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Form , 990-PF

Department of the Treasury (77) Internal Revenue Service

Return of Private Foundation or Section 4947(a)(1) Nonexempt Charitable Trust Treated as a Private Foundation Note: The foundation may be able to use a copy of this return to satisfy state reporting requirements.

ONB No 1545-0052

2008

or (loss)	Forc	ale	nda	year 2008, or	tax year beg	ไกกing	, 2008	and ending				
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Other visits, 3 280 PEACHTREE ROAD NE #400 print prin			e	40 C CY NEE	AR RABBC	ON CHAR	MARIE MREEM			A	• •	mber
ATLANTA, GA 30305 Comparison										_		7 - 2 - 2 - 2
See Specific Instructions. M Check type of organization: X Section 501(c)(3) exempl private foundation 1 Final Private 1	pr	int					.00			P		
Marchiton March Check ppe of organization: Section 501(c)(3) exempt private foundation Section 4947(c)(1) nonexempt charitable frust Other tasable private foundation For most retail at size it and private Section 4947(c)(1) nonexempt charitable frust Other (possity) Section 4947(c)(1) nonexempt charitable frust Other (possity) Section 507(c)(1)(A), check free: Form Part II, cultum (c), first Other (possity) Section 507(c)(1)(A), check free: Form Part II, cultum (c), first Other (possity) Section 507(c)(1)(A), check free: Form Part II, cultum (c), first Other (possity) Section 507(c)(1)(A), check free: Form Part II, cultum (c), first Other (possity) Other (po	or t	ype		millimiti, C	<i>n</i> . 50505					-		
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Section 4947(a)(1) nonexempt charitable trust Other taxable private foundation Far mark who of all sacts at end year (from Part It, column (c), lim is) Other (speet)) Other (speet)		<u></u>		t	otioni IV	Saalaa 50	(a)(3) avampt private (a madelines		۲		
Far mathet value of all assets at end of year of the form of the following (climal following) (climal follow	п	۲							ation		here and attach computation	m
(Intern Part It, column (c), lims 16)		Fai								Ε	If private foundation status	was terminated
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Combibility Comparation			52	ilumns (b), (c), urily equal the a	and (d) may mounts in c	r not neces- olumn (a)		_	•			
2 Ca P						(07						(cash basis only)
3 Interest on savings and temporary cash nivestments. 4 Dividends and interest from securities. 5 a Gross rents. b My region income: - 4, 397. - 4, 397. - 5 a Gross rents. b My region income: - 4, 397. - 5 a Gross rents. b My region income: - 4, 397. - 6 a Gross rents for all 2, 433, 003. - 7 Combits gam net income from Part IV, time 2. - 8 a Gross rents. - 9 income: - 10 post sheet profe for all 2, 433, 003. - 10 post sheet profe for all 2, 43, 43, 45, 46. - 10 post sheet profe for all 2, 43, 43, 43, 45, 46. - 10 post sheet profe for all 2, 43, 43, 43, 45, 46. - 10 post sheet profe for all 2, 43, 43, 43, 45, 46. - 10 post sheet profe for all 2, 43, 43, 43, 45, 46. - 10 post sheet profe for all		I	1	,, ·	-							
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14 Other employee salanes and wages. 15 Pension plans, employee benefits. 16a Legal fees (attach schedule). See St. 2		┪							3,34	ΙΟ.	232, 140,	29.8
15 Pension plans, employee benefits. 16a Legal fees (attach schedule). See St. 2 1, 236. 1, 236. 1, 236. 1, 236. b Accounting fees (attach sch). See St. 3 2, 325. 2, 325. 2, 325. 2, 325. c Other prof fees (attach sch). See St. 4 17 Interest. 18 Taxes (attach schedule) 19 Depreciation (attach sch) sch) and depletion 20 Occupancy. 21 Travel, conferences, and meetings. 22 Printing and publications 23 Other expenses (attach schedule) See Statement. 24 Total operating and administrative expenses. Add times 13 through 23. 25 Contributions, gifts, grants paid Part. XV. 26 Total expenses and disbursements. Add lines 24 and 25. 390, 906. 100, 906. 0. 390, 906. 27 Subtract line 26 from line 12: a Excess of revenue over expenses and disbursements. Add lines 24 and 25. b Not Investment Income (if negative, enter 4). b Not Investment Income (if negative, enter 4). C Adjusted net Income (if negative, enter 4).		ı		•								····
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**Excess of revenue over expenses and disbursements. Description De	١	M S	24				1,377.		-, -,			
25 Contributions, gifts, grants paid Part. XV. 290,000, 10414444 1 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2		E		expenses. Add	d lines 13 th	rough 23						
Add lines 24 and 25		Į					290.000.	Treasure of the		1	ののなどの主義では出い	290,000.
27 Subtract line 26 from line 12: a Excess of revenue over expenses and disbursements. b Net investment income (if negative, enter -0-). C Adjusted net Income (if negative, enter -0-).		١	26				300 006	10	n 0/	16	^	san ans
a Excess of revenue over expenses and disbursements —44, 992. b Net investment income (if negative, enter -0-) — 244, 440. — 252, 746. —		+	27				370, 700.		U, 31	NS:	TE Z. Signification	Langue Ser Line Char
b Net Investment Income (if negative, enter -0-) C Adjusted net Income (if negative, enter -0-).				Excess of rev	enue over e	xpenses			C of	9	四上为数据的	医工作的
C Adjusted net Income (if negative, enter 0-)				and disburser	ments					12	的 是一个一个一个	计是数据 化
		١	ŧ) Not investment inc	come (il negative	s, enter -0-)						
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<u>Form</u>	990-	PF (2008) ED & CLAUDE FORTSON CHARITABLE TR	RUST	58-620	01850 Page 2
Dân	ile"	Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only. (See instructions.)	Beginning of year	End o	of year
Part	10.4	Balance Sheets column should be for end-of-year amounts only. (See instructions.)	(a) Book Value	(b) Book Value	(c) Fair Market Value
	1	Cash - non-interest-bearing			
	2	Savings and temporary cash investments	686,356.	869,514.	405, 228.
	3	Accounts receivable		是是性質是許少學。	為自然是經濟人。
	1	Less. allowance for doubtful accounts ▶			
	4	Pledges receivable	化的过去式和	是是一种的一种。 第二章	沙村《金沙村》
	1	Less: allowance for doubtful accounts ▶			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see the instructions).			
	7	Other notes and loans receivable (attach sch)	19474 - 12 44 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4	MARK THE W	And Tall 10 Table 18 18 18 18 18
A	1	Less: allowance for doubtful accounts			
A S S E	8	Inventories for sale or use			
Ě	_	Prepaid expenses and deferred charges	3,375.	881.	881.
T		investments – U.S. and state government			
	١٠٠٠	obligations (attach schedule) Statement 6	1,935,846.	1,336,325.	1,528,730.
	ı	o Investments — corporate stock (attach schedule). Statement.7.	2,721,668.	2,907,263.	2,811,553.
	، ا	: Investments — corporate bonds (attach schedule)Statement. 8	449,738.	635, 515.	604,674.
	11	investments – land, buildings, and equipment basis		以外的	即不是
		Less: accumulated depreciation (attach schedule)See .Stmt. 9	10,000.	10,000.	25,000.
	12	Investments – mortgage loans			
	13	Investments - other (attach schedule)			
	14	Land, buildings, and equipment, basis.	THE SHEW AND SHEET	能描述的特別。	स्थान स्थाप द्वार है।
		Less: accumulated depreciation (attach schedule)			
	15	Other assets (describe ►)	1.		
		Total assets (to be completed by all filers -			
	-	see instructions_Also, see page 1, item i)	5,806,984.	5,759,498.	5,376,066.
1		Accounts payable and accrued expenses			"这些种爱"
À	18				TO THE PARTY OF THE PARTY.
8	1 -	Deferred revenue			
Ľ,					
1 T	21	Mortgages and other notes payable (attach schedule)	<u> </u>		
<u>i</u> ,	22	Other liabilities (describe.			
E S	23	Total liabilities (add lines 17 through 22)	0.	0.	
		Foundations that follow SFAS 117, check here ► X and complete lines 24 through 26 and lines 30 and 31.	1		(A) (A)
	l				
NF	24	Unrestricted	5,806,984.	5,759,498.	
TN		Temporarily restricted			Bed William
_A D	26	Permanently restricted			K. Marie C. Carlotte
A B A L A		Foundations that do not follow SFAS 117, check here ▶ and complete lines 27 through 31.	}		A STATE OF THE STA
EL	27	Capital stock, trust principal, or current funds			阿尔德西·斯
s Ñ	28	•			地方。這時期就
OE	29	Retained earnings, accumulated income, endowment, or other funds			
RS	4	Total net assets or fund balances (see the instructions).	5,806,984.	5,759,498.	
	31	Total liabilities and net assets/fund balances			
ES :	19694	(see the instructions)	5,806,984.	5,759,498.	Kushatika Bila
Kart	1112	Analysis of Changes in Net Assets or Fund Balanc	es		
1	Total	inet assets or fund balances at beginning of year — Part II, colu of-year figure reported on prior year's return)	mn (a), line 30 (must a	gree with	5,806,984.
		r amount from Part I, line 27a			-44,992.
		increases not included in line 2 (itemize)			
4	Add	lines 1, 2, and 3		4	5,761,992.
5	Decre	ases not uncluded un line 2 (itemize)	10	5	2,494.
		net assets or fund balances at end of year (line 4 minus line 5)		line 30 6	5,759,498.

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Form 990-PF (2008)

	DE FORTSON CHARITABLE TH			5	8-6201850	Page 3
	Losses for Tax on Investment		(b) How acr		(C) Date acquired	(d) Date sold
	e the kind(s) of property sold (e.g., rese; or common stock, 200 shares MLC	ai estate, Company)	P Purd D Dona	1858	(month, day, year)	(month, day, year)
a STATEMENT A PUBLICI			P		Various	Various
b STATEMENT B PUBLICI	Y TRADED SECURITIES		P		Various	Various
с						
<u>d</u>						
e		<u></u>				<u> </u>
(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	
a 640,591.		750	5,938.			-116,347.
ь 1,791,844.		1,582	2,897.			208,947.
<u>c</u>						
<u>d</u>	<u> </u>					
e	<u> </u>					
Complete only for assets show	ring gain in column (h) and owned by	the foundation on 12/31/69			(I) Gains (Colu	amn (h)
(i) Fair Market Value as of 12/31/69	(f) Adjusted basis as of 12/31/69	(k) Excess of column over column (j), if ar		g th	ain minus column () an -0-) or Losses (fr	(), but not less om column (h))
2						-116,347.
b				_		208, 947.
C	 					
d						
	 	······································				
	If gain, also s	enter in Part I line 7				
Capital gain net income or (ne	t capital loss).	enter in Part I, line 7 er -0- in Part I, line 7	. 1	2		92,600.
Net short-term capital gain or	(loss) as defined in sections 1222(5) a	and (6):	Ĭ			
		`` ¬	[
		If (loss) enter -0. L	1			
If gain, also enter in Part I, line in Part I, line 8	e o, columni (c) (see the instructions).	" (1333); cirica 5)	3 1	1	-116 347
in Part I, line 8		<u>. `</u>	ent Inco	me	L	-116,347.
in Part I, line 8 int.Vis. Qualification Unde	r Section 4940(e) for Reduced	Tax on Net Investme		me		-116,347.
in Part I, line 8 int.Vis. Qualification Unde		Tax on Net Investme		me		-116,347.
in Part I, line 8 int.Vis. Qualification Unde	r Section 4940(e) for Reduced e foundations subject to the section 49	Tax on Net Investme		me		-116,347.
in Part I, line 8 Int Vita Qualification Under optional use by domestic private ection 4940(d)(2) applies, leave to	r Section 4940(e) for Reduced e foundations subject to the section 49 this part blank.	Tax on Net Investme	nt income	me .)		
in Part I, line 8. Int Viv Qualification Under optional use by domestic private ection 4940(d)(2) applies, leave to the foundation liable for the second	r Section 4940(e) for Reduced e foundations subject to the section 49 this part blank.	Tax on Net Investme 340(a) tax on net investme	nt income	me .)	[]Yes	-116, 347. X No
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	<u>3-620</u> :			age 4
Part(V)次: Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - s	ee the i	nstructions		
1 a Exempt operating foundations described in section 4940(d)(2), check here ▶ ☐ and enter 'N/A' on line 1.] [性工业	ريان	بتنائد
Date of ruling letter: (attach copy of ruling letter if necessary - see instructions)	1	1		
b Domestic foundations that meet the section 4940(e) requirements in Part V,		<u> </u>	2,4	444.
check here. ► X and enter 1% of Part I, line 27b		1000000	234	Sec.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, column (b)	-		計算	
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable	1	13.8 8	17.	iph.
foundations only. Others enter -0-)	2			0.
3 Add lines 1 and 2			2,4	144.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)				0.
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0		1	2.4	444.
6 Credits/Payments:		13.33	199	100
a 2008 estimated tax pmts and 2007 overpayment credited to 2008	ا . ز	2.50%	1714.6	49.5°
b Exempt foreign organizations — tax withheld at source	7	4.5	(B) (4)	. B. C
c Tax paid with application for extension of time to file (Form 8868) 6c	7	1000000	1	35
d Backup withholding erroneously withheld	_		27	G.
7 Total credits and payments, Add lines 6a through 6d.	7	953.7	n wattu. G	325.
8 Enter any penalty for underpayment of estimated tax. Check here I if Form 2220 is attached		 	:	,,,,,
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	▶ 9	}		0.
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid.	10	 		881.
11 Enter the amount of line 10 to be: Credited to 2009 estimated tax	► 11	 		0.
Part VII-A Statements Regarding Activities	-111	<u></u>		
		1.30.8	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		18	-	X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see the instructions for definition)?.			ļ	x
If the answer is 'Yes' to 1a or 1b, attach a detailed description of the activities and copies of any materials	publish	175.9	145	
or distributed by the foundation in connection with the activities.		77		
c Did the foundation file Form 1120-POL for this year?	•••	10	7.5	<u> </u>
(1) On the foundation > \$ 0. (2) On foundation managers > \$		0.	1,500	8
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax impos-	ed on	100	1997	٠, ﴿ وَإِنَّ إِنَّ الْمُ
foundation managers ▶ \$0.		1.3	100	7.
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.		750	3.5	, L 3
3. Has the foundation made any changes, not previously reported to the IDS, up its coverning instrument, arti-	doc	15%	134	18. T.
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, arti- of incorporation, or bylaws, or other similar instruments? If 'Yes,' attach a conformed copy of the changes		3	L. I	X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?				X
b If 'Yes,' has it filed a tax return on Form 990-T for this year?			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.		10.0	:4:	· , ·
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either:			100)
By language in the governing instrument, or		4	3,3,3	1.
			1	12.
 By state legislation that effectively amends the governing instrument so that no mandatory directions that with the state law remain in the governing instrument? 	Conflic		X	2.0.0.
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.			X	
8a Enter the states to which the foundation reports or with which it is registered (see the instructions)		¥¥.	m-	1 7 E
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.		ි දි 8t		350
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) for calendar year 2008 or the taxable year beginning in 2008 (see instructions for Part XIV)? If 'Yes,' comp	or 4942		PR.	等净 X
10 Did any persons become substantial contributors during the tax year? If 'Yes,' attach a schedule listing the				 ^ -
and addresses		10		X
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Part VIFA 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	x
12 Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?		12	X
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption at Website address	pplication?	13	x)
14 The books are in care of MACHOVIA BANK, N.A. Telephone no Located at MACHOVIA BANK, N.A. Telephone no ZIP + 4 MACHOVIA BANK, N.A. Telephone no ZIP + 4 MACHOVIA BANK, N.A.). F 404 2	66-30	85
15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here	, ,	N/A	
and enter the amount of tax-exempt interest received or accrued during the year			N/A
File Form 4720 if any item is checked in the 'Yes' column, unless an exception applies.		7.3,	Yes No
1 a During the year did the foundation (either directly or indirectly):		27.32	: 25 C. T.
(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?			建国感
(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	1. T. C.	i G
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 the instructions)?	16	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 acts, that were not corrected before the first day of the tax year beginning in 2008?		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)):		700 1400	
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			
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a) (all years listed, answer 'No' and attach statement — see the instructions.)	2) to	2b	N/A
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here			12.14
► 20, 20, 20		10.4	
3a 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		
b If 'Yes,' did it have excess business holdings in 2008 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 2008.)		3b	N/A
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		4a	x
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2008?	,	4b	X
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Form 990-PF (2008) ED & CLAUDE FORTS(58-621	01850 Page 6					
		1 7/ LV may be Req	uneu (commueu)	assumment some					
5 a During the year did the foundation pay or incur any amount to: (1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?									
(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?									
(3) Provide a grant to an individual for travel, study, or other similar purposes? Yes X No									
(4) Provide a grant to an organization other the in section 509(a)(1), (2), or (3), or section	(4) Provide a grant to an organization other than a charitable, etc. organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see instructions)								
(5) Provide for any purpose other than religio educational purposes, or for the preventio	(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?								
b If any answer is 'Yes' to 5a(1)-(5), did any of described in Regulations section 53 4945 or in (see instructions)?	b If any answer is 'Yes' to 5a(1)-(5), did any of the transactions fall to qualify under the exceptions described in Regulations section 53 4945 or in a current notice regarding disaster assistance (see instructions)?								
Organizations relying on a current notice rega			- 🗆						
c If the answer is 'Yes' to question 5a(4), does tax because it maintained expenditure response if 'Yes,' attach the statement required by Regi	sibility for the grant?	••• ••• ••• •••	N/A Yes	No					
·	···· · · · · · · · · · · · · · · · · ·		∐Yes ⊠	1 1 1 1					
b Did the foundation, during the year, pay premi If you answered 'Yes' to 6b, also file Form 88.	70.	•		6b X					
7a At any time during the tax year, was the found				No State of the last of the la					
b If yes, did the foundation receive any proceed	s or have any net incoi	ne attributable to the tra	ansaction?	7b N/A					
Part:VIII: Information About Officers, Dand Contractors	irectors, Trustees,	Foundation Manag	gers, Highly Paid E	mployees,					
1 List all officers, directors, trustees, foundation	n managers and their		ructions).						
(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					
WACHOVIA BANK, N.A. 3414 PEACHTREE RD N E, STE 500 ATLANTA, GA 30303	Trustee 0	0.	0.	0.					
JAMES L. HENDERSON, JR.	ADV COMM	0.	0.	0.					
HAMPTON, GA	-								
KEITH MCBRAYER	ADV COMM 0	0.	0.	0.					
HAMPTON, GA									
J W MARTIN	ADV COMM	0.	0.	0.					
GRIFFIN. GA				Mar MOVE					
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 account, other allowances					
None									
Total number of other employees paid over \$50,000) <u></u>	<u></u>	<u>,</u>	0					
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Part VIII : Information About Officers, Directors, Trustees, Foundation and Contractors (continued)	ation Managers, Highly Paid E	mployees,
3 Five highest-paid independent contractors for professional services - (see in enter 'NONE.	nstructions). If 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	ere in eer een een een een een een een een ee	
List the foundation's four largest direct charitable activities during the tax year, include relevant statistical is organizations and other beneficianes served, conferences convened, research papers produced, etc.	nformation such as the number of	Expenses
1 <u>N/A</u>		
2		
3		
4		
RartitX-B: Summary of Program-Related Investments (see instruction	ions)	
Describe the two largest program-related investments made by the foundation durin	o the tax year on lines 1 and 2.	Amount
1 N/A		
2		
All other program-related investments See instructions. 3		
Total. Add lines 1 through 3	▶	0.
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Part X Minimum Investment Return (All domestic foundations must complete this part see instructions.)	. Foreign to	oundations,
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	5,335,185.
b Average of monthly cash balances.		15,000.
c Fair market value of all other assets (see instructions)		25,000.
d Total (add lines 1a, b, and c)		5, 375, 185.
e Reduction claimed for blockage or other factors reported on lines 1a and 1c		
(attach detailed explanation)	0.	
2 Acquisition indebtedness applicable to line 1 assets		0.
3 Subtract line 2 from line 1d		5,375,185.
4 Cash deemed held for charitable activities. Enter 1-1/2% of line 3 (for greater amount, see instructions)		80, 628.
5 Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4		5,294,557.
6 Minimum investment return. Enter 5% of line 5.		264, 728.
Part-XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private of	perating to	
and certain foreign organizations check here \ \ \ \and do not complete this		undations
1 Minimum investment return from Part X, line 6.	1	264,728.
2a Tax on investment income for 2008 from Part VI, line 5	· · · <u> </u>	204,720.
b Income tax for 2008. (This does not include the tax from Part VI.)	14.	
c Add lines 2a and 2b		2 444
3 Distributable amount before adjustments. Subtract line 2c from line 1		2,444. 262,284.
4 Recoveries of amounts treated as qualifying distributions.		202,204.
5 Add lines 3 and 4	••	262,284.
		202,204.
		262 204
7 Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	_/ _	262, 284.
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.	2月7	390, 906.
b Program-related investments - total from Part IX-B.		
2 Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc. purposes.		
3 Amounts set aside for specific charitable projects that satisfy the: a Suitability test (prior IRS approval required)	3a	
b Cash distribution test (attach the required schedule)	3b	
4 Qualifying distributions Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4.	4	390,906.
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 (see instructions).	5	2,444.
6 Adjusted qualifying distributions. Subtract line 5 from line 4	6	388,462.
Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating qualifies for the section 4940(e) reduction of tax in those years.	·	oundation
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Rait XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2007	2007	(d) 2008
1 Distributable amount for 2008 from Part XI, line 7			马拉克斯	262,284.
2 Undistributed income, if any, as of the end of 2007: a Enter amount for 2007 only			250, 996.	TO THE PARTY OF TH
b Total for prior years: 20, 20, 20		0.	AND THE REPORT	3.1 SAN 4. 4
3 Excess distributions carryover, if any, to 2008:	CONTRACTOR OF THE PARTY.		SPANATANES	William Street, Street
a From 2003				
b From 2004				3 X X X
c From 2005			A CONTRACTOR	
d From 2006				设设的
e From 2007				
f Total of lines 3a through e	0.	建筑建筑	などのである。	問題等認可
4 Qualifying distributions for 2008 from Part	的影響。		學是認識的	建设的
XII, line 4: ► \$ 390, 906.	6 M 22 M		起想的原始	
a Applied to 2007, but not more than line 2a			250, 996.	
b Applied to undistributed income of prior years (Election required — see instructions).		0.		
c Treated as distributions out of corpus			except a letter	建筑工艺学
(Election required - see instructions)	0.	などのである。	的語彙學的言	
d Applied to 2008 distributable amount	是是是是是是	经经济的企业的	的是是是自然的	139, 910.
e Remaining amount distributed out of corpus	0.	完成,但是一个人的	的影響等為關係	· 自然 解析 (1)
5 Excess distributions carryover applied to 2008	0.	特別是重要的	国际公司公司的	0.
(If an amount appears in column (d), the same amount must be shown in column (a).)				
(-),			能够加强症的	
6 Enter the net total of each column as			数型层。建筑	
indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	0.1	自己的 自己以来,"我们可以		
b Prior years' undistributed income. Subtract 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	第126			
4942(a) tax has been previously assessed	TREST POWER LAND	0.	华元5人(广泛学院)	The State of F
d Subtract line 6c from line 6b. Taxable amount see instructions.		0.		
		EN HANT ARRESTA		TOWN THE WAY OF AN
e Undistributed income for 2007. Subtract line 4a from line 2a. Taxable amount — see instructions		的代表的主作的	0.	
f Undistributed income for 2008. Subtract lines				
4d and 5 from line 1. This amount must be				
distributed in 2009	3.3.16.3. 17.15.16.16.16.16.16.16.16.16.16.16.16.16.16.		the state of the s	122,374.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed				学 基础 表现
by section 170(b)(1)(F) or 4942(g)(3)		有关。在10		
(see instructions)	0.		THE RESERVE OF THE PARTY OF THE	CONTRACTOR STATE
8 Excess distributions carryover from 2003 not applied on line 5 or line 7 (see instructions).	0.			
9 Excess distributions carryover to 2009. Subtract lines 7 and 8 from line 6a	0.			
10 Analysis of line 9:	美国的		数据》经验1983	心性肥為縣
a Excess from 2004	以是来创建企 意		计划是全线主义	
b Excess from 2005		医医院 图 2 2		
c Excess from 2006		全国	"是是是是	学生的
d Excess from 2007				
e Excess from 2008	接着學性物學的	美国的	本学	5. 建理学公开派
AA				Form 990-PF (2008)

a 'Assets' alternative test - enter: (1) Value of all assets. (2) Value of all 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)(8)(iii). (3) Largest amount of support from an exempt organization (4) Gross investment income. Ti XV-I Supplementary Information (Complete this part only if the organization had \$5,000 or more in assets at any time during the year - see instructions.)		etermination lette	r that it is a private	operating foundatio	n, and the ruling	
Tax year Prior 3 years prior adjusted net more from Part I or the minimum processors of the part I or the pa					1 4942(1)(3) or	1494261651
income from Part Lor the minimum investment electron from Part X for each year listed. So of line 2.			erating touribation t		1 1 43-2()(3) (1	1 4342()(3)
c Coulings distributions from Part XII, line 4 for each year lasted	income from Part I or the minimum investment return from Part X for		(ъ) 2007		(d) 2005	(e) Total
Inter 4 for each year Insted A mouth included inte 22 not used directly for active conduct of exempt activities. Coulsilying distributions made directly for active conduct of exempt activities. Counsiling a Substitutions and directly for active conduct of exempt activities. Complete 3a, b or 6 for the alternative lest relied upon: a Asset's alternative test - enter: (1) Value of all assets, qualifying under section 4942(0)(3)(9). Extenditure 1 to the section of						
for solve conduct of exempt activities. Complete 3a, b, or c for the statement of the conduct of exempt activities. Subtract line 3d hom line 2c. Complete 3a, b, or c for the statement of th	line 4 for each year listed		<u></u>			
for active conduct of exempl activities. Complete 3a, b, or c for the attendive test of home in a continuation of the continu	for active conduct of exempt activities	····				
alternative test reled upon: a Asset's alternative test - enter: (1) Value of all assets. (2) Yabu of all assets usalishing under section 49420(0(90)). **Coloneous' alternative test - enter: (3) Value of all assets usalishing under section 49420(0(90)). **Coloneous' alternative test - enter: (3) Yabu of assets usalishing under section 49420(0(90)). **Coloneous' alternative test - enter: (3) Yabu of assets usalishing under section 49420(0(90)). **Coloneous' alternative test - enter: (4) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5), or orgalities). (2) Support from general public and 5 or more earny degrazations as provided in section 6942(0(0)(90)). (3) Largest amount of support from an exempt organization. (4) Cross investment income. Information Regarding Foundation Managers: a List any managers of the foundation who have contributed more than 25 of the total contributions received by the foundation before the energy any tax year (but only if they have contributed more than \$5,000), (See section 507(d)(2).) None 1 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc. Programs: Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc. Programs: Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc. Programs: Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc. Programs: Check here if the foundation only makes contributions to prestered charitable organizations and does not accept unsolicited requests for furds. If the foundation makes gifts, grants, etc. (see instructions) to individuals or organizations under other conditions, complete times 2a, b, c, and ad. a The name, address, and telephone number of the person to whom applications should be addressed: See Statement for Line 2a d'Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors: See Statement for Line 2a	for active conduct of exempt activities.					
(1) Value of all assets. additing under section 49A(0)(3(8)(0). 3) Endowment dismals the 1- enter 2/3 of this 5 for each year Island. C'Support alternative test - enter: 19 of this 5 for each year Island. C'Support alternative test - enter: 19 of this 6 for each year Island. C'Support alternative test - enter: 10) Total support other than gross devictors, entis, payments on securities loans (section 5)12(a)(5), or royalities). (2) Support from power public and 5 or more sample approached in section 694(0)(0)(3(m)). (3) Largest amount of support from an exempt organization of the section of the foundation who have contributed more than 25, of the total contributions received by the foundation before the assets at any time during the year - see Instructions.) Information Regarding Foundation who have contributed more than 25,000, (See section 50/(5)(2).) None bust 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 chantable organizations and does not accept unsolicated requests for turds. If the foundation makes gifts, grants, etc., (see instructions) to individuals or organizations under other conditions, complete times 2b, b. c, and d. a The name, address, and telephone number of the person to whom applications should be addressed: See Statement for Line 2a c Any submassion deadlines: See Statement for Line 2a d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors:	3 Complete 3a, b, or c for the alternative test relied upon:				}	
A what of assets qualifying under section 4942(0)(30(0) b' Endowment dismalps test — enter 2/3 of maximum mensioner stream shown in Part X, line 6 for each year listed (1) Total support other than gross investment income (interest, dishedends, rents, payments on securities loans (section 512(a)(5)), or (orgatics) (2) Support from general public and 5 or more entered organizations as provided in section 494(0)(3)(8)(1) (3) Largest amount of support from an exempl organization (4) Gross investment income (interest, dishedends, rents, payments on securities loans (section 512(a)(5)), or (orgatics) Information Regarding Foundation Managers: a List any managers of the foundation what 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 terms 2a, b, c, and d. a The name, address, and telephone number of the person to whom applications should be addressed: See Statement for Line 2a d'Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors: See Statement for Line 2a]		
section 4942()(3(6)(i)	``		 	ļ	}	
mamma mestimat ream shawn in Part X, line 6 for each year lated. **C Support alternative test - enter: (1) Total support other than gross introduced in the state of the sta	section 4942(j)(3)(B)(i)		 			
c Support alternative test — enter: (1) Total support other than gross investment income (interest, dividends, certs, payments) (2) Support from general public and 5 or more exempt organizations as provided in section (49/20/08/01). (3) Largest amount of support from an exempt organization. (4) Gross investment income. 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 >	minimum investment return shown in Part X,				}	
investment income (interest, dividency, rents, payments on securities loans (section 512(a)(5)), or royalities)	r					
(2) Support from general public and 5 or more exempl organizations as provided in section 4940(X)38(M). (3) Largest amount of support from an exempt organization. (4) Gross investment income	investment income (interest, dividends, rents, payments on securities loans (section					
A Largest amount of support from an exempl organization. (4) Gross investment income	(2) Support from general public and 5 or more exempt organizations as provided					
Information Regarding Foundation who have contributed more than \$5,000. (See section 507(d)(2).) None List any managers of the foundation who have contributed more than \$5,000. (See section 507(d)(2).) None List any managers of the foundation who have contributed more than \$5,000. (See section 507(d)(2).) None 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 Information Regarding Contribution 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. The name, address, and telephone number of the person to whom applications should be addressed: See Statement 11 b The form in which applications should be submitted and information and materials they should include: See Statement for Line 2a c Any submission deadlines: See Statement for Line 2a d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors: See Statement for Line 2a	(3) Largest amount of support from					
assets at any time during the year – see instructions.) Information Regarding Foundation Managers: a List any managers of the foundation who 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 b 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: See Statement 11 b The form in which applications should be submitted and information and materials they should include: See Statement for Line 2a d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors: See Statement for Line 2a						
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Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc, Programs: Check here \(^{\text{Loan}}\) 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: See Statement 11 b The form in which applications should be submitted and information and materials they should include: See Statement for Line 2a c Any submission deadlines: See Statement for Line 2a d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors: See Statement for Line 2a	Information Regarding Foundation Manage a List any managers of the foundation who had close of any tax year (but only if they have	ers: ave contributed in	ore than 2% of the	total contributions a section 507(d)(2).)	eceived by the four	ndation before the
Check here I 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: See Statement 11 b The form in which applications should be submitted and information and materials they should include: See Statement for Line 2a c Any submission deadlines: See Statement for Line 2a d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors: See Statement for Line 2a		wn 10% or more of the coundation has a state of the coundation has a state of the countain the c	of the stock of a cor 10% or greater inter	poration (or an equest.	ally large portion o	f the ownership of
requests for funds. If the foundation makes gifts, grants, etc. (see instructions) to individuals or organizations under other conditions, complete items 2s, b, c, and d. a The name, address, and telephone number of the person to whom applications should be addressed: See Statement 11 b The form in which applications should be submitted and information and materials they should include: See Statement for Line 2a c Any submission deadlines: See Statement for Line 2a d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, lunds of institutions, or other factors: See Statement for Line 2a						
See Statement 11 b The form in which applications should be submitted and information and materials they should include: See Statement for Line 2a c Any submission deadlines: See Statement for Line 2a d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors: See Statement for Line 2a	requests for funds. If the foundation makes					
b The form in which applications should be submitted and information and materials they should include: See Statement for Line 2a c Any submission deadlines: See Statement for Line 2a d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors: See Statement for Line 2a		of the person to	whom applications	should be addresse	d:	
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See Statement for Line 2a c Any submission deadlines: See Statement for Line 2a d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors: See Statement for Line 2a						
c Any submission deadlines: See Statement for Line 2a d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors: See Statement for Line 2a	See Statement 11					
See Statement for Line 2a d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors: See Statement for Line 2a	See Statement 11	ubmitted and info	rmation and materia	als they should inclu	rde:	
d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors: See Statement for Line 28	See Statement 11 b The form in which applications should be so See Statement for Line 2a	ubmitted and info	rmation and materia	als they should inclu	rde:	
See Statement for Line 2a	See Statement 11 b The form in which applications should be so See Statement for Line 2a c Any submission deadlines:	ubmitted and info	rmation and materia	als they should inclu	rde:	
	See Statement 11 b The form in which applications should be so See Statement for Line 2a c Any submission deadlines: See Statement for Line 2a					
	See Statement 11 b The form in which applications should be so See Statement for Line 2a c Any submission deadlines: See Statement for Line 2a					r factors:

3 Grants and Contributions Paid During the Ye	ar or Approved for Fu	ture Paymen	ŧ	
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of		Amount
Name and address (home or business)	substantial contributor	recipient		
a Paid during the year	į.			
See Statement 12	ļ	ł		
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Unrelated business income (a) (b) (c) (d) Amount (see the instruction income (see the	ome
b c d e g f g Fees and contracts from government agencies 2 Membership dues and assessments 3 Interest on savings and temporary cash investments 4 Drividends and interest from securities 5 Net rental income or (loss) from real estate: a Debt-financed property b Not debt-financed property b Not debt-financed property 7 Other investment income 8 Gain or (loss) from sales of assets other than inventory 9 Net income or (loss) from special events 10 Gross profit or (loss) from sales of inventory 11 Other revenue:	
g Fees and contracts from government agencies Membership dues and assessments Interest on savings and temporary cash investments Dividends and interest from securities Net rental income or (loss) from real estate: a Debt-financed property b Not debt-financed property Not debt-financed property Other investment income Gain or (loss) from sales of assets other than inventory Net income or (loss) from special events Gross profit or (loss) from sales of inventory Other revenue:	
g Fees and contracts from government agencies 2 Membership dues and assessments 3 Interest on savings and temporary cash investments 4 Dividends and interest from securities 5 Net rental income or (loss) from real estate: a Debt-financed property b Not debt-financed property 6 Net rental income or (loss) from personal property 7 Other investment income 8 Gain or (loss) from sales of assets other than inventory 9 Net income or (loss) from sales of inventory 10 Gross profit or (loss) from sales of inventory 11 Other revenue:	
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a Debt-financed property b Not debt-financed property 6 Net rental income or (loss) from personal property 7 Other investment income 8 Gain or (loss) from sales of assets other than inventory 9 Net income or (loss) from sales of inventory 10 Gross profit or (loss) from sales of inventory 11 Other revenue:	6.31
b Not debt-financed property 6 Net rental income or (loss) from personal property 7 Other investment income. 8 Gain or (loss) from sales of assets other than inventory. 9 Net income or (loss) from sales of inventory. 10 Gross profit or (loss) from sales of inventory. 11 Other revenue:	
6 Net rental income or (loss) from personal property	
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8 Gain or (loss) from sales of assets other than inventory. 9 Net income or (loss) from special events	
9 Net income or (loss) from special events	168.
10 Gross profit or (loss) from sales of inventory 11 Other revenue:	100.
11 Other revenue:	
	 _
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	168.
13 Total. Add line 12, columns (b), (d), and (e)	
See worksheet in the instructions for line 13 to verify calculations.)	517.

Part XVI-B: Relationship of Activities to the Accomplishment of Exempt Purposes

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Line No.	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes). (See the instructions.)
N/A	
<u> </u>	·

Form 990-PF (2008) '8 7 ()

		F (2008) ED & CI						58-620			ege 13
P	ar XVII	Information Re Exempt Organ	egarding Tr	ransfers To	and Transa	ctions a	nd Relations	hips With Nonc	haritable	•	
	1 Did U	ne organization directly tibed in section 501(c) on the political organization	or indirectly of the Code (c	engage in any other than sec	of the following tuon 501(c)(3) o	with any organization	other organizations) or in section	on 527,	要是	Yes	No
	a Trans	fers from the reporting	foundation to						透透	9.5	r.\$0.1
		ash							1a(1)		X
		Other assets							18(2)	37.12	X
		ales of assets to a non	chantable ex	emnt organiza	ition					K -4.	X
		urchases of assets from									X
		ental of facilities, equip									X
		eimbursement arrange							1 b (4)		X
		oans or loan guarantee							16(5)		X
		erformance of services							16(6)		X
	c Shari	ng of facilities, equipme	ent, mailing li	sts, other ass	ets, or paid emp	ployees		••• •• •• ••	1c		X
	d If the the gr	answer to any of the a cods, other assets, or s ransaction or sharing a	above is 'Yes,' services given rrangement, s	complete the	following scheding foundation.	dule. Colun If the found of the good	nn (b) should ah dation received is, other assets.	ways show the fair i less than fair marke or services receive	market val et value in ed.	ue of	
3	Line no.		(c) Name	of nonchantable e	exempt organization	(0) Description of tran	rsfers, transactions, and	sharing arran	gement	3
N	/A										
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_		foundation directly or ibed in section 501(c) or s,' complete the following		nated with, or other than sect	related to, one things to the term of the	or more tax or in section	k-exempt organi n 527?	zations	. Yes	X	No
_		(a) Name of organization	on	(b) T	ype of organiza	tion	<u> </u>) Description of rel	ationship		
N	/A										
_				 			 				
				 			 				
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	Under pena complete. [alties of perjury, I declare that I Declaration of preparer (other t	have examined than taxpayer or fic	us return, including fuciany) is based o	g accompanying scho in all information of v	schules and stat which preparer	aments, and to the be has any knowledge.	est of my knowledge and t	belief, it is true	, согтес	1, and
S	PA	a Yamaato Wa	choria Be	Mr. N.A.	T/U/wfbo	14	6-15-09	- Vhee Pre	nden	<u>ナ</u>	
G	US eghte	sturk of officer or trustee	= E	2 " Class	ade fortson	Trust Date		Title			
H	Paid	Preparer's TOM	<i>PLIE</i> L	EPA CA	4	100	20-09	Check of (See	arer's Identify Signature in N	ing num the instr	3) 3)
E	Pre- parer's	Ferm's name (or Melv.			1. P.C.		XX	employed N/A			
	Use Only	yours a sett.	Zebulon					, , , , , , , , , , , , , , , , , , ,			
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Form 990-PF (2008)

2008	Federal Statements	Page 1
Client 12533	ED & CLAUDE FORTSON CHARITABLE TRUST	58-6201850
3/03/09		11:13AM
Statement 1 Form 990-PF, Part I, Line 6a Net Gain (Loss) from Nonin Assets Not Included in Part	ventory Sales Per Books IV	
Description: Date Acquired: How Acquired: Date Sold: To Whom Sold:	LITIGATION SETTLEMENTS Various Purchase Various	
Gross Sales Price: Cost or Other Basis: Basis Method:	568. 0. Cost	
	Gain (Loss)	568.
	Total §	568.
Statement 2 Form 990-PF, Part I, Line 16a Legal Fees LEGAL FEES	(a) (b) Net (c) Expenses Investment Adjusted Per Books Income Net Income \$ 1,236. \$ 1,236. \$	(d) Charitable Purposes 1,236.
Statement 3 Form 990-PF, Part I, Line 161 Accounting Fees	Total \$ 1,236. \$ 1,236. \$ 0. \$	1,236.
ACCOUNTING FEES	(a) (b) Net (c) Expenses Investment Adjusted per Books Income Net Income \$ 2,325. \$ 2,325. \$ \$ Total \$ 2,325. \$ 2,325. \$ 0. \$	(d) Charitable Purposes 2,325. 2,325.
Statement 4 Form 990-PF, Part I, Line 160 Other Professional Fees	=	
TRUSTEE FEES	(a) (b) Net (c) Expenses Investment Adjusted per Books Income Net Income	(d) Charitable Purposes 92,948.

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2008	Federal	Statements		Page 2
Client 12533	ED & CLAUDE FORT	ISON CHARITABLE T	58-6201850	
3/03/09	·			11:13AM
Statement 5 Form 990-PF, Part I, Line 23 Other Expenses				
Rental Expenses	per	(a) (b) Ne penses Investme Incom 4,397. \$ 4,397. \$ 4,397.	nt Adjusted e <u>Net Incom</u> 97.	
Statement 6 Form 990-PF, Part II, Line 10 Investments - U.S. and State		ons		
U.S. Government Obligat	ions	Valuation Method	Book Value	Fair MarketValue
SEE ATTACHED SCHEDULE S		Cost	\$ 1,336,325. \$ 1,336,325.	\$ 1,528,730. \$ 1,528,730.
		Total	<u>\$ 1,336,325.</u>	<u>\$ 1,528,730.</u>
Statement 7 Form 990-PF, Part II, Line 10 Investments - Corporate Sto	b cks			
Corporate Stocks		Valuation Method	Book Value	Fair Market Value
SEE ATTACHED SCHEDULE S	STATEMENT C	Cost	\$ 2,907,263.	\$ 2,811,553.
Statement 8 Form 990-PF, Part II, Line 10 Investments - Corporate Bor	c ds			
Corporate Bonds		Valuation Method	Book Value	Fair Market Value
SEE ATTACHED SCHEDULE S	STATEMENT C	Cost	\$ 635,515.	\$ 604,674.

2008 **Federal Statements** Page 3 **ED & CLAUDE FORTSON CHARITABLE TRUST Client 12533** 58-6201850 3/03/09 11-13AM Statement 9 Form 990-PF, Part II, Line 11 Investments - Land, Buildings, and Equipment Accum. Book Fair Market Category Basis Deprec Value Value 10,000. \$ 25,000. 25,000. 10,000. Land Total \$ 10,000. 10,000. Statement 10 Form 990-PF, Part III, Line 5 Other Decreases FEDERAL INCOME TAXES..... Total \$ Statement 11 Form 990-PF, Part XV, Line 2a-d **Application Submission Information** Name of Grant Program: Name: organizations under these conditions. Care Of: Street Address: City, State, Zip Code: Telephone: Form and Content: No applications required or accepted. Submission Deadlines: Restrictions on Awards: Statement 12 Form 990-PF, Part XV, Line 3a Recipient Paid During the Year

Name and Address	Donee Relationship	Found- ation Status	Purpose of Grant	 Amount
JOHNSON BIBLE COLLEGE	N/A	PUBLIC	EDUCATIONAL	\$ 30,000.
BEREA CHRISTIAN CHURCH	N/A	PUBLIC	RELIGIOUS	50,000.
FLINT RIVER COUNCIL BSA	N/A	PUBLIC	EDUCATIONAL	20,000.
FORTSON YOUTH CAMP	N/A	PUBLIC	EDUCATIONAL	50,000.

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2008	Federal Stat		Page 4		
Client 12533 E	ED & CLAUDE FORTSON		58-6201850		
3/03/09					11:13AM
Statement 12 (continued) Form 990-PF, Part XV, Line 3a Recipient Paid During the Year	r				
Name and Address	Donee Relationship	Found- ation Status	Purpose of Grant		Amount
A FRIEND'S HOUSE	N/A	PUBLIC	EDUCATIONAL	\$	10,000.
THE SALVATION ARMY	N/A	PUBLIC	RELIGOUS		1,000.
HENRY COUNCIL OF AGING	N/A	PUBLIC	EDUCATIONAL		15,000.
HENRY CO SCHOOL SYSTEM	N/A	PUBLIC	EDUCATIONAL		24,000.
HENRY CO CANCER CENTER	N/A	PUBLIC	SCIENTIFIC		20,000.
HAMPTON UNITED METHODIST SPECIAL PROJ.	' - N/A				50,000.
COMMUNITY CHRISTIAN CHURC	CH N/A				5,000.
YMCA OF METRO ATLANTA	N/A				15,000.
			Tota	al 🛐	290,000.

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2008

Federal Supplemental Information

Page 1

Client 12533

ED & CLAUDE FORTSON CHARITABLE TRUST

58-6201850

3/03/09

11:13AM

PAGE 6 PART 8

WACHOVIA COMPENSATION IS NOT INCLUDED ON PAGE 6 PART 8. HOWEVER, IT IS INCLUDED ON PAGE 1 PART 1 LINE 16 C AS OTHER PROFESSIONAL FEES. THE TOTAL FEES PAID TO WACHOVIA AS TRUSTEE WERE \$ 92,948.