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Return of Private Foundation

| | | | | | | • | | • | | | t. | | | | | | |
|-----------------|----------------|-----------------|---|-------------|-----------------|---------------------------------------|----------|------------------------------|--|--------------|-----------------------------------|-----------------------|--------------------|--------------------------|------------------------------|--|---------------|
| = | Forr | , g | 90-PF | | | Re | etu | ırn of F | Private | e Fou | ndation | l | | | ОМВ | No 1545 | 0052 |
| 18 | 1011 | • | 00 | | | or Secti | ion · | 4947(a)(1) | Nonex | empt C | haritable T | rust | 4 | 15 M | / | nn | c) |
| AN | Depa Interi | rtmer nal Re | it of the Treasury venue Service | Note: 1 | The foun | dation mav b | | eated as a le to use a ci | | | sation satisfy state re | enortina rec | ulren | lU nents | 4 4 | UU | O/ |
| 6 | For | cale | ndar year 2006, | • | | | | 1, 200 | | | ending | SEP 3 | | 2007 | , | | |
| 8 | G | Check | all that apply: | | nıtıal retur | | _ | al return | | Amended r | eturn | Address c | | | $\neg \neg$ | ame cha | nge |
| 8 | Use | the | IRS Name of fo | | | | | | | | | A Employe | r iden | tificatio | n number | | |
| _ | | abel | • | | | WRON R | ED | IKER | | | | | | | | | |
| 8 9 | | lerwi print | se, RUCKE | | | LON nber if mail is not | dolnie | rad to street add | trace) . | • | Room/suite | | | 9691 | | | |
| 3 | | r typ: | | • | | T-NORT | | クマル | | Lan | ROOMVSdite | B Telephon | | | -3318_ | | |
| 4 | | Spe | City or tow | | | | | | The state of the s | | | C If exemption | | | | here | ightharpoonup |
| | | ructi | BIRMI | | | | | 35 2 | 13 | | | D 1. Foreig | • | | • | - | ▶ □ |
| CLEARE | H_(| _ | type of organiza | | | tion 501(c)(3) | | | | _ | | 2. Foreign check h | organiz ere and | ations me I attach co | eeting the 85% omputation | test, | ▶□ |
| V Lil | <u> </u> | | ction 4947(a)(1 arket value of all | <u> </u> | • | | _ | ner taxable pri | | | | E If private | | | | | |
| 긋 | | | arket value of all Part II, col. (c), | | ena or yea | | _ | r (specify) | X Cash | A(| crual | | | |)(A), check | | ~ |
| | • | \$ | urt 11, 001. (0), | | 5,032 | (Part I, co | lumr | (d) must be | on cash l | basis) | | | | | 60-month to)(B), check | | »[□ |
| STATUTE | Pa | ırt I | Analysis of Re | evenue an | nd Expens | es and (d) may not | | (a) Revenu | e and | | investment | (c) Adj | | net | | sburseme: table purp | |
| 2 | | Ι. | necessarily equa | I the amoun | its in colum | n (a)) | + | expenses pe | er books | ır | icome | | come | | | basis onl | |
| Κ | | 1 | Contributions, € | | | | \vdash | | | | | N, | / A. | | | | |
| S | | 3 | Interest on saving cash investments | | | EU IU AILACII SCII D | | | | | | | | | | | |
| | | 4 | Dividends and | | | ties | | 21 | ,505. | | 21,505. | | | | STATE | MENT | r 1 |
| | | 5a | Gross rents | | | | | | | | | | | | | | |
| | | l | Net rental income | ` ′ – | | | | 17 | | | | | | RF | CEIV | = 1 | |
| | Je | ь Б | Net gain or (loss) f Gross sales price | | | on line 10 | \vdash | <u> </u> | ,575. | - | | ļ | Г | | CLIVI | | 10 |
| | Revenue | 7 | assets on line 6a Capital gain net in | come (from | | | · | | | | 17,575. | | 8 | JAI | 11/1/2 | | Š |
| | Œ | 8 | Net short-term | capital gaj | | 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 | | | | | | | ñ | JAI | 102 |) | <u></u> |
| | | 9 | Income modific Gross sales less re | ations | 1 | [14] | _ | | | | | | | OC | DEN. | 117 | 150 |
| | | | and allowances | | 3414 | الما عا | | | | | | | | 00 | DLIV, | <u> </u> | |
| | | | Gross profit or | | 1137 | 2011 | \top | | | | | | | | | | |
| | | 11 | Other income | | | A TANKY A | | | ,735. | | 15,735. | | | | STATE | MENT | r 2 |
| | | | Total Add lines | s THE F | h DXA | NCH Ki | \bot | 54 | ,815. | | <u>54,815.</u> | i | | | | | |
| ı | | 13 | Compensation of Other employee | | | | \vdash | | 0. | - | 0. | | | | ļ <u></u> | | 0. |
| = | | 14 15 | Pension plans, | | - | • | \vdash | | | | | | | | | | |
| 2011 | ses | 16a | Legal fees | op.o, oo | 501101110 | | | | | | | | | | - | | |
| 4 | Expenses | Ь | Accounting fee: | s | | | | | | | | | | | | | |
| က | | | Other professio | nal fees | | | \vdash | | | | - | | | | | | |
| AN | Administrative | | Interest Taxes | | | | \vdash | | | | | - | | | | | |
| | istr | 19 | Depreciation an | id denletio | n | | \vdash | | | | | | | | | | |
| 岀 | Ë | 20 | Occupancy | | | | | | | | | | | | | | |
| Z | Ad | 21 | Travel, conferer | nces, and i | meetings | | | | | | | | | | | | |
| SCANNED JAN 3 1 | and | 22 | Printing and pu | | | | \vdash | | | | | | | | - | | |
| Q | Operating | 23 | Other expenses | | !=!= 44! | _ | \vdash | | | | | | _ | | | | |
| (A) | era | 24 | Total operating expenses. Add | | | | ľ | | 0. | | 0. | | | | | | 0. |
| | ŏ | 25 | Contributions, g | | | , | | 9 | 100. | | | | | | | 9.1 | 100. |
| | | | Total expenses | | - | s | | | | | • | | | | | | |
| | | | Add lines 24 an | | | | | 9 | 100. | | 0. | | | | ļ | <u>9,1</u> | <u>L00.</u> |
| <u> </u> | | | Subtract line 26 | | - | | | A E | 71. | | | | | | | | |
| 1 | | | Excess of revenue Net investment | • | | | - | 45 | 715. | | 54,815. | | | | | | |
| | | | Adjusted net in | | | | | | | | <u> </u> | N/ | 'A | | | | |
| | | | | | | | | | | | | | | | - 04 | M DE | |

LHA For Privacy Act and Paperwork Reduction Act Notice, see the instructions.

Form **990-PF** (2006)

LOROL RODEN BOWRON REDIKER

Form 990-PF (2006) Page 2 RUCKER FOUNDATION 31-1679691 Part II Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only Beginning of year End of year (a) Book Value (b) Book Value (c) Fair Market Value 108,442 1 Cash - non-interest-bearing 54,414 108,442. 2 Savings and temporary cash investments 3 Accounts receivable ► Less: allowance for doubtful accounts 4 Pledges receivable ► Less: allowance for doubtful accounts Grants receivable 6 Receivables due from officers, directors, trustees, and other disqualified persons 7 Other notes and loans receivable Less: allowance for doubtful accounts Inventories for sale or use 9 Prepaid expenses and deferred charges 10a Investments - U.S. and state government obligations STMT 3 390,301. 381,988. **b** Investments - corporate stock c Investments - corporate bonds 11 Investments - land, buildings, and equipment basis Less accumulated degreciation 12 Investments - mortgage loans 13 Investments - other 14 Land, buildings, and equipment basis Less accumulated depreciation 15 Other assets (describe ▶ 444.715. 490,430. 546.032. 16 Total assets (to be completed by all filers) 17 Accounts payable and accrued expenses 18 Grants payable 19 Deferred revenue 20 Loans from officers, directors, trustees, and other disqualified persons 21 Mortgages and other notes payable 22 Other liabilities (describe 23 Total liabilities (add lines 17 through 22) Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31. or Fund Balances 24 Unrestricted 25 Temporarily restricted 26 Permanently restricted ightharpoonsFoundations that do not follow SFAS 117, check here and complete lines 27 through 31. 27 Capital stock, trust principal, or current funds Net Assets 28 Paid-in or capital surplus, or land, bldg., and equipment fund 0. 0. 29 Retained earnings, accumulated income, endowment, or other funds. 444,715. 490,430 444,715. 490,430 30 Total net assets or fund balances 444,715 31 Total liabilities and net assets/fund balances 490,430 Part III | Analysis of Changes in Net Assets or Fund Balances 1 Total net assets or fund balances at beginning of year - Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return) <u>444,715.</u> 2 Enter amount from Part I, line 27a 3 Other increases not included in line 2 (itemize) 3 Add lines 1, 2, and 3 4

490,430.

Decreases not included in line 2 (itemize)

Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30

| Part IV Capital Gains | and Lo | sses for Tax on In | vestmen | t Income | | | | | |
|--|---------------|--|------------------------------------|--|---------------|--|--------------|--|----------------------------------|
| | | nd(s) of property sold (e.g. or common stock, 200 shs | | | (b) F | low acquired - Purchase - Donation | | Date acquired o., day, yr.) | (d) Date sold (mo., day, yr.) |
| 1a ACCO BRANDS IN | C | | | | | P | 09 | /30/05 | 10/01/06 |
| b GALLAHER GROUP | | SPONS ADR | | · | | D | | /05/98 | 10/01/06 |
| c HANESBRANDS, I | NC | | | | _ | P | 09 | /30/06 | 10/01/06 |
| <u>d</u> | | | | | | | | | |
| _e | 45.5 | | | | <u> </u> | | | | |
| (e) Gross sales price | (f) L | Pepreciation allowed (or allowable) | | st or other basis expense of sale | | | | h) Gain or (loss) plus (f) minus (| g) |
| a 2,604. | | | | 3,30 | | | | | <698. |
| b 32,710. | | | | 14,43 | | | | | <u> 18,273.</u> |
| c 2,814. | | | | 2,81 | 4. | | | | 0. |
| <u>d</u> | | | | | | | | | |
| Complete and for accets chaven | 0 0010 10 0 | olumn (h) and owned by t | ha foundation | on 12/21/60 | | | <i>(1)</i> O | (0-1, (1-) | |
| Complete only for assets showin | | <u> </u> | | | | | | is (Col. (h) gain but not less thai | |
| (i) F.M.V. as of 12/31/69 | | j) Adjusted basis as of 12/31/69 | | cess of col. (i) col. (j), if any | | | | ses (from col. (| h)) |
| <u>a</u> | | | | | | | | | <698. |
| <u>b</u> | | | | ······································ | | | | | <u> 18,273.</u> |
| | | | | | _ | | | | 0. |
| d | | | | | \dashv | | | | |
| <u>e</u> | | | | | _ | | | | |
| 2 Capital gain net income or (net ca | pıtal loss). | { If gain, also enter lf (loss), enter -0- | ın Part I, line ın Part I, line | ⁷ ₇ } | | 2 | | | 17,575. |
| 3 Net short-term capital gain or (los If gain, also enter in Part I, line 8, o | | | d (6): | | } | | | | |
| If (loss), enter -0- in Part I, line 8 | | | | | ىل | 3 | | N/A | |
| Part V Qualification U | nder S | ection 4940(e) for | Reduced | lax on Net | Inve | estment I | ncom | <u>e</u> | |
| (For optional use by domestic private | foundatio | ns subject to the section 4 | 940(a) tax on | net investment in | come | .) | | | |
| If section 4940(d)(2) applies, leave th | us part bla | nk. | | | | | | | |
| , ,, , , , | • | | | | | | | | |
| Was the foundation liable for the sect | | | | • | iods | | | | Yes X No |
| If "Yes," the foundation does not quali | | | | | | | | | |
| 1 Enter the appropriate amount in e | ach colun | | ictions before | making any entrie | | | | | (4) |
| (a) Base period years | | (b) Adjusted qualifying dist | rihiitions | Net value of no | (C) nchari | itahle-iise assi | ete | | (d) ution ratio |
| Calendar year (or tax year beginnin | ig in) | | | THE VALUE OF HE | iichai | | | (cor (p) giv | ided by col. (c)) |
| 2005 | - | | 6,976. | | | 515,68 | | | .052311 |
| 2004 | | | 9,000. | | | 484,42 439,55 | | | .018579 |
| 2003 | | | 9,314. | · · · · · · · · · · · · · · · · · · · | | | | · | .043940 |
| 2002 | | | 9,079. 8,000. | | | 398,14 | | | .047919 |
| 2001 | | · <u> </u> | 0,000. | | | 394,59 | 71. | 1 | .020274 |
| 2 Total of line 1, column (d) | | | | | | | | 2 | .183023 |
| 3 Average distribution ratio for the 5 | - | | n line 2 by 5, | or by the number | of yea | ırs | | | |
| the foundation has been in existen | ice if less t | than 5 years | | | | | . [_: | 3 | .036605 |
| 4 Enter the net value of noncharitable | le-use ass | ets for 2006 from Part X, I | ne 5 | | | | | 4 | 533,396. |
| 5 Multiply line 4 by line 3 | | | | | | | | 5 | 19,525. |
| o manapiy into 4 by tine o | • | | | | | | | | |
| 6 Enter 1% of net investment incom | e (1% of F | Part I, line 27b) | | • | | | | 6 | 548. |
| 7 Add lines 5 and 6 | | | | | | | <u> </u> | 7 | 20,073. |
| 8 Enter qualifying distributions from | Part XII, I | ine 4 | • | | | | | 8 | 9,100. |
| If line 8 is equal to or greater than See the Part VI instructions. | line 7, che | eck the box in Part VI, line | 1b, and comp | lete that part using | g a 1% | 6 tax rate. | | | |

LOROL RODEN BOWRON REDIKER

| | H 990-FF (2006) RUCKER FOUNDATION | | | <u>6/969.</u> | | Page 4 |
|----|--|-----------|--|------------------------|--------------|--------------|
| Pa | art VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or | r 494 | <u> 18 - s</u> | <u>ee instr</u> | uctio | ns) |
| 18 | Exempt operating foundations described in section 4940(d)(2), check here 🕨 🔲 and enter "N/A" on line 1. | ŀ | | | | |
| | Date of ruling letter: (attach copy of ruling letter if necessary-see instructions) | | | | | |
| t | Domestic foundations that meet the section 4940(e) requirements in Part V, check here 🕨 🔲 and enter 1% | L | 1 | | 1,(| <u> </u> |
| | of Part I, line 27b | | | | | |
| C | : All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b) | | | | | |
| 2 | Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) | L | 2 | | _ | 0. |
| 3 | Add lines 1 and 2 | | 3 | | 1, | <u> </u> |
| 4 | Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) | _ | 4 | | | _0. |
| 5 | Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0- | | 5 | | 1,0 | 96. |
| 6 | Credits/Payments: | İ | | | | |
| a | 2006 estimated tax payments and 2005 overpayment credited to 2006 6a | | | | | |
| b | Exempt foreign organizations - tax withheld at source 6b | | | | | |
| C | Tax paid with application for extension of time to file (Form 8868) | | | | | |
| C | Backup withholding erroneously withheld | | | | | |
| 7 | Total credits and payments. Add lines 6a through 6d | | 7 | | | 0. |
| 8 | Enter any penalty for underpayment of estimated tax. Check here if Form 2220 is attached | L | 8 | | | 19. |
| 9 | Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed | ▶ | 9 | | 1,1 | <u> 15.</u> |
| 10 | Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid | ▶: | 10 | | | |
| | Enter the amount of line 10 to be: Credited to 2007 estimated tax | | <u> 11 </u> | | | |
| | art VII-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 interv | ene in | | | Yes | No |
| | any political campaign? | | | 1a | | X |
| b | Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition | - | | 1b | | X |
| | If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials put | blished | d or | | | |
| | distributed by the foundation in connection with the activities. | | | | | |
| | Did the foundation file Form 1120-POL for this year? | | | 1c | <u> </u> | X |
| d | Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: | | | | | |
| | | <u>).</u> | | | | |
| е | Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation | | | | | |
| | managers. ► \$0. | | | | | |
| 2 | Has the foundation engaged in any activities that have not previously been reported to the IRS? | | | 2 | | X |
| _ | If "Yes," attach a detailed description of the activities. | | | | | |
| 3 | Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation | n, or | | | | |
| | bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes | | | 3 | | <u> </u> |
| | Did the foundation have unrelated business gross income of \$1,000 or more during the year? | | /- | 4a | - | X |
| | If "Yes," has it filed a tax return on Form 990-T for this year? | | N/A | | 1 | |
| 5 | Was there a liquidation, termination, dissolution, or substantial contraction during the year? | | | 5 | + | X |
| | 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 Provided logislation that effectively amende the course instrument on that are mandeterm directives that are iffer to the first with the course instrument on the course instrument. | 4-4- I | | | | |
| | By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the second in the governing instrument. | tate lav | N | | . | |
| 7 | remain in the governing instrument? | | | 6 | X | |
| 7 | Did the foundation have at least \$5,000 in assets at any time during the year? | | | 7 | X | |
| 0. | If "Yes," complete Part II, col. (c), and Part XV | | | | | |
| oa | Enter the states to which the foundation reports or with which it is registered (see instructions) AL | | | — [| | |
| L | | | | - ∤ | | |
| D | If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) | | | | v | |
| ٥ | of each state as required by General Instruction G? If "No," attach explanation | noles 4 | | <u>8b</u> | X | |
| 3 | Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for year 2006 or the tayable year hoginapping in 2006 (see instructions for Part VIVO2 (f 1998 1 accomplete Part VIVO | aienda | 11 | | 1 | v |
| 10 | year 2006 or the taxable year beginning in 2006 (see instructions for Part XIV)? If "Yes," complete Part XIV Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses | | | 9 | \vdash | X |
| 10 | one any persons become substantial contributors during the tax year it "Yes," attach a schedule listing their names and addresses | | | 10 Form 99 0 |)_DE | |
| | | | | しいけい マブリ | 7-T-T | (2000) |

| _ | | |
|----|----|---|
| Pο | 'n | ρ |

| | art VII-A Statements Regarding Activities Continued | 7031 | | |
|------------|--|---------------|------------|---------------|
| | | $\overline{}$ | | |
| 114 | At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? | | | х |
| | If "Yes," attach schedule. (see instructions) | 11a | | |
| u | of "Yes," did the foundation have a binding written contract in effect on August 17, 2006, covering the interest, rents, royalties, and | 1,,, | | |
| 40 | annuities described in the attachment for line 11a? N/A | 11b | | Х |
| | Did the foundation acquire a direct or indirect interest in any applicable insurance contract? | 12 | v | |
| 13 | Did the foundation comply with the public inspection requirements for its annual returns and exemption application? | 13 | X | L |
| | Web site address ► N/A | 4 1 A | - 2 2 | 10 |
| 14 | The books are in care of THE FOUNDATION Telephone no. (205) | 414 | -33 | T 9 _ |
| | Located at ►THE FOUNDATION'S ADDRESS, BIRMINGHAM, AL ZIP+4 ►35 | 203 | | $\overline{}$ |
| 15 | Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here | | , ▶ | ـــا٠ |
| Da | and enter the amount of tax-exempt interest received or accrued during the year | N | <u>/A</u> | |
| P 6 | art VII-B Statements Regarding Activities for Which Form 4720 May Be Required | т | V | NI - |
| | 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? | | ĺ | |
| | (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) | j l | | |
| | a disqualified person? | | | |
| | (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? | | | |
| | (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 | | | i |
| | for the benefit or use of a disqualified person)? | | | |
| | (6) Agree to pay money or property to a government official? (Exception. Check "No" | | | |
| | ıf 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.) | | | |
| 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 22 of the instructions)? N/A | 1b | | |
| | Organizations relying on a current notice regarding disaster assistance check here | | | |
| C | Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected | | | |
| | before the first day of the tax year beginning in 2006? | 1c | | _X_ |
| 2 | Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation | | | |
| | defined in section 4942(j)(3) or 4942(j)(5)): | | | |
| a | At the end of tax year 2006, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning | | | |
| | before 2006? X Yes No | | | |
| | If "Yes," list the years \triangleright 2005 ,, | | | |
| 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 | X | |
| C | If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. | | | |
| | > , | | | |
| 3a | Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time | | | |
| | during the year? | | | |
| b | If "Yes," did it have excess business holdings in 2006 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 2006.) N/A | 3ь | | |
| 4 a | Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? | 4a | | X |
| | Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that | | 1 | |
| - | had not been removed from jeopardy before the first day of the tax year beginning in 2006? | 4b | İ | Х |
| | Topic boginning in Eddo | <u> </u> | | |

| LOROL RODEN BOWRON REDI | | • | 31-16796 | 91 Page 6 |
|--|--|---|--|---|
| Part VII-B Statements Regarding Activities for Which | r Form 4720 May Be l | Required Contin | ued | |
| 5a During the year did the foundation pay or incur any amount to: (1) Carry on propaganda, or otherwise attempt to influence legislation (sect | , | | es X No | |
| (2) Influence the outcome of any specific public election (see section 4955) any voter registration drive?(3) Provide a grant to an individual for travel, study, or other similar purpos | | Y | es X No es X No | |
| (4) Provide a grant to an organization other than a charitable, etc., organization of the standard of the standar | | • | es 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 to | inder the exceptions described | Y | es 🗓 No | |
| section 53.4945 or in a current notice regarding disaster assistance (see insi Organizations relying on a current notice regarding disaster assistance check c If the answer is "Yes" to question 5a(4), does the foundation claim exemption | k here | uned | N/A ► | 5b |
| expenditure responsibility for the grant? If "Yes," attach the statement required by Regulations section 53 49 6a Did the foundation, during the year, receive any funds, directly or indirectly, 1 | N 945-5(d) | 1/A y | es D No | |
| a personal benefit contract? b Did the foundation, during the year, pay premiums, directly or indirectly, on a lf you answered "Yes" to 6b, also file Form 8870 | · | | | 6b X |
| 7a At any time during the tax year, was the foundation a party to a prohibited tax | | . L Yo | es 🗶 No 📙 | |
| b If yes, did the foundation receive any proceeds or have any net income attrib | | | | 7b |
| Part VIII Information About Officers, Directors, Trus Paid Employees, and Contractors | stees, Foundation Ma | inagers, Highly | У | |
| 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 | 0.00 | 0. | 0. | 0. |
| J. MICHAEL REDIKER 506 HAMPTON DRIVE | TRUSTEE | | | |
| BIRMINGHAM, AL 35209 | 0.00 | 0. | 0. | 0. |
| | | | | |
| 2 Compensation of five highest-paid employees (other than those in | ncluded on line 1). If none, | enter "NONE." | | |
| (a) Name and address of each employee paid more than \$50,000 | (b) Title and average hours per week devoted to position | (c) Compensation | (d) Contributions to employee benefit plans and deferred compensation | (e) Expense account, other allowances |
| NONE | | | | |
| | | | | |

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0

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

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| Part VIII Information About Officers, Directors, Trustees, Foundar Paid Employees, and Contractors Continued | tion Managers, Highly | |
|--|--|------------------|
| 3 Five highest-paid independent contractors for professional services. If none, enter | "NONE." | ··· |
| (a) Name and address of each person paid more than \$50,000 | (b) Type of service | (c) Compensation |
| NONE | | |
| | | |
| | _ | |
| | | |
| Total number of others receiving over \$50,000 for professional services Part IX-A Summary of Direct Charitable Activities | | ▶ 0 |
| List the foundation's four largest direct charitable activities during the tax year. Include relevant statistic number of organizations and other beneficiaries served, conferences convened, research papers produced to the conference of the convened of th | cal information such as the uced, etc. | Expenses |
| 1 N/A | | |
| 2 | | |
| 3 | | |
| | | |
| 4 | | |
| Part IX-B Summary of Program-Related Investments | | |
| Describe the two largest program-related investments made by the foundation during the tax year on line \mathbf{N}/\mathbf{A} | nes 1 and 2. | Amount |
| | | |
| 2 | | |
| All other program-related investments. See instructions. | | |
| 3 | | |
| Total. Add lines 1 through 3 | > | 0. |

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| P | art X Minimum Investment Return (All domestic foundations must complete this part Foreign four | ndations, s | ee instructions) |
|----|---|-------------|-------------------|
| 1 | Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes: | | |
| a | | 1a | 460,091. |
| b | Average of monthly cash balances | 1b | 81,428. |
| C | Fair market value of all other assets | 1c | 01/1201 |
| d | Total (add lines 1a, b, and c) | 1d | 541,519. |
| e | Reduction claimed for blockage or other factors reported on lines 1a and | | |
| - | 1c (attach detailed explanation) 1e 0. | | |
| 2 | Acquisition indebtedness applicable to line 1 assets | 2 | 0. |
| 3 | Subtract line 2 from line 1d | 3 , | 541,519. |
| 4 | Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions) | 4 | 8,123. |
| 5 | Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4 | 5 | 533,396. |
| 6 | Minimum investment return. Enter 5% of line 5 | 6 | 26,670. |
| P | art XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and foreign organizations check here and do not complete this part.) | nd certain | |
| 1 | Minimum investment return from Part X, line 6 | 1 | 26,670. |
| 2a | Tax on investment income for 2006 from Part VI, line 5 | | |
| b | Income tax for 2006. (This does not include the tax from Part VI.) | | |
| C | Add lines 2a and 2b | 2c | 1,096. |
| 3 | Distributable amount before adjustments. Subtract line 2c from line 1 | 3 | 25,574. |
| 4 | Recoveries of amounts treated as qualifying distributions | 4 | 0. |
| 5 | Add lines 3 and 4 | 5 | 25,574. |
| 6 | Deduction from distributable amount (see instructions) | 6 | 0. |
| 7_ | Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1 | 7 | 25,574. |
| P | art XII Qualifying Distributions (see instructions) | | - |
| 1 | Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes: | | |
| а | Expenses, contributions, gifts, etc total from Part I, column (d), line 26 | 1a | 9,100. |
| | 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: | | |
| а | Suitability test (prior IRS approval required) | 3a | |
| b | Cash distribution test (attach the required schedule) | 3b | |
| 4 | Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4 | 4 | 9,100. |
| 5 | Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment | | |
| | income. Enter 1% of Part I, line 27b | 5 | 0. |
| 6 | Adjusted qualifying distributions. Subtract line 5 from line 4 | 6 | 9,100. |
| | Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the | foundation | |
| | 4940(e) reduction of tax in those years | | • |

Part XIII Undistributed Income (see instructions)

| Line 7 25 | | (a) Corpus | (b) Years prior to 2005 | (c) 2005 | (d) 2006 |
|---|--|---------------|----------------------------|-------------|--------------------|
| 2 Undershould recent. 4 any, as of the send of 2005 a fell real mount for 12005 only b Total for prior years: 3 Excess distributions carryover, if any, to 2006; a From 2001 b From 2002 c From 2003 d From 2006 c From 2006 d From 2006 | 1 Distributable amount for 2006 from Part XI, line 7 | | | | 25,574. |
| a Enter amount for 2005 only b Total for prior years: □ Sexess delabulitions carryover, if any, to 2005: a From 2001 b From 2002 c From 2003 d From 2004 from 2005 from 2006 f | 2 Undistributed income, if any, as of the end of 2005 | | | | |
| b Total for prior years: 0 . 3 Excess distributions carryover, if any, to 2006: a From 2002 c From 2003 d From 2004 e From 2005 f Total of lines & through e 4 Qualitying distributions for 2006 from Part XII, line d, P. S. 9, 1,00 . 4 Qualitying distributions of the common of prior Part XII, line d, P. S. 9, 1,00 . 5 Applied to undistributed momen of prior Part XII, line d, P. S. 9, 1,00 . 6 Applied to undistributions out of corpus c Preserved as distributions out of corpus c Preserved Celebron required -see instructions) c Treated as distributions out of corpus c Preserved Celebron required -see instructions c Treated as distributions out of corpus c Preserved Celebron required -see instructions c Treated as distributions out of corpus c Preserved Celebron required -see instructions c Treated as distributions out of corpus c Preserved Celebron required -see instructions c Treated as distributions out of corpus as the second required of the second served to the second served t | | | | 21,982. | |
| 3. Excess distributions carryover, if any, to 2005: a From 2001 b From 2002 c From 2003 d From 2004 e From 2005 t Total of lines 3a through e 4. Qualifying distributions to 2006 from Part XII, line 4: b S | b Total for prior years: | | 0 | | |
| a From 2001 b From 2002 c From 2003 d From 2004 c From 2005 f Total of hines Sal through e O . 4 Coulshiping debtubous for 2005 from Part XII, kine 4: ▶ \$ 9, 100 . a Applied to 2005, but not more than line 2 e b Applied to 2005, but not more than line 2 e b Applied to 2005, but not more than line 2 e b Applied to 2005, but not more than line 2 e b Applied to 2005, but not more than line 2 e b Applied to 2005, but not more than line 2 e b Applied to 2005 distributation and of corpus (Election required - see instructions) C Freatend as distributions out of corpus (Election required - see instructions) C Applied to 2006 distributation amount D C Certain and a struction and a control than a control | 3 Excess distributions carryover, if any, to 2006: | | | | |
| b From 2002 c From 2003 d From 2004 e From 2005 f Total of lines 3a through e 4. Qualitying distributions for 2006 from Part XII, line 4: b \$ 9,100. a Applied to 2005, but not more than line 2: b Applied to 2005, but not more than line 2: b Applied to 2005, but not more than line 2: b Applied to 2005, but not more than line 2: b Applied to 2005 distributions come of prior years (Election required - see instructions) c Treated as distributions out of corpus (Election required - see instructions) d Capital as distributions compared applied as a construction of the see instructions of the see instruction of the see instruction of the see instruction of the see instruction of the see instruction | | | | | |
| e From 2003 d From 2004 e From 2005 1 Totat of hims & sthrough e 1 Totat of hims & sthrough e 2 | | i | | | |
| d From 2004 e From 2005 e From 2005 Total of hese 3a through e 4 Qualifying distributions for 2006 from Part XII, Ime 4: № \$ 9,100. a Applied to 2005, but not more than line 2a b Applied to 2005, but not more than line 2a b Applied to 2005, but not more than line 2a b Applied to 2005, but not more than line 2a b Applied to 2005 distributions out of corpus (Election required-see mistuctions) d Applied to 2006 distributiable amount e Remaining amount distributed out of corpus Elections required-see mistuctions) d Applied to 2006 distributiable amount e Remaining amount distributed out of corpus Elections required-see mistuctions 0 . d Centred see and to 2006 D . Election required-see mistuctions 0 . d Centred see and to 2006 Election required-see mistuctions 0 . d Centred see and to 2006 D . d Centred see and to 2007 a Centred see and to 2016 and to 2006 minut se seewin column (a) b Priori years' (intolationate did nome. a Centred seemon to priori years' undistributed morne for which a notice of deficiency has been issued, or on which the section 494(2) tax has been previously assessed 0 . d Subtract line 6 for mine 18b. Taxable amount - see mist. 1 12 , 882. 1 Undistributed morne for 2006. Subtract line 4 from line 2a. Taxable amount - see mist. 1 12 , 882. 1 Undistributed morne for 2006. Subtract line 4 afrom line 2a. Taxable amount - see mist. 1 12 , 882. 1 Undistributed morne for 2006. Subtract line 4 distributed morne for 2006. Subtract line 4 distributed morne for 2007 2 Amounts treated as distributions carryover from 2001 to applied on the 5 or line 7 0 . 3 Excess distributions carryover from 2001 to applied on the 5 or line 7 0 . 3 Excess form 2006 Excess from 2006 | | † | | | |
| e From 2005 Total of lines 3 at brough e Q | * | [| | | |
| Total of lines 3 at through e 0 . | | 1 | | | |
| 4. Qualifying distributions for 2006 from Part XII, lime 4: Fe \$ 9,100. 4. Applied to 2005, but not more than line 2a. 5. Applied to undistributed morme of prior years (Election required - see instructions) 6. Treated as distributions out of corpus (Election required - see instructions) 7. Compared to the structure of the s | <u> </u> | 1 0.1 | | | |
| Part XI, line 4: ▶ \$ 9,100. a Applied to 2005, but not more than line 2a b Applied to 12005, but not more than line 2a b Applied to undistributed encome of prior years (Election required - see instructions) c Treated as distributions out of corpus (Election required - see instructions) d Applied to 2006 distributable amount eRemaining amount distributed out of corpus EREmaining amount distributed out of corpus 6. Excess distributions carryover applied to 2009 0. 6. Exter the net total of each column as indicated below: a Corpus And lines 3f, 4c, and 46 Substact line 5 b Prior years' undistributed income. Subtract line 2 c Enter the mount of prior years' undistributed income. Subtract line 4b from line 2b c Enter the mount of prior years' undistributed morne for which a notice of deficiency has been sisted, or on which the section 4942(a) tax has been previously assessed d Subtract line 6b. Taxable amount - see instructions 0. d Subtract line 6c from line 6b. Taxable amount - see instructions 0. d Undistributed income for 2005. Subtract line 4a from line 2 6. Toom line 1. This amount must be distributed microme for 9442(a) tax has been previously assessed 7. Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b) (1)(E) or 4942(p)(3) 7. Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b) (1)(E) or 4942(p)(3) 7. Excess distributions carryover to 2007. 8. Excess distributions carryover to 2007. 9. Excess distributions carryover to 2007. 9. Excess stimulous carryover to 2007. 9. Excess firm 2005 6. Excess firm 2006 6. Excess from 2006 | | | | | |
| a Applied to 2005, but not more than line 2a b Applied to undistributed income of prior years (Election required - see instructions) c Treated as distributions out of corpus (Election required - see instructions) d Applied to 2006 distributable amount e Remaining amount distributed out of corpus c Excess distributions carpover applied to 2006 off in amount appears in existing to 2006 off in amount appears in column (a), the same amount must be evien in column (a). 6 Enter the net total of each column as indicated below: a Corpus Add lines 31, 4e, and 4e Subtract line 5 b Prior years' undistributed mome. Subtract line 4b from line 2b c. Enter the amount of prior years' undistributed mome for which a notice of deficiency has been issued, or on which the section 4942(p) tax has been priviously assessed d Subtract line 6c from line 6b. Taxable amount - see instructions e Undistributed income for 2005. Subtract line 4a from line 2a. Taxable amount - see instructions e Undistributed income for 2005. Subtract line 4a from line 2a. Taxable amount - see instructions e Undistributed income for 2005. Subtract line 4a from line 2a. Taxable amount - see instructions e Undistributed income for 4042(p)(3) Amounts treated as distributions carryover from 2001 not applied on line 5 or line 7 0. Excess distributions carryover from 2001 not applied on line 5 or line 7 0. Excess from 2006 Excess from 2006 Excess from 2006 Excess from 2006 Excess from 2006 Excess from 2006 Excess from 2006 | | | | | |
| b Appled to undistributed moome of pror years (Election required - see instructions) c Treated as distributions out of corpus (Election required - see instructions) d Appled to 2006 distributable amount e Remaning amount distributed out of corpus 5 Excess distributions carryover applied to 2006 distributable amount e Remaning amount distributed out of corpus 5 Excess distributions carryover applied to 2006 distributable amount (a) the same amount must be aboven in column (a) the same amount must be aboven in column (a) the same amount must be aboven in column (a) the same amount time of the amount of prori years undistributed income. Subtract line 40 from line 20 c. Enter the amount of prori years undistributed income for which a notice of deficiency has been issued, or no which the section 4942(a) tax has been previously assessed dischibuted income for 2005. Subtract line 40 from line 60. Taxable amount - see instructions e Undistributed income for 2005. Subtract line 4a from line 62. Taxable amount - see instructions e Undistributed income for 2006. Subtract line 4a from line 6. Taxable amount - see instructions to distributed income for 2006. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2007 and 5 from line 1. This amount must be distributed in 2007 and 5 from line 1. This amount must be distributed as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(E) or 4942(b)(3) 3 0. 2 Excess distributions carryover from 2001 on tappled on line 5 or line 7 0. 3 Excess distributions carryover from 2001 on tappled on line 5 or line 7 0. 4 Excess from 2004 cexcess from 2004 cexcess from 2005 cexcess from 2004 cexcess from 2005 cexcess from 2006 cexcess from 2006 cexcess from 2006 cexcess from 2006 cexcess from 2006 cexcess from 2006 cexcess from 2006 cexcess from 2006 cexcess from 2006 cexcess from 2006 cexcess from 2006 cexcess from 2006 cexcess from 2006 cexcess from 2006 cexcess from 2006 cexces from 2006 cexcess from 2006 cexces from 2006 cexcess from 2006 c | • | 1 | | 9 100 | |
| years (Election required - see instructions) c Treated as distributions out of corpus (Election required - see instructions) d Applied to 2006 distributable amount e Remaining amount distributed out of corpus 5 Excess distributions carryover applied to 2006 off an amount appears in column (a), the same amount must be shown in column (a). The same amount must be shown in column (a). 6 Enter the net total of each column as indicated below: a Corpus Add lines 34, 44, and 46 Subtract line 5 b Prior years' undistributed more. Subtract line 4h from line 2b c Enter the amount of prior years' undistributed more for which a notice of deficiency has been issued, or on which the section 1494(a) tax has been previously assessed d Subtract line 6c from line 6b. Taxable amount - see instructions e Undistributed income for 2005. Subtract line 4 from line 2a. Taxable amount - see instr. I fundistributed income for 2006. Subtract lines 4d and 5 from line 1. This amount must be distributed more for 2006. Subtract lines 4d and 5 from line 1. This amount must be distributed more for 2007. Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b) (1)(E) or 4942(p)(3) 3. Excess distributions carryover from 2001 not applied on line 5 or line 7 Decesses from 2003 Excess from 2004 Excess from 2004 Excess from 2005 Excess from 2004 Excess from 2006 Excess from 2006 Excess from 2006 | | | | 3,100. | |
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| (Election required - see instructions) d Applied to 2006 distributable amount e Remaining amount distributed out of corpus 5. Excess floatibutions carryover to 2007. Election floating and the service of the distributions carryover to 2007. Subtract lines 40 from line 50. Cartiffication for 2006. Subtract line 6 both cartiffication from the section 4942(g)(3) as a second septiment of 2006. Subtract line 40 from line 6b. Taxable amount - see instructions e Undistributed income for which a notice of detection when the section 4942(g) tax has been previously assessed d at from line 2. Taxable amount - see instructions e Undistributed income for 2006. Subtract line 4a from line 2. Taxable amount - see instructions e Undistributed income for 2006. Subtract line 4a from line 2a. Taxable amount - see instructions e Undistributed income for 2006. Subtract line 4a from line 2a. Taxable amount - see instructions e Undistributed income for 2006. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2007 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(f) (f)(f) or 4942(g)(3) 3. Excess distributions carryover to 2007. Subtract lines 7 and 8 from line 6a O. Analysis of line 9: Excess from 2002 b Excess from 2004 d Excess from 2006 e Excess from 2006 e Excess from 2006 e Excess from 2006 | • | | | | |
| d Applied to 2006 distributable amount Remaining amount distributed out of corpus Excessed distributions carryover applied to 2008 (if an amount appease in column (d), the same amount must be shown in column (d)) Enter the net total of each column as indicated below: a Corpus Add lines 31, 4c, and 4e Subtract line 5 b Prior years' undistributed income. Subtract line 4b from line 2b c. Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed d Subtract line 6c from line 6b. Taxable amount - see instructions e Undistributed income for 2006. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2007 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(E) or 4942(a)(3) a. Excess distributions carryover from 2001 not applied on line 5 on line 7 Excess distributions carryover from 2001 not applied on line 5 on line 7 Excess distributions carryover to 2007. Subtract lines 7 and 8 from line 6a Analysis of line 9: acxess from 2002 be Excess from 2004 de Excess from 2004 de Excess from 2005 e Excess from 2006 | • | ١ | | | |
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| 5 Encest darbubdons carryover applied to 2009 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 | | 0 | | | <u> </u> |
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| a Corpus Add lines 3f, 4c, and 4e. Subtract line 5 b Pror years' undistributed income. Subtract line 4b from line 2b c Enter the amount of pror 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 6b. Taxable amount - see instructions e Undistributed income for 2005. Subtract line 4a from line 2a. Taxable amount - see instructions e Undistributed income for 2005. Subtract line 4a from line 2a. Taxable amount - see instructions f Undistributed income for 2005. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2007 A mounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(E) or 4942(g)(3) Corpus to satisfy requirements imposed by section 170(b)(1)(E) or 4942(g)(3) Corpus to satisfy requirements imposed by section 170(b)(1)(E) or 4942(g)(3) Corpus to satisfy requirements carryover from 2001 not applied on line 5 or line 7 Corpus to satisfy the satisfy of line 9: Corpus to a satisfy the satisfy of line 9: Corpus to satisfy the satisfy of line 9: Corpus to satisfy of | 6 Enter the net total of each column as | | | | |
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| 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 3. d Subtract line 6c from line 6b. Taxable amount - see instructions e Undistributed income for 2005. Subtract line 4a from line 2a. Taxable amount - see instructions e Undistributed income for 2005. Subtract line 4a from line 2a. Taxable amount - see instructions f Undistributed income for 2006. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2007 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(E) or 4942(g)(3) Excess distributions carryover from 2001 not applied on line 5 or line 7 B Excess distributions carryover to 2007. Subtract lines 7 and 8 from line 6a Analysis of line 9: a Excess from 2002 b Excess from 2003 c Excess from 2004 d Excess from 2005 e Excess from 2005 e Excess from 2006 | - | | 0. | | |
| amount - see instructions e Undistributed income for 2005. Subtract line 4a from line 2a. Taxable amount - see instr. f Undistributed income for 2006. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2007 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(E) or 4942(g)(3) 3. Excess distributions carryover from 2001 not applied on line 5 or line 7 Excess distributions carryover to 2007. Subtract lines 7 and 8 from line 6a Analysis of line 9: a Excess from 2002 b Excess from 2003 c Excess from 2004 d Excess from 2005 e Excess from 2006 | 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 | | | | |
| e Undistributed income for 2005. Subtract line 4a from line 2a. Taxable amount - see instr. f Undistributed income for 2006. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2007 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(E) or 4942(g)(3) 8 Excess distributions carryover from 2001 not applied on line 5 or line 7 Excess distributions carryover to 2007. Subtract lines 7 and 8 from line 6a Analysis of line 9: a Excess from 2002 b Excess from 2003 c Excess from 2004 d Excess from 2005 e Excess from 2006 | d Subtract line 6c from line 6b. Taxable | | | | |
| 4a from line 2a. Taxable amount - see instr. † Undistributed income for 2006. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2007 7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(E) or 4942(g)(3) 8 Excess distributions carryover from 2001 not applied on line 5 or line 7 9 Excess distributions carryover to 2007. Subtract lines 7 and 8 from line 6a 10 Analysis of line 9: a Excess from 2002 b Excess from 2003 c Excess from 2004 d Excess from 2005 e Excess from 2006 | | | 0. | | |
| f Undistributed income for 2006. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2007 7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(E) or 4942(g)(3) 8 Excess distributions carryover from 2001 not applied on line 5 or line 7 9 Excess distributions carryover to 2007. Subtract lines 7 and 8 from line 6a 10 Analysis of line 9: a Excess from 2002 b Excess from 2004 d Excess from 2005 e Excess from 2006 | e Undistributed income for 2005. Subtract line | | | | |
| lines 4d and 5 from line 1. This amount must be distributed in 2007 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(E) or 4942(g)(3) Excess distributions carryover from 2001 not applied on line 5 or line 7 Excess distributions carryover to 2007. Subtract lines 7 and 8 from line 6a Analysis of line 9: a Excess from 2002 b Excess from 2003 c Excess from 2004 d Excess from 2005 e Excess from 2006 | | , | | 12,882. | |
| be distributed in 2007 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(E) or 4942(g)(3) Excess distributions carryover from 2001 not applied on line 5 or line 7 Excess distributions carryover to 2007. Subtract lines 7 and 8 from line 6a Analysis of line 9: a Excess from 2002 b Excess from 2003 c Excess from 2004 d Excess from 2005 e Excess from 2006 | | | ľ | | |
| Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(E) or 4942(g)(3) Excess distributions carryover from 2001 not applied on line 5 or line 7 Excess distributions carryover to 2007. Subtract lines 7 and 8 from line 6a Analysis of line 9: a Excess from 2002 b Excess from 2003 c Excess from 2004 d Excess from 2005 e Excess from 2006 | lines 4d and 5 from line 1. This amount must | | | | |
| corpus to satisfy requirements imposed by section 170(b)(1)(E) or 4942(g)(3) B Excess distributions carryover from 2001 not applied on line 5 or line 7 C Excess distributions carryover to 2007. Subtract lines 7 and 8 from line 6a O Analysis of line 9: a Excess from 2002 b Excess from 2003 c Excess from 2004 d Excess from 2005 e Excess from 2006 | | | | <u> </u> | <u>25,574.</u> |
| section 170(b)(1)(E) or 4942(g)(3) B Excess distributions carryover from 2001 not applied on line 5 or line 7 B Excess distributions carryover to 2007. Subtract lines 7 and 8 from line 6a Analysis of line 9: a Excess from 2002 b Excess from 2003 c Excess from 2004 d Excess from 2005 e Excess from 2006 | | İ | | | |
| B Excess distributions carryover from 2001 not applied on line 5 or line 7 D Excess distributions carryover to 2007. Subtract lines 7 and 8 from line 6a D Analysis of line 9: a Excess from 2002 b Excess from 2003 c Excess from 2004 d Excess from 2005 e Excess from 2006 | | _ | | | |
| not applied on line 5 or line 7 | | 0. | | | |
| ## Excess distributions carryover to 2007. Subtract lines 7 and 8 from line 6a | - | | | | |
| Subtract lines 7 and 8 from line 6a | • • | 0. | | | |
| Analysis of line 9: a Excess from 2002 b Excess from 2003 c Excess from 2004 d Excess from 2005 e Excess from 2006 | | | | | |
| a Excess from 2002 | | 0. | | | |
| b Excess from 2003 c Excess from 2004 d Excess from 2005 e Excess from 2006 | O Analysis of line 9: | | | | |
| c Excess from 2004 | F | | | | |
| d Excess from 2005 e Excess from 2006 | | | | | |
| e Excess from 2006 | · · · · · · · · · · · · · · · · · · · | | | | |
| | | | | | |
| | e Excess from 2006 | | | | |

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RUCKER FOUNDATION 31-1679691 Page 10 Part XIV Private Operating Foundations (see instructions and Part VII-A, question 9) N/A 1 a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2006, enter the date of the ruling 4942(j)(5) 4942(j)(3) or b Check box to indicate whether the foundation is a private operating foundation described in section Tax year Prior 3 years 2 a Enter the lesser of the adjusted net (a) 2006 (b) 2005(c) 2004(d) 2003(e) Total income from Part I or the minimum investment return from Part X for each year listed **b** 85% of line 2a 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 Complete 3a, b, or c for the alternative test relied upon: a "Assets" alternative test - enter: (1) Value of all assets (2) Value of assets qualifying under section 4942(j)(3)(B)(i) b "Endowment" alternative test - enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed c "Support" alternative test - enter: (1) Total support other than gross investment income (interest. dividends, rents, payments on securities loans (section 512(a)(5)), or royalties) (2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii) (3) Largest amount of support from an exempt organization (4) Gross investment income Supplementary Information (Complete this part only if the foundation had \$5,000 or more in assets Part XV at any time during the year-see page 28 of the instructions.) Information Regarding Foundation Managers: a List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000). (See section 507(d)(2).) NONE b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest. NONE Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs: Check here 🕨 🗶 if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. (see instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d. a The name, address, and telephone number of the person to whom applications should be addressed: b The form in which applications should be submitted and information and materials they should include: c Any submission deadlines: d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors;

Form 990-PF (2006) RUCKER FOUNDATION

Part XV Supplementary Information (continued)

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| 3 Grants and Contributions Paid During the Ye | ear or Approved for Future | Payment | | |
|---|--|--------------------------------|----------------------------------|--------|
| Recipient | If recipient is an individual, show any relationship to any foundation manager or substantial contributor | Foundation | Purpose of grant or contribution | Amount |
| Name and address (home or business) | any foundation manager or substantial contributor | status of recipient | contribution | Amount |
| a Paid during the year | | | | |
| BIRMINGHAM BOTANICAL GARDENS | | 501(C)(3) PUBLIC CHARITY | | 6,000. |
| BIRMINGHAM HISTORICAL SOCIETY | | 501(C)(3) PUBLIC CHARITY | | 1,600. |
| DUBOIS WY RODEO | | 501(C)(3) PUBLIC CHARITY | | 500. |
| JR. LEAGUE OF BIRMINGHAM PRESIDENT'S SOCIETY | | 501(C)(3) PUBLIC CHARITY | | 1,000. |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| Total | | | ▶ 3a | 9,100. |
| b Approved for future payment | | | - 0a | 9,100. |
| NONĒ | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| Total | | | ► 2h | |

Page 12

| Part XVI-A | Analysi | s of Income | -Producing | Activities |
|------------|---------|-------------|------------|-------------------|

| Enter gross amounts unless otherwise indicated. | Unrelate | ed business income | | ed by section 512, 513, or 514 | (e) |
|---|-------------------------|-------------------------|-------------------------------|---------------------------------------|--------------------------------------|
| 1 Program service revenue: | (a) Business code | (b) Amount | (C) Exclu- sion code | (d) Amount | Related or exempt function income |
| | code | | 1000 | | <u> </u> |
| a | | | | | |
| b | 1 1 | | 1 | · · · · · · · · · · · · · · · · · · · | |
| c | 1 | | + + | | |
| d | - | | + | | |
| e | - | | 1 | | ···································· |
| t | - | <u></u> | + + | - | |
| g Fees and contracts from government agencies | | | | | |
| 2 Membership dues and assessments | | | | | |
| 3 Interest on savings and temporary cash | i | | | | |
| investments | | | _ - | | |
| 4 Dividends and interest from securities | | | 14 | 21,505. | |
| 5 Net rental income or (loss) from real estate: | | | \vdash | | |
| a Debt-financed property | | | | | |
| b Not debt-financed property | | | | | |
| 6 Net rental income or (loss) from personal | | | | | |
| property | | | | | |
| 7 Other investment income | | | 01 | 15,735. | |
| 8 Gain or (loss) from sales of assets other | - | | | | |
| than inventory | | | 18 | 17,575. | |
| 9 Net income or (loss) from special events | | | | | |
| 10 Gross profit or (loss) from sales of inventory | | | 1 | | |
| 11 Other revenue: | | | | | |
| a | | | 1 | | |
| b | 1 1 | | | | |
| | | | | | |
| | 1 1 | | - | | |
| de | | | | | |
| 12 Subtotal. Add columns (b), (d), and (e) | | 0. | | 54,815. | 0. |
| 13 Total Add line 12, columns (b), (d), and (e) | | | 1 1 | | 54,815. |
| (See worksheet in line 13 instructions to verify calculations.) | | | | 13 | 34,013. |
| | to the Ace | mnlishment of Ex | ·omnt | Durnaga | |
| | | | | | |
| Line No. Explain below how each activity for which inco | | | contribu | ted importantly to the accomp | lishment of |
| the foundation's exempt purposes (other than | by providing tu | nas for such purposes). | | | |
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| 62362 1 01-29-07 | | | | | Form 990-PF (2006) |

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| Ρ | art XVII | Information Re Exempt Organ | | and Transactions a | nd Relationships With I | Voncharitab | | <u>ugo 10</u> |
|------------------------------|-------------------|------------------------------------|---|---------------------------------------|--|---------------------------|----------|---------------|
| 1 | Did the o | rganization directly or indi | rectly engage in any of the followi | ng with any other organizatio | n described in section 501(c) of | | Yes | No |
| | the Code | (other than section 501(c |)(3) organizations) or in section 5 | 27, relating to political organ | izations? | | | |
| а | Transfers | from the reporting found | ation to a noncharitable exempt of | rganization of: | | | | } |
| | (1) Cash | | | | | 1a(1 | | X |
| | 1a(2 | | X | | | | | |
| þ | Other trai | nsactions: | | | | | | |
| | (1) Sales | s of assets to a noncharita | ble exempt organization | | 1b(1 | Ц | X | |
| | (2) Purc | hases of assets from a no | ncharitable exempt organization | | 1b(2 | <u> </u> | X | |
| | (3) Rent | al of facilities, equipment, | or other assets | | 1b(3 | Ų | X_ | |
| | (4) Reim | bursement arrangements | | | 1b(4 | <u> </u> | X | |
| (5) Loans or loan guarantees | | | | | | | | Х |
| | | | embership or fundraising solicitation | | | <u>1b(6</u> |) | X |
| | | | iling lists, other assets, or paid en | | | 1c | | X |
| d | | | | | vays show the fair market value of t | | sets, | |
| | | | | | e in any transaction or sharing arra | ngement, show in | | |
| <u></u> | | | other assets, or services received. | · · · · · · · · · · · · · · · · · · · | 144 | | | |
| <u>(a)</u> | Line no | (b) Amount involved | (c) Name of noncharitabl | e exempt organization | (d) Description of transfers, trans | actions, and sharing a | rrangeme | ents |
| | | | N/A | | | | - | |
| — | - | | | | - | | | |
| | | | <u> </u> | · · · · · · · · · · · · · · · · · · · | - | | | |
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| | . | | | | | | | |
| 2a | Is the fou | ndation directly or indirect | tly affiliated with, or related to, one | or more tax-exempt organiz | ations described | | | |
| | ın section | 501(c) of the Code (other | than section 501(c)(3)) or in sec | tion 527? | | Yes Yes | X | No |
| <u>b</u> | If "Yes," co | omplete the following sch | | , | | | | |
| | | (a) Name of org | anization | (b) Type of organization | (c) Description of | f relationship | | |
| | | N/A | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | , | | | | | | |
| \neg | Linder nenalt | ies of permiry. I declare that I b | ave examined this return, including according | mpanying schedules and stateme | ents, and to the best of my knowledge an | d belief it is true com | not . | |
| | | | r than taxpayer or fiduciary) is based on | | | d belief, it is true, con | 5C1, | |
| | $\sim 10^{\circ}$ | in a K 4 | Jan 1sta | 1/05/11 | v mpricman | | | |
| 5 | Signat | ure of officer or trustee | <u>augma</u> | Date | TRUSTEE | | | |
| Sign Here | · · · · · · | eparer's | | | ate / Check if | Preparer's SSN o | r PTIN | |
| igi | S S Sia | nature \(\int\) | le UP NOC | <u>L</u> | self- employed ▶ □ | مماما | | R |
| 8 | | 's name (or yours DENT | | NY, LLP | EIN > | <u> ~~ ~~ </u> | , , , , | - |
| | C S Lise | 1-employed), P. O | | 411, HHL | CIN P | | | |
| | | | INGHAM, AL 3525 | 9-9726 | Phone no. | 205-871- | 188 | 0 |
| | | | | | 1. 1101101101 | Form 99 0 | | |

| FORM 990-PF DIVIDENDS AND IN | NTEREST FROM | SECUR | ITIES | STATEMENT |
|---------------------------------------|----------------------------|-------|---------------------------------|-------------------------------|
| SOURCE GE | ROSS AMOUNT | | TAL GAINS VIDENDS | COLUMN (A) AMOUNT |
| MERRILL LYNCH | 21,505. | | 0. | 21,505 |
| TOTAL TO FM 990-PF, PART I, LN 4 | 21,505. | | 0. | 21,505 |
| FORM 990-PF OTHE | ER INCOME | | | STATEMENT 2 |
| DESCRIPTION | (A) REVENUE PER BOOK | | (B) ET INVEST- ENT INCOME | (C) ADJUSTED NET INCOME |
| OTHER INCOME | 15, | 735. | 15,735. | |
| | | | | |
| TOTAL TO FORM 990-PF, PART I, LINE 11 | 15, | 735. | 15,735. | |
| | DRATE STOCK | 735. | 15,735. | STATEMENT 3 |
| | | | 15,735. K VALUE | |
| FORM 990-PF CORPO | | | | STATEMENT : |