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Form 990-PF

Department of the Treasury
Internal Revenue ServiceReturn of Private Foundation
or Section 4947(a)(1) Nonexempt Charitable Trust
Treated as a Private Foundation

OMB No 1545-0052

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 AUG 1, 2008, and ending JUL 31, 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: **Bartlett-Patterson Corporation**

Number and street (or P O box number if mail is not delivered to street address): **119 S. Main Street**

Room/suite: _____

City or town, state, and ZIP code: **Greenville, TN 37743**

A Employer identification number: **62-1706760**

B Telephone number: **(423) 639-0151**

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): **\$ 1,533,031.**

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

K If exemption application is pending, check here ☐

L 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)
1	Contributions, gifts, grants, etc., received				
2	Check ☒ If the foundation is not required to attach Sch B				
3	Interest on savings and temporary cash investments	1,972.	1,972.	1,972.	Statement 1
4	Dividends and interest from securities	77,339.	77,339.	77,339.	Statement 2
5a	Gross rents				
b	Net rental income or (loss)				
6a	Net gain or (loss) from sale of assets not on line 10	10.			
b	Gross sales price for all assets on line 6a	130,010.			
7	Capital gain net income (from Part IV, line 2)		10.		
8	Net short-term capital gain			4.	
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	79,321.	79,321.	79,315.	
13	Compensation of officers, directors, trustees, etc.	0.	0.	0.	0.
14	Other employee salaries and wages				
15	Pension plans, employee benefits				
16a	Legal fees				
b	Accounting fees Stmt 3	7,271.	6,971.	6,971.	300.
c	Other professional fees				
17	Interest				
18	Taxes Stmt 4	2,228.	20.	236.	1,992.
19	Depreciation and depletion				
20	Occupancy	2,077.	0.	0.	2,077.
21	Travel, conferences, and meetings				
22	Printing and publications				
23	Other expenses Stmt 5	42.	42.	42.	0.
24	Total operating and administrative expenses. Add lines 13 through 23	11,618.	7,033.	7,249.	4,369.
25	Contributions, gifts, grants paid	67,623.			67,623.
26	Total expenses and disbursements. Add lines 24 and 25	79,241.	7,033.	7,249.	71,992.
27	Subtract line 26 from line 12.	80.			
a	Excess of revenue over expenses and disbursements				
b	Net investment income (if negative, enter -0-)		72,288.		
c	Adjusted net income (if negative, enter -0-)			72,066.	

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

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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				
	2	Savings and temporary cash investments		426,617.	139,314.	143,399.
	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 Stmt 6		50,000.	50,000.	48,157.
	b	Investments - corporate stock Stmt 7		1,113,497.	1,113,497.	836,899.
	c	Investments - corporate bonds Stmt 8		228,000.	228,000.	206,170.
11	Investments - land, buildings, and equipment basis					
	Less: accumulated depreciation					
12	Investments - mortgage loans					
13	Investments - other Stmt 9		0.	284,240.	298,406.	
14	Land, buildings, and equipment basis					
	Less: accumulated depreciation					
15	Other assets (describe)					
16	Total assets (to be completed by all filers)		1,818,114.	1,815,051.	1,533,031.	
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				
	22	Other liabilities (describe)				
23	Total liabilities (add lines 17 through 22)		0.	0.		
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ☐					
	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.					
	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		1,818,114.	1,815,051.	
30	Total net assets or fund balances		1,818,114.	1,815,051.		
31	Total liabilities and net assets/fund balances		1,818,114.	1,815,051.		

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	1,818,114.
2	Enter amount from Part I, line 27a	2	80.
3	Other increases not included in line 2 (itemize)	3	0.
4	Add lines 1, 2, and 3	4	1,818,194.
5	Decreases not included in line 2 (itemize) <u>Miscellaneous</u>	5	3,143.
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	1,815,051.

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 Wells Fargo & Co.	P	01/05/09	01/05/09
b Alliance Bank CD	P	12/27/07	03/23/09
c Bank of the Commonwealth CD	P	12/27/07	06/30/09
d Capital Gains Dividends			
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 4.			4.
b 65,000.		65,000.	0.
c 65,000.		65,000.	0.
d 6.			6.
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

(i) FM V. 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			4.
b			0.
c			0.
d			6.
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	10.
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	{ }	3	4.

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	120,677.	0.	.000000
2006	117,875.	0.	.000000
2005	102,049.	0.	.000000
2004	96,725.	0.	.000000
2003	95,713.	0.	.000000

2 Total of line 1, column (d)	2	.000000
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	.000000
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	0.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	723.
7 Add lines 5 and 6	7	723.
8 Enter qualifying distributions from Part XII, line 4	8	71,992.

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

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	723.
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	723.
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	723.
6 Credits/Payments:			
a 2008 estimated tax payments and 2007 overpayment credited to 2008	6a	320.	
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	320.	
8 Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached	8	9.	
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	412.	
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10		
11 Enter the amount of line 10 to be credited to 2009 estimated tax ☒ Refunded ☐	11		

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?	1a	X
b 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.	1b	X
c Did the foundation file Form 1120-POL for this year?	1c	X
d 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.	2	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	3	X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a	X
b If "Yes," has it filed a tax return on Form 990-T for this year?	4b	N/A
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.	5	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?	6	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.	7	X
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ☒ None		
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 <i>See Statement 11</i>	8b	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	9	X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10	X

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 ► C. Ray Adams Telephone no. ► (423) 639-0151 Located at ► 119 S. Main Street, Greeneville, TN ZIP+4 ► 37743			
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	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? ☐ 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	X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2008?	4b	X

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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)? ☐ Yes ☒ NoOrganizations relying on a current notice regarding disaster assistance check here ☐

N/A

5b

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

N/A

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

6b

If you answered "Yes" to 6b, also file Form 8870.

X

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

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
Gene Gaby	President			
230 Depot Street				
Greeneville, TN 37743	0.50	0.	0.	0.
Ray Adams	Treasurer			
119 S. Main Street				
Greeneville, TN 37743	0.50	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

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	0.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	0.
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	0.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	0.
6	Minimum investment return. Enter 5% of line 5	6	0.

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

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	71,992.
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	71,992.
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	723.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	71,269.

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 instructions)

	(a) Corpus	(b) Years prior to 2007	(c) 2007	(d) 2008
1 Distributable amount for 2008 from Part XI, line 7				0.
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				
b From 2004				
c From 2005				
d From 2006				
e From 2007				
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2008 from Part XII, line 4 ▶ \$ <u>N/A</u>				
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				0.
e Remaining amount distributed out of corpus	0.			
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	0.			
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	0.			
9 Excess distributions carryover to 2009. Subtract lines 7 and 8 from line 6a	0.			
10 Analysis of line 9:				
a Excess from 2004				
b Excess from 2005				
c Excess from 2006				
d Excess from 2007				
e Excess from 2008				

Part XIV Private Operating Foundations (see instructions and Part VII-A, question 9)

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

2 a 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

Tax year (a) 2008	Prior 3 years			(e) Total
	(b) 2007	(c) 2006	(d) 2005	
0.	111,211.	108,418.	103,115.	322,744.
0.	94,529.	92,155.	87,648.	274,332.
71,992.	121,930.	119,111.	103,149.	416,182.
0.	0.	0.	0.	0.
71,992.	121,930.	119,111.	103,149.	416,182.
				0.
				0.
				0.
				0.
				0.
				0.
79,315.	131,289.	126,845.	113,669.	451,118.

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 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))

None

b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest

None

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 instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d

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

See the attached memo answering this question.

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.

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	1,972.	
4 Dividends and interest from securities			14	77,339.	
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			18	10.	
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.		79,321.	0.
13 Total. Add line 12, columns (b), (d), and (e)				79,321.	79,321.

(See worksheet in line 13 instructions to verify calculations)

Part XVI-B

Relationship of Activities to the Accomplishment of Exempt Purposes

[illegible]

Form 990-PF Interest on Savings and Temporary Cash Investments Statement 1

Source	Amount
Andrew Johnson Bank CD	1,033.
Andrew Johnson Bank Money Market	938.
United States Treasury	1.
Total to Form 990-PF, Part I, line 3, Column A	1,972.

Form 990-PF Dividends and Interest from Securities Statement 2

Source	Gross Amount	Capital Gains Dividends	Column (A) Amount
3M Corp	556.	0.	556.
Alliance Bank CD	1,901.	0.	1,901.
Andrew Johnson Bancshares	300.	0.	300.
Atmos Energy	2,236.	0.	2,236.
Bank of America Corp	23,132.	0.	23,132.
Bank of Com. CD	2,868.	0.	2,868.
Bond Fund of America	1,354.	0.	1,354.
BP Amoco	1,008.	0.	1,008.
Capital Income Builder	227.	0.	227.
Capital World Growth	316.	0.	316.
Caterpillar Financial Services	2,671.	0.	2,671.
Chevron Corp New	2,080.	0.	2,080.
Citigroup, Inc.	441.	0.	441.
Crescent B & T	5,256.	0.	5,256.
Duke Realty Corp	834.	0.	834.
Edward Jones Money Market	965.	0.	965.
Emerson Electric	774.	0.	774.
Equity Residential	4,246.	0.	4,246.
FHLMC	2,575.	0.	2,575.
Franklin Income Fund	941.	6.	935.
Fundamental Investors Fund	206.	0.	206.
GE Capital Corp.	6,000.	0.	6,000.
GE Capital Corp.	1,380.	0.	1,380.
GMAC Smartnotes	750.	0.	750.
Household Financial Corp.	840.	0.	840.
Motorola	540.	0.	540.
National Rural Utilities	884.	0.	884.
Piedmont Natural Gas	3,922.	0.	3,922.
Southern Co.	6,790.	0.	6,790.
Wachovia Corp	95.	0.	95.
Washington Mutual Investors	179.	0.	179.
Weingarten Realty Inv	1,004.	0.	1,004.
Wells Fargo	74.	0.	74.
Total to Fm 990-PF, Part I, ln 4	77,345.	6.	77,339.

Form 990-PF	Accounting Fees			Statement	3
Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes	
Adams & Plucker, CPAs	7,271.	6,971.	6,971.	300.	
To Form 990-PF, Pg 1, ln 16b	7,271.	6,971.	6,971.	300.	

Form 990-PF	Taxes			Statement	4
Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes	
Dan Walker, Property Taxes	825.	0.	0.	825.	
Jim Warner, Property Taxes	1,167.	0.	0.	1,167.	
Tax on Investment Income	216.	0.	216.	0.	
Tennessee Annual Report	20.	20.	20.	0.	
To Form 990-PF, Pg 1, ln 18	2,228.	20.	236.	1,992.	

Form 990-PF	Other Expenses			Statement	5
Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes	
Office expense	42.	42.	42.	0.	
To Form 990-PF, Pg 1, ln 23	42.	42.	42.	0.	

Form 990-PF	U.S. and State/City Government Obligations	Statement	6
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Description	U.S. Gov't	Other Gov't	Book Value	Fair Market Value
Federal Home Loan Mortgage	X		50,000.	48,157.
Total U.S. Government Obligations			50,000.	48,157.
Total State and Municipal Government Obligations				
Total to Form 990-PF, Part II, line 10a			50,000.	48,157.

Form 990-PF	Corporate Stock	Statement	7
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Description	Book Value	Fair Market Value
Bank America Corp	542,892.	349,103.
Equity Residential	35,960.	52,800.
Motorola Inc	95,681.	38,664.
Southern Co	98,097.	125,600.
Chevron Corp	29,193.	55,576.
Piedmont Natural Gas Inc	75,917.	91,094.
Atmos Energy	43,460.	46,172.
Citigroup Inc	45,828.	2,853.
Wells Fargo & Co	44,536.	4,623.
BP Amoco PLC	19,781.	15,012.
Duke Realty Corp	20,226.	5,694.
Emerson Electric Co	21,134.	21,828.
Weingarten Realty Investors	19,827.	8,487.
3M Co	20,965.	19,393.
Total to Form 990-PF, Part II, line 10b	1,113,497.	836,899.

Form 990-PF	Corporate Bonds	Statement	8
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Description	Book Value	Fair Market Value
Household Finance Corp	15,000.	13,133.
General Motors Acceptance Corp	12,000.	6,330.
Caterpillar Financial Service	52,000.	51,798.
General Electric Capital Corp	100,000.	87,880.
GE Capital Corp Internotes	27,000.	24,655.
National Rural Utils Coop Internotes	22,000.	22,374.
Total to Form 990-PF, Part II, line 10c	228,000.	206,170.

Form 990-PF	Other Investments	Statement	9
Description	Valuation Method	Book Value	Fair Market Value
Bond Fund of America	COST	127,000.	131,800.
Capital Income Builder Fund	COST	34,000.	37,412.
Capital World Growth & Income	COST	33,000.	38,337.
New Perspective Fund	COST	25,000.	29,130.
Washington Mutual Investors	COST	33,000.	36,492.
Franklin Income Fund Cl A	COST	16,232.	14,774.
Fundamental Investors Fund A	COST	16,008.	10,461.
Total to Form 990-PF, Part II, line 13		284,240.	298,406.

Form 990-PF	Grants and Contributions Paid During the Year	Statement	10
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Recipient Name and Address	Recipient Relationship and Purpose of Grant	Recipient Status	Amount
Appalachian Girl Scout Council, Inc. P.O. Box 3100 CRS, Johnson City, TN 37602	None Promote values in young people	Public Charity	1,000.
Boy Scouts of America, 129 Boone Ridge Lane, Johnson City, TN 37602	None Instill values in youth and build character	Public Charity	1,000.
Boys and Girls Club, 740 W. Church Street, Greeneville, TN 37745	None Assist young people in the community	Public Charity	2,000.
Child Advocacy Center for the 3rd Judicial System 200 Main Street, Mosheim, TN 37818	None Assist physically and sexually abused children	Public Charity	2,000.

Coal Fund, 107 N. Cutler Street, Greeneville, TN 37743	None Assist individuals in need	Public Charity	25,000.
Free Will Baptist Family Ministries 90 Stanley Lane, Greeneville, TN 37743	None Assist deprived and needy children	Public Charity	1,000.
George Clem Multicultural Association 111 Old Knoxville Hwy., Greeneville, TN 37743	None Assist George Clem with multicultural program	Public Charity	1,100.
Greene County Imagination Library, P.O. Box 576, Chuckey, TN 37641	None Assist children to prepare for kindergarten	Public Charity	1,000.
Greeneville/Greene County Library, 210 North Main Street, Greeneville, TN 3	None Acquire books for the library	Public charity	2,500.
Holston United Methodist Home for Children 404 Holston Drive, Greeneville, TN 37743	None Assist deprived and needy children	Public Charity	1,000.
Laughlin Healthcare Foundation, 1420 Tusculum Blvd., Greeneville, TN 37745	None Assist individuals to go to college	Public Charity	600.
Mosheim Public Library, 730 Main Street, Mosheim, TN 37818	None Acquire books for the library	Public Charity	750.

Nathanael Greene Museum, 101 W. McKee Street, Greeneville, TN 37743	None Promote Nathanel Greene's name and legacy	Public Charity	500.
Opportunity House, 203 N. Irish Street, Greeneville, TN 37745	None Assist individuals in need	Public Charity	4,000.
Takoma Foundation, 401 Takoma Avenue, Greeneville, TN 37743	None Assist individuals to go to college	Public Charity	600.
United Way of Greene County, 115 Academy Street, Greeneville, TN 37743	None Assist individuals in need	Public Charity	2,000.
Various, , Greeneville, TN 37743	None Promote Andrew Johnson's name	Public Charity	20,573.
YMCA, 404 Y Street, Greeneville, TN 37745	None Assist individuals in the community	Public Charity	1,000.
Total to Form 990-PF, Part XV, line 3a			67,623.

Form 990-PF	Explanation Concerning Part VII-A, Line 8b	Statement 1f
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Explanation

According to the Tennessee Charitable Solicitation Act, an organization that receives gross contributions from the public of less than \$30,000 annually, pursuant to T.C.A. 48-101-502(a)(2) is exempt from the registration requirements in the State of Tennessee. The Bartlett-Patterson Corporation is exempt.

Bartlett-Patterson Corporation
62-1706760
Information for Form 990-PF
July 31, 2009

Part XV – Item 2

The organization accepts requests and there are no preselected charitable organizations. The primary purpose of the organization is to promote the legacy of President Andrew Johnson, who was the great-great grandfather of the donor.

We have completed a book on the life of the President. We worked with Dr. Robert Orr who is well versed on this subject. We commissioned him to do this book for a specific purpose. The original commission was for him to do the "true story of the President." This book is about 80 pages plus photos, is a hardback edition and is presented to all students in the Greeneville and Greene County schools. Our initial group was all students in the 8th through 12th grade at each school located in Greene County. This is a continuing project as we return to each school each year to the 8th grade. We leave extra books for transfer students. The books are delivered by and lectures provided by the Author. We have provided books to all of the initial group. Some of these books have been provided to the National Park Service for their use.

Past projects have been acquisition of various pieces of memorabilia of the Johnson family for the National Park Service, the Presidential Library at Tusculum College and other interested public agencies.

Since Greeneville is the home of Andrew Johnson we are blessed to have the Tailor Shop, his home, his grave, and other sites maintained by the National Park Service. The corporation has assisted in providing a statue of the President and a replica of his birthplace. The Park Service opens and closes it for visitors. The corporation provides maintenance and general upkeep on an ongoing basis.

We have provided rare books relating to the President and/or his family to the Greeneville/Greene County Library and assisted the library in the renovation of acquired property for their genealogy section that houses their collection of Johnson items. They have many items from the Johnson era that are available for viewing and/or use by the public and historians.

We have also acquired three impeachment tickets for the National Park Service.

We continue to assist in the acquisition of Johnson memorabilia for the library and for the Park Service. We participate in the local "August 7" Day Celebration.

The Bartlett home was left to the local chapter of the Daughters of the American Revolution for use in their tax exempt function. We maintain the home and pay expenses such as utilities, insurance, and repairs.