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## 990-PF

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### **Return of Private Foundation**

or Section 4947(a)(1) Nonexempt Charitable Trust



Treated as a Private Foundation Department of the Treasury Internal Revenue Service Note: The organization may be able to use a copy of this return to satisfy state reporting requirements SEP 30, 2003 For calendar year 2002, or tax year beginning OCT 1. 2002 and ending G Sheck all that apply: Initial return Final return Amended return Address change Name change Name of organization A Employer identification number Use the IRS LOROL RODEN BOWRON REDIKER label 31-1679691 Otherwise, RUCKER FOUNDATION Number and street (or P O box number if mail is not delivered to Room/suite print B Telephone number or type 312 23RD STREET NORTH (205) 414-3318See Specific C If exemption application is pending, check here City or town, state, and ZIP code Instructions. 0436804869 D 1. Foreign organizations, check here BIRMINGHAM, AL Foreign organizations meeting the 85% test, check here and attach computation X Section 501(c)(3) exempt private foundation Check type of organization: Section 4947(a)(1) nonexempt charitable trust Other taxable private foundation E If private foundation status was terminated J Accounting method: X Cash Accrual Fair market value of all assets at end of year under section 507(b)(1)(A), check here (from Part II, col (c), line 16) Other (specify) If the foundation is in a 60-month termination (Part I, column (d) must be on cash basis) 418,946. under section 507(b)(1)(B), check here (d) Disbursements for charitable purposes (cash basis only) Part | Analysis of Revenue and Expenses (a) Revenue and expenses per books (b) Net investment (c) Adjusted net (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a)) income ıncome N/A Contributions, gifts, grants, etc., received Check X If the foundation is not required to attach Sch. B Distributions from split-interest trusts Interest on savings and temporary cash investments 16.445 16,445 STATEMENT Dividends and interest from securities 5a Gross rents b (Net rental income or (loss) Net gain or (loss) from sale of assets not on line 10 STATEMENT <31,917. 6a Gross sales price for all assets on line 6a 46,494. 0 Capital gain net income (from Part IV, line 2) Net short-term capital gain Income modifications Gross sales less in the CEIVED b Less Cost of goods sold c Gross profit or (loss) 1 3 2011 STATEMENT 25,635 25,635 11 Other income Total Add lines Timoughanch 42.080 10,163 12 Compensation of officers, diffectors, trustees, etc. 0. 0 13 Other employee salaries and wages 15 Pension plans, employee benefits Operating and Administrative Expenses 16a Legal fees **b** Accounting fees c Other professional fees 17 Interest 18 Taxes 19 Depreciation and depletion 20 Occupancy Travel, conferences, and meetings 22 Printing and publications 23 Other expenses 24 Total operating and administrative 0 0 expenses Add lines 13 through 23 19,500. 19,500 25 Contributions, gifts, grants paid Total expenses and disbursements 19,500. 19,500 0 Add lines 24 and 25 Subtract line 26 from line 12:

<9,337.

42,080

N/A

a Excess of revenue over expenses and disbursements

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

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

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Page 2

	art	Balance Sheets Attached schedules and amounts in the description	Beginning of year	End of	year
	ait	column should be for end-of-year amounts only	(a) Book Value	(b) Book Value	(c) Fair Market Value
	1	Cash - non-interest-bearing	22,240.	55,899.	<u>55,899.</u>
	2	Savings and temporary cash investments			· · · · · · · · · · · · · · · · · · ·
	3	Accounts receivable			
	ĺ	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 ▶			
ţ	8	Inventories for sale or use			
Assets	9	Prepaid expenses and deferred charges			
Ä	10a	Investments - U.S. and state government obligations			
	b	Investments - corporate stock STMT 4	433,156.	390,160.	363,047.
	C	Investments - corporate bonds			
	11	investments - land, buildings, and equipment basis			
		Less accumulated depreciation			
	12	Investments - mortgage loans			
	13	Investments - other			
	14	Land, buildings, and equipment basis ▶			
		Less accumulated depreciation			
	15	Other assets (describe ►			
	16	Total assets (to be completed by all filers)	455,396.	446,059.	418,946.
	17	Accounts payable and accrued expenses			
	18	Grants payable			
S	19	Deferred revenue			
Liabilities	20	Loans from officers, directors, trustees, and other disqualified persons			
jabi	21	Mortgages and other notes payable			
_	22	Other liabilities (describe >			
	23	Total liabilities (add lines 17 through 22)	0.	0.	
		Organizations that follow SFAS 117, check here			
<b>"</b>		and complete lines 24 through 26 and lines 30 and 31.			
ces	24	Unrestricted			
lan	25	Temporarily restricted			
or Fund Balanc	26	Permanently restricted			
Ĕ		Organizations that do not follow SFAS 117, check here			
F		and complete lines 27 through 31.			
ts	27	Capital stock, trust principal, or current funds	0.	0.	
SSe	28	Paid-ın or capıtal surplus, or land, bldg., and equipment fund	0.	0.	
Net Assets	29	Retained earnings, accumulated income, endowment, or other funds	455,396.	446,059.	
Ž	30	Total net assets or fund balances	455,396.	446,059.	
	31	Total liabilities and net assets/fund balances	455,396.	446,059.	
P	art	III Analysis of Changes in Net Assets or Fund B	alances		
Ξ		<del></del>	20		
		I net assets or fund balances at beginning of year - Part II, column (a), line	อบ		AEE 206
	•	st agree with end-of-year figure reported on prior year's return)	•	·   1	455,396.
		r amount from Part I, line 27a		2	<9,337.
		r increases not included in line 2 (itemize)	<u> </u>	3	446 050
		lines 1, 2, and 3		4	446,059.
		eases not included in line 2 (itemize)  I net assets or fund balances at end of year (line 4 minus line 5) - Part II, co	olumn (h) line 20	5 6	446,059.
<u>~</u>	·VIA	i not assets of fund balances at one of year fille 4 millus line of " Fart II, of	, mile 00 .		440,033.

RUCKER FOUNDATION

Part IV C	apital Gains a	nd Losses for Tax on Ir	nvestmen	t 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		acquired lay, yr.)	(d) Date sold (mo., day, yr.)
1a MIRANT	CORPORAT	ION				P	04/0	2/01	10/01/02
	ARK CORPO		· · · · · ·			D		5/98	10/01/02
		FINANCIAL, INC				D		5/98	10/01/02
	CORPORATI	ON			-	D	10/0	5/98	10/01/02
<u>e</u>	<del></del>	(6) Depression allowed	(-) (-)	at ar ather bear			(5) (	lain as (lasa	<u> </u>
(e) Gross	sales price	(f) Depreciation allowed (or allowable)		st or other basis expense of sale				ain or (loss s (f) minus	(g)
_a	1,317.			18,54					<u>&lt;17,228.</u>
<u>b</u>	34,260.	<del></del>		30,03					4,228.
<u>c</u>	7,947.	<del></del>		4,81					3,135.
<u>d</u>	2,970.			25,02	2.				<22,052.
Complete onl	v for assets showing	gain in column (h) and owned by	the foundation	n on 12/31/69	-	··· <u>·</u>	(I) Coine (C	Col. (h) gain	minue
	of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Ex	cess of col. (i)		CC	ol. (k), but	not less tha (from col. (	n -0-) <b>or</b>
				(1),					<17,228.
b			<u> </u>						4,228.
С									3,135.
d									<22,052.
<u>e</u>		<del></del>				···			
2 Capital gain ne	t income or (net cap	ital loss). { If gain, also enter if (loss), enter -0-	r ın Part i, line - ın Part I. line	7 }		2			<31,917.
		) as defined in sections 1222(5) an			`			-	
	ter in Part I, line 8, co -0- in Part I, line 8	olumn (c).				2		N/A	
		der Section 4940(e) for	Reduced	Tax on Net	Inv	estment In	come	11/11	<u> </u>
(For optional use	by domestic private f	oundations subject to the section 4	4940(a) tax on	net investment in	come	1.)			
•			, ,			•			
ii section 4940(a)	(2) applies, leave this	s part diank.							
-		ion 4942 tax on the distributable a	•		eriod?	>			Yes X No
		of under section 4940(e). Do not o							· · · · · · · · · · · · · · · · · · ·
1 Enter the appr	(a)	ch column for each year; see instru	uctions before	making any entrie				<del>,</del>	(d)
Base	e period years or tax year beginning	(b) Adjusted qualifying dist	tributions	Net value of no	(c) nchar	ıtable-use asset	s	Distrit	(d) oution ratio rided by col. (c))
Calendar year (	2001	1.111/	8,000.			394,59		(cor. (b) aiv	.0202742
<del></del>	2000		4,272.			390,25			.0365714
	1999 .		6,448.	- **.		403,82			.0407308
	1998		0.	<del>-</del>		468,95			.0000000
	1997								
2 Total of line 1,							2_		.0975764
		year base period - divide the total o	on line 2 by 5,	or by the number	of yea	ars			0040041
the foundation	has been in existenc	e if less than 5 years					3		.0243941
4 Enter the net va	alue of noncharitable	-use assets for 2002 from Part X, I	line 5				4		398,148.
		,	•						
5 Multiply line 4	by line 3								9,712.
6 Enter 1% of ne	t investment income	(1% of Part I, line 27b)					6		421.
7 Add lines 5 and	16						. 7		10,133.
9 Enter qualifier	g distributions from F	Part VII line A							
	_	•	46		4-		8		19,500.
If line 8 is equa	n to or greater than li	ne 7, check the box in Part VI, line	ib, and comp	nete that part using	g a 1%	% tax rate.			

Forn	LOROL RODEN BOWRON REDIKER n 990-PF (2002) RUCKER FOUNDATION		31-	1679	691	I	Page 4
Pa	art VI Excise Tax Based on Investment Income (Section 4940(a),	4940(b), 4940(e), or	4948	- see i	nstru	ctio	ns)
	a Exempt operating foundations described in section 4940(d)(2), check here ▶ ☐ and enter "N		1	T			
	Date of ruling letter: (attach copy of ruling letter if necessary-see in						
	Domestic organizations that meet the section 4940(e) requirements in Part V, check here		1			4	21.
	of Part I, line 27b	J and cirici 170	<u> </u>	1			<u> 4 + •</u>
	: All other domestic organizations enter 2% of line 27b. Exempt foreign organizations enter 4% of F	Part I line 12 col (h)					
			١,	1			0.
	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others e	enter -u-)	2	<del> </del>			21.
	Add lines 1 and 2		3	<del> </del>		4	
	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others	enter -U-)	4	├			<u>0.</u>
	Tax based on investment income Subtract line 4 from line 3. If zero or less, enter -0-		5				<u>21.</u>
6	Credits/Payments:	1					
а	a 2002 estimated tax payments and 2001 overpayment credited to 2002 6a		4				
b	Exempt foreign organizations - tax withheld at source 6b		_				
C	: Tax paid with application for extension of time to file (Form 8868)		_				
d	Backup withholding erroneously withheld 6d						
7	Total credits and payments. Add lines 6a through 6d		7				0.
	Enter any penalty for underpayment of estimated tax. Check here if Form 2220 is attached		8				
	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	•	9			4	21.
	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid		10	<u> </u>			
	Enter the amount of line 10 to be: Credited to 2003 estimated tax	Refunded	11				
	art VII-A Statements Regarding Activities	Ittianded	1 11	<del>!</del>			
						Yes	No
1a	a During the tax year, did the organization attempt to influence any national, state, or local legislation	n or did it participate or interve	ne in			163	
	any political campaign?				1a		X
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (se				1b	<u> </u>	X
	If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and c	copies of any materials publ	ished o	or			
	distributed by the organization in connection with the activities.						
C	Did the organization file Form 1120-POL for this year?				1c		X
d	I Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year	r:					
	(1) On the organization. ► \$ (2) On organization managers. ►	\$	<u>.</u>				
е	Enter the reimbursement (if any) paid by the organization during the year for political expenditure	e tax imposed on organization			ĺ .		1
	managers. ►\$ 0.					ĺ	
2	Has the organization engaged in any activities that have not previously been reported to the IRS?				2	ĺ	X
	If "Yes," attach a detailed description of the activities						
3	Has the organization made any changes, not previously reported to the IRS, in its governing instru	ument, articles of incorporation	ı. or		'		
Ů	bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes	a, a	.,		3	ĺ	x
A a	a Did the organization have unrelated business gross income of \$1,000 or more during the year?				4a		X
	•		N	I/A	4b		
	olf "Yes," has it filed a tax return on Form 990-T for this year?		1,	1/ A	5		х
9	Was there a liquidation, termination, dissolution, or substantial contraction during the year?				_ <del>3</del> _		<u>├</u> ^
_	If "Yes," attach the statement required by General Instruction T						
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 are stated in the state of t	ctions that conflict with the stat	te law			l '	
	remain in the governing instrument?				6	X	<b>!</b>
7	Did the organization have at least \$5,000 in assets at any time during the year?				7	X	<u> </u>
	If "Yes," complete Part II, col (c), and Part XV.						
8a	Enter the states to which the foundation reports or with which it is registered (see instructions)	<b>&gt;</b>					1
	ALABAMA						
Ь	If the answer is "Yes" to line 7, has the organization furnished a copy of Form 990-PF to the Attorn	ney General (or designate)		<del></del>			
	of each state as required by General Instruction G? If "No," attach explanation	, , ,			8b	х	-
9	Is the organization claiming status as a private operating foundation within the meaning of section	 n 4942(1)(3) or 4942(1)(5) for c	alendar				
•	year 2002 or the taxable year beginning in 2002 (see instructions for Part XIV)? If "Yes," complete				9	'	X
10	Did any persons become substantial contributors during the tax year? it "Yes," attach a schedule listing				10	<u> </u>	X
		·			11	Х	
11	Did the organization comply with the public inspection requirements for its annual returns and exe	enihuan ahhiranan					1
4-	Web site address > N/A	T-1					
12	The books are in care of THE FOUNDATION	Telephone no.		4 5			
_	Located at ► THE FOUNDATION'S ADDRESS		ZIP+	4 ▶			
13	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - (	Uneck here		_			ـــا ٠

RUCKER FOUNDATION Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required Yes No File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. 1a During the year did the organization (either directly or indirectly): Yes X No (1) Engage in the sale or exchange, or leasing of property with a disqualified person? (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) Yes X No a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? Yes 🗓 No Yes X No (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? (5) Transfer any income or assets to a disqualified person (or make any of either available Yes X No for the benefit or use of a disqualified person)? (6) Agree to pay money or property to a government official? (Exception, Check "No" if the organization agreed to make a grant to or to employ the official for a period after Yes X No termination of government service, if terminating within 90 days.) 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 page 19 of the instructions)? N/A 1b Organizations relying on a current notice regarding disaster assistance check here c Did the organization engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected X before the first day of the tax year beginning in 2002? 1c Taxes on failure to distribute income (section 4942) (does not apply for years the organization was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)): a At the end of tax year 2002, did the organization have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2002? If "Yes," list the years ▶ b Are there any years listed in 2a for which the organization 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 N/A 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. 3a Did the organization hold more than a 2% direct or indirect interest in any business enterprise at any time Yes X No during the year? b If "Yes," did it have excess business holdings in 2002 as a result of (1) any purchase by the organization 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, N/A Form 4720, to determine if the organization had excess business holdings in 2002) 3b 4a Did the organization invest during the year any amount in a manner that would jeopardize its charitable purposes? X 4a b Did the organization 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 2002? 4b X 5a During the year did the organization pay or incur any amount to: Yes X No (1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? (2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, Yes X No any voter registration drive? (3) Provide a grant to an individual for travel, study, or other similar purposes? Yes X No (4) Provide a grant to an organization other than a charitable, etc., organization described in section Yes X No 509(a)(1), (2), or (3), or section 4940(d)(2)? (5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for Yes X No the prevention of cruelty to children or animals? 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 5b Organizations relying on a current notice regarding disaster assistance check here c If the answer is "Yes" to question 5a(4), does the organization claim exemption from the tax because it maintained 🔲 Yes 🔲 No expenditure responsibility for the grant? N/A If "Yes," attach the statement required by Regulations section 53.4945-5(d). 6a Did the organization, during the year, receive any funds, directly or indirectly, to pay premiums on Yes X No a personal benefit contract? b Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract? X 6b If you answered "Yes" to 6b, also file Form 8870.

# LOROL RODEN BOWRON REDIKER RUCKER FOUNDATION Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly

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Part VIII Information About Officers, Directors, Trus Paid Employees, and Contractors	stees, Foundation M	anagers, Highl	y	Page 6
1 List all officers, directors, trustees, foundation managers and the	ir 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
DIANA R. SLAUGHTER	TRUSTEE			
2942 CHEROKEE ROAD				
BIRMINGHAM, AL 35223	0.	0.	0.	0.
J. MICHAEL REDIKER	TRUSTEE			
506 HAMPTON DRIVE	4			_
BIRMINGHAM, AL 35209	0.	0.	0.	0.
2 Compensation of five highest-paid employees (other than those in		, enter "NONE."	(d) Contributions to	
(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			<b>&gt;</b>	0
3 Five highest-paid independent contractors for professional service	···			
(a) Name and address of each person paid more than \$50,00	0	(b) Type of serv	rice (	c) Compensation
NONE				
				<del></del>
		· · · · · · · · · · · · · · · · · · ·		
Total number of others receiving over \$50,000 for professional services			<b>•</b>	0
Part IX-A Summary of Direct Charitable Activities				
List the foundation's four largest direct charitable activities during the tax year. Inclumber of organizations and other beneficiaries served, conferences convened, re	clude relevant statistical infornesearch papers produced, etc.	nation such as the	E	kpenses
1 <u>N/A</u>				
2				<del></del>
				<u></u>
3				
4				

LOROL	RODEN	BOWRON	REDIKER
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F	Part IX-B Summary of Program-Related Investments		
D	escribe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.	·	Amount
1	N/A		
	•		
2			
_			
_	<u> </u>		
Α	Il other program-related investments. See instructions.		
3			
<del>_</del>	tal. Add lines 1 through 2		0.
=	otal. Add lines 1 through 3		
F	Part X Minimum Investment Return (All domestic foundations must complete this part. Foreign four	ndations,	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	365,141.
	Average of monthly cash balances	1b	39,070.
C	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	404,211.
е	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	404,211.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	6,063.
5	Net value of noncharitable-use assets Subtract line 4 from line 3. Enter here and on Part V, line 4	5	398,148.
6	Minimum investment return. Enter 5% of line 5	6	<u> 19,907.</u>
P	Part XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations are	nd certain	
	foreign organizations check here 🕨 💹 and do not complete this part.)		10.005
1	Minimum investment return from Part X, line 6	1	19,907.
	Tax on investment income for 2002 from Part VI, line 5		
	Income tax for 2002. (This does not include the tax from Part VI.)		401
C	Add lines 2a and 2b	2c	421.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	19,486.
	Recoveries of amounts treated as qualifying distributions  4a  0.		
	Income distributions from section 4947(a)(2) trusts  4b  0 •		^
-	Add lines 4a and 4b .	4c	10.406
5	Add lines 3 and 4c	5	19,486.
6	Deduction from distributable amount (see instructions)	6	10.496
<u>/</u>	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	19,486.
F	art 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	19,500.
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		3a	
b		3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	19,500.
5	Organizations that qualify under section 4940(e) for the reduced rate of tax on net investment		
	income. Enter 1% of Part I, line 27b	5	421.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	19,079.
	Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the	foundati	on qualifies for the section
	4940(e) reduction of tax in those years.		

Part XIII Undistributed Income (see instructions)

1. Distributible amount for 2002 from Part XI, line 7 2 (breinferholder corrows if any, so of the end of 2001 a Enter amount for 2001 only 194 (as yet) and 195		(a) Corpus	(b) Years prior to 2001	(c) 2001	(d) 2002
2 Undestribution commy a rev. as of the end of 2010	1 , Distributable amount				
2 Undestribution commy a rev. as of the end of 2010	for 2002 from Part XI, line 7				19,486.
	·				
1 Total for pror years: 20 0 0	· · · · · · · · · · · · · · · · · · ·			19,377.	
3 Excess distributions carryover, if any, to 2002:  a From 1998  c From 1998  d From 1998  d From 2001  f Total of lines 3a through e  4 Qualifying distributions for 2002 from Part XII, line 4: ▶ \$ 19,500.  a Applied to 2001, but not more than line 2a  Applied to undistributed income of prior years ((Election required - see instructions)  c Freated as distributions out of corpus  (Election required - see instructions)  of Applied to 2002 distributions out of corpus  (Election required - see instructions)  of Applied to 2002 distributions out of corpus  c Excess distributions carryover space see on survivors  provided as a survivor of the same amount  e Romaning amount distributed out of corpus  c Excess distributions carryover space see on survivors  a Corpus Assistion 31.4c, and 44. Subnist line 5  b From years' (undistributed in once for which a notice of deficiency has been sized, or on which the section 494(a) tax has been previously assessed  Subtract line 6 from line 6b. Taxable amount see instructions  undistributed income for which a notice of deficiency has been sizued, or on which the section 494(a) tax has been previously assessed  \$11,335.  11,335.  2	b Total for prior years:				
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From 2001	c From 1999				
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Subtract lines 7 and 8 from line 6a  10	not applied on line 5 or line 7	0.			
10 Analysis of line 9:     a Excess from 1998     b Excess from 2000     d Excess from 2001	9 Excess distributions carryover to 2003.				
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b Excess from 1999 c Excess from 2000 d Excess from 2001	10 Analysis of line 9:				
d Excess from 2000 d Excess from 2001	a Excess from 1998				
d Excess from 2001	b Excess from 1999				
	c Excess from 2000		j		
e Excess from 2002	d Excess from 2001				
	e Excess from 2002				

#### LOROL RODEN BOWRON REDIKER

	FOUNDATION			31-16	79691 Page 9
Part XIV Private Operating F	oundations (see in	structions and Part VII	-A, question 9)	N/A	
1 a If the foundation has received a ruling of	r determination letter tha	t it is a private operating			
foundation, and the ruling is effective fo	r 2002, enter the date of	the ruling	▶		
b Check box to indicate whether the organ	nization is a private opera	ting foundation described	I in section	4942(j)(3) or 4	942(į)(5)
2 a Enter the lesser of the adjusted net	Tax year		Prior 3 years	<b></b>	
income from Part I or the minimum	(a) 2002	(b) 2001	(c) 2000	(d) 1999	(e) Total
investment return from Part X for				· · · · · · · · · · · · · · · · · · ·	
each year listed					
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				<u> </u>	
(4) Gross investment income					
Part XV Supplementary Info	, ,		•	ion had \$5,000 or i	more in assets
at any time during t	he year-see page	e 25 of the instru	ctions.)		
1 Information Regarding Foundation	n Managers:	-			
a List any managers of the foundation wh	o have contributed more	than 2% of the total conti	ributions received by tl	ne foundation before the clo	se of any tax
year (but only if they have contributed n	nore than \$5,000). (See s	ection 507(d)(2).)	-		•
NONE					
b List any managers of the foundation wh	o own 10% or more of th	e stock of a corporation (	or an equally large por	tion of the ownership of a p	artnership or
other entity) of which the foundation has					•
NONE					
2 Information Regarding Contributi	on, Grant, Gift, Loan.	Scholarship, etc., Pr	ograms:		
Check here ► X if the organization				es not accept unsolicited re	quests for funds. If
the organization makes gifts, grants, etc					
a The name, address, and telephone num	ber of the person to whor	n applications should be	addressed:		· · · · · · · · · · · · · · · · · · ·
,	5 person to mor			-	
b The form in which applications should b	e submitted and informat	tion and materials they sh	ioniq iucinde.		
2 io io in in initial applications should b	- Japanikou uno miorinu	and materials troy of	moiddo,		
c Any submission deadlines:					
e raiy subiliissivii ucauiilites.					
d Any restrictions or limitations on awards	s such as by geographics	l areas charitable fields	kinds of institutions o	r other factors:	
2 . ary 1000 loading of miniations on awards	,, saon as by goograpillo	ar ar out, until mulic licids,	ao or mantanona, v	. caror ractors.	

RUCKER FOUNDATION Part XV Supplementary Information (continued)

31-1679691

Page 10

3 Grants and Contributions Paid During the		Payment		
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
<del></del>	or substantial contributor	recipient		
a Paid during the year				ļ
SEE STATEMENT 5				
Total			<b>▶</b> 3a	19,500.
b Approved for future payment				
NONE				
Total			<b>▶</b> 3b	0.

nter gross amounts unless otherwise indicated.	Unrelate	ed business income		ted by section 512, 513, or 514	(e)
•	(a) Business	(b)	(C) Exclu- sion	(d)	Related or exempt
Program service revenue:	code	Amount	code	Amount	function income
a			1		
b					
c			$\perp$		<del> </del>
d					
e					
f			ļļ		
g Fees and contracts from government agencies					
Membership dues and assessments					
Interest on savings and temporary cash					
investments					
Dividends and interest from securities			14	16,445.	
Net rental income or (loss) from real estate:					
a Debt-financed property			11		
<b>b</b> Not debt-financed property			1		
Net rental income or (loss) from personal					
property					
Other investment income			01	25,635.	
Gain or (loss) from sales of assets other				İ	
than inventory			18	<31,917.	<b>&gt;</b>
Net income or (loss) from special events					
Gross profit or (loss) from sales of inventory					
Other revenue:					
a	_				
			1 1		
b					
b	1 1				
	_				
c d	_				
c d E Subtotal. Add columns (b), (d), and (e)	_	0 .		10,163.	
cd		0		10,163.	10,16
c d d e Subtotal. Add columns (b), (d), and (e) Total. Add line 12, columns (b), (d), and (e) e worksheet in line 13 instructions to verify calculations art XVI-B Relationship of Activities ne No Explain below how each activity for which in	s to the Acco	omplishment of E.	xempt	13 : Purposes uted importantly to the accom	10,16
c d G E Subtotal. Add columns (b), (d), and (e) Total. Add line 12, columns (b), (d), and (e) e worksheet in line 13 instructions to verify calculations  art XVI-B Relationship of Activities	s to the Acco	omplishment of E.	xempt	13 : Purposes uted importantly to the accom	10,16
c d e Subtotal. Add columns (b), (d), and (e) Total. Add line 12, columns (b), (d), and (e) e worksheet in line 13 instructions to verify calculations eart XVI-B Relationship of Activities ne No Explain below how each activity for which in	s to the Acco	omplishment of E.	xempt	13 : Purposes uted importantly to the accom	10,16
c d e Subtotal. Add columns (b), (d), and (e) Total. Add line 12, columns (b), (d), and (e) e worksheet in line 13 instructions to verify calculations eart XVI-B Relationship of Activities ne No Explain below how each activity for which in	s to the Acco	omplishment of E.	xempt	13 : Purposes uted importantly to the accom	10,16
c d e Subtotal. Add columns (b), (d), and (e) Total. Add line 12, columns (b), (d), and (e) se worksheet in line 13 instructions to verify calculations. Part XVI-B Relationship of Activities tine No Explain below how each activity for which in	s to the Acco	omplishment of E.	xempt	13 : Purposes uted importantly to the accom	10,16
c d e Subtotal. Add columns (b), (d), and (e) Total. Add line 12, columns (b), (d), and (e) e worksheet in line 13 instructions to verify calculations eart XVI-B Relationship of Activities ne No Explain below how each activity for which in	s to the Acco	omplishment of E.	xempt	13 : Purposes uted importantly to the accom	10,16
c d e Subtotal. Add columns (b), (d), and (e) Total. Add line 12, columns (b), (d), and (e) e worksheet in line 13 instructions to verify calculations eart XVI-B Relationship of Activities ne No Explain below how each activity for which in	s to the Acco	omplishment of E.	xempt	13 : Purposes uted importantly to the accom	10,16
c d e Subtotal. Add columns (b), (d), and (e) Total. Add line 12, columns (b), (d), and (e) we worksheet in line 13 instructions to verify calculations art XVI-B Relationship of Activities ne No Explain below how each activity for which in	s to the Acco	omplishment of E.	xempt	13 : Purposes uted importantly to the accom	10,16
c d e Subtotal. Add columns (b), (d), and (e) Total. Add line 12, columns (b), (d), and (e) we worksheet in line 13 instructions to verify calculations art XVI-B Relationship of Activities ne No Explain below how each activity for which in	s to the Acco	omplishment of E.	xempt	13 : Purposes uted importantly to the accom	10,16
c d e Subtotal. Add columns (b), (d), and (e) Total. Add line 12, columns (b), (d), and (e) e worksheet in line 13 instructions to verify calculations eart XVI-B Relationship of Activities ne No Explain below how each activity for which in	s to the Acco	omplishment of E.	xempt	13 : Purposes uted importantly to the accom	10,16
c d e Subtotal. Add columns (b), (d), and (e) Total. Add line 12, columns (b), (d), and (e) e worksheet in line 13 instructions to verify calculations eart XVI-B Relationship of Activities ne No Explain below how each activity for which in	s to the Acco	omplishment of E.	xempt	13 : Purposes uted importantly to the accom	10,16
c d e Subtotal. Add columns (b), (d), and (e) Total. Add line 12, columns (b), (d), and (e) e worksheet in line 13 instructions to verify calculations eart XVI-B Relationship of Activities ne No Explain below how each activity for which in	s to the Acco	omplishment of E.	xempt	13 : Purposes uted importantly to the accom	10,16
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c d e Subtotal. Add columns (b), (d), and (e) Total. Add line 12, columns (b), (d), and (e) se worksheet in line 13 instructions to verify calculations. Part XVI-B Relationship of Activities tine No Explain below how each activity for which in	s to the Acco	omplishment of E.	xempt	13 : Purposes uted importantly to the accom	10,16
c d e Subtotal. Add columns (b), (d), and (e) Total. Add line 12, columns (b), (d), and (e) ee worksheet in line 13 instructions to verify calculations. Part XVI-B Relationship of Activities ine No Explain below how each activity for which in	s to the Acco	omplishment of E.	xempt	13 : Purposes uted importantly to the accom	10,16
c d e Subtotal. Add columns (b), (d), and (e) Total. Add line 12, columns (b), (d), and (e) se worksheet in line 13 instructions to verify calculations. Part XVI-B Relationship of Activities tine No Explain below how each activity for which in	s to the Acco	omplishment of E.	xempt	13 : Purposes uted importantly to the accom	10,16
c d e Subtotal. Add columns (b), (d), and (e) Total. Add line 12, columns (b), (d), and (e) ee worksheet in line 13 instructions to verify calculations Part XVI-B Relationship of Activities ine No Explain below how each activity for which in	s to the Acco	omplishment of E.	xempt	13 : Purposes uted importantly to the accom	10,16

31	-1	6	7	9	6	9	1

				IDATION		31-167			ge 12
<u>_</u>	Part X	VII Information R Exempt Organ		Transfers To and Tran	sactions	and Relationships With Nonch	aritable	е	
1	Did t	he organization directly or ind	rectly engage	in any of the following with any o	ther organizat	tion described in section 501(c) of		Yes	No
	the C	ode (other than section 501(c	:)(3) organizat	tions) or in section 527, relating t	o political orga	inizations?			
				oncharitable exempt organization					
	(1)			. 5			1a(1)		Х
		Other assets					1a(2)		X
		r Transactions:			-		10127		
		Sales of assets to a noncharita	able evemnt o	raanization			16/13		X
		Purchases of assets from a no					1b(1)		X
		Rental of facilities, equipment,		· ·			1b(2)		X
				เจ			1b(3)		X
		Reimbursement arrangements	•				1b(4)		
		oans or loan guarantees		6du			1b(5)	-	X
		Performance of services or mi	=	*			1b(6)		X
		ng of facilities, equipment, ma					1c	L	X
	or se	answer to any of the above is rvices given by the reporting ( nn (d) the value of the goods,	organization. I	f the organization received less th	n (b) should a an fair market	lways show the fair market value of the goods value in any transaction or sharing arrangeme	, other as: ent, show	sets, In	
(a)	Line no.			e of noncharitable exempt organi	zation (	d) Description of transfers, transactions, and s	haring ari	rangem	ents
			<u> </u>	N/A		-, -, -, -, -, -, -, -, -, -, -, -, -, -			
		·					•		
			<del> </del>						
					*		<del></del>		
			<del> </del>	·					
					<del></del>				
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				<u>-</u> -	<u></u>				
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_									
_									
		L	<u> </u>	· · · · · · · · · · · · · · · · · · ·					
	ın sed	tion 501(c) of the Code (othe s," complete the following sch	r than section	with, or related to, one or more ta 501(c)(3)) or in section 527?	x-exempt orga	anizations described [	Yes	X	] No
_		(a) Name of organization		(b) Type of organizat	ion	(c) Description of relations	ship		
_				N/A					
	<del></del>								
ē	and cor	populties of perjury, I declare that I in politie Declaration of prepaler (other politics) and the politics of perjury (other politics) and the politics of th	than taxpayer	or fiduciary) is based on all information	of which prepare	TRUSTEE	s true, corre	ct,	
n Here	<b>P</b> 31			Date	<del></del> -	Title Chack if Propos	or's CCN	DTIN	
Sign	Paid Preparer's Use Only	Preparer's signature	le C	& Prooch		colf-	er's SSN oi		8
	Pai Pai e C	Firm's name (or yours DENT	,		'B	. EIN ▶			
	Pre Us	if setf-employed), P • O	. BOX	59726					
		address, and ZIP code BIRM	INGHAM	, AL 35259-9726	5	Phone no. 205-	871-	188	0_

Phone no.

FORM 99	90-PF	(	SAIN OR	(LOSS)	FROM	SALE	OF	' A	SSETS		STA	TEMEN'	ր 1	
DESCRII	(A) PTION OF	PROPERTY	<del>.</del>						ANNER QUIRED		TE IRED	DATE	SOLD	
MIRANT	CORPORA	TION					P	UR	CHASED	04/0	2/01	10/0	01/02	
	(B) GROSS		(C) (D) COST OR EXPENSI					(E)	Ξ)		(F)			
		PRICE	OTHER		EXI	PENSE SALE	OF	•	DEPRE	c.	GAIN	OR LO	oss	
		1,317.		18,545	<u> </u>		0	•		0.		<17	,228.	
DESCRIE	(A) PTION OF	PROPERTY	•						ANNER QUIRED		TE IRED	DATE	SOLD	
TORCHMA	RK CORP	ORATION						DOI	NATED	10/0	5/98	10/0	1/02	
	GR	B) OSS PRICE		C) JE AT OF ACQ.	EXI	(D) ENSE SALE	OF	•	(E)	c.	GAIN	(F)	oss	
		34,260.		30,032			0	•		0.		4 ,	228.	
(A) DESCRIPTION OF PROPERTY									ANNER QUIRED	DA ACQU	TE IRED	DATE	SOLD	
WADDELL & REED FINANCIAL			L, INC				_	10d	NATED	10/0	5/98	10/0	1/02	
	(B) GROSS SALES PRICE		(C VALU	!) IE AT	EXF	(D) EXPENSE SALE		(E)		(:		(F)	F)	
				F ACQ.				DEPREC.		c.	GAIN OR LOSS			
		7,947.		4,812.			0	•		0.		3,	135.	

(E) DEPREC. 0. RITIES	(F) GAIN OR LOSS <22,052.3  0. <31,917.3	
DEPREC.  0.  RITIES  ITAL GAINS	GAIN OR LOSS <22,052.2  0. <31,917.2	
0. RITIES	<22,052.5 0. <31,917.5	
RITIES	<31,917.	
TAL GAINS	<31,917.	
TAL GAINS		
TAL GAINS	STATEMENT 2	
TAL GAINS	STATEMENT 2	
IVIDENDS	COLUMN (A) AMOUNT	
16,445. 0.		
0.	16,445.	
	STATEMENT 3	
	AMOUNT	
	25,635.	
	25,635.	
	STATEMENT 4	
OK VALUE	FAIR MARKET VALUE	
11,650. 136,875.	7,200. 127,320. 17,810.	
	OK VALUE  19,631. 11,650. 136,875. 34,109. 5,975. 14,422.	

LOROL RODEN BOWRON REDIKE	ER RUCKER FO	UNDA	• • •	•	3:	L-167969:	
GALLAHER GROUP PLC SPONS AI		14,437.		18,755			
KELLOGG COMPANY		13,450.		13,340.			
PEPCO HOLDINGS, INC.		8,147. 28,984.					
SARA LEE CORPORATION							
SOUTHERN COMPANY				42,771. 30,820.			
CREDIT SUISSE GROUP							
CHEVRON CORPORATION		12,469. 16,420.					
ANNALY CAPITAL MANAGEMENT,							
TOTAL TO FORM 990-PF, PART	II, LINE 10	В		390,160.			
FORM 990-PF	GRANTS AND C	ONTER TRITET	ONG	<del></del>	C T A T I	EMENT !	
TOTAL 950 IF	PAID DURING				SIAIL	emeni .	
RECIPIENT NAME AND ADDRESS	RECIPIENT STATUS	PURPOSE	OF GRANT	RECIE RELATI		AMOUNT	
THE ALTAMONT SCHOOL	501(C)(3) PUBLIC CHARITY					10,000	
BIRMINGHAM MUSEUM OF ART	501(C)(3)						
	PUBLIC						
	CHARITY					2,500	
THE ALABAMA SYMPHONY	501(C)(3)						
	PUBLIC						
	CHARITY					500	
THE BIRMINGHAM BALLET	501(C)(3)						
	PUBLIC						
	CHARITY					500.	
JR. LEAGUE OF BIRMINGHAM	501(C)(3)						
PRESIDENT'S SOCIETY	PUBLIC						
	CHARITY		-			1,000.	
JR. LEAGUE OF BIRMINGHAM	501(C)(3)						
ENDOWMENT	PUBLIC						
	CHARITY					1,000.	
CATHEDRAL CHURCH OF THE	501(C)(3)						
ADVENT	PUBLIC						
	CHARITY					1,000.	
HIGHLANDS DAY SCHOOL	501(C)(3)						
	PUBLIC						
	CUNDIMU					2 500	

CHARITY

2,500.

LOROL RODEN BOWRON R	EDIKER RUCKER FOUNDA	31-1679691
BIRMINGHAM HISTORICAL SOCIETY	501(C)(3) PUBLIC CHARITY	500.
TOTAL TO FORM 990-PF,	PART XV, LINE 3A	19,500.