

For calendar year 2024, or tax year beginning 01-01-2024 , and ending 12-31-2024

Name of foundation OneAmerica Foundation Inc		A Employer identification number 31-1146437
Number and street (or P.O. box number if mail is not delivered to street address) ONE AMERICA SQ PO BOX 368	Room/suite	B Telephone number (see instructions) (317) 285-1059
City or town, state or province, country, and ZIP or foreign postal code INDIANAPOLIS, IN 462060368		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		E If private foundation status was terminated under section 507(b)(1)(A), check here ☐
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ▶\$ 14,078,357	J Accounting method: ☐ Cash ☒ Accrual ☐ Other (specify) _____ (Part I, column (d) must be on cash basis.)	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions).)		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received (attach schedule)				
	2 Check ☒ if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities . . .	615,645	615,645		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	214,546			
	b Gross sales price for all assets on line 6a _____	609,495			
	7 Capital gain net income (from Part IV, line 2) . . .		214,546		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances _____	0			
Operating and Administrative Expenses	b Less: Cost of goods sold	0			
	c Gross profit or (loss) (attach schedule)	0			
	11 Other income (attach schedule)	2,111	2,111	0	
	12 Total. Add lines 1 through 11	832,302	832,302	0	
	13 Compensation of officers, directors, trustees, etc.				
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)	0	0	0	0
	b Accounting fees (attach schedule)	0	0	0	0
	c Other professional fees (attach schedule)	0	0	0	0
	17 Interest				
	18 Taxes (attach schedule) (see instructions) . . .	5,806	0	0	0
	19 Depreciation (attach schedule) and depletion . . .	0	0	0	
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	99	50	0	49
	24 Total operating and administrative expenses. Add lines 13 through 23	5,905	50	0	49
	25 Contributions, gifts, grants paid	1,036,066			1,036,066
	26 Total expenses and disbursements. Add lines 24 and 25	1,041,971	50	0	1,036,115
	27 Subtract line 26 from line 12:				
	a Excess of revenue over expenses and disbursements	-209,669			
	b Net investment income (if negative, enter -0-)		832,252		
	c Adjusted net income (if negative, enter -0-) . . .			0	

Part II		Balance Sheets	Attached schedules and amounts in the description column should be for end-of-year amounts only. (See instructions.)	Beginning of year	End of year	
				(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing		50,378	35,884	35,884
	2	Savings and temporary cash investments		1,586,839	1,415,323	1,415,323
	3	Accounts receivable ▶ _____				
		Less: allowance for doubtful accounts ▶ _____		0	0	0
	4	Pledges receivable ▶ _____				
		Less: allowance for doubtful accounts ▶ _____		0	0	0
	5	Grants receivable				
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)		0	0	0
	7	Other notes and loans receivable (attach schedule) ▶ _____				
		Less: allowance for doubtful accounts ▶ _____		0	0	0
	8	Inventories for sale or use				
	9	Prepaid expenses and deferred charges				
	10a	Investments—U.S. and state government obligations (attach schedule)		0	0	0
	b	Investments—corporate stock (attach schedule)		0	0	0
	c	Investments—corporate bonds (attach schedule)		0		0
	11	Investments—land, buildings, and equipment: basis ▶ _____				
	Less: accumulated depreciation (attach schedule) ▶ _____		0		0	
12	Investments—mortgage loans					
13	Investments—other (attach schedule)		11,901,805	12,748,639	12,627,150	
14	Land, buildings, and equipment: basis ▶ _____					
	Less: accumulated depreciation (attach schedule) ▶ _____		0		0	
15	Other assets (describe ▶ _____)		0	0	0	
16	Total assets (to be completed by all filers—see the instructions. Also, see page 1, item I)		13,539,022	14,199,846	14,078,357	
Liabilities	17	Accounts payable and accrued expenses		12,080	13,787	
	18	Grants payable			72,500	
	19	Deferred revenue.				
	20	Loans from officers, directors, trustees, and other disqualified persons		0	0	
	21	Mortgages and other notes payable (attach schedule)		0	0	
	22	Other liabilities (describe ▶ _____)				
	23	Total liabilities (add lines 17 through 22).		12,080	86,287	
Net Assets or Fund Balances	Foundations that follow FASB ASC 958, check here ▶ ☐ and complete lines 24, 25, 29 and 30.					
	24	Net assets without donor restrictions				
	25	Net assets with donor restrictions				
	Foundations that do not follow FASB ASC 958, check here ▶ ☒ and complete lines 26 through 30.					
	26	Capital stock, trust principal, or current funds				
	27	Paid-in or capital surplus, or land, bldg., and equipment fund				
	28	Retained earnings, accumulated income, endowment, or other funds		13,526,942	14,113,559	
	29	Total net assets or fund balances (see instructions)		13,526,942	14,113,559	
	30	Total liabilities and net assets/fund balances (see instructions)		13,539,022	14,199,846	

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 13,526,942
2	Enter amount from Part I, line 27a	2 -209,669
3	Other increases not included in line 2 (itemize) ▶ _____	3 796,286
4	Add lines 1, 2, and 3	4 14,113,559
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 14,113,559

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.)
1 a SPDR S&P ETF		P	2010-02-16	2024-09-19
b FIDELITY GROWTH COMPANY		P	2010-02-25	2024-07-15
c PARNASSUS CORE EQUITY		P	2013-06-28	2024-08-12
d VANGUARD GRW INDEX		P	2019-08-28	2024-07-15
e HOMESTEAD SMALL CO		P	2020-03-20	2024-10-23

(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 190,979		36,596	154,383
b 41,550		6,778	34,772
c 122,020		65,920	56,100
d 39,836		17,526	22,310
e 215,110		268,129	-53,019

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

(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col.(h))
a		0	154,383
b		0	34,772
c		0	56,100
d		0	22,310
e		0	-53,019

2 Capital gain net income or (net capital loss)

3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6):
If gain, also enter in Part I, line 8, column (c) (see instructions). If (loss), enter -0-
in Part I, line 8

If gain, also enter in Part I, line 7
If (loss), enter -0- in Part I, line 7

2

3

214,546

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

1a Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1.			
Date of ruling or determination letter: (attach copy of letter if necessary—see instructions)		1	11,568
b All other domestic foundations enter 1.39% (0.0139) of line 27b. Exempt foreign organizations enter 4% (0.04) 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	11,568
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		4	
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-		5	11,568
6 Credits/Payments:			
a 2024 estimated tax payments and 2023 overpayment credited to 2024	6a	8,202	
b Exempt foreign organizations—tax withheld at source	6b	0	
c Tax paid with application for extension of time to file (Form 8868)	6c	8,000	
d Backup withholding erroneously withheld	6d		
7 Total credits and payments. Add lines 6a through 6d		7	16,202
8 Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached.		8	
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed		9	
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid.		10	4,634
11 Enter the amount of line 10 to be: Credited to 2025 estimated tax		Refunded	11
4,634			0

Part VI-A

Statements Regarding Activities

1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		Yes	No
1a				No
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition.			No
	<i>If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.</i>			
c	Did the foundation file Form 1120-POL for this year?.	1c		No
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. ▶ \$ (2) On foundation managers. ▶ \$			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ \$			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If "Yes," attach a detailed description of the activities.</i>	2		No
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? <i>If "Yes," attach a conformed copy of the changes</i>	3		No
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a		No
b	If "Yes," has it filed a tax return on Form 990-T for this year?	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If "Yes," attach the statement required by General Instruction T.</i>	5		No
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: ● By language in the governing instrument, or ● By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	Yes	
7	Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col. (c), and Part XIV.</i>	7	Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ IN			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? <i>If "No," attach explanation</i> .	8b	Yes	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2024 or the taxable year beginning in 2024? See the instructions for Part XIII. <i>If "Yes," complete Part XIII</i>	9		No
10	Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses.</i>	10		No
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)? <i>If "Yes," attach schedule. See instructions.</i>	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? <i>If "Yes," attach statement. See instructions</i>	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ▶ N/A	13	Yes	
14	The books are in care of ▶ CORPORATE TAX Telephone no. ▶ (317) 285-1059 Located at ▶ ONE AMERICAN SQ PO BOX 368 INDIANAPOLIS IN ZIP+4 ▶ 462060368			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —check here ▶ and enter the amount of tax-exempt interest received or accrued during the year	15		
16	At any time during calendar year 2024, 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. <i>If "Yes", enter the name of the foreign country</i> ▶	16	Yes	No
				No

Part VI-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?	1a(1)	No
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	1a(2)	No
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	1a(3)	No
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	1a(4)	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)?	1a(5)	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.)	1a(6)	No
b If any answer is "Yes" to 1a(1)–(6); did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions	1b	
c Organizations relying on a current notice regarding disaster assistance check here. 		
d 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 2024?	1d	No
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):		
a At the end of tax year 2024, did the foundation have any undistributed income (Part XII, lines 6d and 6e) for tax year(s) beginning before 2024? If "Yes," list the years  20____, 20____, 20____, 20____	2a	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.)	2b	
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.  20____, 20____, 20____, 20____		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	3a	No
b If "Yes," did it have excess business holdings in 2024 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period?(Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2024.).	3b	
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	No
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2024?	4b	No

Part VI-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))?

5a(1)

No

(2)

Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?

5a(2)

No

(3)

Provide a grant to an individual for travel, study, or other similar purposes?

5a(3)

No

(4)

Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions

5a(4)

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?

5a(5)

No

b

If any answer is "Yes" to 5a(1)–(5); did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance? See instructions

5b

c

Organizations relying on a current notice regarding disaster assistance check

5c

d

If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?
If "Yes," attach the statement required by Regulations section 53.4945–5(d).

5d

6a

Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?

6a

No

b

Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?
If "Yes" to 6b, file Form 8870.

6b

No

7a

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

7a

No

b

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

7b

8

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

8

No

Part VII

Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors

1

List all officers, directors, trustees, foundation managers and their compensation. See instructions

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
J SCOTT DAVISON ONE AMERICA SQ PO BOX 368 INDIANAPOLIS, IN 462060368	DIRECTOR 2.000	0	0	0
DENNIS MARTIN ONE AMERICA SQ PO BOX 368 INDIANAPOLIS, IN 462060368	DIRECTOR 2.000	0	0	0
BART BROWN ONE AMERICA SQ PO BOX 368 INDIANAPOLIS, IN 462060368	DIRECTOR 2.000	0	0	0
KARIN SARRATT ONE AMERICA SQ PO BOX 368 INDIANAPOLIS, IN 462060368	DIRECTOR 2.000	0	0	0
CINDY REESE ONE AMERICA SQ PO BOX 368 INDIANAPOLIS, IN 462060368	DIRECTOR 2.000	0	0	0
CRAIG LEHMAN ONE AMERICA SQ PO BOX 368 INDIANAPOLIS, IN 462060368	TREASURER/DIRECTOR 2.000	0	0	0
RICHARD M ELLERY ONE AMERICA SQ PO BOX 368 INDIANAPOLIS, IN 462060368	SECRETARY/DIRECTOR 2.000	0	0	0
KIM THOMAS ONE AMERICA SQ PO BOX 368 INDIANAPOLIS, IN 462060368	PRESIDENT/DIRECTOR 2.000	0	0	0

2

Compensation of five highest-paid employees (other than those included on line 1—see instructions). If none, enter "NONE."

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances

Total

number of other employees paid over \$50,000.

0

Form 990-PF (2024)

Part VII

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

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

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation

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

0

Part VIII- Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1	
2	
3	
4	

Part VIII- Summary of Program-Related Investments (see instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.	Amount
1 NONE	
2 NONE	
All other program-related investments. See instructions.	
3 	0
Total. Add lines 1 through 3	0

Part IX 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	12,607,160
b	Average of monthly cash balances.	1b	1,418,736
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	14,025,896
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	
3	Subtract line 2 from line 1d.	3	14,025,896
4	Cash deemed held for charitable activities. Enter 1.5% (0.015) of line 3 (for greater amount, see instructions).	4	210,388
5	Net value of noncharitable-use assets. Subtract line 4 from line 3.. . . .	5	13,815,508
6	Minimum investment return. Enter 5% (0.05) of line 5.	6	690,775

Part X 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 IX, line 6.	1	690,775
2a	Tax on investment income for 2024 from Part V, line 5.	2a	11,568
b	Income tax for 2024. (This does not include the tax from Part V.).	2b	
c	Add lines 2a and 2b.	2c	11,568
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	679,207
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	679,207
6	Deduction from distributable amount (see instructions).	6	
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XII, line 1.	7	679,207

Part XI 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	1,036,115
b	Program-related investments—total from Part VIII-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	0
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part XII, line 4.. . . .	4	1,036,115

Part XII

Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2023	(c) 2023	(d) 2024
1 Distributable amount for 2024 from Part X, line 7				679,207
2 Undistributed income, if any, as of the end of 2024:				
a Enter amount for 2023 only.			0	
b Total for prior years: 20____, 2021, 2020		0		
3 Excess distributions carryover, if any, to 2024:				
a From 2019.	248,465			
b From 2020.	253,307			
c From 2021.	0			
d From 2022.	65,124			
e From 2023.	101,875			
f Total of lines 3a through e.	668,771			
4 Qualifying distributions for 2024 from Part XI, line 4: \$ 1,036,115				
a Applied to 2023, but not more than line 2a			0	
b Applied to undistributed income of prior years (Election required—see instructions).		0		
c Treated as distributions out of corpus (Election required—see instructions).	0			
d Applied to 2024 distributable amount				679,207
e Remaining amount distributed out of corpus	356,908			
5 Excess distributions carryover applied to 2024. (If an amount appears in column (d), the same amount must be shown in column (a).)				0
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	1,025,679			
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				
d Subtract line 6c from line 6b. Taxable amount—see instructions.		0		
e Undistributed income for 2023. Subtract line 4a from line 2a. Taxable amount—see instructions.			0	
f Undistributed income for 2024. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2025				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions).	0			
8 Excess distributions carryover from 2019 not applied on line 5 or line 7 (see instructions)	248,465			
9 Excess distributions carryover to 2025. Subtract lines 7 and 8 from line 6a	777,214			
10 Analysis of line 9:				
a Excess from 2020	253,307			
b Excess from 2021	0			
c Excess from 2022.	65,124			
d Excess from 2023	101,875			
e Excess from 2024	668,771			

Part

Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
United Way of Central Indiana PO BOX 88409 INDIANAPOLIS,IN 462080409	N/A	P C	Health, Welfare, & Amateur Athletics	327,391
Howard University Dept of Athletics 2400 6TH ST NW WASHINGTON,DC 20059	N/A	P C	Health, Welfare, & Amateur Athletics	65,000
Junior Achievement of Central Indiana 7435 N KEYSTONE AVE SUITE B INDIANAPOLIS,IN 46240	N/A	P C	Education	42,500
Christel House International 2960 NORTH MERIDIAN STREET SUITE 17 0 INDIANAPOLIS,IN 46208	N/A	P C	Education	40,000
Diversity in Aquatics Inc PO BOX 25633 ALEXANDRIA,V A 223135633	N/A	P C	Health, Welfare, & Amateur Athletics	40,000
Camptown Inc 7998 GEORGETOWN ROAD SUITE 700 Indianapolis,IN 46268	N/A	P C	Health, Welfare, & Amateur Athletics	31,500
Easterseals Crossroads 4740 KINGSWAY DR INDIANAPOLIS,IN 46205	N/A	P C	Education	25,000
Preble Street 55 PORTLAND STREET PORTLAND,ME 04101	N/A	P C	Civic & Community	25,000
Region 9 Head Start Association 2035 HURLEY WAY SUITE 250 SACRAMENTO,C A 95825	N/A	P C	Education	25,000
Girls Inc 120 WALL ST 18TH FLOOR NEW YORK,NY 10005	N/A	P C	Civic & Community	20,000
Greater Indy Habitat for Humanity 3135 N MERIDIAN ST INDIANAPOLIS,IN 46208	N/A	P C	Civic & Community	20,000
Indiana State Museum and Historic Sites 650 W WASHINGTON ST INDIANAPOLIS,IN 46204	N/A	P C	Education	20,000
Million Meal Movement 9250 CORPORATION DRIVE SUITE 300 INDIANAPOLIS,IN 46256	N/A	P C	Civic & Community	20,000
Franklin College 101 BRANIGIN BLVD FRANKLIN,IN 46131	N/A	P C	Education	17,500
Indianapolis Cultural Trail Inc 132 W WALNUT ST	N/A	P C	Civic & Community	16,000

INDIANAPOLIS,IN 46204	N/A	P C	Civic & Community	15,000
Children's Museum of Indianapolis 3000 N MERIDIAN ST INDIANAPOLIS,IN 46208	N/A	P C	Civic & Community	15,000
HVAF of Indiana Inc 45 E 10TH ST INDIANAPOLIS,IN 46204	N/A	P C	Civic & Community	15,000
Indianapolis Jazz Foundation PO BOX 20857 INDIANAPOLIS,IN 46220	N/A	P C	Civic & Community	15,000
The Immigrant Welcome Center Inc 2049 N MERIDIAN ST INDIANAPOLIS,IN 46202	N/A	P C	Civic & Community	12,500
Meals of hope of Foundation Inc 2221 CORPORATION BLVD NAPLES,FL 34109	N/A	P C	Civic & Community	11,900
The Parks Alliance of Indianapolis 3001 N WHITE RIVER PARKWAY W DRIVE INDIANAPOLIS,IN 46222	N/A	P C	Health, Welfare, & Amateur Athletics	11,625
Hawthorne Community Center 2440 W OHIO ST INDIANAPOLIS,IN 46222	N/A	P C	Civic & Community	11,500
91 Place 1125 E BROOKSIDE AVE SUITE S50 INDIANAPOLIS,IN 46201	N/A	P C	Civic & Community	10,000
Elevate Indianapolis 2834 E WASHINGTON ST INDIANAPOLIS,IN 46201	N/A	P C	Education	10,000
Foster Success 546 E 17TH STREET SUITE 206 INDIANAPOLIS,IN 46202	N/A	P C	Civic & Community	10,000
Hamilton County Community Foundation 11810 TECHNOLOGY DR FISHERS,IN 46038	N/A	P C	Civic & Community	10,000
Indy Chamber 111 MONUMENT CIR 2200 INDIANAPOLIS,IN 46204	N/A	P C	Civic & Community	10,000
Indy Humane 7929 MICHIGAN RD INDIANAPOLIS,IN 46268	N/A	P C	Civic & Community	10,000
Ivy Tech Foundation 50 W FALL CREEK PARKWAY NORTH DRIVE INDIANAPOLIS,IN 462085752	N/A	P C	Education	10,000
Latinas Welding Guild 1936 S LYNHURST DR SUITE R INDIANAPOLIS,IN 46241	N/A	P C	Education	10,000
Mitch Daniels Leadership Foundation 880 W MONON GREEN BLVD SUITE 101 CARMEL,IN 46032	N/A	P C	Education	10,000
Purdue for Life Foundation DICK SANDY DAUCH ALUMNI CENTER 403	N/A	P C	Civic & Community	10,000

WEST WOOD STREET WEST LAFAYETTE,IN 479072007				
Second Helpings Inc 1121 SOUTHEASTERN AVE INDIANAPOLIS,IN 46202	N/A	P C	Civic & Community	10,000
University of Indianapolis 1400 E HANNA AVE INDIANAPOLIS,IN 46227	N/A	P C	Education	10,000
Hope Academy 3919 MADISON AVENUE SUITE 100 INDIANAPOLIS,IN 46227	N/A	P C	Education	6,000
American Red Cross 431 18TH ST NW WASHINGTON,DC 20006	N/A	P C	Civic & Community	5,000
Bloom Project PO BOX 12205 FORT WAYNE,IN 46863	N/A	P C	Education	5,000
Chiro-Black Tech Inc 2802 CENTRAL AVE SUITE C INDIANAPOLIS,IN 46208	N/A	P C	Health, Welfare, & Amateur Athletics	5,000
Firefly Children & Family Alliance 1575 DR MARTIN LUTHER KING JR ST INDIANAPOLIS,IN 46202	N/A	P C	Civic & Community	5,000
Indianapolis Urban League Inc URBAN LEAGUE 777 INDIANA AVE SUITE 1 INDIANAPOLIS,IN 46202	N/A	P C	Civic & Community	5,000
INHP 2960 N MERIDIAN ST SUITE 300 INDIANAPOLIS,IN 46208	N/A	P C	Civic & Community	5,000
Marian University 3200 COLD SPRING RD INDIANAPOLIS,IN 46222	N/A	P C	Education	5,000
Servants at Work 8427 ZIONSVILLE RD INDIANAPOLIS,IN 46268	N/A	P C	Civic & Community	3,500
Alive Center 500 W 5TH AVE NAPERVILLE,IL 60563	N/A	P C	Education	2,000
Children in Crisis Inc 1000 LUKES WAY FORT WALTON BEACH,FL 32547	N/A	P C	Civic & Community	2,000
City of Hope 1500 E DUARTE ROAD DUARTE,CA 91010	N/A	P C	Health, Welfare, & Amateur Athletics	2,000
Feeding Tampa Bay 3624 CAUSEWAY BLVD TAMPA,FL 33619	N/A	P C	Civic & Community	2,000
Harper for Kids 2920 BUCHANAN STREET SUITE 9 SAN FRANCISCO,CA 94123	N/A	P C	Education	2,000
Helen Keller Festival 206 W 5TH STREET TUSCUMBIA,AL 35674	N/A	P C	Civic & Community	2,000

Nami of Connecticut Inc 1030 NEW BRITAIN AVE SUITE 201 WEST HARTFORD,CT 06110	N/A	P C	Civic & Community	2,000
New Hope for Families PO BOX 154 BLOOMINGTON,IN 47402	N/A	P C	Civic & Community	2,000
Pals 7644 W ELWREN RD BLOOMINGTON,IN 47403	N/A	P C	Health, Welfare, & Amateur Athletics	2,000
Promise686 Inc 5300 TRIANGLE PARKWAY SUITE 202 PEACHTREE CORNERS,GA 30092	N/A	P C	Civic & Community	2,000
Rally Foundation 5775 GLENRIDGE DRIVE BUILDING B SUITE 370 ATLANTA,GA 30328	N/A	P C	Health, Welfare, & Amateur Athletics	2,000
Rancho Coastal Humane Society 389 REQUEZA STREET ENCINITAS,CA 92024	N/A	P C	Civic & Community	2,000
SecureFutures Inc 710 N PLANKINTON AVE 1400 MILWAUKEE,WI 53203	N/A	P C	Education	2,000
The Natasha Love Foundation 78 BRAYTON AVE CRANSTON,RI 02920	N/A	P C	Education	2,000
West Perry MAT Club 6 W MAIN ST NEW BLOOMFIELD,PA 17068	N/A	P C	Health, Welfare, & Amateur Athletics	2,000
YMCA Camp Northern Lights 9089 ELY-BABBITT ROAD HWY 21 N BABBITT,MN 55706	N/A	P C	Health, Welfare, & Amateur Athletics	2,000
Zach Madison Foundation 2808 W CROOKED STICK CT EAGLE,ID 83616	N/A	P C	Health, Welfare, & Amateur Athletics	2,000
Benimble Foundation 10927 CEDAR PINE DRIVE INDIANAPOLIS,IN 46235	N/A	P C	Civic & Community	1,500
Damien Center 26 N ARSENAL AVE INDIANAPOLIS,IN 46201	N/A	P C	Health, Welfare, & Amateur Athletics	1,500
Indianapolis Opera 4011 N PENNSYLVANIA STREET INDIANAPOLIS,IN 46205	N/A	P C	Civic & Community	1,500
IWIN Foundation PO BOX 30648 INDIANAPOLIS,IN 46220	N/A	P C	Health, Welfare, & Amateur Athletics	1,500
The Villages of Indiana 3833 N MERIDIAN STREET INDIANAPOLIS,IN 46208	N/A	P C	Civic & Community	1,500
WFYI 1630 N MERIDIAN ST INDIANAPOLIS,IN 46202	N/A	P C	Civic & Community	1,500
EdChoice	N/A	P C	Education	1,000

111 MONUMENT CIRCLE INDIANAPOLIS, IN 46204				
Eiteljorg Museum 500 W WASHINGTON ST INDIANAPOLIS, IN 46204	N/A	P C	Civic & Community	150
Total ▶ 3a				1,036,066
b Approved for future payment				
Total ▶ 3b				0

Enter gross amounts unless otherwise indicated.		Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions.)
		(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue:						
a _____						
b _____						
c _____						
d _____						
e _____						
f _____						
g Fees and contracts from government agencies						
2 Membership dues and assessments						
3 Interest on savings and temporary cash investments						
4 Dividends and interest from securities				14	615,645	
5 Net rental income or (loss) from real estate:						
a Debt-financed property.						
b Not debt-financed property.						
6 Net rental income or (loss) from personal property						
7 Other investment income						
8 Gain or (loss) from sales of assets other than inventory				18	214,546	
9 Net income or (loss) from special events:						
10 Gross profit or (loss) from sales of inventory						
11 Other revenue:						
a AMORTIZATION OF BOND PREMIUM _____				14	2,111	
b _____						
c _____						
d _____						
e _____						
12 Subtotal. Add columns (b), (d), and (e) . . .			0		832,302	0
13 Total. Add line 12, columns (b), (d), and (e). (See worksheet in line 13 instructions to verify calculations.)				13	832,302	832,302

[illegible]

Part XVI

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

1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?

a Transfers from the reporting foundation to a noncharitable exempt organization of:

(1) Cash.

(2) Other assets.

b Other transactions:

(1) Sales of assets to a noncharitable exempt organization.

(2) Purchases of assets from a noncharitable exempt organization

(3)* Rental of facilities, equipment, or other assets.

(4) Reimbursement arrangements.

(5) Loans or loan guarantees.

(6) Performance of services or membership or fundraising solicitations.

c Sharing of facilities, equipment, mailing lists, other assets, or paid employees.

d If the answer to any of the above is "Yes," complete the following schedule. Column **(b)** should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column **(d)** the value of the goods, other assets, or services received.

[illegible]

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) (other than section 501(c)(3)) or in section 527? ☐ Yes ☒ No

b If "Yes," complete the following schedule.

(a) Name of organization	(b) Type of organization	(c) Description of relationship

Sign Here

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

2025-07-30

Signature of officer or trustee

Date _____

Title

May the IRS discuss this return with the preparer shown below?

See instructions. ☐ Yes ☐ No

**Paid
Preparer
Use Only**

Print/Type preparer's name

Preparer's Signature

Date _____

Check if self-employed ☐

PTIN

P01256574

Firm's name ► Forvis Mazars LLP

Firm's address ► 211 N Broadway Suite 600

St Louis, M O 631022733

Phone no.
(314) 231-5544

Additional Data

[Return to Form](#)

Software ID: 24020961

Software Version: 2024v5.1

Form 990PF - Special Condition Description:

Special Condition Description

TY 2024 IRS 990 e-File Render

Name: OneAmerica Foundation Inc

EIN: 31-1146437

Software ID: 24020961

Software Version: 2024v5.1

Category	Amount
NONE	

TY 2024 IRS 990 e-File Render

Name: OneAmerica Foundation Inc

EIN: 31-1146437

Software ID: 24020961

Software Version: 2024v5.1

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
AMER BEACON BRIDGEWAY LG CAP	FMV	682,231	682,231
FIDELITY GROWTH COMPANY FD	FMV	816,885	816,885
HOMESTEAD SM CO STK FD	FMV	0	0
ISHARES IBOXX	FMV	779,932	779,932
ISHARES MSCI EAFE ETF	FMV	800,089	678,600
ISHARES TR RUSSELL MIDCAP GWTH	FMV	551,363	551,363
ISHARES RUSSELL MIDCAP ETF	FMV	658,580	658,580
ISHARES RUSSELL 1000 ETF	FMV	605,661	605,661
ISHARES TR MBS ETF	FMV	389,640	389,640
JANUS FLEX BD FD T SH	FMV	1,280,456	1,280,456
MFS INTERNATIONAL NEW DISC	FMV	391,213	391,213
PARNASSUS CORE EQUITY INST	FMV	286,800	286,800
SPDR S&P 500 ETF TR	FMV	624,175	624,175
VANGUARD EQUITY INC INV	FMV	908,928	908,928
VANGUARD ST FEDERAL ADM	FMV	1,058,645	1,058,645
VANGUARD ST CORP BD ETF	FMV	1,031,682	1,031,682
VANGUARD GRWTH INDEX INV	FMV	1,113,463	1,113,463
VANGUARD SMALL CAP ETF	FMV	768,896	768,896

TY 2024 IRS 990 e-File Render

Name: OneAmerica Foundation Inc

EIN: 31-1146437

Software ID: 24020961

Software Version: 2024v5.1

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
MISCELLANEOUS EXPENSES	99	50	0	49

TY 2024 IRS 990 e-File Render

Name: OneAmerica Foundation Inc

EIN: 31-1146437

Software ID: 24020961

Software Version: 2024v5.1

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
AMORTIZATION OF BOND PREMIUM	2,111	2,111	0

TY 2024 IRS 990 e-File Render

Name: OneAmerica Foundation Inc

EIN: 31-1146437

Software ID: 24020961

Software Version: 2024v5.1

Description	Amount
UNREALIZED GAIN ON INVESTMENTS	796,286

TY 2024 IRS 990 e-File Render

Name: OneAmerica Foundation Inc

EIN: 31-1146437

Software ID: 24020961

Software Version: 2024v5.1

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FEDERAL EXCISE TAX	5,806	0	0	0