge program	82,500.00
URBAN LEAGUE OF METROPOLITAN ST LOUIS	3701 Grandal Square	St. Louis	МО	63108	No	PC	Coping with Health Wellness & Mental Challenges program	50,000.00
American Online Giving Foundation	PO Box 1010	Safety Harbor	냄	34695	No	PC	Various program grants	718,938.80
Boys & Girls Club of Monmouth County Net Present Value Adjustment	1201 Monroe Ave	Asbury Park	2	07712	No	PC	Mindfulness and Social-Emotional Learning Integration program	20,000.00
וארנו ובסרוונ אמומר שמלמסנווורוונ								00.000,00

4,940,601.33

Anthem Foundation, Inc. EIN 35-2122763 Form 990-PF 12/31/2019

Part XV - Supplementary Information Line 3a - Grants and contributions paid during the year 2019

Recipient	Address	City	State	diZ	Recipient an Individual?	Fdn Status	Purpose of grant or Contribution	Amount
500 Festival Foundation	21 Virginia Ave Ste 500	Indianapolis	z	46204	N _o	SOI	500 Festival Cornerstone Partnership	40.000.00
After-School All-Stars	5670 Wilshire Blvd	Los Angeles	ð	90036	No	PC	Triple Plav	86,660.00
Alameda Point Collaborative	677 W Ranger Road	Alameda	ర	94501	No	PC	Senior Housing & Medical Respite Center	125,000.00
American Heart Association	2300 Centrepark West Drive	West Palm Beach	7	33409	No	PC	Hands-OnlyTM CPR	202,487.11
American Heart Association	2300 Centrepark West Drive	West Palm Beach	FL	33409	No	PC	Hands-OnlyTM CPR	202,487.11
American Heart Association	2300 Centrepark West Drive	West Palm Beach	교	33409		PC	Hands-OnlyTM CPR	166,115.36
American Heart Association	2300 Centrepark West Drive	West Palm Beach	긤	33409		PC	Hands-OnlyTM CPR	112,045.00
American Heart Association	2300 Centrepark West Drive	West Palm Beach	卍	33409		PC	Hands-OnlyTM CPR	325,230.41
American Heart Association	2300 Centrepark West Drive	West Palm Beach	교	33409		PC	Hands-OnlyTM CPR	325,230.41
American Heart Association	2300 Centrepark West Drive	West Palm Beach	귙	33409		PC	Hands-OnlyTM CPR	325,230.41
American Heart Association	2300 Centrepark West Drive	West Palm Beach	교	33409		PC	Hands-OnlyTM CPR	354,495.81
American National Red Cross	17th Street	Washington	DC	20006		PC	Annual Disaster Relief Program	160,000.00
American Online Giving Foundation	PO Box 1010	Safety Harbor	교	34695		S.	Various program grants	438,875.00
American Online Giving Foundation	PO Box 1010	Safety Harbor	교	34695	No	PC C	Associate Engagement Program grants	2,770,539.25
Americares	88 Hamilton Drive	Stamford	t	06902		S.	Americares Emergency Response Program	50,000.00
Bay Area Community Services	390 49th St.	Oakland	5	94609		2	Housing Fast Support Network	66,304.25
Bay Area Community Services	390 49th St.	Oakland	5	94609		2	Housing Fast Support Network	66,304.25
Boys and Girls Club of America	1275 Peachtree St NE	Atlanta	ВA	30309		PC	Triple Play	200,000.00
Boys and Girls Club of America	1275 Peachtree St NE	Atlanta	ВA	30309		2	Triple Play	100,000.00
Boys and Girls Club of America	1275 Peachtree St NE	Atlanta	ВA	30309		PC	Triple Play	100,000.00
BUILDING BRIDGES ACROSS THE RIVER	1901 MISSISSIPPI AVENUE SE	Washington	DC	20020		PC	C.R.I.S.P. Community Supported Agriculture Program	25,000.00
Camillus House, Inc.	1603 NW 7th Avenue	Miami	교	33136		PC	Institute of Success and Personal Achievement (ISPA) Program	50,000.00
Camp Kudzu, Inc.	5885 Glenridge Dr., Suite 160	Atlanta	GA	30328		PC	Educating youth to safely deliver insulin	32,500.00
Children's Bureau, Inc.	1575 Dr. Martin Luther King Jr	Indianapolis	Z	46202	No	S	Trauma-Informed trainings Partnership program	39,600.00
							Telehealth Behavioral Health Services through Social Media	
Children's Home Society of Florida	482 South Keller Rd	Orlando	교	32810	No	2	Campaign	50,000.00
			į			;	Support for homelessness prevention for at-risk expectant mothers	;
Community Shelter Board	11 Liberty Street, Suite 150	Columbus	НО	43235		S :	and rapid re-housing services	50,000.00
Corporation for Supportive Housing	61 Broadway 23rd Floor	New York	Ż	10006	No	O O	Expanding Access to Housing	117,110.00
		-	-	1000			ZUID DOUGA NALIONAL AGAPTIVE SPORTS PARTNETSNIP SPORSOFED BY	6
Disabled Sports USA	451 HUNGERFORD DR STE 608	Kockville	MD	70820	o N	ž	Anthem Foundation	206,250.00
621 - 44000 policies 20	AE1 UNINGERED DO TE GOO	Dockello	2	01000		2	ZOLO DOGOS NACIONAL ANAPLINE SPOLES PALCINEISIND SPONSOLEU DY	00 010 300
Ped short a policy of the	44044 CIT SELECTED ON SIE 600	NOCANIIIE	€ (20030	0 I	2 8		200,230.00
Don't Quit! Foundation	11611 Can Moonto Blvd. Suite 515	Beverly HIIIS	5 5	90210		7 8	The National Champion School Campaign	262,500.00
Don't Quit! Foundation	240 Canad Cantal Parliment State 12	Deverly mills	5 :	שובטני		2 2	The National Champion School Campaign	262,500.00
Dunk Cancer	25 Each Woolean Drive	Chiorgo	£ =	52659		5 8	IIVI programs	20,000.00
Feeding America	35 East Wacker Drive	cnicago	=	nana		۲	Food is Medicine Health Care Partnerships initiative	200,000,000
Feeding America	35 East Wacker Drive	Chicago	=	60601		PC	Donated gift cards for food bank/s disaster or emergency response	18.345.00
Fight for Life Foundation	1427 West 86th Street	Indianapolis	. ≥	46260	No	. D	Building Dreams Program grant	30.000.00
Georgia State University Foundation	PO Box 3984	Atlanta	GA	30302		PC	Project Healthy Grand Parents	35,000,00
Indiana Sports Corporation	201 S. Capitol Ave Suite 1200	Indianapolis	Z	46225		PC	Indiana Sports corp Corporate Challenge	50,000.00
Indianapolis Cultural Trail	132 W WALNUT ST	Indianapolis	Z	46204		PC	Indianapolis Cultural Trail and Pacers Bikeshare	500,000.00
INDIANAPOLIS DOWNTOWN INC	111 Monument Circle Ste 1900	Indianapolis	Z	46204		PC C	Downtown Indy, Inc.'s Healthy Happenings	40,000.00
International Association of Lions Clubs	300 W. 22nd Street	Oak Brook	=	60523	No	PC	Associate Volunteer Days	137,000.00
		:					Improve management of complex patients that present to an	
Kentucky Hospital Research and Education	2501 Nelson Miller Parkway	Louisville	∑	40253	No	D.	emergency department	62,500.00
						;	Improve management of complex patients that present to an	;
Kentucky Hospital Research and Education	2501 Nelson Miller Parkway	Louisville	≿	40253	No	D.	emergency department	62,500.00
						;	Improve management of complex patients that present to an	;
Kentucky Hospital Research and Education	2501 Nelson Miller Parkway	Louisville	≿ :	40253	o I	ž (emergency department	62,500.00
Manch of Dimon	JEEO Coutal Debug Cuito 1200	Odk Brook	,,,	בסכטס		5 8	Associate Volunteel Days	87,814.00
March of Dimes	2 October 1200	Arington Carab Baseland	K - 1	22202	0 I	2 2	Healthy Moms, Strong Bables	275,000.00
Michael Pheips Foundation	/ Ocean Street	South Portland	⊒ : :	04106		ς :	IM program tunding	35,500.00
NAMI Chio	1225 Dublin Rd	Columbus	5 5	43215		Z :	Miami Diabetes Initiative	50,000.00
National Council on Aging	251 18th Street South	Arlington	A Y	20222	o I	ž 1	Aging Mastery Program	344,693.00
National Institute of Health Care Memt	1225 19th Street South	Washington	X C	20222		2 2	Rare Diseases Database Expansion	128 500 00
National Organization of Rare Disorders	55 Kenosia Avenue	Danhury	d t	06810		2 6	Rare Diseases Database Expansion	73 000 00
National Organization of have produced	1324 Eith Avenue Boom 210	Now York	5 2	10020		2 6	Change Line NVC	23,000.00
New York Separations of Fairs and Inc.	14.04 Interpretation (10.00)			1		2	יייי עס הקפוני	00:000:00

40,000.00	12,500.00	25,000.00		110,000.00		75,000.00	20,000.00	26,000.00		75,000.00	31,150.00	32,050.00	-	87,500.00	-	87,500.00	25,000.00		102,500.00	65,379.50	28,918.24	71,000.00		30,503.00	82,500.00	100,000.00	the	62,500.00	25,000.00	25,000.00	25,000.00	12.250.00
California Circle of Promise	Diabetes Seif Management Program	Healthy Families	educating primary care providers {PCP} with actionable steps to	prevent suicide	educating primary care providers {PCP} with actionable steps to	prevent suicide	Early Detection: Prevention Cancer Educational Program	Share Our Meals Program	Improving Health Among People with Intellectual Disabilities	Partnership program grant	Health & Fitness for All	Health & Fitness for All	Community Based Program to Improve Healthy Food Access and	Decrease Cardio Disease Risk Factors	Community Based Program to Improve Healthy Food Access and	Decrease Cardio Disease Risk Factors	Thoughts to Action: Behavioral Alternatives Solutions Program		2020 National Joy Tour program	Improving Value in Neonatal care	Associate Engagement Program grants	UNCF/Anthem Corporate Scholars Program - Gap Funding	IDEA Exchange Community Engagement Team: Readying HIV-	Positive Individuals for Treatment	National Fitness Challenge program	Emergency Food Pantry Grant	Indiana Workforce Recovery: Ending Substance Use Disorder in the	Workplace	Rural Elder Awareness of Medication Safety	Rural Elder Awareness of Medication Safety	Diabetes Awareness program	Vouth in Motion
PC	PC	2		<u>P</u> C		PC	5	PC		PC	2	PC		PC		PC	PC		PC	PC	PC - See Footnote	2		2	PC C	5		<u>R</u>	PC	PC	PC	Öd
92614 No	23606 No	20774 No		10036 No		10036 No	89101 No	20005 No		46278 No	30324 No	30324 No		19103 No		19103 No	33145 No		92688 No	03755 No	GL 7 6JJ No	20001 No		33136 No	oN 60608	23236 No		46204 No	42101 No	42101 No	44115 No	04 101 No
CA	۸۸	MD		Ν		Ŋ	Š	DC		Z	GA	GA		PA		PA	냄		5	H	Gloucestershire	20		급	8	٧A		Z	Σ	Κ	НО	ME
Irvine	Newport News	Largo		New York		New York	Las Vegas	Washington		Indianapolis	Atlanta	Atlanta		Philadelphia		Philadelphia	Miami	Ranco Santa	Margarita	Hanover	Cirencester	Washington		Miami	Colorado Springs	Richmond		Indianapolis	Bowling Green	Bowling Green	Cleveland	Portland
2817 McGaw Avenue	739 Thimble Shoals Blvd	9475 Lottsford Road Ste 202		230 West 41st St		230 West 41st St	823 South 6th St	1030 15th Street NW, Suite 1100W		6200 Technology Center Drive; Suite 105	176 Ottley Drive, N.E.	176 Ottley Drive, N.E.		1617 JFK Blvd		1617 JFK Blvd	2103 Coral Way 2nd Floor		PO Box 80667	11 Rope Ferry Road #6210	Benevity UK, Unit 9 Cirencester Office Park	1805 7th Street NW		Medical Development	1 Olympic Plaza	300 Arboretum Place, Suite 200		115 W Washington St	292 Alumni Ave	292 Alumni Ave	925 Euclid Ave	70 Forest Ave
Orange County Affiliate of Susan G. Komen	Peninsula Agency on Aging, Inc.	Prince George's Child Resource Center		Research Foundation of CUNY		Research Foundation of CUNY	Research, Education, and Access to Commun	Share our Strength		Special Olympics Indiana	The ARC of the United States	The ARC of the United States		The Food Trust		The Food Trust	The Motivational Edge		The NEGU Foundation	Trustees of Dartmouth College	United Kingdom Online Giving Foundation	United Negro College Fund		University of Miami	US Association for Blind Athletes	Virginia Foundation for Community College		Wellness Council of Indiana	Western Kentucky University	Western Kentucky University	Western Reserve Area Agency On Aging	VMCA of Southern Maine

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