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Form **990-PF**

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

2008

OMB No 1545-0052

Department of the Treasury Internal Revenue Service (77)

Note: The foundation may be able to use a copy of this return to satisfy state reporting requirements

2008 and ending

Use the IRS tabel. W. Russell and Patricia Davis Duke Otherwise. Proundation, Inc. Poundation, Inc. Poundation, Inc. Poundation See Specific Instructions H. Check type of organization See Specific Section 4947(601) nonexempt characterise trust Section 4947(601				ck all that apply: Initial return Fina		, and ending	rocs change Na	mo change
M. Russell and Patricia Davis Duke S6-2069802					ar return A Amended			
Otherwise, print 225 W. Longmeadow Road Creenville, NC 27858 C				e. W. Russell and Patricia I	Davis Duke		• •	
## Check bye of organization X Section 50 (c)(3) everypt private foundation Comparization X Section 50 (c)(3) everypt private foundation Section 4947(c)(1) nonexempt charitable trust Other taxable private foundation Far materialists at each size Accounting method. Cash Accounting fresh taxable at last size is deal of year Accounting method. Cash Accounting fresh taxable state Accounting the private foundation Far materialists at least of year Accounting (c), policy Accounting method. Cash Accounting fresh taxable state Accounting (c), policy Accounting method. Cash Accounting the far material private foundation Indicate the private foundation Far material private foundation Comparison Cash Cash Accounting the private foundation Far material private foundation Comparison Cash Cash Cash Accounting the private foundation Cash C		Oth	erw	ise, Foundation, Inc.	Javio Dane	ŀ		instructions)
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Instructions						ŀ		
H Check type of organization [X] Section 501(c)(3) evering triviate foundation [Section 4947(c)) (nonexempt charable triviate [Total Fair market value of all assets at end of year [John Chemic Column (in the fair market value of all assets at end of year [John Chemic Column (in the fair market value of all assets at end of year [John Chemic Column (in the fair market value of all assets at end of year [John Chemic Column (in the fair market value of all assets at end of year [John Chemic Chemic Chemic Column (in the fair market value of all assets at end of year [John Chemic C		Inst	ructi	ons.				_
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Fart						private foundation	here and attach computati	on 🟲 📘
Other (specify) Other (specify) Fart I, column (d) must be on cash basis Fart I Analysis of Revenue and Expenses (the footing of any ontinees service (see the specify) Other (specify) Other (speci		ī		ir market value of all assets at end of year J Acc	ounting method: X C	ash Accrual	E If private foundation status	s was terminated
Part Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (a) may not necessarily equal the amounts in column (a) (b) Net investment (c) Adjusted net income (c) Adjust			(fr	om Part II, column (c), line 16)	Other (specify)			
Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (cash basis only) 1 Contributions) (i.e., necessed (eff sch)) 2 Cit Interest on savings and temporary 4 Dividends and interest from securities 5a Gross rents b test equal/(less) from sale of sasets not on two 10 or of the property of the contributions of the columns (b) (cash basis only) 8 R B C City Interest from securities (cash basis only) 1 Contributions (miles) (cash basis only) 8 R B C City Interest from securities (cash basis only) 1 D Contributions (miles) (column (d) must be or	cash basis)	under section 507(b)(1)(B), check here.
Expenses The fold of amounts in columns (0), (c), and (c) may not necessory (case the instructions) 1 1 1 1 1 1 1 1 1		Pai	<u>t I</u>		(a) Revenue and	(b) Net investmer	t (c) Adjusted net	(d) Disbursements
Sanity equal the amounts in column (a) (cash basis only)				Expenses (The total of amounts in				for charitable
Continuence, site, grants, etc., received (at sich) 18,823.				sarily equal the amounts in column (a)				
2 Ck				(see the instructions))				(cash sadio only)
3 Interest on savings and temporary cash investments 4 Dividents and interest from securities 5 Gross rents 5 Box (rents) Form of the securities 16, 253 1					18,823.			
Cash investments				·				
Sa Gross rents Sa G								-
Sa Gross rents Sa G				4 Dividends and interest from securities	16,253.	16,25	3. 16,253.	
Comparation								
B B B Coros sales price for all 18,570.				D Net rental income or (loss)				
Total. Add lines 1 through 11 Total. Add lines 1 through 11 Total consumers and wages 15 Pension plans, employee benefits 16 a legal fees (attach schedule) 17 Total control profess (attach schedule) 18 Total rest to the rest of		R	,		-252.			
8 Net short-term capital gain 0.		E	:	assets on line 6a				1
10 10 10 10 10 10 10 10							· · · · · · · · · · · · · · · · · · ·	
10 a Gross sales less refurs and allowances		- N	i				_	<u> </u>
returns and allowances b Less. Cost of goods sold c Gross profit/(loss) (att sch) 11 Other income (attach schedule) 12 Total. Add lines 1 through 11 13 Compensation of officers, directors, trustees, etc. 14 Other employee salaries and wages 15 Pension plans, employee benefits 16a Legal fees (attach schedule) b Accounting fees (attach schedule) b Accounting fees (attach sch) See St. 1 c Other prof fees (attach sch) See St. 2 17 Interest 18 Taxes (attach schedule) See Stmt. 3 19 Depreciation (attach sch) See St. 2 17 Interest 20 Occupancy 21 Travel, conferences, and meetings 22 Printing and publications 23 Other expenses (attach schedule) 24 Total operating and administrative expenses. Add lines 13 through 23 25 Contributions, gifts, grants paid Part XV 26 Total expenses and disbursements. Add lines 24 and 25 27 Subtract line 26 from line 12: a Excess of revenue over expenses and disbursements b Net investment income (if negative, enter -0-) 16, 253.								
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a Excess of revenue over expenses and disbursements -11, 229. b Net investment income (if negative, enter -0-) 16, 253.				Add lines 24 and 25	46,053.	(0.	44,805.
and disbursements -11, 229. b Net investment income (if negative, enter -0-) 16, 253.								
b Net investment income (if negative, enter -0-)					-11.229.			
						16,25	3.	
				·				



Page 2

Part	11	Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only (See Instructions)	(a) Book Value	(b) Book Value	(c) Fair Market Value
	1		(a) Book Value	(b) Book Value	(c) an marrier value
	2		21,479.	10,250.	10,250.
		Accounts receivable	21, 173.	10,230.	
		Less allowance for doubtful accounts			
	4		·		
		Less allowance for doubtful accounts			
	5				
	6	Receivables due from officers, directors, trustees, and other			
		disqualified persons (attach schedule) (see the instructions)			
	7	Other notes and loans receivable (attach sch)			
A S E T		Less allowance for doubtful accounts ►			
S	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
S		Investments — U.S. and state government obligations (attach schedule)			<u> </u>
	l	b Investments — corporate stock (attach schedule)			
	'	c investments — corporate bonds (attach schedule)		·-·-	
	11	Investments – land, buildings, and equipment basis			
		Less accumulated depreciation (attach schedule)			
	i	Investments – mortgage loans		262 - 11	011 000
	13	` ′	263,544.	263,544.	211,222.
	14				
		Less accumulated depreciation (attach schedule)			
		Other assets (describe Total assets (to be completed by all filers—			
	16	see instructions. Also, see page 1, item I)	285,023.	273,794.	221,472.
Ŀ	17	Accounts payable and accrued expenses	·		
I A	18	Grants payable			
A B I	19	Deferred revenue			
Ŀ	20	Loans from officers, directors, trustees, & other disqualified persons			
I T	21	Mortgages and other notes payable (attach schedule)			
- 1	22	Other liabilities (describe			
E S	23	Total liabilities (add lines 17 through 22)	0.	0.	
		Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31.			
N F E U	24	Unrestricted	285,023.	273,794.	
ΤN	25	· · · ·			
A D	26	Permanently restricted			
A B S A L T A		Foundations that do not follow SFAS 117, check here and complete lines 27 through 31.			
E L T A	27	Capital stock, trust principal, or current funds		_	İ
SNC	28	Paid-in or capital surplus, or land, building, and equipment fund			
0 E	29	Retained earnings, accumulated income, endowment, or other funds			
R S	30	Total net assets or fund balances(see the instructions)	285,023.	273,794.	
	31	Total liabilities and net assets/fund balances (see the instructions)	285,023.	273,794.	
Part	III	Analysis of Changes in Net Assets or Fund Balance			· · · · · · · · · · · · · · · · · · ·
		al net assets or fund balances at beginning of year- Part II, colum		ee with	
'	end-	of-year figure reported on prior year's return)	in (a), into so (must agr	1	285,023.
2	Ente	er amount from Part I, line 27a		2	-11,229.
3	Other	increases not included in line 2 (itemize)		3	
4	Add	lines 1, 2, and 3		4	273,794.
		eases not included in line 2 (itemize)			
6_	Tota	I net assets or fund balances at end of year (line 4 minus line 5)-	- Part II, column (b), line	<u>30</u> 6	273,794.

(a) List and describ	e the kınd(s) of property sold (e.g., r se; or common stock, 200 shares ML	eal estate,	(b) How acq P — Purch D — Donat	ase	(c) Date acquired (month, day, year)	(d) Date sold (month, day, year)
1a Exxon Mobil			D		12/12/08	12/23/08
b						
c						
d						
<u>e</u>		420-1			4.2 0 07	(100=)
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other bas plus expense of sal			(h) Gain or (e) plus (f) m	(ioss) inus (g)
a 18,570.		18	3,822.			-252.
b			,,,,,,,	-	<u> </u>	<u>_</u>
c						
d						<u> </u>
e						
Complete only for assets shown	ng gain in column (h) and owned by	the foundation on 12/31/69			(I) Gains (Colu	
(i) Fair Market Value as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of column over column (j), if ar			gain minus column (l an -0-) or Losses (fr	
a						-252.
b						
С						
d						
ее	<u></u>			- 1		
2 Capital gain net income or (net	capital loss). If gain, also If (loss), entour coss) as defined in sections 1222(5) a	enter in Part I, line 7 ter -0- in Part I, line 7		2		-252.
. 5 .	8, column (c) (see the instructions)	·· ¬		3		-252.
	Section 4940(e) for Reduced	Tax on Net Investmen	nt Incom			202.
If section 4940(d)(2) applies, leave the Was the foundation liable for the sect If Yes, the foundation does not qualing a Enter the appropriate amount in	ion 4942 tax on the distributable amo	nplete this part.		5.	Yes	X No
(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use ass	sets	(col	(d) Distributior umn (b) divided	
2007	56,110.	23	3,396.			2.398273
2006	34,457.					
2005						
2004			_			
2003						
2 Total of line 1, column (d)				2		2.398273
3 Average distribution ratio for the number of years the foundation	e 5-year base period– divide the tota has been in existence if less than 5	ol on line 2 by 5, or by the years		3	_	1.199137
4 Enter the net value of noncharit	able-use assets for 2008 from Part >	K, line 5		4		840.
5 Multiply line 4 by line 3				5		1,007.
6 Enter 1% of net investment inco	ome (1% of Part I, line 27b)			6		163.
7 Add lines 5 and 6				7		1,170.
8 Enter qualifying distributions fro	om Part XII, line 4			8		44,805.
If line 8 is equal to or greater the Part VI instructions	an line 7, check the box in Part VI, I	line 1b, and complete that pa	art using a	1% t	ax rate See the	
BAA					Forr	n 990-PF (2008)

Form	990-PF (2008) W. Russell and Patricia Davis Duke 56-2069802		F	age 4
Par	t VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948- see the instruction	ions)		
1 a	Exempt operating foundations described in section 4940(d)(2), check here			
	Date of ruling letter: (attach copy of ruling letter if necessary- see instructions)			
b	Domestic foundations that meet the section 4940(e) requirements in Part V,			<u> 163.</u>
	check here ► X and enter 1% 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, column (b)			
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable			
_	foundations only Others enter -0-)			0.
3	Add lines 1 and 2			<u>L63.</u>
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) Tax based on investment incomeSubtract line 4 from line 3. If zero or less, enter -0-			<u>0.</u> L63.
5	The based of the salient mediane based of the first sine of the salient sine of the sa			105.
•	Credits/Payments. 2008 estimated tax pmts and 2007 overpayment credited to 2008 6a			
	Exempt foreign organizations – tax withheld at source 6b			İ
	Tax paid with application for extension of time to file (Form 8868)			
	Backup withholding erroneously withheld 6d			,
	Total credits and payments. Add lines 6a through 6d See Statement 4 7	-	-	L63.
, R	Enter any penalty for underpayment of estimated tax. Check here			
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed			0.
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter theamount overpaid			
11	Enter the amount of line 10 to be Credited to 2009 estimated tax.			
	t VII-A Statements Regarding Activities	-		
	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it		Yes	No
ıa	participate or intervene in any political campaign?	1a		Х
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see the instructions for definition)?	1ь		х
	If the answer is 'Yes' to 1a or 1b , attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities			
c	Did the foundation file Form 1120-POL for this year?	1c		Х
	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year:			
	(1) On the foundation $\ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \$			
е	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers \blacktriangleright \$ 0.	l i		
2	Has the foundation engaged in any activities that have not previously been reported to the IRS?	2		Х
-	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			<u> </u>
	of incorporation, or bylaws, or other similar instruments? If 'Yes,' attach a conformed copy of the changes	3		X
	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a		X (2)
	olf 'Yes,' has it filed a tax return on Form 990-T for this year?	4b	N	/A
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			
	• By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6		X
7	Did the foundation have at least \$5,000 in assets at any time during the year? If 'Yes,' complete Part II, column (c), and Part XV	7	X	<u> </u>
	Enter the states to which the foundation reports or with which it is registered (see the instructions)	 		\vdash
oa	N/A			
b	If the answer is 'Yes' to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If 'No,' attach explanation See Statement 5	8b		Х
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5)			
	for calendar year 2008 or the taxable year beginning in 2008 (see instructions for Part XIV) if Yes, complete Part XIV	9		<u>X</u>
10	Did any persons become substantial contributors during the tax year? If 'Yes,' attach a schedule listing their names and addresses See Statement 6	10	Х	
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TEEA0304L 09/18/08

	990-PF (2008) W. Russell and Patricia Davis Duke	56-206980	2	Р	age 5
Par	t VII-A Statements Regarding Activities Continued				
11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If 'Yes', attach schedule (see instructions)		11		Х
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract befor August 17, 2008?	е	12		х
13	Did the foundation comply with the public inspection requirements for its annual returns and exe	mption application?	13	X	
14		ephone no ► (252)	 355-	0702	- - -
• •		+ 4 ► 27835	= = -		
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu oForm 1041 - Check h		N/A		TT-
	and enter the amount of tax-exempt interest received or accrued during the year	▶ 15			N/A
Par	t VII-B Statements Regarding Activities for Which Form 4720 May Be Require	ed .			
	File Form 4720 if any item is checked in the 'Yes' column, unless an exception applies.			Yes	No
1 a	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?	Yes X No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	Yes X No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	Yes X No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	Yes X No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	Yes X No			
	(6) Agree to pay money or property to a government official? Exception. Check 'No' if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days).	Yes XNo			
k	olf any answer is 'Yes' to 1a(1)-(6), did any of the acts fail to qualify under the exceptions describ Regulations section 53 4941(d)-3 or in a current notice regarding disaster assistance (see the in	ed in structions)?	1b	N,	/A
	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 that were not corrected before the first day of the tax year beginning in 2008?	l acts,	1c	_	X
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was private operating foundation defined in section $4942(j)(3)$ or $4942(j)(5)$):	s a			
a	At the end of tax year 2008, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2008?	Yes X No			
	If 'Yes,' list the years ► 20 , 20 , 20 , 20				
Ł	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			7.7	(2
_	all years listed, answer 'No' and attach statement— see the instructions.)		_2b	N	/A
(: If the provisions of section 4942(a)(2) are being applied toany of the years listed in 2a, list the years 1.20 , 20 , 20	ars nere.			
3 a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	Yes X No			
t	olf 'Yes,' did it have excess business holdings in 2008 as a result o(1) any purchase by the found	ation			
	or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period ap by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or beques (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720,	it, or			
	(3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, determine if the foundation had excess business holdings in 2008)	to	3b	N	/A
	- · · · · · · · · · · · · · · · · · · ·		35		**
48	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		4a		X
k	Did the foundation make any investment in a prior year (but after December 31, 1969) that could	1_		.	
	jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2008?	T	4b		Х

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Form **990-PF** (2008)

Form 990-PF (2008) W. Russell and Pat			56-20	69802	Page 6
Part VII-B Statements Regarding Activit		n 4720 May Be Req	uired (continued)		
5a During the year did the foundation pay or incu	=			,	1 1
(1) Carry on propaganda, or otherwise attempt	ot to influence legislation	on (section 4945(e))?	Yes X	No	
(2) Influence the outcome of any specific pub on, directly or indirectly, any voter registra	lic election (see section ation drive?	n 4955); or to carry	Yes X	No	
(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 to in section 509(a)(1), (2), or (3), or section	nan a charitable, etc, o 4940(d)(2)? (see instr	rganization described uctions)	Yes X] No	
(5) Provide for any purpose other than religio educational purposes, or for the prevention	us, charitable, scientific n of cruelty to children	c, literary, or or animals?	Yes X] No	
b If any answer is 'Yes' to 5a(1)-(5), did any of to described in Regulations section 53.4945 or in (see instructions)?	he transactions fail to d i a current notice regar	qualify under the except ding disaster assistance	ions	5b	N/A
Organizations relying on a current notice rega	rding disaster assistan	ce check here	▶ [
c If the answer is 'Yes' to question 5a(4), does tax because it maintained expenditure respon	the foundation claim ex sibility for the grant?	cemption from the	N/A Yes] No	
If 'Yes,' attach the statement required by Regi	ulations section 53 494	5-5(d)			
6a Did the foundation, during the year, receive ar on a personal benefit contract?	ny funds, directly or inc	directly, to pay premiums	Yes X]No	
b Did the foundation, during the year, pay prem If you answered 'Yes' to 6b, also file Form 88.	=	ctly, on a personal bene	fit contract?	6b	<u> </u>
7a At any time during the tax year, was the found		nibited tax shelter transa	ction? Yes X	No	
b If yes, did the foundation receive any proceed	s or have any net incor	me attributable to the tra	ansaction?	7b	N/A
Part VIII Information About Officers, D	rectors, Trustees,	Foundation Manag	ers, Highly Paid E	Employees,	
and Contractors				-	
1 List all officers, directors, trustees, foundation	(b) Title and average			(a) Evange	
(a) Name and address	hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense a other allow	
W. Russell Duke, Jr.	President	0.	0.		0.
P.O. Box 835	1.00				
Greenville, NC 27835	_				
_Patricia Davis Duke	Treasurer	0.	0.		0.
P.O. Box 835	2.00				
Greenville, NC 27835	Director				
_ELawrence_Davis,_III P.O. Box 835	Director 1.00	0.	0.		0.
Greenville, NC 27835	1.00				
2 Compensation of five highest-paid employee					
(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 a other allow	account, ances
None			compensation		
					.
			,	<u> </u>	
				 	
Total number of other employees paid over \$50,000		<u></u>	-		0
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)6980 <u>2</u> Page 7
Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid and Contractors (continued)	Employees,
3 Five highest-paid independent contractors for professional services (see instructions). If none,	
enter 'NONE.'	
(a) Name and address of each person paid more than \$50,000 (b) Type of service	(c) Compensation
None	
	
Total number of others receiving over \$50,000 for professional services	0
Part IX-A Summary of Direct Charitable Activities	
List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Evpanges
	Expenses
1 <u>N/A</u>	-
	-
2	
	_
3	-
	-
4	_
Part IX-B Summary of Program-Related Investments (see instructions)	
Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.	Amount
1 <u>N/A</u>	-
	-
2	
	-
All other program-related investments. See instructions	
3	-
	-
Total. Add lines 1 through 3	▶ 0.
BAA	Form 990-PF (2008)

TEEA0307L 09/18/08

Form 990-PF (2008)

Form 800 PE (2009) W. Duggoll and Datricia David Duko	-2069802	Page 8
Form 990-PF (2008) W. Russell and Patricia Davis Duke 56 Part X Minimum Investment Return (All domestic foundations must complete this part. For 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 _	-
b Average of monthly cash balances	1 b	853.
c Fair market value of all other assets (see instructions).	1c	
d Total (add lines 1a, b, and c)	1d	<u>853.</u>
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	853.
4 Cash deemed held for charitable activities Enter 1-1/2% of line 3 (for greater amount, see instructions)	4	13.
5 Net value of noncharitable-use assetsSubtract line 4 from line 3. Enter here and on Part V, line 4	5	840.
6 Minimum investment return Enter 5% of line 5	6	42.
Part XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating and certain foreign organizations check here ► and do not complete this pa	ating foundat	ions
1 Minimum investment return from Part X, line 6	1	42.
2a Tax on investment income for 2008 from Part VI, line 5 2a 163.		
b Income tax for 2008 (This does not include the tax from Part VI.)		
c Add lines 2a and 2b	2c	163.
3 Distributable amount before adjustments. Subtract line 2c from line 1	3	-121.
4 Recoveries of amounts treated as qualifying distributions	4	
5 Add lines 3 and 4	5	-121.
6 Deduction from distributable amount (see instructions)	6	
7 Distributable amountas adjusted. Subtract line 6 from line 5 Enter here and on Part XIII, line 1	7	0.
Part XII Qualifying Distributions (see instructions)		
1 Amounts paid (including administrative expenses) to accomplish charitable, etc, purposes a Expenses, contributions, gifts, etc – total from Part I, column (d), line 26	1a	44,805.
b Program-related investments – total from Part IX-B	1b	
2 Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc, purposes	2	
3 Amounts set aside for specific charitable projects that satisfy the: a Suitability test (prior IRS approval required)	3a	

Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years

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

Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b (see instructions)

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b Cash distribution test (attach the required schedule).

6 Adjusted qualifying distributions. Subtract line 5 from line 4

Form **990-PF** (2008)

44,805.

44,642.

163.

3ь

4

5

6

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2007	(c) 2007	(d) 2008
1 Distributable amount for 2008 from Part XI,				0.
2 Undistributed income, if any, as of the end of 2007				<u></u>
a Enter amount for 2007 only			0.	
b Total for prior years 20, 20, 20		0.		
3 Excess distributions carryover, if any, to 2008				
a From 2003	-			
b From 2004 c From 2005	1			
d From 2006				
e From 2007 60,758.	-			
f Total of lines 3a through e	60,758.			
4 Qualifying distributions for 2008 from Part	00,730.			
XII, line 4 ► \$ 44,805.				
a Applied to 2007, but not more than line 2a			0.	
b Applied to undistributed income of prior years				
(Election required – see instructions)		0.		
c Treated as distributions out of corpus				
(Election required – see instructions)	44,805.			
d Applied to 2008 distributable amount				0.
e Remaining amount distributed out of corpus	0.	***		
5 Excess distributions carryover applied to 2008 (If an amount appears in column (d), the	0.		-	<u> </u>
same amount must be shown in column (a))				
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	105,563.			
b Prior years' undistributed income. Subtract	20070001			
line 4b from line 2b		0.		
c Enter the amount of prior years' undistribut-				
ed income for which a notice of deficiency has been issued, or on which the section				
4942(a) tax has been previously assessed		0.	_	
d Subtract line 6c from line 6b Taxable amount — see instructions		0.		
		<u> </u>		
e Undistributed income for 2007 Subtract line 4a from line 2a Taxable amount — see instructions			0.	
			<u> </u>	
f Undistributed income for 2008. Subtract lines 4d and 5 from line 1. This amount must be				
distributed in 2009				0.
7 Amounts treated as distributions out of				
corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)			-	
(see instructions)	0.			
8 Excess distributions carryover from 2003 not			'	
applied on line 5 or line 7 (see instructions)	0.	- n -		
9 Excess distributions carryover to 2009. Subtract lines 7 and 8 from line 6a	105,563.			
10 Analysis of line 9	103,003.	J. 10710 35		
a Excess from 2004				
b Excess from 2005			-	
c Excess from 2006				
d Excess from 2007 60,758.				
e Excess from 2008 44,805 .				

Form 990-PF (2008) W. Russell and Pa				56-206980	
Part XIV Private Operating Foundation					N/A
1a If the foundation has received a ruling or of its effective for 2008, enter the date of the	ruling			_	4040()(5)
b Check box to indicate whether the foundat		rating foundation d		4942(j)(3) or	4942(j)(5)
2a Enter the lesser of the adjusted net income from Part I or the minimum	Tax year	4 > 0007	Prior 3 years	(-1) 200E	(a) Tatal
investment return from Part X for each year listed	(a) 2008	(b) 2007	(c) 2006	(d) 2005	(e) Total
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	_				
 Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c 					
3 Complete 3a, b, or c for the alternative test relied upon					
a 'Assets' alternative test – enter:					
(1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					-
b 'Endowment' alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed					
c 'Support' alternative test— enter			:		
(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section)					
512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(III)					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					
Part XV Supplementary Information	(Complete this	part only if the	organization ha	ad \$5,000 or mo	re in
assets at any time during th		structions.)			
1 Information Regarding Foundation Manage a List any managers of the foundation who had a list any managers of the foundation who had a list any managers of the foundation.		ore than 2% of the	total contributions r	received by the foun	dation before the
close of any tax year (but only if they have	contributed more	than \$5,000). (See	section 507(d)(2).)	cccived by the loan	dation belove the
See Statement 7					
b List any managers of the foundation who of a partnership or other entity) of which the None	own 10% or more o foundation has a 1	f the stock of a corp 0% or greater intere	poration (or an equiest.	ally large portion of	the ownership of
0.16	. 0:4 1 0 /	lauakin -t- D			
2 Information Regarding Contribution, Gran Check here \(^\text{X}\) if the foundation only n requests for funds. If the foundation make complete items 2a, b, c, and d	nakes contributions	to preselected cha	rıtable organızatıon	s and does not acce anizations under oth	ept unsolicited ner conditions,
a The name, address, and telephone number	r of the person to	whom applications s	should be addresse	d:	
a me name, address, and telephone name	, or the person to t	тып арривально с	silouru do udur oddo	u.	
b The form in which applications should be	submitted and infor	mation and materia	is they should inclu	ıde.	
			,		
c Any submission deadlines					
d Any restrictions or limitations on awards, s	such as by geograp	hical areas, charita	ble fields, kinds of	institutions, or other	factors:
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3 Grants and Contributions Paid During the Y	ear or Approved for Fut	ure Paymen	ıt	
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of	Purpose of grant or contribution	Amount
Name and address (home or business)	substantial contributor	recipient		
a Paid during the year See Attached Schedule	None		Unrestricted	44,805.
,				
				}
		i		
Total			► 3a	44,805.
b Approved for future payment				
Total			► 3b	

Part XVI-A Analysis of Income-Producing Activities

er gross amounts unless otherwise indica	ted. Unrelated	business income		section 512, 513, or 514	
Program service revenue:	(a) Business code	(b) Amount	(c) Exclu- sion code	(d) Amount	(e) Related or exempt function income (see the instructions
-			tout		(000 010 0100
a b	II		 		
c			 		
d					
e		<u> </u>			
f					
g Fees and contracts from government ag					
Membership dues and assessments					
Interest on savings and temporary cash investmen	nts			<u> </u>	<u>. </u>
Dividends and interest from securities			14	16,253.	
Net rental income or (loss) from real es	state:				
Debt-financed property			J. ———		
b Not debt-financed property					
Net rental income or (loss) from personal property	y				
Other investment income			<u> </u>		
Gain or (loss) from sales of assets other than inve			18	<u>-252.</u>	
Net income or (loss) from special event					
Gross profit or (loss) from sales of inve	entory				<u> </u>
Other revenue					=
a		 			
)		·			
D			 		
<u> </u>			 		
				16 001	-
Subtotal Add columns (b), (d), and (e)				16,001.	
Subtotal Add columns (b), (d), and (e). Total. Add line 12, columns (b), (d), and	ad (e)			16,001.	
Subtotal Add columns (b), (d), and (e). Total. Add line 12, columns (b), (d), and	ad (e)				
Subtotal Add columns (b), (d), and (e). Total. Add line 12, columns (b), (d), and everywhere the instructions for line 13.	id (e) to verify calculations.)	hment of Exemp	t Purposes	13	
Subtotal Add columns (b), (d), and (e), Total. Add line 12, columns (b), (d), and e worksheet in the instructions for line 13 t XVI-B Relationship of Activity	to verify calculations.)			13	16,001
Subtotal Add columns (b), (d), and (e), Total. Add line 12, columns (b), (d), an worksheet in the instructions for line 13 t XVI-B Relationship of Activity	to verify calculations.)			13	16,001
Subtotal Add columns (b), (d), and (e). Total. Add line 12, columns (b), (d), and e worksheet in the instructions for line 13 t XVI-B Relationship of Activitions Explain below how each activity accomplishment of the foundations.	to verify calculations.)			13	16,001
Subtotal Add columns (b), (d), and (e). Total. Add line 12, columns (b), (d), and e worksheet in the instructions for line 13 t XVI-B Relationship of Activitions Explain below how each activity accomplishment of the foundations.	to verify calculations.)			13	16,001
Subtotal Add columns (b), (d), and (e). Total. Add line 12, columns (b), (d), and e worksheet in the instructions for line 13. TXVI-B Relationship of Activity Re No. Explain below how each activity accomplishment of the foundation.	to verify calculations.)			13	16,001
Subtotal Add columns (b), (d), and (e). Total. Add line 12, columns (b), (d), and e worksheet in the instructions for line 13. TXVI-B Relationship of Activity Re No. Explain below how each activity accomplishment of the foundation.	to verify calculations.)			13	16,001
Subtotal Add columns (b), (d), and (e). Total. Add line 12, columns (b), (d), and e worksheet in the instructions for line 13 t XVI-B Relationship of Activitions Explain below how each activity accomplishment of the foundations.	to verify calculations.)			13	16,001
Subtotal Add columns (b), (d), and (e). Total. Add line 12, columns (b), (d), and e worksheet in the instructions for line 13. TXVI-B Relationship of Activity Re No. Explain below how each activity accomplishment of the foundation.	to verify calculations.)			13	16,001
Subtotal Add columns (b), (d), and (e). Total. Add line 12, columns (b), (d), and worksheet in the instructions for line 13. TXVI-B Relationship of Activity Relationship of Activity accomplishment of the foundation	to verify calculations.)			13	16,001
Subtotal Add columns (b), (d), and (e). Total. Add line 12, columns (b), (d), and worksheet in the instructions for line 13. TXVI-B Relationship of Activity Relationship of Activity accomplishment of the foundation	to verify calculations.)			13	16,001
Subtotal Add columns (b), (d), and (e). Total. Add line 12, columns (b), (d), an worksheet in the instructions for line 13 t XVI-B Relationship of Activitions Explain below how each activity accomplishment of the foundations.	to verify calculations.)			13	16,00
Subtotal Add columns (b), (d), and (e). Total. Add line 12, columns (b), (d), and worksheet in the instructions for line 13. TXVI-B Relationship of Activity Relationship of Activity accomplishment of the foundation	to verify calculations.)			13	16,00
Subtotal Add columns (b), (d), and (e). Total. Add line 12, columns (b), (d), and worksheet in the instructions for line 13. TXVI-B Relationship of Activity Relationship of Activity accomplishment of the foundation	to verify calculations.)			13	16,00
Subtotal Add columns (b), (d), and (e). Total. Add line 12, columns (b), (d), and worksheet in the instructions for line 13. TXVI-B Relationship of Activity Relationship of Activity accomplishment of the foundation	to verify calculations.)			13	16,00
Subtotal Add columns (b), (d), and (e). Total. Add line 12, columns (b), (d), an worksheet in the instructions for line 13 EXVI-B Relationship of Activitions Explain below how each activity accomplishment of the foundations.	to verify calculations.)			13	16,00
Subtotal Add columns (b), (d), and (e). Total. Add line 12, columns (b), (d), an worksheet in the instructions for line 13 XVI-B Relationship of Activitions Explain below how each activity accomplishment of the foundations.	to verify calculations.)			13	16,001
Subtotal Add columns (b), (d), and (e). Total. Add line 12, columns (b), (d), and worksheet in the instructions for line 13. TXVI-B Relationship of Activity Relationship of Activity accomplishment of the foundation	to verify calculations.)			13	16,001
Subtotal Add columns (b), (d), and (e). Total. Add line 12, columns (b), (d), and worksheet in the instructions for line 13. TXVI-B Relationship of Activity Relationship of Activity accomplishment of the foundation	to verify calculations.)			13	16,001
Subtotal Add columns (b), (d), and (e). Total. Add line 12, columns (b), (d), and worksheet in the instructions for line 13. TXVI-B Relationship of Activity Relationship of Activity accomplishment of the foundation	to verify calculations.)			13	16,001
Subtotal Add columns (b), (d), and (e). Total. Add line 12, columns (b), (d), and e worksheet in the instructions for line 13. TXVI-B Relationship of Activity Re No. Explain below how each activity accomplishment of the foundation.	to verify calculations.)			13	16,001
Subtotal Add columns (b), (d), and (e). Total. Add line 12, columns (b), (d), and worksheet in the instructions for line 13. TXVI-B Relationship of Activity Relationship of Activity accomplishment of the foundation	to verify calculations.)			13	16,001
Subtotal Add columns (b), (d), and (e). Total. Add line 12, columns (b), (d), and e worksheet in the instructions for line 13 t XVI-B Relationship of Activity Relationship of Activity accomplishment of the foundation	to verify calculations.)			13	16,001
Subtotal Add columns (b), (d), and (e). Total. Add line 12, columns (b), (d), and e worksheet in the instructions for line 13 t XVI-B Relationship of Activity Relationship of Activity accomplishment of the foundation	to verify calculations.)			13	16,001
Subtotal Add columns (b), (d), and (e). Total. Add line 12, columns (b), (d), and e worksheet in the instructions for line 13. TXVI-B Relationship of Activity Re No. Explain below how each activity accomplishment of the foundation.	to verify calculations.)			13	16,001
Subtotal Add columns (b), (d), and (e). Total. Add line 12, columns (b), (d), and e worksheet in the instructions for line 13. It XVI-B Relationship of Activity accomplishment of the foundation N/A V	to verify calculations.)			13	16,001
Subtotal Add columns (b), (d), and (e). Total. Add line 12, columns (b), (d), and e worksheet in the instructions for line 13 TXVI-B Relationship of Activity Below how each activity accomplishment of the foundations.	to verify calculations.)			13	16,00

Yes No

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

							res	NO
descr		of the Code (o	ngage in any of the followin ther than section 501(c)(3) o					
	5 .		a noncharitable exempt org	anization of				
(1) Cash						1 a (1)		_X
(2) Other assets							oxdot	X
b Other	transactions						<u> </u>	
(1) S	ales of assets to a non-	charitable exe	mpt organization			1 b (1)		X
(2) F	orchases of assets fron	n a noncharita	ble exempt organization			1b(2)		X_
(3) F	Rental of facilities, equip	ment, or othe	r assets			1 b (3)		X
(4) F	Reimbursement arranger	ments				1b (4)		X
(5) L	oans or Ioan guarantee	s				1 b (5)		X
(6) F	erformance of services	or membersh	ip or fundraising solicitation:	5		1 b (6)	<u> </u>	X
c Sharı	ng of facilities, equipme	ent, mailing lis	its, other assets, or paid em	ployees		1 c		X
the q	oods, other assets, or s	ervices given	by the reporting foundation.	If the founda	(b) should always show the fair atton received less than fair ma other assets, or services receiv	rket value in	e of	
(a) Line no	(b) Amount involved		of noncharitable exempt organization		Description of transfers, transactions, a		ngemeni	ts
I/A								
		- · -						
					•			
		•						
descr	e foundation directly or in tibed in section 501(c) of s,' complete the following	f the Code (o	ated with, or related to, one ther than section 501(c)(3))	or more tax- or in section	exempt organizations 527?	Yes	s X	No
	(a) Name of organization		(b) Type of organization	ation	(c) Description of	relationship		
I/A	<u>.</u>							
Under pena	alties of perjury, I declare that I ha	ve examined this re	turn, including accompanying schedules	and statements, a	and to the best of my knowledge and belief, it as any knowledge	is true, correct, a	nd	
complete	Declaration of preparer (other t	nan taxpayer or 110	uciary) is based on all information of	williai preparer il	as any knowledge			
	(4)	$\langle \langle $	'A	1/	-21-10 - Jrea	r		
	ature of officer or trustee	A WILL	<u>u</u>	Date	- 21-10 - 11te	<u> </u>		
Sign	aure or onicer or trustee			Date		reparer's Identify		her
الداء و	Preparer's	20 1	0.00	_		See Signature in		
Paid Pre-	signature A	· Columbia	m, CVH		employed	200196839)	
parer's Firm's name (or H. EDWIN GRAY CPA P.A. EIN ► 56-1390857								
Use Only	I address and ———	EVANS ST						
	address, and ZIP code GREEI	WILLE, N	C 27834-3268		Phone no ► (<u>252) 758</u>	<u>-730</u>	10
AA						Form 99	0-PF	(2008)

Schedule B (Form 990, 990-EZ, or 990-PF)

Department of the Treasury Internal Revenue Service **Schedule of Contributors**

► Attach to Form 990, 990-EZ and 990-PF ► See separate instructions. OMB No 1545-0047

2008

Name of the organization W. Russell a	Employer identification number				
Foundation,	Inc.	56-2069802			
Organization type (check one):					
Filers of:	Section:				
Form 990 or 990-EZ	501(c)() (enter number) organization 4947(a)(1) nonexempt charitable trust not tree 527 political organization	ated as a private foundation			
Form 990-PF	PF Solicicical exempt private foundation 4947(a)(1) nonexempt charitable trust treated as a private foundation 501(c)(3) taxable private foundation				
Check if your organization is covered boxes for both the General Rule and a	by the General Rule or a Special Rule . (Note: Only a section a Special Rule See instructions.)	n 501(c)(7), (8), or (10) organization can check			
General Rule —					
	990-EZ, or 990-PF that received, during the year, \$5,000 o II.)	or more (in money or property) from any one			
Special Rules –					
For a section 501(c)(3) organization 509(a)(1)/170(b)(1)(A)(vi) and receasmount on Form 990, Part VIII, lin	on filing Form 990, or Form 990-EZ, that met the 33-1/3% served from any one contributor, during the year, a contribute 1 in or 2% of the amount on Form 990-EZ, line 1. Comple	support test of the regulations under sections aon of the greater of \$5,000 or (2) 2% of the te Parts I and II.			
aggregate contributions or beguest) organization filing Form 990, or Form 990-EZ, that receiv ts of more than \$1,000 for usee <i>xclusively</i> for religious, char elty to children or animals. Complete Parts I, II, and III.	red from any one contributor, during the year, ritable, scientific, literary, or educational			
\$1,000 (If this box is checked, entetc, purpose. Do not complete any) organization filing Form 990, or Form 990-EZ, that receiv vely for religious, charitable, etc, purposes, but these contri- ter here the total contributions that were received during the of the Parts unless the General Rule applies to this organizations of \$5,000 or more during the year)	ributions did not aggregate to more than he was represented by religious, charitable			
		¥			
990-PF) but they must answer 'No' on	vered by the General Rule and/or the Special Rules do not Part IV, line 2 of their Form 990, or check the box in the h do not meet the filing requirements of Schedule B (Form 9	seading of their Form 990-F7, or on line 2 of			
BAA For Privacy Act and Paperwork for Form 990. These instructions will	Reduction Act Notice, see the Instructions Sobe issued separately.	chedule B (Form 990, 990-EZ, or 990-PF) (2008)			

Schedule	B (Form 990, 990-EZ, or 990-PF) (2008)	Page 1	of 1 of Part I
Name of org		' '	ridentification number
	ssell and Patricia Davis Duke	56-2	069802
Part I	Contributors (see instructions)		
(a) Number	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
1	Wilton R Duke Jr & Patricia D Duke		Person Payroll
	P.O. Box 835 Greenville, NC 27835	\$18,823.	(Complete Part II if there is a noncash contribution)
(a) Number	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
		\$	Person Payroll Noncash (Complete Part II if there is a noncash contribution)
(a) Number	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
		\$	Person Payroll Noncash (Complete Part II if there is a noncash contribution)
(a) Number	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
		\$	Person Payroll Noncash (Complete Part II if there is a noncash contribution)
(a) Number	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
		\$	Person Payroll Noncash (Complete Part II if there is a noncash contribution)
(a) Number	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
		\$	Person Payroli Noncash (Complete Part II if there is a noncash contribution.)

of 1

of Part II

Name of organization

W. Russell and Patricia Davis Duke

Employer Identification number

56-2069802

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
1	237 Shares of Exxon Mobil Corp. Common Stock		
		\$ 18,823	. 12/12/08
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	

Name of organization

W. Russell and Patricia Davis Duke

Employer identification number

	<u>sell and Patricia Davis Duke</u>			56-20698 <u>0</u> 2	<u> </u>			
Part III	Exclusively religious, charitable, e organizations aggregating more tl	etc, individual contribution nan \$1,000 for the year. (ons to section Complete cols (a)	501(c)(7), (8), or (10) through (e) and the follow	ing line entry.)			
	For organizations completing Part III, enter contributions of \$1,000 or less for the year.	total of <i>exclusively</i> religious, ch (Enter this information once—	naritable, etc, see instructions.)) ► \$	N/A			
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift		(d) Description of how gi				
	N/A							
	Transferee's name, addre	(e) Transfer of gift Transferee's name, address, and ZIP + 4 Relationship of transferor to transferee						
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift		(d) Description of how gift is held				
	(e) Transfer of gift Transferee's name, address, and ZIP + 4 Relationship of transferor to transferee				sferee			
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift		(d) Description of how git	ft is held			
	(e) Transfer of gift Transferee's name, address, and ZIP + 4			nship of transferor to tran	sferee			
					· · · · · · · · · · · · · · · · · · ·			
(a) No. from Part I	(b) (c) Purpose of gift Use of gift			(d) Description of how gif	ft is held			
					-			
	(e) Transfer of gift Transferee's name, address, and ZIP + 4 Relationship of transferor to transferee							

W. RUSSELL AND PATRICIA DAVIS DUKE FOUNDATION, INC. EIN 56-2069802 2008 FORM 990-PF - EXPLANATION OF AMENDED RETURN

THE 2008 FORM 990-PF WAS AMENDED DUE TO CHANGES CAUSED BY THE FOUNDATION'S RECENTLY AMENDED 2007 FORM 990-PF THE CHANGES AFFECT THE FOLLOWING AREAS. INVESTMENTS REPORTED ON PART II, NET ASSETS REPORTED ON PART III, NET INVESTMENT INCOME REPORTED ON PART V, AND UNDISTRIBUTED INCOME REPORTED ON PART VIII

CHANGES MADE TO THE 2008 FORM 990-PF DID NOT AFFECT THE FOUNDATION'S 2008 TAX LIABILITY, WHICH WAS PAID IN A TIMELY MANNER WHEN ORIGINALLY DUE.

2008		deral Stater		Page 1		
Client DUKEFOUN	W. Russ	sell and Patricia Foundation, In		56-2069802		
6/08/10	· ·				01:50PM	
Statement 1 Form 990-PF, Part I, Line 16b Accounting Fees						
Tax Return Preparation	Total	(a) Expenses per Books \$ 1,215. \$ 1,215.	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes 0.	
Statement 2 Form 990-PF, Part I, Line 16c Other Professional Fees						
Management Fees	Total	(a) Expenses per Books \$ 13. \$ 13.	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes 0.	
Statement 3 Form 990-PF, Part I, Line 18 Taxes						
Federal Income Tax	Total	(a) Expenses per Books \$ 20. \$ 20.	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes 0.	
Statement 4 Form 990-PF, Part VI, Line 7 Total Credits and Payments						
Tax Paid With Original Retu	ırn			Total \$	163. 163.	
Statement 5 Form 990-PF, Part VII-A, Line 8b Copies of Form 990-PF to State Of State of N.C. does not requ						

. . .

2008

Federal Statements

Page 2

Client DUKEFOUN

W. Russell and Patricia Davis Duke Foundation, Inc.

56-2069802

6/08/10

01:50PM

Statement 6 Form 990-PF, Part VII-A, Line 10 Substantial Contributors During the Tax Year

Name of Substantial Contributor Address of Substantial Contributor

W. Russell and Patricia Davis Duke

PO Box 835 Greenville, NC 27835

Statement 7 Form 990-PF, Part XV, Line 1a Foundation Managers - 2% or More Contributors

W. Russell Duke, Jr. Patricia Davis Duke