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

2008

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 JUL 1, 2008, and ending JUN 30, 2009

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

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

Name of foundation
THE UNAKA FOUNDATION, INC.

Number and street (or P O box number if mail is not delivered to street address) Room/suite
1500 INDUSTRIAL ROAD

City or town, state, and ZIP code
GREENEVILLE, TN 37745-3541

A Employer identification number
62-1530053

B Telephone number
423-639-1171

H Check type of organization ☒ Section 501(c)(3) exempt private foundation
☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation

I Fair market value of all assets at end of year (from Part II, col (c), line 16) **\$ 17,770.** (Part I, column (d) must be on cash basis)

J Accounting method ☒ Cash ☐ Accrual
☐ Other (specify) _____

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 ☐

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))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received	770,000.		N/A	
	2 Check ☐ if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments	252.	252.		STATEMENT 1
	4 Dividends and interest from securities				
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10				
	b Gross sales price for all assets on line 6a				
	7 Capital gain net income (from Part IV, line 2)		0.		
	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)					
11 Other income					
12 Total. Add lines 1 through 11	770,252.	252.			
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc.	0.	0.		0.
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees				
	b Accounting fees				
	c Other professional fees				
	17 Interest				
	18 Taxes				
	19 Depreciation and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses	257.	0.		0.
	24 Total operating and administrative expenses. Add lines 13 through 23	257.	0.		0.
	25 Contributions, gifts, grants paid	800,543.			800,543.
26 Total expenses and disbursements. Add lines 24 and 25	800,800.	0.		800,543.	
27 Subtract line 26 from line 12	<30,548.>				
a Excess of revenue over expenses and disbursements		252.			
b Net investment income (if negative, enter -0-)					
c Adjusted net income (if negative, enter -0-)			N/A		

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

Form 990-PF (2008)

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only		
		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing	32,429.	11,730.	11,730.
	2 Savings and temporary cash investments	15,889.	6,040.	6,040.
	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			
	7 Other notes and loans receivable ▶			
	Less allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments - U S and state government obligations			
	b Investments - corporate stock			
	c Investments - corporate bonds			
Liabilities	11 Investments - land, buildings, and equipment basis ▶			
	Less accumulated depreciation ▶			
	12 Investments - mortgage loans			
	13 Investments - other			
	14 Land, buildings, and equipment basis ▶			
	Less accumulated depreciation ▶			
	15 Other assets (describe ▶)			
	16 Total assets (to be completed by all filers)	48,318.	17,770.	17,770.
	17 Accounts payable and accrued expenses			
	18 Grants payable			
Net Assets or Fund Balances	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe ▶)			
	23 Total liabilities (add lines 17 through 22)	0.	0.	
Foundations that follow SFAS 117, check here ▶ ☐	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ ☒			
	27 Capital stock, trust principal, or current funds	0.	0.	
	28 Paid-in or capital surplus, or land, bldg, and equipment fund	0.	0.	
	29 Retained earnings, accumulated income, endowment, or other funds	48,318.	17,770.	
	30 Total net assets or fund balances	48,318.	17,770.	
31 Total liabilities and net assets/fund balances	48,318.	17,770.		

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	48,318.
2 Enter amount from Part I, line 27a	2	<30,548.>
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	17,770.
5 Decreases not included in line 2 (itemize) ▶	5	0.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	17,770.

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				
b NONE				
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				
(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	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))	
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		
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) If (loss), enter -0- in Part I, line 8		If gain, also enter in Part I, line 8, column (c) If (loss), enter -0- in Part I, line 8 3		

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

(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 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	2,162,739.	27,230.	79.424862
2006	1,628,925.	20,102.	81.032982
2005	686,001.	97,101.	7.064819
2004	555,517.	73,631.	7.544608
2003	51,500.	7,506.	6.861178
2 Total of line 1, column (d)			2 181.928449
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 36.385690
4 Enter the net value of noncharitable-use assets for 2008 from Part X, line 5			4 16,115.
5 Multiply line 4 by line 3			5 586,355.
6 Enter 1% of net investment income (1% of Part I, line 27b)			6 3.
7 Add lines 5 and 6			7 586,358.
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			8 800,543.

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

1a	Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1 Date of ruling letter _____ (attach copy of ruling letter if necessary-see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☒ and enter 1% of Part I, line 27b	1	3.
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col (b)		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	2	0.
3	Add lines 1 and 2	3	3.
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	0.
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5	3.
6	Credits/Payments		
a	2008 estimated tax payments and 2007 overpayment credited to 2008	6a	27.
b	Exempt foreign organizations - tax withheld at source	6b	
c	Tax paid with application for extension of time to file (Form 8868)	6c	
d	Backup withholding erroneously withheld	6d	
7	Total credits and payments. Add lines 6a through 6d	7	27.
8	Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached	8	
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	24.
11	Enter the amount of line 10 to be Credited to 2009 estimated tax ☒ 24. Refunded ☐	11	0.

Part VII-A Statements Regarding Activities

	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?		X
1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.		X
1c Did the foundation file Form 1120-POL for this year?		X
2 Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation ☒ \$ 0. (2) On foundation managers ☒ \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ☒ \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		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?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV.	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ☒ TN		
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	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2008 or the taxable year beginning in 2008 (see instructions for Part XIV)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes" attach a schedule listing their names and addresses		X

N/A

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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)(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 application? Website address ► N/A	13	X	
14	The books are in care of ► L.A. YONZ Telephone no ► 423-639-1171 Located at ► 1500 INDUSTRIAL ROAD, GREENEVILLE, TN ZIP+4 ► 37745-3541			
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		N/A

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?	☐ Yes ☒ No	
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	☐ Yes ☒ No	
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	☐ Yes ☒ No	
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	☐ Yes ☒ 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 ☒ 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 ☒ 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)? Organizations relying on a current notice regarding disaster assistance check here	N/A	1b
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
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?	☐ Yes ☒ No	
If "Yes," list the years ►		
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.)	N/A	2b
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	☐ Yes ☒ 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.)	N/A	3b
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		4a
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

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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)?

☐ 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 instructions)?

N/A

5b

Organizations relying on a current notice regarding disaster assistance check here

☒

c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?

N/A

☐ 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?

6b

X

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?

N/A

7b

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.

(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 3		0.	0.	0.

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

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

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

0

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Part X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see instructions.)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
a	Average monthly fair market value of securities	1a	0.
b	Average of monthly cash balances	1b	16,360.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	16,360.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	16,360.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	245.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	16,115.
6	Minimum investment return. Enter 5% of line 5	6	806.

Part XI Distributable Amount (see instructions) (Section 4942(i)(3) and (i)(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	806.
2a	Tax on investment income for 2008 from Part VI, line 5	2a	3.
b	Income tax for 2008 (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	3.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	803.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	803.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	803.

Part XII Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes		
a	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	1a	800,543.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	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	800,543.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	3.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	800,540.

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.

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Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2007	(c) 2007	(d) 2008
1 Distributable amount for 2008 from Part XI, line 7				803.
2 Undistributed income, if any, as of the end of 2007				
a Enter amount for 2007 only			0.	
b Total for prior years		0.		
3 Excess distributions carryover, if any, to 2008				
a From 2003	51,125.			
b From 2004	551,835.			
c From 2005	681,188.			
d From 2006	1,628,042.			
e From 2007	2,161,423.			
f Total of lines 3a through e	5,073,613.			
4 Qualifying distributions for 2008 from Part XII, line 4 ▶ \$ 800,543.				
a Applied to 2007, but not more than line 2a			0.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2008 distributable amount				803.
e Remaining amount distributed out of corpus	799,740.			
5 Excess distributions carryover applied to 2008 (If an amount appears in column (d), the same amount must be shown in column (a).)	0.			0.
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	5,873,353.			
b Prior years' undistributed income Subtract line 4b from line 2b		0.		
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		0.		
d Subtract line 6c from line 6b Taxable amount - see instructions		0.		
e Undistributed income for 2007 Subtract line 4a from line 2a Taxable amount - see instr			0.	
f Undistributed income for 2008 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2009				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)	0.			
8 Excess distributions carryover from 2003 not applied on line 5 or line 7	51,125.			
9 Excess distributions carryover to 2009. Subtract lines 7 and 8 from line 6a	5,822,228.			
10 Analysis of line 9				
a Excess from 2004	551,835.			
b Excess from 2005	681,188.			
c Excess from 2006	1,628,042.			
d Excess from 2007	2,161,423.			
e Excess from 2008	799,740.			

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 Paid during the year GRANTS TO CHARITABLE ORGANIZATIONS (SEE ATTACHED STATEMENT) MATCHING GRANTS TO CHARITABLE ORGS (SEE ATTACHED STATEMENT) SCHOLARSHIPS (SEE ATTACHED STATEMENT)				718,227. 15,816. 66,500.
Total			3a	800,543.
b Approved for future payment NONE				
Total			3b	0.

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated

Enter gross amounts unless otherwise indicated		Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income
		(a) Business code	(b) Amount	(c) Exclu- sion code	(d) Amount	
1 Program service revenue						
a _____						
b _____						
c _____						
d _____						
e _____						
f _____						
g Fees and contracts from government agencies						
2 Membership dues and assessments						
3 Interest on savings and temporary cash investments				14	252.	
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 special events						
10 Gross profit or (loss) from sales of inventory						
11 Other revenue						
a _____						
b _____						
c _____						
d _____						
e _____						
12 Subtotal. Add columns (b), (d), and (e)			0.		252.	0.
13 Total. Add line 12, columns (b), (d), and (e)					13	252.

(See worksheet in line 13 instructions to verify calculations)

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

[illegible]

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

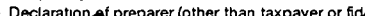
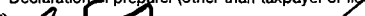
		Yes	No
1	Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?		
a	Transfers from the reporting foundation to a noncharitable exempt organization of		
	(1) Cash		X
	(2) Other assets		X
b	Other transactions		
	(1) Sales of assets to a noncharitable exempt organization		X
	(2) Purchases of assets from a noncharitable exempt organization		X
	(3) Rental of facilities, equipment, or other assets		X
	(4) Reimbursement arrangements		X
	(5) Loans or loan guarantees		X
	(6) Performance of services or membership or fundraising solicitations		X
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees		X
d	If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received.		

[illegible]

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		
(a) Name of organization	(b) Type of organization	(c) Description of relationship
N/A		

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.

Sign Here	Signature of officer or trustee 		Date <u>5/10/10</u>	Title <u>Treas.</u>
	Preparer's signature 		Date <u>5/16/10</u>	Check if self-employed ☐
Paid Preparer's Use Only	Firm's name (or yours if self-employed) <u>PUGH & COMPANY, P.C.</u>			EIN <u></u>
	address, and ZIP code <u>315 N. CEDAR BLUFF RD. KNOXVILLE, TN 37923</u>			Phone no. <u>(865) 769-0660</u>

Form **990-PF** (2008)

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

Department of the Treasury
Internal Revenue Service

Schedule of Contributors

▶ Attach to Form 990, 990-EZ, and 990-PF.

OMB No 1545-0047

2008

Name of the organization

THE UNAKA FOUNDATION, INC.

Employer identification number

62-1530053

Organization type (check one)

Filers of:

Section:

Form 990 or 990-EZ

☐ 501(c)() (enter number) organization

☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation

☐ 527 political organization

Form 990-PF

☒ 501(c)(3) exempt private foundation

☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation

☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**. (Note. Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.)

General Rule

☒ For organizations filing Form 990, 990-EZ, or 990-PF that received, during the year, \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II.

Special Rules

☐ For a section 501(c)(3) organization filing Form 990, or Form 990-EZ, that met the 33 1/3% support test of the regulations under sections 509(a)(1)/170(b)(1)(A)(vi), and received from any one contributor, during the year, a contribution of the greater of (1) \$5,000 or (2) 2% of the amount on Form 990, Part VIII, line 1h or 2% of the amount on Form 990-EZ, line 1. Complete Parts I and II.

☐ For a section 501(c)(7), (8), or (10) organization filing Form 990, or Form 990-EZ, that received from any one contributor, during the year, aggregate contributions or bequests of more than \$1,000 for use *exclusively* for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals. Complete Parts I, II, and III.

☐ For a section 501(c)(7), (8), or (10) organization filing Form 990, or Form 990-EZ, that received from any one contributor, during the year, some contributions for use *exclusively* for religious, charitable, etc., purposes, but these contributions did not aggregate to more than \$1,000. (If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Do not complete any of the parts unless the **General Rule** applies to this organization because it received nonexclusively religious, charitable, etc., contributions of \$5,000 or more during the year.) ▶ \$ _____

Caution. Organizations that are not covered by the General Rule and/or the Special Rules do not file Schedule B (Form 990, 990-EZ, or 990-PF), but they **must** answer "No" on Part IV, line 2 of their Form 990, or check the box in the heading of their Form 990-EZ, or on line 2 of their Form 990-PF, to certify that they do not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

LHA For Privacy Act and Paperwork Reduction Act Notice, see the Instructions
for Form 990. These instructions will be issued separately.

Schedule B (Form 990, 990-EZ, or 990-PF) (2008)

Name of organization

Employer identification number

THE UNAKA FOUNDATION, INC.

62-1530053

Part I Contributors (see instructions)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
1	UNAKA COMPANY, INC. 1500 INDUSTRIAL ROAD GREENEVILLE, TN 37745-3541	\$ 770,000.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution.)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution.)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution.)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution.)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution.)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution.)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution.)

FORM 990-PF INTEREST ON SAVINGS AND TEMPORARY CASH INVESTMENTS STATEMENT 1

SOURCE	AMOUNT
ANDREW JOHNSON BANK	252.
TOTAL TO FORM 990-PF, PART I, LINE 3, COLUMN A	252.

FORM 990-PF OTHER EXPENSES STATEMENT 2

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
SUPPLIES	257.	0.		0.
TO FORM 990-PF, PG 1, LN 23	257.	0.		0.

FORM 990-PF PART VIII - LIST OF OFFICERS, DIRECTORS TRUSTEES AND FOUNDATION MANAGERS STATEMENT 3

NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN CONTRIB	EXPENSE ACCOUNT
DEAN A. NEBBEN 1914 HIXSON MARINA ROAD HIXSON, TN 37343	DIRECTOR 1.00	0.	0.	0.
RAYBURN H. TANKERSLEY 216 HICKORY TRAIL GREENEVILLE, TN 37745	DIRECTOR 1.00	0.	0.	0.
HARRY D. WADE P.O. BOX 50754 KNOXVILLE, TN 37950-0754	DIRECTOR 1.00	0.	0.	0.
DOMINICK JACKSON 1500 INDUSTRIAL ROAD GREENEVILLE, TN 37745	PRESIDENT 1.00	0.	0.	0.
L. A. YONZ 1500 INDUSTRIAL ROAD GREENEVILLE, TN 37745	SECRETARY 1.00	0.	0.	0.
TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII		0.	0.	0.

FORM 990-PF

GRANT APPLICATION SUBMISSION INFORMATION
PART XV, LINES 2A THROUGH 2D

STATEMENT 4

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

SCHOLARSHIPS-DOMINICK JACKSON; GRANTS TO CHARITABLE ORGANIZATIONS-L.A. YONZ
(423) 639-1171; 1500 INDUSTRIAL ROAD
GREENEVILLE, TN 37745-3541

TELEPHONE NUMBER

(423)639-1171

FORM AND CONTENT OF APPLICATIONS

SEE ATTACHED APPLICATIONS FOR BOTH SCHOLARSHIPS AND CHARITABLE
CONTRIBUTIONS

ANY SUBMISSION DEADLINES

SCHOLARSHIPS - NONE CHARITABLE CONTRIBUTIONS - NONE

RESTRICTIONS AND LIMITATIONS ON AWARDS

SCHOLARSHIPS ARE LIMITED TO DEPENDENTS OF EMPLOYEES OF UNAKA COMPANY, INC.
AND DEPENDENTS OF EMPLOYEES' SPOUSES. CHARITABLE CONTRIBUTIONS ARE
AVAILABLE TO ALL ORGANIZATIONS EXEMPT UNDER CODE SEC. 501(C). SEE ATTACHED
REGARDING THE MATCHING CHARITABLE GIFTS PROGRAM.

UNAKA FOUNDATION, INC.
 CHARITABLE CONTRIBUTIONS
 FOR YEAR ENDING JUNE 30, 2009

PAYEE	DATE	CK#	AMOUNT
LAS COLINAS SYMPHONY	15-Aug-08	WIRE	300,000.00
GREENEVILLE CITY SCHOOLS FOUNDATION	15-Aug-08	740	25,000.00
CASA OF NORTHEAST TENNESSEE	15-Aug-08	741	5,000.00
GREENEVILLE SKATE PARK ORGANIZATION	27-Aug-08	742	5,000.00
AMERICAN CANCER SOCIETY	27-Aug-08	743	1,000.00
EKOANKAR	27-Aug-08	744	1,000.00
UNITED WAY OF MARLBORO COUNTY	27-Aug-08	745	5,000.00
VOLUNTEER CENTER OF GREENEVILLE/ GREENE COUNTY	27-Aug-08	746	2,000.00
JR. ACHIEVEMENT OF GREENEVILLE/GREENE COUNTY	27-Aug-08	747	2,000.00
MARCH OF DIMES WALK AMERICA PEE DEE DIVISION	27-Aug-08	748	1,000.00
GREENE COUNTY YMCA CAPITAL CAMPAIGN PLEDGE	27-Aug-08	749	6,666.67
STRAY DOG INC.	12-Sep-08	750	1,000.00
MARION COUNTY UNITED FUND	12-Sep-08	751	5,000.00
JR. ACHIEVEMENT OF GREENEVILLE/GREENE COUNTY	22-Dec-08	786	5,000.00
R&DA MILITARY ASSISTANCE PROGRAM	29-Dec-08	787	5,000.00
GREENEVILLE SOCCER ASSOCIATION	29-Dec-08	788	5,000.00
SEQUOYAH COUNCIL BSA	9-Jan-09	801	2,500.00
LOWES CHARITABLE & EDUCATIONAL FOUNDATION	9-Jan-09	802	41,060.00
LAS COLINAS SYMPHONY	15-Jan-09	WIRE	150,000.00
ARLINGTON SYMPHONY ORCHESTRA	15-Jan-09	WIRE	150,000.00
			<u>718,226.67</u>

ALL RECIPIENTS ARE PUBLIC CHARITIES.
 ALL CONTRIBUTIONS WERE UNRESTRICTED AND FOR USE
 IN FURTHERANCE OF THE RECIPIENT ORGANIZATIONS
 STATED CHARITABLE PURPOSES.

UNAKA FOUNDATION INC.
 MATCHING CHARITABLE CONTRIBUTIONS
 FOR YEAR ENDING JUNE 30, 2009

PAYEE	DATE	CK#	AMOUNT	CONTRIBUTOR
LAUGHLIN HEALTHCARE FOUNDATION	12-Sep-08	753	1,000.00	DOMINICK JACKSON
UNIVERSITY OF TENNESSEE	12-Sep-08	754	1,200.00	DOMINICK JACKSON
GREENEVILLE GREENE COUNTY COMM. MINISTRIES	22-Sep-08	755	1,000.00	KENNETH HOOD
HOLSTON HOME FOR CHILDREN	22-Sep-08	756	210.00	SUSIE PHILLIPS
MUSCULAR DYSTROPHY ASSOCIATION	22-Sep-08	757	100.00	SUSIE PHILLIPS
TEXAS A&M KINGSVILLE FOUNDATION	22-Sep-08	758	3,898.00	J. PHILLIP MCCORMICK
NATIONAL M.S. SOCIETY	22-Sep-08	759	341.00	MECO EMPLOYEES
AMERICAN CANCER SOCIETY	22-Sep-08	760	50.00	SUSIE PHILLIPS
LAUGHLIN HEALTHCARE FOUNDATION	22-Dec-08	785	1,000.00	DOMINICK JACKSON
UNITED FUND OF MARION COUNTY	29-Dec-08	789	120.00	SOPAKCO EMPLOYEES
UNITED WAY OF GREENE COUNTY	29-Dec-08	790	398.74	UNAKA/MECO EMPLOYEES
ST. JUDE CHILDREN'S HOSPITAL	29-Dec-08	791	115.00	UNAKA/MECO EMPLOYEES
UNITED WAY OF GREENE COUNTY	29-Dec-08	792	525.00	MECO EMPLOYEES
UNIVERSITY OF TENNESSEE	29-Dec-08	793	2,200.00	DOMINICK JACKSON
MUSCULAR DYSTROPHY ASSOCIATION	29-Dec-08	794	2.50	WHITNEY WINTER
MUSCULAR DYSTROPHY ASSOCIATION	29-Dec-08	795	219.00	MECO EMPLOYEES
ST. JUDE CHILDREN'S HOSPITAL	29-Dec-08	796	100.00	TAMARA REEVES
FREE WILL BAPTIST HOME FOR CHILDREN	29-Dec-08	797	500.00	KENNETH HOOD
HOLSTON HOME FOR CHILDREN	29-Dec-08	798	160.00	BROOKS,PHILLIPS
LAKE CENTRAL ATHLETIC BOOSTERS	29-Dec-08	799	500.00	KEVIN GATES
AMERICAN CANCER SOCIETY	29-Dec-08	800	230.00	UNAKA/MECO EMPLOYEES
AMERICAN CANCER SOCIETY	5-Jun-09	804	1,946.50	UNAKA/MECO EMPLOYEES
			<u>15,815.74</u>	

ALL RECIPIENTS ARE PUBLIC CHARITIES.
 ALL CONTRIBUTIONS WERE UNRESTRICTED AND FOR USE
 IN FURTHERANCE OF THE RECIPIENT ORGANIZATIONS
 STATED CHARITABLE PURPOSES.

Unaka Foundation
06/30/2009 Scholarship Summary
Scholarship Grants

Fall 2008 Grants	\$	33,000.00 ①
Spring 2009 Grants	\$	36,000.00 ②
	\$	<u>69,000.00</u>
Refunded Scholarships	\$	(2,500.00)
Grand Total	\$	<u>66,500.00</u>

NO SCHOLARSHIP RECIPIENT IS RELATED
TO ANY FOUNDATION MANAGER OR
SUBSTANTIAL CONTRIBUTOR.

SCHOLARSHIP RECIPIENTS
 Fall Semester 2008

MECO

Student	Parent	Address	College/University Attending	Amount
Sasha Davis	Allan Hubbard	1525 Jim Fox Road Greeneville, TN 37743	Walters State Community College	1,000.00
Michael D. Hartman	Mitchell Hartman	7338 Blue Springs Parkway Mosheim, TN 37818	University of Tennessee - Knoxville	1,000.00
Jessica Landers	Linda Landers	3223 Grassy Creek Rd. Greeneville, TN 37743	East Tennessee State University	1,000.00
Courtney Leifert	Robert Leifert	217 Woodcrest Dr. Greeneville, TN 37745	East Tennessee State University	1,000.00
Stephen Leifert	Robert Leifert	217 Woodcrest Dr. Greeneville, TN 3776	East Tennessee State University	1,000.00
Ananda Lowe	Judy Kitzmiller	770 Baleyton Road Greeneville, TN 37745	Tusculum College	1,000.00
Ashley Ann Mills	Tom Mills	505 Steadman Road Blountville, TN 37617	East Tennessee State University	1,000.00
Ira Thomas Pratt	Julius Pratt	655 Main St. Mosheim, TN 37818	East Tennessee State University	1,000.00
Tommy H. Ricker	Shirley Ricker	4152 Oak Hills Road Perrolsville, TN 37843	King College	1,000.00
Nicolas G. Tullock	Maybelle Tullock	108 Alpine Circle Greeneville, TN 37743	University of Tennessee - Knoxville	1,000.00
Tiffany E. Venable	Doug Venable	55 Logwood Ln. Greeneville, TN 37745	Walters State Community College	1,000.00
Sara Ward	Harrell Ward	P. O. Box 1075 Greeneville, TN 37744	Bryan College	1,000.00

SOPAKCO - SC

Jessica L. Alken	Lottie A. Campbell	210 Patmar Square Mullins, SC 29574	Coastal Carolina University	1,000.00
Davis Maria Dubose	David DuBose	333 Powhatan Drive Mullins, SC 29574	College of Charleston	1,000.00
Thomas S. DuBose	David DuBose	333 Powhatan Drive Mullins, SC 29574	College of Charleston	1,000.00
John N. Gerald	Allan Davis	1731 Spectra Ct Gresham, SC 29548	Coastal Carolina University	1,000.00
Reginald Godbolt	Angela Wheeler	P.O. Box 494 Mullins, SC 29574	Florence-Darlington Technical College	1,000.00
Justin Drew Gregory	Jeffrey Gregory	401 Minlum Ave. Hamlet, NC 28345	University Of North Carolina Wilmington	1,000.00
Daniel Grey Gregory	Jeffrey Gregory	401 Minlum Ave. Hamlet, NC 28345	University Of North Carolina Charlotte	1,000.00
Samantha Grier	Susan Grier	105 E. McLaurin Ave. McColl, SC 29570	Clemson University	1,000.00
Janica Hemingway	Curlena Hemingway	4012 Highland Parc Pl SE Marietta, GA 30067	Life University	1,000.00
LeToya Johnson	Gwendolyn Brown	2402 Highland Park Ct. Marion, SC 29571	Catholic University	1,000.00
Justin W. McCreary	Bill McCreary	1808 Nighthawk Drive Florence, SC 29501	Virginia Wesleyan College	1,000.00
Ryan J. McCreary	Bill McCreary	1809 Nighthawk Drive Florence, SC 29501	University of South Carolina	1,000.00
Tyquan Parker	Valarie Smith	473 McQueen Road Bennettsville, SC 29512	Voorhees College	1,000.00
Bryan Stewart	Dennis Stewart	11280 Loch Lamond Drive Laurinburg, NC 28352	University of North Carolina - Pembroke	1,000.00
Natalia Rene Wheeler	Nina Hughes	408 Liberty St Mullins, SC 29574	Florence-Darlington Technical College	1,000.00
Marquisia Wilson	Gloria Wilson	504 Manning St Marion, SC 29571	Francis Marion University	1,000.00
Vernisha Wilson	Gloria Wilson	504 Manning St Marion, SC 29571	South Carolina State University	1,000.00

CROWN POINT

Jeffrey W. Gates	Kevin Gates	3151 Burga Drive Crown Point, IN 46307	Indiana University	1,000.00
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SOPAKCO - Warehousing

UNAKA

Kelly Hodge	Kris Hodge	331 Gulnn Drive Greeneville, TN 37743	East Tennessee State University	1,000.00
Daniel Hodge	Kris Hodge	331 Gulnn Drive Greeneville, TN 37743	Walters State Community College	1,000.00
Hannah Royal	Melinda Stewart	402 W. Irish Street Greeneville, TN 37743	University of Tennessee-Knoxville	1,000.00

TOTAL \$33,000.00 ①

SCHOLARSHIP RECIPIENTS
 Spring Semester 2009

MECO

Student	Parent	Address	College/University Attending	Amount	CHECK #	ACKNOWLEDGED
Casey Boyles	Lora Boyles	60 Lorraine Street Greeneville, TN 37743	Walters State Community College	1,000.00		
Sasha Davis	Alan Hubbard	1525 Jim Fox Road Greeneville, TN 37743	Walters State Community College	1,000.00		
Michael D. Hartman	Michelle Hartman	7338 Blue Springs Parkway Mosheim, TN 37818	University of Tennessee - Knoxville	1,000.00		
Joshua Scott Fillers	Brian Fillers	135 Victoria Lane Chuckey, TN 37641	Northeast State Technical College	1,000.00		
Jessica Landers	Linda Landers	3223 Grassy Creek Rd. Greeneville, TN 37743	East Tennessee State University	1,000.00		
Courtney Lelfert	Robert Lelfert	217 Woodcrest Dr. Greeneville, TN 37745	East Tennessee State University	1,000.00		
Stephen Lelfert	Robert Lelfert	217 Woodcrest Dr. Greeneville, TN 3775	East Tennessee State University	1,000.00		
Amanda Lowe	Judy Kitzmiller	770 Baileyton Road Greeneville, TN 37745	Tusculum College	1,000.00		
Ashley Ann Mills	Tom Mills	505 Steadman Road Blountville, TN 37617	East Tennessee State University	1,000.00		
Ira Thomas Prait	Julius Prait	655 Main St. Mosheim, TN 37818	East Tennessee State University	1,000.00		
Tommy H. Ricker	Shirley Ricker	4162 Oak Hills Road Pamolsville, TN 37843	King College	1,000.00		
Tiffany E. Venable	Doug Venable	55 Logwood Ln. Greeneville, TN 37745	Walters State Community College	1,000.00		
Sara Ward	Harrell Ward	P. O. Box 1075 Greeneville, TN 37744	Bryan College	1,000.00		

SOPAKCO - SC

Marquella Brigman	Tara Brigman	518 Morgan Circle Mullins, SC 29574	Florence-Darlington Technical College	1,000.00
Jessica L. Alken	Lollie A. Campbell	210 Palmer Square Mullins, SC 29574	Coastal Carolina University	1,000.00
Davis Maria Dubose	David DuBose	333 Powhatan Drive Mullins, SC 29574	College of Charleston	1,000.00
Thomas S. DuBose	David DuBose	333 Powhatan Drive Mullins, SC 29574	College of Charleston	1,000.00
John N. Gerald	Allan Davis	1731 Speckle Ct. Gresham, SC 29546	Coastal Carolina University	1,000.00
Felicia Nefanda Godbolt	Angela Wheeler	714 Tamarack Dr. Apt # 6304 Fayetteville, NC 28311	Sandhills Community College	1,000.00
Justin Drew Gregory	Jeffrey Gregory	401 Mintum Ave. Hamlet, NC 28345	University Of North Carolina Wilmington	1,000.00
Daniel Grey Gregory	Jeffrey Gregory	401 Mintum Ave. Hamlet, NC 28345	University Of North Carolina Charlotte	1,000.00
Samantha Grier	Susan Grier	105 E. McLaurin Ave. McColl, SC 29570	Clemson University	1,000.00
Kenneth Hardee Jr.	Kenneth Hardee	1822 Dew Road Marion, SC 29571	Nascar Technical Institute	1,000.00
Jenica Hemingway	Curfena Hemingway	4012 Highland Parc Pl SE Marietta, GA 30067	Life University	1,000.00
Justin W. McCreary	Bill McCreary	1809 Nighthawk Drive Florence, SC 29501	Virginia Wesleyan College	1,000.00
Ryan J. McCreary	Bill McCreary	1809 Nighthawk Drive Florence, SC 29501	University of South Carolina	1,000.00
Verneda Owens	Tyrene Johnson	2110 Mallou Ct. Mullins, SC 29574	Florence-Darlington Technical College	1,000.00
Tyquan Parker	Valerie Smith	473 McQueen Road Bennettsville, SC 29512	Voorhees College	1,000.00
Bryan Stewart	Dennis Stewart	11280 Loch Lamond Drive Laurinburg, NC 28352	University of North Carolina - Pembroke	1,000.00
Hashan S. Tyson	Herman L. Tyson	823 Wilkinson Drive Laurinburg, NC 28352	University of North Carolina - Greensboro	1,000.00
Marquisha Wilson	Gloria Wilson	504 Manning St. Marion, SC 29571	Francis Marion University	1,000.00
Vernisha Wilson	Gloria Wilson	504 Manning St. Marion, SC 29571	South Carolina State University	1,000.00

CROWN POINT

Jeffrey W. Gates	Kevin Gates	3151 Burge Drive Crown Point, IN 46307	Indiana University	1,000.00
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SOPAKCO - Warehousing

UNAKA

Kelly Hodge	Kris Hodge	331 Gulin Drive Greeneville, TN 37743	East Tennessee State University	1,000.00
Daniel Hodge	Kris Hodge	331 Gulin Drive Greeneville, TN 37743	Walters State Community College	1,000.00
Hannah Royal	Melinda Stewart	402 W. Irish Street Greeneville, TN 37743	University of Tennessee-Knoxville	1,000.00

TOTAL \$36,000.00 (2)

**APPLICATION FOR SCHOLARSHIP GRANT FROM THE UNAKA
SCHOLARSHIP FOUNDATION**

THE UNAKA FOUNDATION, INC

EIN: 62-1530053

ATTACHMENT TO 990-PF

PAGE 10, PART XV, #2(b)

Affiliate _____ Date _____

Name _____ Age: _____ Sex: _____ SSN _____

Address _____ Tel. No. _____
_____ Marital Status _____

Parent's Name _____
Father _____ Dept. where parent works _____
Mother _____ Dept. where parent works _____

High School Attended _____ Year Graduated _____
Scholastic Average: _____ Major Subjects: _____

College or University Selected or Attending: _____
Address: _____

Have you made application for entrance to this School? _____

Have you been accepted? _____ *No. of Hours enrolled: _____

*Applicant must maintain 12 hours per semester for Undergraduate Program; 6 hours for Graduate School.

TO BE SIGNED BY THE PARENT(S) OF THE APPLICANT:

I/We the parents of _____ consent to the acceptance of a scholarship grant from the Unaka Scholarship Foundation in the amount of \$ _____ and approve of the school selected to receive these funds. We agree to encourage our child to abide by all rules and conditions set forth by the Administrative Committee governing the granting of this scholarship.

Father _____ Date _____ Mother _____ Date _____

TO BE SIGNED BY THE APPLICANT:

I hereby make application to receive a scholarship grant in the amount of \$ _____ from the Unaka Scholarship Foundation and if approved, agree to abide by all the rules and conditions set forth by the Administrative Committee governing the granting of this scholarship.

Signature of Applicant _____ Date _____

APPROVED – ADMINISTRATIVE COMMITTEE **DATE**

Chairman

REQUEST FOR CHARITABLE CONTRIBUTION

Date
Requested by
Company
Recipient Organization
Address
City, State, Zip
Attn:
Amount
Comments
Tax Exempt Status Verified

Matching Charitable Gifts Program

Purpose of the Program

The purpose of the program is to increase Unaka Company's charitable contributions and to stimulate individual gifts from employees and others. Under this program, Unaka Company will match personal gifts of eligible contributors to those organizations that meet the requirements of eligibility set forth below.

Eligible Contributors

All regular salaried and hourly paid employees who have been employed one year or longer, retirees, and directors of Unaka Company and its subsidiaries are eligible to participate in this Matching Charitable Gifts Program.

Eligible Organizations

- Private or public schools, colleges, universities, and graduate professional schools in the United States qualified as not-for-profit institutions. Gifts may also be made to a properly certified alumni fund, foundation, or subdivision of the school which has been qualified to receive gifts for the school and its educational program.
- Organizations that are involved in public service on a broad scale. Examples include the American Cancer Society, American Red Cross, American Heart Association, United Way, etc.
- The organization must qualify as a charitable organization under section 501(c) of the Internal Revenue Code

Matches will not be made for gifts made to religious institutions or political organizations.

Qualifying Gifts

- Unaka Company will match each eligible contributor's gift up to an aggregate of \$500.00 after one year of employment and up to \$5000.00 after two years of employment.
- The contribution must come from the personal funds of the contributor and be in cash or securities. The value of securities will be determined by the company as of the last sale or published bid price on the date of the gift.
- Unaka's Matching Charitable Gifts Program will match dollar for dollar for organizations in Greene County, TN, Sullivan County, TN, Marion County, SC, and Marlboro County, SC. For organizations outside these four counties, the company will match \$ 50 for each \$1.00.
- The employee cannot benefit personally from the contribution.
- For IRS purposes Unaka must receive a receipt or a written acknowledgement for any gift.
- Matching gifts are not automatic. Unaka reserves the right to refuse any requests.

Amendment, Suspension, or Discontinuance

Unaka Company may at any time amend, suspend, or discontinue this matching of gifts. However, no amendment, suspension or discontinuance shall affect the obligation of the company to match gifts made prior to the date of such amendment, suspension, or discontinuance.

Unaka Company reserves the right to decide all questions of interpretation which may arise in connection with the administration of this program.

Contribution Instructions

Simply fill out the donor's portion of this brochure and mail it with your contribution to the organization of your choice. When your gift is received, an official of the organization will complete the remaining section of your form and return it to: Unaka Company, Director of Human Resources, 1500 Industrial Rd., Greeneville, Tn 37745.

Application for Extension of Time To File an
Exempt Organization Return

OMB No. 1545-1709

► 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	Name of Exempt Organization	Employer identification number
	THE UNAKA FOUNDATION, INC.	62-1530053
File by the due date for filing your return. See instructions.	Number, street, and room or suite no. If a P.O. box, see instructions.	
	1500 INDUSTRIAL ROAD	
	City, town or post office, state, and ZIP code. For a foreign address, see instructions.	
	GREENEVILLE, TN 37745-3541	

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

- | | | |
|---|---|------------------------------------|
| ☐ Form 990 | ☐ Form 990-T (corporation) | ☐ Form 4720 |
| ☐ Form 990-BL | ☐ Form 990-T (sec. 401(a) or 408(a) trust) | ☐ Form 5227 |
| ☐ Form 990-EZ | ☐ Form 990-T (trust other than above) | ☐ Form 6069 |
| ☒ Form 990-PF | ☐ Form 1041-A | ☐ Form 8870 |

DOMINICK JACKSON

- The books are in the care of ► 1500 INDUSTRIAL ROAD - GREENEVILLE, TN 37745-3541
- Telephone No. ► 423-639-1171 FAX No. ►

- 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 FEBRUARY 15, 2010, 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 JUL 1, 2008, and ending JUN 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	\$	0.
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	\$	27.
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	\$	0.

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.

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

Form 8868 (Rev. 4-2009)

SCANNED
Date 12-9-09
By am

- If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only Part II and check this box ☒ **X**

Note. Only complete Part II if you have already been granted an automatic 3-month extension on a previously filed Form 8868.

- If you are filing for an **Automatic 3-Month Extension**, complete only Part I (on page 1).

Part II		Additional (Not Automatic) 3-Month Extension of Time. Only file the original (no copies needed)	
Type or print File by the extended due date for filing the return. See instructions	Name of Exempt Organization		Employer identification number
	THE UNAKA FOUNDATION, INC.		62-1530053
	Number, street, and room or suite no. If a P.O. box, see instructions.		For IRS use only
	1500 INDUSTRIAL ROAD		
	City, town or post office, state, and ZIP code. For a foreign address, see instructions.		
	GREENEVILLE, TN 37745-3541		

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

- ☐ Form 990 ☐ Form 990-EZ ☐ Form 990-T (sec. 401(a) or 408(a) trust) ☐ Form 1041-A ☐ Form 5227 ☐ Form 8870
☐ Form 990-BL ☒ Form 990-PF ☐ Form 990-T (trust other than above) ☐ Form 4720 ☐ Form 6069

STOP! Do not complete Part II if you were not already granted an automatic 3-month extension on a previously filed Form 8868.

DOMINICK JACKSON

- The books are in the care of **1500 INDUSTRIAL ROAD - GREENEVILLE, TN 37745-3541**
 Telephone No. **423-639-1171** FAX No. _____
- 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 is for.

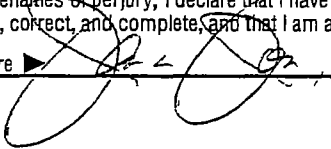
- 4 I request an additional 3-month extension of time until **MAY 15, 2010**
- 5 For calendar year _____, or other tax year beginning **JUL 1, 2008**, and ending **JUN 30, 2009**
- 6 If this tax year is for less than 12 months, check reason: ☐ Initial return ☐ Final return ☐ Change in accounting period
- 7 State in detail why you need the extension

THE RETURN FILER NEEDS ADDITIONAL TIME TO GATHER ALL THE INFORMATION NECESSARY TO FILE A COMPLETE AND ACCURATE RETURN.

8a	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	8a	\$	0.
b	If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit and any amount paid previously with Form 8868.	8b	\$	27.
c	Balance Due. Subtract line 8b from line 8a. 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	8c	\$	0.

Signature and Verification

Under penalties of perjury, I declare that I have examined this form, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete, and that I am authorized to prepare this form.

Signature  Title **CP** Date **2/8/10**

Form 8868 (Rev. 4-2009)

SCANNED
 Date **2/8/10**
 By **dm**