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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

Department of the Treasury
Internal Revenue Service

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

For calendar year 2008, or tax year beginning 05/01, 2008, and ending 04/30, 2009

G Check all that apply: Initial return Final return Amended return Address change Name change

POSTMARK DATE
DEC 1 2009

Use the IRS label. Otherwise, print or type. See Specific Instructions.

Name of foundation
LEE ARTHUR C/T
Number and street (or P.O. box number if mail is not delivered to street address) Room/suite
Wachovia Bank, N.A.
1525 WEST WT HARRIS BLVD
City or town, state, and ZIP code
CHARLOTTE, NC 28288-5709

A Employer identification number
63-6110715
B Telephone number (see page 10 of the instructions)
(336) 732-6015
C If exemption application is pending, check here
D 1 Foreign organizations, check here
2 Foreign organizations meeting the 85% test, check here and attach computation
E If private foundation status was terminated under section 507(b)(1)(A), check here
F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here

Check type of organization: Section 501(c)(3) exempt private foundation
 Section 4947(a)(1) nonexempt charitable trust Other taxable private foundation
Fair market value of all assets at end of year (from Part II, col (c), line 16) **\$ 966,005.**
J Accounting method: Cash Accrual
 Other (specify) _____
(Part I, column (d) must be on cash basis.)

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see page 11 of the instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1	Contributions, gifts, grants, etc., received (attach schedule)				
2	Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch. B.				
3	Interest on savings and temporary cash investments	1,454.	1,454.		STMT 1
4	Dividends and interest from securities	53,497.	52,988.		STMT 2
5a	Gross rents				
b	Net rental income or (loss)				
6a	Net gain or (loss) from sale of assets not on line 10	-1,880.			
b	Gross sales price for all assets on line 6a	124,669.			
7	Capital gain net income (from Part IV, line 2)				
8	Net short-term capital gain				
9	Income modifications				
10a	Gross sales less returns and allowances				
b	Less: Cost of goods sold				
c	Gross profit or (loss) (attach schedule)				
11	Other income (attach schedule)				
12	Total. Add lines 1 through 11	53,071.	54,442.		
13	Compensation of officers, directors, trustees, etc	17,220.	17,220.		
14	Other employee salaries and wages				
15	Pension plans, employee benefits				
16a	Legal fees (attach schedule)				
b	Accounting fees (attach schedule)				
c	Other professional fees (attach schedule)				
17	Interest				
18	Taxes (attach schedule) (see page 14 of the instructions)	334.	334.		
19	Depreciation (attach schedule) and depletion				
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	17,554.	17,554.		
25	Contributions, gifts, grants paid	46,578.			46,578.
26	Total expenses and disbursements. Add lines 24 and 25	64,132.	17,554.		46,578.
27	Subtract line 26 from line 12.				
a	Excess of revenue over expenses and disbursements	-11,061.			
b	Net investment income (if negative, enter -0-)		36,888.		
c	Adjusted net income (if negative, enter -0-)				

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Form **990-PF** (2008)

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Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions.)			
		Beginning of year	End of year		
		(a) Book Value	(b) Book Value	(c) Fair Market Value	
Assets	1	Cash - non-interest-bearing		NONE	
	2	Savings and temporary cash investments			
	3	Accounts receivable ▶			
		Less: allowance for doubtful accounts ▶			
	4	Pledges receivable ▶			
		Less: allowance for doubtful accounts ▶			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see page 15 of the instructions)			
	7	Other notes and loans receivable (attach schedule) ▶ *		NONE	
		Less: allowance for doubtful accounts ▶		NONE	NONE
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10 a	Investments - U S and state government obligations (attach schedule)		NONE	NONE
	b	Investments - corporate stock (attach schedule)		NONE	NONE
	c	Investments - corporate bonds (attach schedule)		NONE	NONE
	11	Investments - land, buildings, and equipment, basis ▶		NONE	
	Less: accumulated depreciation (attach schedule) ▶		NONE		
12	Investments - mortgage loans		NONE		
13	Investments - other (attach schedule)				
14	Land, buildings, and equipment basis ▶				
	Less: accumulated depreciation (attach schedule) ▶				
15	Other assets (describe ▶)	1,193,352.	1,182,388.	966,005.	
16	Total assets (to be completed by all filers - see the instructions Also, see page 1, item I)	1,193,352.	1,182,388.	966,005.	
Liabilities	17	Accounts payable and accrued expenses			
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶)			
23	Total liabilities (add lines 17 through 22)				
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/>				
	and complete lines 24 through 26 and lines 30 and 31.				
	24	Unrestricted			
	25	Temporarily restricted			
	26	Permanently restricted			
	Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. ▶ <input checked="" type="checkbox"/>				
	27	Capital stock, trust principal, or current funds	1,193,352.	1,182,388.	
	28	Paid-in or capital surplus, or land, bldg, and equipment fund			
29	Retained earnings, accumulated income, endowment, or other funds				
30	Total net assets or fund balances (see page 17 of the instructions)	1,193,352.	1,182,388.		
31	Total liabilities and net assets/fund balances (see page 17 of the instructions)	1,193,352.	1,182,388.		

Part III Analysis of Changes in Net Assets or Fund Balances		
1	Total net assets or fund balances at beginning of year - Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1,193,352.
2	Enter amount from Part I, line 27a	-11,061.
3	Other increases not included in line 2 (itemize) ▶ SEE STATEMENT 6	97.
4	Add lines 1, 2, and 3	1,182,388.
5	Decreases not included in line 2 (itemize) ▶	
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	1,182,388.

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)		(b) How acquired P-Purchase D-Donation	(c) Date acquired (mo., day, yr)	(d) Date sold (mo., day, yr)
1a SEE PART IV DETAIL				
b				
c				
d				
e				
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)	
a				
b				
c				
d				
e				
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))	
(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any		
a				
b				
c				
d				
e				
2 Capital gain net income or (net capital loss)		{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	-1,880.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c) (see pages 13 and 17 of the instructions). If (loss), enter -0- in Part I, line 8.			}	3

Part V Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income

N/A

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income.)

If section 4940(d)(2) applies, leave this part blank.

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? Yes No
If "Yes," the foundation does not qualify under section 4940(e). Do not complete this part.

1 Enter the appropriate amount in each column for each year; see page 18 of the instructions before making any entries.

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2007			
2006			
2005			
2004			
2003			
2 Total of line 1, column (d)			2
3 Average distribution ratio for the 5-year base period - divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years			3
4 Enter the net value of noncharitable-use assets for 2008 from Part X, line 5			4
5 Multiply line 4 by line 3			5
6 Enter 1% of net investment income (1% of Part I, line 27b)			6
7 Add lines 5 and 6			7
8 Enter qualifying distributions from Part XII, line 4 if line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions on page 18.			8

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see page 18 of the instructions)

Table with 11 rows for excise tax calculations. Includes sub-rows for credits/payments (6a-6d) and a 'Refunded' column for line 11.

Part VII-A Statements Regarding Activities

Table with 10 rows for activity statements. Includes columns for 'Yes' and 'No' responses.

Part 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)(3)? If "Yes," attach schedule (see page 20 of the 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 application?	13	X	

Website address N/A

14 The books are in care of WACHOVIA BANK, NA Telephone no. (336) 732-6015
 Located at 100 NORTH MAIN STREET, WINSTON SALEM, NC ZIP + 4 27150-6732

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here
 and enter the amount of tax-exempt interest received or accrued during the year 15

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.

		Yes	No
1a	During the year did the foundation (either directly or indirectly):		
(1)	Engage in the sale or exchange, or leasing of property with a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(2)	Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(3)	Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No		
(4)	Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> 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)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b	If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)? <input type="checkbox"/> Organizations relying on a current notice regarding disaster assistance check here <input type="checkbox"/>	1b	X
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)).		
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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years <input type="checkbox"/>		
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see page 20 of the instructions)	2b	X
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here <input type="checkbox"/>		
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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	
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

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required (continued)

5a During the year did the foundation pay or incur any amount to:

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? Yes No

(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? Yes No

(3) Provide a grant to an individual for travel, study, or other similar purposes? Yes No

(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 page 22 of the instructions) Yes No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? Yes No

b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see page 22 of the instructions)? Yes No
 Organizations relying on a current notice regarding disaster assistance check here

c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? Yes No
 If "Yes," attach the statement required by Regulations section 53.4945-5(d).

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? Yes No

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? Yes No
 If you answered "Yes" to 6b, also file Form 8870

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? Yes No

b If yes, did the foundation receive any proceeds or have any net income attributable to the transaction? Yes No

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

1 List all officers, directors, trustees, foundation managers and their compensation (see page 22 of the instructions).

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (if not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
SEE STATEMENT 8		17,220.	-0-	-0-

2 Compensation of five highest-paid employees (other than those included on line 1 - see page 23 of the instructions). If none, enter "NONE."

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE		NONE	NONE	NONE

Total number of other employees paid over \$50,000 None

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

3 Five highest-paid independent contractors for professional services (see page 23 of the instructions). If none, enter "NONE."

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		NONE

Total number of others receiving over \$50,000 for professional services **NONE**

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	Expenses
1 NONE	

2	

3	

4	

Part IX-B Summary of Program-Related Investments (see page 23 of the instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1 NONE	

2	

All other program-related investments See page 24 of the instructions	
3 NONE	

Total. Add lines 1 through 3	

Part X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see page 24 of the 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	1,029,774.
b	Average of monthly cash balances	1b	156.
c	Fair market value of all other assets (see page 24 of the instructions)	1c	NONE
d	Total (add lines 1a, b, and c)	1d	1,029,930.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	
2	Acquisition indebtedness applicable to line 1 assets	2	NONE
3	Subtract line 2 from line 1d	3	1,029,930.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see page 25 of the instructions)	4	15,449.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	1,014,481.
6	Minimum investment return. Enter 5% of line 5	6	50,724.

Part XI Distributable Amount (see page 25 of the instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here and do not complete this part.)

1	Minimum investment return from Part X, line 6	1	50,724.
2a	Tax on investment income for 2008 from Part VI, line 5	2a	738.
b	Income tax for 2008. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	738.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	49,986.
4	Recoveries of amounts treated as qualifying distributions	4	NONE
5	Add lines 3 and 4	5	49,986.
6	Deduction from distributable amount (see page 25 of the instructions)	6	NONE
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	49,986.

Part XII Qualifying Distributions (see page 25 of the 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	46,578.
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	NONE
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	NONE
b	Cash distribution test (attach the required schedule)	3b	NONE
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	46,578.
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 page 26 of the instructions)	5	
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	46,578.

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.

Part XIII Undistributed Income (see page 26 of the instructions)

	(a) Corpus	(b) Years prior to 2007	(c) 2007	(d) 2008
1 Distributable amount for 2008 from Part XI, line 7				49,986.
2 Undistributed income, if any, as of the end of 2007:				
a Enter amount for 2007 only			NONE	
b Total for prior years 20____, 20____, 20____		NONE		
3 Excess distributions carryover, if any, to 2008:				
a From 2003	NONE			
b From 2004	NONE			
c From 2005	NONE			
d From 2006	NONE			
e From 2007	NONE			
f Total of lines 3a through e	NONE			
4 Qualifying distributions for 2008 from Part XII, line 4 ▶ \$ <u>46,578.</u>				
a Applied to 2007, but not more than line 2a			NONE	
b Applied to undistributed income of prior years (Election required - see page 26 of the instructions)		NONE		
c Treated as distributions out of corpus (Election required - see page 26 of the instructions)	NONE			
d Applied to 2008 distributable amount				46,578.
e Remaining amount distributed out of corpus	NONE			
5 Excess distributions carryover applied to 2008 (If an amount appears in column (d), the same amount must be shown in column (a).)	NONE			NONE
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	NONE			
b Prior years' undistributed income Subtract line 4b from line 2b		NONE		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		NONE		
d Subtract line 6c from line 6b. Taxable amount - see page 27 of the instructions		NONE		
e Undistributed income for 2007 Subtract line 4a from line 2a Taxable amount - see page 27 of the instructions			NONE	
f Undistributed income for 2008. Subtract lines 4d and 5 from line 1 This amount must be distributed in 2009.				3,408.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see page 27 of the instructions)	NONE			
8 Excess distributions carryover from 2003 not applied on line 5 or line 7 (see page 27 of the instructions)	NONE			
9 Excess distributions carryover to 2009. Subtract lines 7 and 8 from line 6a	NONE			
10 Analysis of line 9:				
a Excess from 2004	NONE			
b Excess from 2005	NONE			
c Excess from 2006	NONE			
d Excess from 2007	NONE			
e Excess from 2008	NONE			

Part XIV Private Operating Foundations (see page 27 of the instructions and Part VII-A, question 9) NOT APPLICABLE

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2008, enter the date of the ruling

b Check box to indicate whether the foundation is a private operating foundation described in section 4942(j)(3) or 4942(j)(5)

	Tax year	Prior 3 years			(e) Total
	(a) 2008	(b) 2007	(c) 2006	(d) 2005	
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon					
a "Assets" alternative test - enter					
(1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test - enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed					
c "Support" alternative test - enter					
(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

Part XV Supplementary Information (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year - see page 27 of the instructions.)

1 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).)

N/A

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.

N/A

2 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 page 28 of the instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d.

a The name, address, and telephone number of the person to whom applications should be addressed:

b The form in which applications should be submitted and information and materials they should include:

c Any submission deadlines:

d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors:

Part XV Supplementary Information (continued)

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a <i>Paid during the year</i> SEE STATEMENT 11				
Total ▶ 3a				46,578.
b <i>Approved for future payment</i>				
Total ▶ 3b				

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

- 1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code... a Transfers from the reporting foundation to a noncharitable exempt organization of (1) Cash (2) Other assets b Other transactions: (1) Sales of assets to a noncharitable exempt organization (2) Purchases of assets from a noncharitable exempt organization (3) Rental of facilities, equipment, or other assets (4) Reimbursement arrangements (5) Loans or loan guarantees (6) Performance of services or membership or fundraising solicitations c Sharing of facilities, equipment, mailing lists, other assets, or paid employees d If the answer to any of the above is "Yes," complete the following schedule

Table with 4 columns: (a) Line no, (b) Amount involved, (c) Name of noncharitable exempt organization, (d) Description of transfers, transactions, and sharing arrangements

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

b If "Yes," complete the following schedule

Table with 3 columns: (a) Name of organization, (b) Type of organization, (c) Description of relationship

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

Signature of officer or trustee: [Signature] Date: 12/10/2009 Title: Trustee

Sign Here section containing Preparer's signature, Date, Check if self-employed, Preparer's identifying number, Firm's name, address, and ZIP code, EIN, and Phone no.

**FORM 990-PF - PART IV
CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME**

Kind of Property		Description				P or D	Date acquired	Date sold
Gross sale price less expenses of sale	Depreciation allowed/ allowable	Cost or other basis	FMV as of 12/31/69	Adj basis as of 12/31/69	Excess of FMV over adj basis		Gain or (loss)	
							5,967.	
							4,219.	
							02/02/2007	05/09/2008
613.00								
							114.00	
							05/24/2007	05/09/2008
1,541.00								
							-840.00	
							07/26/2007	05/09/2008
698.00								
							220.00	
							02/06/2006	05/09/2008
1,956.00								
							49.00	
							08/27/2007	05/15/2008
399.00								
							66.00	
							03/06/2007	05/15/2008
1,799.00								
							-300.00	
							10/28/1993	05/15/2008
109.00								
							-2.00	
							12/02/2005	05/15/2008
379.00								
							167.00	
							02/02/2007	05/15/2008
1,873.00								
							-389.00	
							01/09/2006	06/11/2008
1,574.00								
							-75.00	

**FORM 990-PF - PART IV
CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME**

Kind of Property		Description				P or D	Date acquired	Date sold
Gross sale price less expenses of sale	Depreciation allowed/ allowable	Cost or other basis	FMV as of 12/31/69	Adj basis as of 12/31/69	Excess of FMV over adj basis		Gain or (loss)	
247.00		168.00					79.00	
162.00		164.00					-2.00	
603.00		482.00					121.00	
2,165.00		2,353.00					-188.00	
1,274.00		2,482.00					-1,208.00	
1,798.00		1,981.00					-183.00	
133.00		135.00					-2.00	
1,920.00		1,836.00					84.00	
1,992.00		1,949.00					43.00	
92.00		93.00					-1.00	
1,364.00		2,246.00					-882.00	

**FORM 990-PF - PART IV
CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME**

Kind of Property		Description				P or D	Date acquired	Date sold
Gross sale price less expenses of sale	Depreciation allowed/ allowable	Cost or other basis	FMV as of 12/31/69	Adj basis as of 12/31/69	Excess of FMV over adj basis		Gain or (loss)	
344.00		307.00					08/27/2007	09/10/2008
								37.00
1,346.00		1,584.00					08/22/2006	09/10/2008
								-238.00
2,039.00		2,009.00					05/04/2007	09/10/2008
								30.00
2,395.00		2,318.00					12/12/2007	09/10/2008
								77.00
69,511.00		67,958.00					12/13/2006	09/10/2008
								1,553.00
366.00		315.00					05/09/2008	09/10/2008
								51.00
138.00		140.00					10/28/1993	09/15/2008
								-2.00
1,775.00		1,974.00					12/02/2005	09/30/2008
								-199.00
75.00		76.00					10/28/1993	10/15/2008
								-1.00
475.00		399.00					02/02/2007	10/29/2008
								76.00
698.00		2,160.00					02/15/2008	10/29/2008
								-1,462.00

**FORM 990-PF - PART IV
CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME**

Kind of Property		Description				P or D	Date acquired	Date sold
Gross sale price less expenses of sale	Depreciation allowed/ allowable	Cost or other basis	FMV as of 12/31/69	Adj basis as of 12/31/69	Excess of FMV over adj basis		Gain or (loss)	
1,223.00		50. AETNA INC-NEW COM PROPERTY TYPE: SECURITIES 1,992.00					08/04/2006 -769.00	11/05/2008
513.00		9. MCDONALDS CORP COM PROPERTY TYPE: SECURITIES 401.00					02/02/2007 112.00	11/05/2008
14.00		13.9 GOVERNMENT NATL MTG ASSN GTD PASS T PROPERTY TYPE: SECURITIES 14.00					10/28/1993	11/17/2008
1,133.00		111. APPLIED MATERIALS INC COM W/RIGHTS PROPERTY TYPE: SECURITIES 2,016.00					02/02/2007 -883.00	12/15/2008
648.00		29. BRISTOL-MYERS SQUIBB CO COM PROPERTY TYPE: SECURITIES 669.00					01/24/2008 -21.00	12/15/2008
1,374.00		27. DANAHER CORP COM PROPERTY TYPE: SECURITIES 2,346.00					11/30/2007 -972.00	12/15/2008
480.00		8. GENERAL MILLS INC COM W/RTS EXP 02/01 PROPERTY TYPE: SECURITIES 499.00					05/15/2008 -19.00	12/15/2008
791.00		12. GOLDMAN SACHS GRP INC COM PROPERTY TYPE: SECURITIES 1,742.00					03/06/2006 -951.00	12/15/2008
292.00		39. BANK AMER CORP COM PROPERTY TYPE: SECURITIES 1,784.00					09/26/2005 -1,492.00	01/16/2009
643.00		9. BECTON DICKINSON & CO COM PROPERTY TYPE: SECURITIES 559.00					01/09/2006 84.00	01/21/2009
613.00		8. EXXON MOBIL CORP COM PROPERTY TYPE: SECURITIES 470.00					06/15/2005 143.00	01/21/2009

**FORM 990-PF - PART IV
CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME**

Kind of Property		Description				P or D	Date acquired	Date sold
Gross sale price less expenses of sale	Depreciation allowed/ allowable	Cost or other basis	FMV as of 12/31/69	Adj basis as of 12/31/69	Excess of FMV over adj basis		Gain or (loss)	
409.00		7. MCDONALDS CORP COM PROPERTY TYPE: SECURITIES 312.00					02/02/2007 97.00	01/28/2009
1,019.00		58. AMDOCS LTD COM PROPERTY TYPE: SECURITIES 1,619.00					01/09/2006 -600.00	01/28/2009
1,437.00		60. AT&T INC COM PROPERTY TYPE: SECURITIES 2,280.00					02/02/2007 -843.00	02/12/2009
483.00		17. BMC SOFTWARE INC COM RTS EXP 05/12/2 PROPERTY TYPE: SECURITIES 514.00					08/27/2007 -31.00	03/05/2009
380.00		36. OWENS ILL INC COM PROPERTY TYPE: SECURITIES 2,063.00					03/26/2008 -1,683.00	03/05/2009
1,178.00		23. NOBLE ENERGY INC PROPERTY TYPE: SECURITIES 2,209.00				COM	05/09/2008 -1,031.00	03/30/2009
TOTAL GAIN (LOSS)							----- -1,880. =====	

FORM 990PF, PART I - INTEREST ON TEMPORARY CASH INVESTMENTS

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
WACHOVIA PT MONEY MARKET	1,454.	1,454.
TOTAL	1,454.	1,454.

FORM 990PF, PART I - DIVIDENDS AND INTEREST FROM SECURITIES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
AT&T INC COM	97.	97.
AON CORP COM	28.	28.
APPLIED MATERIALS INC COM W/RIGHTS ATTAC	20.	20.
ARCHER DANIELS MIDLAND CO COM	7.	7.
BANK AMER CORP COM	62.	62.
BANK AMER CORP SR NT DTD 2/14/2000 7.8%	3,900.	3,900.
BANK OF NEW YORK MELLON CORP COM	28.	28.
BAXTER INTL INC COM W/RIGHTS ATTACHED EX	31.	31.
BECTON DICKINSON & CO COM	34.	34.
BERKSHIRE HATHWAY BD DTD 12/22/2003 4.2%	630.	630.
BOTTLING GROUP LLC BD DTD 11/15/2002 CAL	1,931.	1,931.
BRISTOL-MYERS SQUIBB CO COM	106.	106.
CA INC COM	3.	3.
CELANESE CORP COM	6.	6.
CHEVRONTXACO CORP COM	68.	68.
CHUBB CORP COM	56.	56.
CLOFOX CO COM	12.	12.
COLGATE-PALMOLIVE CO COM	10.	10.
CONCOPHILLIPS COM	55.	55.
CONSTELLATION ENERGY GRP INC COM	13.	13.
CORNING INC COM W/RTS EXP 07/15/2006	8.	8.
CREDIT SUISSE FIRST BOSTON USA BD DTD 01	2,563.	2,563.
DANAHER CORP COM	2.	2.
DREYFUS THE BOSTON COMPANY SMALL CAP VAL	46.	46.
EII INTERNATIONAL PROPERTY-I EII INTL PR	522.	522.
EATON CORP COM W/RTS EXP 07/12/2005	27.	27.
EMBARQ CORP-W/I COM	28.	28.
EMERSON ELEC CO COM W/RTS ATTACHED EXP 1	39.	39.
EVERGREEN INTL BOND FUND CL I (FD #460)	9,318.	9,318.
EXXON MOBIL CORP COM	40.	40.
FHLB BD	3,688.	3,688.
FIRSTENERGY CORP COM 12/01/2004	41.	41.
	7.375%	2/12/10

FORM 990PF, PART I - DIVIDENDS AND INTEREST FROM SECURITIES
 =====

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
-----	-----	-----
GOVERNMENT NATL MTG ASSN GTD PASS THRU P	12.	12.
GAP INC COM	26.	26.
GENERAL ELECTRIC CO BD DTD 01/28/2003 5%	3,750.	3,750.
GENERAL MILLS INC COM W/RTS EXP 02/01/20	43.	43.
GOLDMAN SACHS GRP INC COM	13.	13.
HARBOR INTERNATIONAL FUND	1,152.	1,152.
HEWLETT-PACKARD CO COM	16.	16.
ING REAL ESTATE FUND CL I	1,960.	1,486.
INTEL CORP COM	50.	50.
INTL BUSINESS MACHINES CORP COM	35.	35.
ISHARES MIDCAP INDEX FD	542.	542.
JP MORGAN CHASE & CO COM	60.	60.
JP MORGAN CHASE & CO NTS DTD 12/14/2004	2,250.	2,250.
JOHNSON & JOHNSON COM	50.	50.
KELLOGG CO COM	53.	53.
LAZARD EMERGING MKTS PORTFOLIO	797.	797.
LOCKHEED MARTIN CORP COM	40.	40.
MCDONALDS CORP COM	63.	63.
MELLON INSTITUTIONAL FUNDS - THE BOSTON	48.	48.
MERCK & CO INC COM	30.	30.
MICROSOFT CORP COM	36.	36.
NIKE INC CL B COM	34.	34.
NOBLE ENERGY INC	12.	12.
NORFOLK SOUTHN CORP COM W/RIGHTS ATTACHE	18.	18.
OCCIDENTAL PETE CORP COM	33.	33.
PIMCO FDS PAC INVT MGMT REAL RETURN BD F	1,177.	1,177.
PIMCO EMERGING MARKETS BOND FD INS CL	2,960.	2,960.
PFIZER INC COM W/RTS ATTACHED EXP 10/15/	56.	56.
PIMCO COMMODITY REALRETURN STRATEGY FD I	2,115.	2,115.
PIONEER HIGH YIELD FD-Y	7,354.	7,354.
PRAXAIR INC COM	40.	40.
PRECISION CASTPARTS CORP COM	2.	2.
PROCTER & GAMBLE CO COM	56.	56.

FORM 990PF, PART I - DIVIDENDS AND INTEREST FROM SECURITIES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
ROSS STORES INC COM	23.	23.
SEMPRA ENERGY COM	37.	37.
STATE STR CORP COM	10.	10.
3M CO COM	13.	13.
UNITED STATES TREAS NT DTD 2/15/2000 6.5	3,250.	3,250.
UNITED TECHNOLOGIES CORP COM	44.	44.
VERIZON COMMUNICATIONS COM	93.	93.
WAL-MART STORES INC BD DTD 04/29/2003 4.	1,618.	1,618.
ACE LTD COM W/RIGHTS ATTACHED EXP 6/1/20	12.	12.
COOPER IND LTD CL A	47.	12.
COVIDIEN LTD COM	12.	12.
NOBLE CORP COM	4.	4.
ACE LIMITED COM	32.	32.
TOTAL	53,497.	52,988.

FORM 990PF, PART I - TAXES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
FOREIGN TAXES ON QUALIFIED FOR FOREIGN TAXES ON NONQUALIFIED	313. 21.	313. 21.
TOTALS	334.	334.

FORM 990PF, PART III - OTHER INCREASES IN NET WORTH OR FUND BALANCES
=====

DESCRIPTION -----	AMOUNT -----
ADJUSTMENT TO BOOK VALUE	97.

TOTAL	97.
	=====

LEE ARTHUR C/T

63-6110715

STATE(S) WHERE THE FOUNDATION IS REGISTERED
=====

AL

STATEMENT 7

LEE ARTHUR C/T

63-6110715

FORM 990PF, PART VIII - LIST OF OFFICERS, DIRECTORS, AND TRUSTEES

=====

OFFICER NAME:

WACHOVIA BANK, NA

ADDRESS:

1525 W WT HARRIS BLVD
CHARLOTTE, NC TRUSTEE

TITLE:

40

COMPENSATION 17,220.

TOTAL COMPENSATION: 17,220.

=====

0

RECIPIENT NAME:
PEOPLE TO PEOPLE HEALTH FD INC
ADDRESS:
ATTN BEVERLY SCHRECK
MILLWOOD, VA 22646
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
CONTRIBUTION
FOUNDATION STATUS OF RECIPIENT:
PUBLIC CHARITY
AMOUNT OF GRANT PAID 2,329.

RECIPIENT NAME:
GIRL SCOUTS OF
ADDRESS:
NORTH CENTRAL ALABAMA
BIRMINGHAM, AL 35242
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
CONTRIBUTION
FOUNDATION STATUS OF RECIPIENT:
PUBLIC CHARITY
AMOUNT OF GRANT PAID 2,329.

RECIPIENT NAME:
SALVATION ARMY
ADDRESS:
P O BOX 218
ANNISTON, AL 36202
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
CONTRIBUTION
FOUNDATION STATUS OF RECIPIENT:
PUBLIC CHARITY
AMOUNT OF GRANT PAID 2,329.

=====

RECIPIENT NAME:
GREATER ALA COUNCIL NO.1, INC.
ADDRESS:
BOY SCOUTS OF AMERICA
BIRMINGHAM, AL 35243
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
CONTRIBUTION
FOUNDATION STATUS OF RECIPIENT:
PUBLIC CHARITY
AMOUNT OF GRANT PAID 2,329.

RECIPIENT NAME:
GREATER ALA COUNCIL NO.1, INC.
BOY SCOUTS OF AMERICA
ADDRESS:
PO BOX 43307
BIRMINGHAM, AL 35243
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
CONTRIBUTION
FOUNDATION STATUS OF RECIPIENT:
PUBLIC CHARITY

RECIPIENT NAME:
FIRST UNITED METHODIST CHURCH
ADDRESS:
ATTN HEATHER ANGEL
ANNISTON, AL 36202
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
CONTRIBUTION
FOUNDATION STATUS OF RECIPIENT:
PUBLIC CHARITY
AMOUNT OF GRANT PAID 32,604.

RECIPIENT NAME:
THE BOYS AND GIRLS CLUB
ADDRESS:
OF EAST CENTRAL ALABAMA
ANNISTON, AL 36202
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
CONTRIBUTION
FOUNDATION STATUS OF RECIPIENT:
PUBLIC CHARITY
AMOUNT OF GRANT PAID 2,329.

RECIPIENT NAME:
ANNISTON YMCA
ADDRESS:
ATTN KEN HOFFMAN
ANNISTON, AL 36202
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
CONTRIBUTION
FOUNDATION STATUS OF RECIPIENT:
PUBLIC CHARITY
AMOUNT OF GRANT PAID 2,329.

TOTAL GRANTS PAID: 46,578.
=====

**SCHEDULE D
(Form 1041)**

Capital Gains and Losses

OMB No 1545-0092

2008

Department of the Treasury
Internal Revenue Service

▶ **Attach to Form 1041, Form 5227, or Form 990-T. See the separate instructions for Form 1041 (also for Form 5227 or Form 990-T, if applicable).**

Name of estate or trust

LEE ARTHUR C/T

Employer identification number

63-6110715

Note: Form 5227 filers need to complete only Parts I and II.

Part I Short-Term Capital Gains and Losses - Assets Held One Year or Less

(a) Description of property (Example 100 shares 7% preferred of "Z" Co)	(b) Date acquired (mo, day, yr.)	(c) Date sold (mo, day, yr)	(d) Sales price	(e) Cost or other basis (see page 4 of the instructions)	(f) Gain or (loss) for the entire year Subtract (e) from (d)
1a SHORT-TERM CAPITAL GAIN DIVIDENDS		STMT 1			5,967.

b Enter the short-term gain or (loss), if any, from Schedule D-1, line 1b	1b	-6,732.
2 Short-term capital gain or (loss) from Forms 4684, 6252, 6781, and 8824	2	
3 Net short-term gain or (loss) from partnerships, S corporations, and other estates or trusts	3	
4 Short-term capital loss carryover. Enter the amount, if any, from line 9 of the 2007 Capital Loss Carryover Worksheet	4	()
5 Net short-term gain or (loss). Combine lines 1a through 4 in column (f). Enter here and on line 13, column (3) on the back ▶	5	-765.

Part II Long-Term Capital Gains and Losses - Assets Held More Than One Year

(a) Description of property (Example 100 shares 7% preferred of "Z" Co)	(b) Date acquired (mo, day, yr)	(c) Date sold (mo, day, yr)	(d) Sales price	(e) Cost or other basis (see page 4 of the instructions)	(f) Gain or (loss) for the entire year Subtract (e) from (d)
6a LONG-TERM CAPITAL GAIN DIVIDENDS		STMT 1			4,219.

b Enter the long-term gain or (loss), if any, from Schedule D-1, line 6b	6b	-5,334.
7 Long-term capital gain or (loss) from Forms 2439, 4684, 6252, 6781, and 8824	7	
8 Net long-term gain or (loss) from partnerships, S corporations, and other estates or trusts	8	
9 Capital gain distributions	9	
10 Gain from Form 4797, Part I	10	
11 Long-term capital loss carryover. Enter the amount, if any, from line 14 of the 2007 Capital Loss Carryover Worksheet	11	()
12 Net long-term gain or (loss). Combine lines 6a through 11 in column (f). Enter here and on line 14a, column (3) on the back ▶	12	-1,115.

For Paperwork Reduction Act Notice, see the Instructions for Form 1041.

Schedule D (Form 1041) 2008

Part III Summary of Parts I and II		(1) Beneficiaries' (see page 5)	(2) Estate's or trust's	(3) Total
Caution: Read the instructions before completing this part.				
13	Net short-term gain or (loss)	13		-765.
14	Net long-term gain or (loss):			
a	Total for year	14a		-1,115.
b	Unrecaptured section 1250 gain (see line 18 of the wrksht.)	14b		
c	28% rate gain	14c		
15	Total net gain or (loss). Combine lines 13 and 14a	15		-1,880.

Note: If line 15, column (3), is a net gain, enter the gain on Form 1041, line 4 (or Form 990-T, Part I, line 4a). If lines 14a and 15, column (2), are net gains, go to Part V, and do not complete Part IV. If line 15, column (3), is a net loss, complete Part IV and the **Capital Loss Carryover Worksheet**, as necessary.

Part IV Capital Loss Limitation

16	Enter here and enter as a (loss) on Form 1041, line 4 (or Form 990-T, Part I, line 4c, if a trust), the smaller of:		
a	The loss on line 15, column (3) or b \$3,000	16	(1,880)

Note: If the loss on line 15, column (3), is more than \$3,000, or if Form 1041, page 1, line 22 (or Form 990-T, line 34), is a loss, complete the **Capital Loss Carryover Worksheet** on page 7 of the instructions to figure your capital loss carryover.

Part V Tax Computation Using Maximum Capital Gains Rates

Form 1041 filers. Complete this part only if both lines 14a and 15 in column (2) are gains, or an amount is entered in Part I or Part II and there is an entry on Form 1041, line 2b(2), and Form 1041, line 22, is more than zero.

Caution: Skip this part and complete the worksheet on page 8 of the instructions if:

- Either line 14b, col. (2) or line 14c, col. (2) is more than zero, or
- Both Form 1041, line 2b(1), and Form 4952, line 4g are more than zero.

Form 990-T trusts. Complete this part only if both lines 14a and 15 are gains, or qualified dividends are included in income in Part I of Form 990-T, and Form 990-T, line 34, is more than zero. Skip this part and complete the worksheet on page 8 of the instructions if either line 14b, col. (2) or line 14c, col. (2) is more than zero.

17	Enter taxable income from Form 1041, line 22 (or Form 990-T, line 34)	17	
18	Enter the smaller of line 14a or 15 in column (2) but not less than zero	18	
19	Enter the estate's or trust's qualified dividends from Form 1041, line 2b(2) (or enter the qualified dividends included in income in Part I of Form 990-T)	19	
20	Add lines 18 and 19	20	
21	If the estate or trust is filing Form 4952, enter the amount from line 4g; otherwise, enter -0-	21	
22	Subtract line 21 from line 20. If zero or less, enter -0-	22	
23	Subtract line 22 from line 17. If zero or less, enter -0-	23	
24	Enter the smaller of the amount on line 17 or \$2,200	24	
25	Is the amount on line 23 equal to or more than the amount on line 24? <input type="checkbox"/> Yes. Skip lines 25 and 26; go to line 27 and check the "No" box. <input type="checkbox"/> No. Enter the amount from line 23	25	
26	Subtract line 25 from line 24	26	
27	Are the amounts on lines 22 and 26 the same? <input type="checkbox"/> Yes. Skip lines 27 thru 30, go to line 31 <input type="checkbox"/> No. Enter the smaller of line 17 or line 22	27	
28	Enter the amount from line 26 (If line 26 is blank, enter -0-)	28	
29	Subtract line 28 from line 27	29	
30	Multiply line 29 by 15% (.15)	30	
31	Figure the tax on the amount on line 23. Use the 2008 Tax Rate Schedule for Estates and Trusts (see the Schedule G instructions)	31	
32	Add lines 30 and 31	32	
33	Figure the tax on the amount on line 17. Use the 2008 Tax Rate Schedule for Estates and Trusts (see the Schedule G instructions)	33	
34	Tax on all taxable income. Enter the smaller of line 32 or line 33 here and on line 1a of Schedule G, Form 1041 (or line 36 of Form 990-T)	34	

Name of estate or trust as shown on Form 1041 Do not enter name and employer identification number if shown on the other side

Employer identification number

LEE ARTHUR C/T

63-6110715

Part II Long-Term Capital Gains and Losses - Assets Held More Than One Year

(a) Description of property (Example 100 sh 7% preferred of "Z" Co)	(b) Date acquired (mo, day, yr)	(c) Date sold (mo, day, yr)	(d) Sales price (see page 4 of the instructions)	(e) Cost or other basis (see page 4 of the instructions)	(f) Gain or (loss) Subtract (e) from (d)
6a 10. BAXTER INTL INC COM W/RIGHTS ATTACHED EXP 3/23/	02/02/2007	05/09/2008	613.00	499.00	114.00
33. TIDEWATER INC COM W/RTS ATTACHED EXP 11/01/20	02/06/2006	05/09/2008	1,956.00	1,907.00	49.00
45. CIGNA CORP COM	03/06/2007	05/15/2008	1,799.00	2,099.00	-300.00
108.88 GOVERNMENT NATL MTG ASSN GTD PASS THRU POOL #36	10/28/1993	05/15/2008	109.00	111.00	-2.00
4. PRAXAIR INC COM	12/02/2005	05/15/2008	379.00	212.00	167.00
131. XEROX CORP COM W/RTS ATTACHED EXP 4/16/2007	02/02/2007	05/15/2008	1,873.00	2,262.00	-389.00
30. CLOROX CO COM	01/09/2006	06/11/2008	1,574.00	1,649.00	-75.00
2. INTL BUSINESS MACHINES CORP COM	01/09/2006	06/11/2008	247.00	168.00	79.00
161.5 GOVERNMENT NATL MTG ASSN GTD PASS THRU POOL #36	10/28/1993	06/16/2008	162.00	164.00	-2.00
13. AON CORP COM	01/09/2006	07/09/2008	603.00	482.00	121.00
27. CONSTELLATION ENERGY GRP INC COM	06/06/2007	07/09/2008	2,165.00	2,353.00	-188.00
26. 3M CO COM	03/06/2007	07/09/2008	1,798.00	1,981.00	-183.00
132.63 GOVERNMENT NATL MTG ASSN GTD PASS THRU POOL #36	10/28/1993	07/15/2008	133.00	135.00	-2.00
27. EATON CORP COM W/RTS EXP 07/12/2005	01/09/2006	08/06/2008	1,920.00	1,836.00	84.00
38. METLIFE INC COM	01/09/2006	08/06/2008	1,992.00	1,949.00	43.00
91.51 GOVERNMENT NATL MTG ASSN GTD PASS THRU POOL #36	10/28/1993	08/15/2008	92.00	93.00	-1.00
3. LOCKHEED MARTIN CORP COM	08/27/2007	09/10/2008	344.00	307.00	37.00
40. MERCK & CO INC COM	08/22/2006	09/10/2008	1,346.00	1,584.00	-238.00
106. ORACLE CORP COM	05/04/2007	09/10/2008	2,039.00	2,009.00	30.00
6189.8014 PIMCO FDS PAC INVT MGMT REAL RETURN BD FD	12/13/2006	09/10/2008	69,511.00	67,958.00	1,553.00
137.91 GOVERNMENT NATL MTG ASSN GTD PASS THRU POOL #36	10/28/1993	09/15/2008	138.00	140.00	-2.00
58. BANK OF NEW YORK MELLON CORP COM	12/02/2005	09/30/2008	1,775.00	1,974.00	-199.00
74.53 GOVERNMENT NATL MTG ASSN GTD PASS THRU POOL #36	10/28/1993	10/15/2008	75.00	76.00	-1.00
8. BAXTER INTL INC COM W/RIGHTS ATTACHED EXP 3/23/	02/02/2007	10/29/2008	475.00	399.00	76.00
50. AETNA INC-NEW COM	08/04/2006	11/05/2008	1,223.00	1,992.00	-769.00

6b Total. Combine the amounts in column (f). Enter here and on Schedule D, line 6b

FEDERAL CAPITAL GAIN DIVIDENDS

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SHORT-TERM CAPITAL GAIN DIVIDENDS

LAZARD EMERGING MKTS PORTFOLIO	403.00
LAZARD EMERGING MKTS PORTFOLIO	229.00
PIMCO COMMODITY REALRETURN STRATEGY FD I	5,335.00

TOTAL SHORT-TERM CAPITAL GAIN DIVIDENDS	-----	5,967.00
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LONG-TERM CAPITAL GAIN DIVIDENDS

15% RATE CAPITAL GAIN DIVIDENDS

EII INTERNATIONAL PROPERTY-I EII INTL PR	40.00
FREDDIE MAC COM VTG	4.00
LAZARD EMERGING MKTS PORTFOLIO	1,374.00
PIMCO EMERGING MARKETS BOND FD INS CL	683.00
PIMCO COMMODITY REALRETURN STRATEGY FD I	883.00
PIONEER HIGH YIELD FD-Y	1,043.00
WORLDCOM INC-WORLDCOM GROUP - WORLDCOM GRP CO	192.00

TOTAL 15% RATE CAPITAL GAIN DIVIDENDS	-----	4,219.00
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TOTAL LONG-TERM CAPITAL GAIN DIVIDENDS

4,219.00

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DETAIL LIST
SELECTED ACCOUNTS 04/30/09 THROUGH 04/30/09
SETTLE DATE POSITION FOR ██████████ LEE ARTHUR-CORE AS OF 04/30/09

CUSIP #	SECURITY NAME	UNITS / ORIG.	FACE	BOOK VALUE	MARKET VALUE	FED TAX COST	STATE TAX COST
PRINCIPAL							
=====							
DEPOSIT ACCOUNTS							

997981006	WACHOVIA PT MONEY MARKET		20,128.61	20,128.61	20,128.61		
TOTAL	DEPOSIT ACCOUNTS		20,128.61	20,128.61	20,128.61		
COMMON STOCKS							

00846U101	AGILENT TECHNOLOGIES INC COM	64	1,957.81	1,168.64	1,168.64	1,957.81	1,957.81
031162100	AMGEN INC COM	25	1,446.82	1,211.75	1,211.75	1,446.82	1,446.82
037389103	AON CORP COM	44	1,631.88	1,856.80	1,856.80	1,631.88	1,631.88
039483102	ARCHER DANIELS MIDLAND CO COM	51	1,428.79	1,255.62	1,255.62	1,428.79	1,428.79
055921100	BMC SOFTWARE INC COM	47	1,420.13	1,629.49	1,629.49	1,419.92	1,419.92
071813109	BAXTER INTL INC COM	29	1,445.65	1,406.50	1,406.50	1,445.65	1,445.65
075887109	BECTON DICKINSON & CO COM	21	1,303.59	1,270.08	1,270.08	1,303.59	1,303.59
110122108	BRISTOL-MYERS SQUIBB CO COM	64	1,476.32	1,228.80	1,228.80	1,476.32	1,476.32
12673P105	CA INC COM	85	1,459.43	1,466.25	1,466.25	1,459.43	1,459.43
166764100	CHEVRON CORP COM	26	2,267.81	1,718.60	1,718.60	2,267.81	2,267.81
171232101	CHUBB CORP COM	42	2,298.88	1,635.90	1,635.90	2,298.88	2,298.88
194162103	COLGATE-PALMOLIVE CO COM	25	1,606.88	1,475.00	1,475.00	1,606.88	1,606.88
20825C104	CONOCOPHILLIPS COM	29	1,767.11	1,189.00	1,189.00	1,756.15	1,756.15
29078E105	EMBARQ CORP-W/I COM	40	1,404.27	1,462.40	1,462.40	1,404.27	1,404.27
291011104	EMERSON ELECTRIC CO COM	41	2,038.97	1,395.64	1,395.64	2,038.97	2,038.97
30231G102	EXXON MOBIL CORP COM	19	1,117.01	1,266.73	1,266.73	1,117.01	1,117.01

DETAIL LIST
SELECTED ACCOUNTS 04/30/09 THROUGH 04/30/09
SETTLE DATE POSITION FOR ██████████ LEE ARTHUR-CORE AS OF 04/30/09

CUSIP #	SECURITY NAME	UNITS / ORIG. FACE	BOOK VALUE	MARKET VALUE	FED TAX COST	STATE TAX COST
337932107	FIRSTENERGY CORP COM	25	2,067.42	1,022.50	2,067.42	2,067.42
364760108	GAP INC COM	101	1,955.31	1,569.54	1,955.31	1,955.31
370334104	GENERAL MILLS INC COM	28	1,745.71	1,419.32	1,745.71	1,745.71
428236103	HEWLETT-PACKARD CO COM	50	762.61	1,799.00	762.61	762.61
437076102	HOME DEPOT INC COM	61	1,414.27	1,605.52	1,414.27	1,414.27
458140100	INTEL CORP COM	89	2,361.31	1,404.42	2,361.31	2,361.31
459200101	INTL BUSINESS MACHINES CORP COM	17	1,321.84	1,754.57	1,291.84	1,291.84
46625H100	JP MORGAN CHASE & CO COM	50	2,251.45	1,650.00	2,251.45	2,251.45
478160104	JOHNSON & JOHNSON COM	27	1,366.38	1,413.72	1,366.38	1,366.38
487836108	KELLOGG COMPANY COM	40	1,778.87	1,684.40	1,778.87	1,778.87
539830109	LOCKHEED MARTIN CORP COM	19	1,943.67	1,492.07	1,943.67	1,943.67
580135101	MCDONALDS CORP COM	27	1,204.20	1,438.83	1,204.20	1,204.20
594918104	MICROSOFT CORP COM	75	2,322.49	1,519.50	2,322.49	2,322.49
654106103	NIKE INC CL B COM	35	1,910.02	1,836.45	1,910.02	1,910.02
655844108	NORFOLK SOUTHERN CORP COM	27	1,955.77	963.36	1,955.77	1,955.77
674599105	OCCIDENTAL PETE CORP COM	26	1,555.04	1,463.54	1,555.04	1,555.04
678026105	OIL STATES INTERNATIONAL INC COM	39	2,020.33	737.10	2,020.33	2,020.33
717081103	PFIZER INC COM	88	1,557.21	1,175.68	1,557.21	1,557.21
74005P104	PRAXAIR INC COM	26	1,390.30	1,939.86	1,375.63	1,375.63
740189105	PRECISION CASTPARTS CORP COM	20	2,300.84	1,497.20	2,300.84	2,300.84
742718109	PROCTER & GAMBLE CO COM	35	1,918.09	1,730.40	1,918.09	1,918.09
778296103	ROSS STORES INC COM	54	1,889.83	2,048.76	1,889.83	1,889.83

DETAIL LIST
SELECTED ACCOUNTS 04/30/09 THROUGH 04/30/09
SETTLE DATE POSITION FOR [REDACTED] LEE ARTHUR-CORE AS OF 04/30/09

CUSIP #	SECURITY NAME	UNITS / ORIG. FACE	BOOK VALUE	MARKET VALUE	FED TAX COST	STATE TAX COST
790849103	ST JUDE MED INC COM	49	2,066.45	1,642.48	2,066.45	2,066.45
816851109	SEMPRA ENERGY COM	34	1,937.02	1,564.68	1,937.02	1,937.02
857477103	STATE STREET CORP COM	41	1,445.37	1,399.33	1,445.37	1,445.37
913017109	UNITED TECHNOLOGIES CORP COM	31	1,751.42	1,514.04	1,751.42	1,751.42
91913Y100	VALERO ENERGY CORP COM	72	1,187.88	1,428.48	1,187.88	1,187.88
92343V104	VERIZON COMMUNICATIONS COM	52	2,329.66	1,577.68	2,329.66	2,329.66
942683103	WATSON PHARMACEUTICALS INC COM	65	1,831.88	2,011.10	1,831.88	1,831.88
G1150G111	ACCENTURE LTD COM	42	1,352.73	1,236.06	1,352.73	1,352.73
G24182100	COOPER INDUSTRIES LTD COM	47	1,752.50	1,541.13	1,752.50	1,752.50
G2552X108	COVIDIEN LTD COM	36	1,972.28	1,187.28	1,972.28	1,972.28
H0023R105	ACE LIMITED COM	40	2,199.53	1,852.80	2,199.53	2,199.53
H5833N103	NOBLE CORP COM	33	2,176.56	901.89	2,176.56	2,176.56
TOTAL	COMMON STOCKS	2,153	87,067.59	73,659.89	87,011.75	87,011.75
	PRINCIPAL CASH		0.00	0.00		
*****	PRINCIPAL TOTAL	2,153	107,196.20	93,788.50	87,011.75	87,011.75
	INCOME					
	=====					
	DEPOSIT ACCOUNTS					
997981006	WACHOVIA PT MONEY MARKET		4,423.39	4,423.39		
TOTAL	DEPOSIT ACCOUNTS		4,423.39	4,423.39		
	INCOME CASH		0.00	0.00		
*****	INCOME TOTAL		4,423.39	4,423.39	0.00	0.00
	ASSET FILE TOTAL	2,153	111,619.59	98,211.89	87,011.75	87,011.75

DETAIL LIST
SELECTED ACCOUNTS 04/30/09 THROUGH 04/30/09
SETTLE DATE POSITION FOR ██████████ LEE ARTHUR C/T AS OF 04/30/09

CUSIP #	SECURITY NAME	UNITS / ORIG. FACE	BOOK VALUE	MARKET VALUE	FED TAX COST	STATE TAX COST
	PRINCIPAL =====					
	DEPOSIT ACCOUNTS -----					
997981006	WACHOVIA PT MONEY MARKET		13,952.73	13,952.73		
TOTAL	DEPOSIT ACCOUNTS		13,952.73	13,952.73		
	U.S. GOVERNMENTS & AGENCIES -----					
3133MATQ2	FED HOME LN BK CONS BD DTD 2/10/2000 7.375% 02/12/2010	50,000	50,343.28	52,578.00	50,343.28	50,343.28
9128275Z1	UNITED STATES TREAS NT DTD 2/15/2000 6.5% 02/15/2010	50,000	50,711.31	52,386.50	50,711.31	50,711.31
TOTAL	U.S. GOVERNMENTS & AGENCIES	100,000	101,054.59	104,964.50	101,054.59	101,054.59
	CORPORATE BONDS - NONCONVERTIBLE -----					
060505AD6	BANK OF AMERICA CORP SR NT DTD 2/14/2000 7.8% 02/15/2010	50,000	50,615.54	50,627.50	50,615.54	50,615.54
084664AF8	BERKSHIRE HATHWAY BD DTD 12/22/2003 4.2% 12/15/2010	15,000	15,024.75	15,374.55	15,024.75	15,024.75
10138MAB1	BOTTLING GROUP LLC BD DTD 11/15/2002 CALLABLE 4.625% 11/15/2012	45,000	45,567.90	46,689.30	45,567.90	45,567.90
22541LAM5	CREDIT SUISSE FIRST BOSTON USA BD DTD 01/09/2004 5.125% 01/15/2014	50,000	50,853.45	49,523.50	50,853.45	50,853.45
369604AY9	GENERAL ELECTRIC CO BD DTD 01/28/2003 5% 02/01/2013	75,000	76,301.87	76,980.75	76,301.87	76,301.87
46625HCA6	JP MORGAN CHASE & CO NTS DTD 12/14/2004 4.5% 01/15/2012	50,000	49,745.50	49,845.50	49,745.50	49,745.50
931142BT9	WAL-MART STORES INC BD DTD 04/29/2003 4.55% 05/01/2013	40,000	39,911.20	42,408.00	39,911.20	39,911.20
TOTAL	CORPORATE BONDS - NONCONVERTIBLE	325,000	328,020.21	331,449.10	328,020.21	328,020.21

DETAIL LIST
SELECTED ACCOUNTS 04/30/09 THROUGH 04/30/09
SETTLE DATE POSITION FOR [REDACTED] LEE ARTHUR C/T AS OF 04/30/09

CUSIP #	SECURITY NAME	UNITS /	ORIG. FACE	BOOK VALUE	MARKET VALUE	FED TAX COST	STATE TAX COST
	CLOSED-END FUND - EQUITY						
464287499	ISHARES RUSSELL MIDCAP INDEX FD	412	44,948.09	25,717.04	44,948.09	44,948.09	
TOTAL	CLOSED-END FUND - EQUITY	412	44,948.09	25,717.04	44,948.09	44,948.09	
	MUTUAL FUNDS - FIXED TAXABLE						
299908830	EVERGREEN INTERNATIONAL BOND FD CL I (FD #460)	5,193.579	54,480.64	52,507.08	54,480.64	54,480.64	
693391559	PIMCO EMERGING MARKETS BOND FD INS CL	6,822.612	70,000.00	60,721.25	70,000.00	70,000.00	
72369B406	PIONEER HIGH YIELD FD CL Y	11,168.988	120,999.53	75,614.05	120,999.53	120,999.53	
TOTAL	MUTUAL FUNDS - FIXED TAXABLE	23,185.179	245,480.17	188,842.38	245,480.17	245,480.17	
	MUTUAL FUNDS - OTHER						
26852M105	EII INTERNATIONAL PROPERTY-I EII INTL PROPERTY-I	1,589.825	40,000.00	17,074.72	40,000.00	40,000.00	
44981V706	ING REAL ESTATE FUND CL I	4,951.8	76,026.00	39,317.29	76,026.00	76,026.00	
722005667	PIMCO COMMODITY REALRETURN STRATEGY FD INSTL	6,150.793	65,000.00	39,242.06	65,000.00	65,000.00	
TOTAL	MUTUAL FUNDS - OTHER	12,692.418	181,026.00	95,634.07	181,026.00	181,026.00	
	MUTUAL FUNDS - EQUITY						
26203E836	DREYFUS THE BOSTON COMPANY SMALL CAP GROWTH FUND CL I	203.011	12,000.00	7,259.67	12,000.00	12,000.00	
26203E851	DREYFUS THE BOSTON COMPANY SMALL CAP VALUE FUND CL I	484.485	11,144.70	7,335.10	11,144.70	11,144.70	
TOTAL	MUTUAL FUNDS - EQUITY	687.496	23,144.70	14,594.77	23,144.70	23,144.70	
	MUTUAL FUNDS - INTERNATIONAL EQUITY						
411511306	HARBOR INTERNATIONAL FUND INS CL	1,190.199	69,833.75	45,798.86	69,833.75	69,833.75	

DETAIL LIST
SELECTED ACCOUNTS 04/30/09 THROUGH 04/30/09
SETTLE DATE POSITION FOR ██████████ LEE ARTHUR C/T AS OF 04/30/09

CUSIP #	SECURITY NAME	UNITS / ORIG.	FACE	BOOK VALUE	MARKET VALUE	FED TAX COST	STATE TAX COST
52106N889	LAZARD EMERGING MKTS PORTFOLIO	1,494.449		35,000.00	18,531.17	35,000.00	35,000.00
TOTAL	MUTUAL FUNDS - INTERNATIONAL EQUITY	2,684.648		104,833.75	64,330.03	104,833.75	104,833.75
	PRINCIPAL CASH			0.00	0.00		
*****	PRINCIPAL TOTAL	464,661.741		1,042,460.24	839,484.62	1,028,507.51	1,028,507.51
	INCOME						
	=====						
	DEPOSIT ACCOUNTS						

997981006	WACHOVIA PT MONEY MARKET			28,308.36	28,308.36		
TOTAL	DEPOSIT ACCOUNTS			28,308.36	28,308.36		
	INCOME CASH			0.00	0.00		
*****	INCOME TOTAL			28,308.36	28,308.36	0.00	0.00
	ASSET FILE TOTAL	464,661.741		1,070,768.60	867,792.98	1,028,507.51	1,028,507.51

Application for Extension of Time To File an Exempt Organization Return

Department of the Treasury
Internal Revenue Service

▶ File a separate application for each return.

- If you are filing for an **Automatic 3-Month Extension**, complete only Part I and check this box X
 - If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only Part II (on page 2 of this form)
- Do not complete Part II unless** you have already been granted an automatic 3-month extension on a previously filed Form 8868.

Part I Automatic 3-Month Extension of Time. Only submit original (no copies needed)

A corporation required to file Form 990-T and requesting an automatic 6-month extension - check this box and complete Part I only

All other corporations (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns.

Electronic Filing (e-file). Generally, you can electronically file Form 8868 if you want a 3-month automatic extension of time to file one of the returns noted below (6 months for a corporation required to file Form 990-T) However, you cannot file Form 8868 electronically if (1) you want the additional (not automatic) 3-month extension or (2) you file Forms 990-BL, 6069, or 8870, group returns, or a composite or consolidated Form 990-T. Instead, you must submit the fully completed and signed page 2 (Part II) of Form 8868 For more details on the electronic filing of this form, visit www.irs.gov/efile and click on *e-file for Charities & Nonprofits*

Type or print File by the due date for filing your return See instructions	Name of Exempt Organization LEE ARTHUR C/T	Employer identification number 63-6110715
	Number, street, and room or suite no If a P O box, see instructions 1525 WEST WT HARRIS BLVD	
	City, town or post office, state, and ZIP code For a foreign address, see instructions CHARLOTTE, NC 28288-5709	

Check type of return to be filed (file a separate application for each return):

- | | | |
|---|--|------------------------------------|
| <input type="checkbox"/> Form 990 | <input type="checkbox"/> Form 990-T (corporation) | <input type="checkbox"/> Form 4720 |
| <input type="checkbox"/> Form 990-BL | <input type="checkbox"/> Form 990-T (sec 401(a) or 408(a) trust) | <input type="checkbox"/> Form 5227 |
| <input type="checkbox"/> Form 990-EZ | <input type="checkbox"/> Form 990-T (trust other than above) | <input type="checkbox"/> Form 6069 |
| <input checked="" type="checkbox"/> Form 990-PF | <input type="checkbox"/> Form 1041-A | <input type="checkbox"/> Form 8870 |

- The books are in the care of ▶ WACHOVIA BANK, NA
- Telephone No ▶ (205) 254-5720 FAX No. ▶ 336-732-2024

- If the organization does not have an office or place of business in the United States, check this box
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) _____ If this is for the whole group, check this box . If it is for part of the group, check this box and attach a list with the names and EINs of all members the extension will cover.

1 I request an automatic 3-month (6 months for a corporation required to file Form 990-T) extension of time until 12/15, 2009, to file the exempt organization return for the organization named above The extension is for the organization's return for.

- ▶ calendar year _____ or
- ▶ tax year beginning 05/01, 2008, and ending 04/30, 2009

2 If this tax year is for less than 12 months, check reason: Initial return Final return Change in accounting period

3a If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	3a	\$	738.
b If this application is for Form 990-PF or 990-T, enter any refundable credits and estimated tax payments made Include any prior year overpayment allowed as a credit	3b	\$	
c Balance Due. Subtract line 3b from line 3a. Include your payment with this form, or, if required, deposit with FTD coupon or, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	3c	\$	738.

Caution. If you are going to make an electronic fund withdrawal with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions

For Privacy Act and Paperwork Reduction Act Notice, see Instructions.