Form **990-PF**

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

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

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

OMB No 1545-0052

2009

For calendar year 2009, or tax year beginning 01-01-2009 , and ending 12-31-2009

G Check all that apply ☐ Initial return ☐ Initial return of a former public charity ☐ Final return
☐ Amended return ☐ Address change ☐ Name change

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

Name of foundation
CLARENCE L ROBEY CHARITABLE TRUST

Number and street (or P O box number if mail is not delivered to street address) | Room/suite
B B T PO BOX 5228

City or town, state, and ZIP code
MARTINSVILLE, VA 24115

A Employer identification number
54-6138649

B Telephone number (see page 10 of the instructions)
(703) 293-3726

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 ▸ ☐

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)*▸$ 1,367,684

J Accounting method ☐ Cash ☐ Accrual
☐ Other (specify) _
(Part I, column (d) must be on cash basis.)

Part I **Analysis of Revenue and Expenses** *(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see page 11 of the instructions))*

			(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1	Contributions, gifts, grants, etc , received (attach schedule)	3,000			
	2	Check ▸ ☑ if the foundation is **not** required to attach Sch B				
	3	Interest on savings and temporary cash investments	4,599	4,599		
	4	Dividends and interest from securities	34,659	34,659		
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10	-2,192			
	b	Gross sales price for all assets on line 6a 667,908				
	7	Capital gain net income (from Part IV, line 2)		0		
	8	Net short-term capital gain			0	
	9	Income modifications				
	10a	Gross sales less returns and allowances				
	b	Less Cost of goods sold				
	c	Gross profit or (loss) (attach schedule)				
	11	Other income (attach schedule)	97	97		
	12	**Total.** Add lines 1 through 11	40,163	39,355		
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc	3,470	3,470		
	14	Other employee salaries and wages		0	0	0
	15	Pension plans, employee benefits		0	0	
	16a	Legal fees (attach schedule)	518			0
	b	Accounting fees (attach schedule)	650			650
	c	Other professional fees (attach schedule)	336			176
	17	Interest				0
	18	Taxes (attach schedule) (see page 14 of the instructions)	799			0
	19	Depreciation (attach schedule) and depletion	0	0		
	20	Occupancy				
	21	Travel, conferences, and meetings		0	0	
	22	Printing and publications		0	0	
	23	Other expenses (attach schedule)	360			360
	24	**Total operating and administrative expenses.** Add lines 13 through 23	6,133	3,470	0	1,186
	25	Contributions, gifts, grants paid	59,825			59,825
	26	**Total expenses and disbursements.** Add lines 24 and 25	65,958	3,470	0	61,011
	27	Subtract line 26 from line 12				
	a	**Excess of revenue over expenses and disbursements**	-25,795			
	b	**Net investment income** (if negative, enter -0-)		35,885		
	c	**Adjusted net income** (if negative, enter -0-)			0	

Part II **Balance Sheets** Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)

		Beginning of year (a) Book Value	End of year (b) Book Value	(c) Fair Market Value
Assets				
1	Cash—non-interest-bearing	15,853	11,974	11,974
2	Savings and temporary cash investments	27,109	73,970	73,970
3	Accounts receivable ▶			
	Less allowance for doubtful accounts ▶		0	0
4	Pledges receivable ▶			
	Less allowance for doubtful accounts ▶			
5	Grants receivable			
6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see page 15 of the instructions)			
7	Other notes and loans receivable (attach schedule) ▶			
	Less allowance for doubtful accounts ▶ 0			
8	Inventories for sale or use			
9	Prepaid expenses and deferred charges			
10a	Investments—U S and state government obligations (attach schedule)	98,394	98,394	107,481
b	Investments—corporate stock (attach schedule)	256,864	586,800	640,863
c	Investments—corporate bonds (attach schedule)	449,747	378,007	398,788
11	Investments—land, buildings, and equipment basis ▶			
	Less accumulated depreciation (attach schedule) ▶			
12	Investments—mortgage loans			
13	Investments—other (attach schedule)	458,244	129,596	134,608
14	Land, buildings, and equipment basis ▶			
	Less accumulated depreciation (attach schedule) ▶			
15	Other assets (describe ▶)			
16	**Total assets** (to be completed by all filers—see the instructions Also, see page 1, item I)	1,306,211	1,278,741	1,367,684
Liabilities				
17	Accounts payable and accrued expenses			
18	Grants payable			
19	Deferred revenue			
20	Loans from officers, directors, trustees, and other disqualified persons			
21	Mortgages and other notes payable (attach schedule)			
22	Other liabilities (describe ▶)			
23	**Total liabilities** (add lines 17 through 22)		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	1,306,211	1,278,741	
28	Paid-in or capital surplus, or land, bldg , and equipment fund			
29	Retained earnings, accumulated income, endowment, or other funds			
30	**Total net assets or fund balances** (see page 17 of the instructions)	1,306,211	1,278,741	
31	**Total liabilities and net assets/fund balances** (see page 17 of the instructions)	1,306,211	1,278,741	

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	1,306,211
2	Enter amount from Part I, line 27a	2	-25,795
3	Other increases not included in line 2 (itemize) ▶	3	168
4	Add lines 1, 2, and 3	4	1,280,584
5	Decreases not included in line 2 (itemize) ▶	5	1,843
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	1,278,741

Part IV Capital Gains and Losses for Tax on Investment Income

	(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
1a	See Additional Data Table			
b				
c				
d				
e				

	(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a	See Additional Data Table			
b				
c				
d				
e				

	Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) **or** Losses (from col (h))
	(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
a	See Additional Data Table			
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	-2,192
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see pages 13 and 17 of the instructions) If (loss), enter -0- in Part I, line 8		3	

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

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

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

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2008	69,632	1,350,428	0 051563
2007	40,799	828,547	0 049242
2006	32,267	602,798	0 053529
2005	38,650	606,045	0 063774
2004	39,855	639,364	0 062335

2	**Total** of line 1, column (d).	2	0 280443
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	0 056089
4	Enter the net value of noncharitable-use assets for 2009 from Part X, line 5.	4	1,220,957
5	Multiply line 4 by line 3.	5	68,482
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	359
7	Add lines 5 and 6.	7	68,841
8	Enter qualifying distributions from Part XII, line 4.	8	61,011

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate See the Part VI instructions on page 18

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

1a	Exempt operating foundations described in section 4940(d)(2), check here ▶ ☐ and enter "N/A" on line 1 Date of ruling or determination letter ________ **(attach copy of 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	718
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	718
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	718
6	Credits/Payments				
a	2009 estimated tax payments and 2008 overpayment credited to 2009	6a	904		
b	Exempt foreign organizations—tax withheld at source	6b			
c	Tax paid with application for extension of time to file (Form 8868)	6c	0		
d	Backup withholding erroneously withheld	6d			
7	Total credits and payments Add lines 6a through 6d			7	904
8	Enter any **penalty** for underpayment of estimated tax Check here ☐ if Form 2220 is attached			8	0
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	186
11	Enter the amount of line 10 to be **Credited to 2010 estimated tax** ▶ 186	**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?	1a		No
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)?	1b		No
	*If the answer is "Yes" to **1a** or **1b**, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.*			
c	Did the foundation file **Form 1120-POL** for this year?	1c		No
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year **(1)** On the foundation ▶ $ ________ **(2)** On foundation managers ▶ $ ________			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ▶ $ ________			
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		No
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		No
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		No
b	If "Yes," has it filed a tax return on **Form 990-T** for this year?	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? *If "Yes," attach the statement required by General Instruction T.*	5		No
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	Yes	
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	Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see page 19 of the instructions) ▶ VA			
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*	8b	Yes	
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 2009 or the taxable year beginning in 2009 (see instructions for Part XIV on page 27)? *If "Yes," complete Part XIV*	9		No
10	Did any persons become substantial contributors during the tax year? *If "Yes," attach a schedule listing their names and addresses*	10		No

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 page 20 of the instructions)	11		No
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Yes	
	Website address ▶			

14 The books are in care of ▶BRANCH BANKING & TRUST COMPANY Telephone no ▶(703) 293-3726

Located at ▶4117 CHAIN BRIDGE RD FAIRFAX VA ZIP+4 ▶220304117

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of **Form 1041**—Check here ▶ ☐

and enter the amount of tax-exempt interest received or accrued during the year ▶ | 15 |

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

			Yes	No
	File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			
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)?	1b		
	Organizations relying on a current notice regarding disaster assistance check here ▶ ☐			
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2009?	1c		No
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 2009, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2009? ☐ Yes ☑ No			
	If "Yes," list the years ▶ 20____, 20____, 20____, 20____			
b	Are there any years listed in 2a for which the foundation is **not** applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to **all** years listed, answer "No" and attach statement—see page 20 of the instructions)	2b		No
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ▶ 20____, 20____, 20____, 20____			
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 2009 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 2009.)*	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
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 2009?	4b		No

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

5a	During the year did the foundation pay or incur any amount to			
	(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☑ No			
	(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☑ No			
	(3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☑ No			
	(4) Provide a grant to an organization other than a charitable, etc , organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see page 22 of the instructions) ☐ Yes ☑ No			
	(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☑ No			
b	If any answer is "Yes" to 5a(1)–(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53 4945 or in a current notice regarding disaster assistance (see page 22 of the instructions)?	**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? ☐ 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**		**No**
	If "Yes" to 6b, 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?	**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 (see page 22 of the instructions).

(a) Name and address	**(b)** Title, and average hours per week devoted to position	**(c)** Compensation **(If not paid, enter -0-)**	**(d)** Contributions to employee benefit plans and deferred compensation	**(e)** Expense account, other allowances
See Additional Data TableSee Additional Data Table				

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

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

Total number of other employees paid over $50,000 ▶	0

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

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

(a) Name and address of each person paid more than $50,000	**(b)** Type of service	**(c)** Compensation
NONE		
Total number of others receiving over $50,000 for professional services. . . . . ▶		0

Part IX-A **Summary of Direct Charitable Activities**

List the foundation's four largest direct charitable activities during the tax year Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc	Expenses
1	
2	
3	
4	

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

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1	
2	
All other program-related investments See page 24 of the instructions	
3	
Total. Add lines 1 through 3. . . . . ▶	

Part X **Minimum Investment Return** (All domestic foundations must complete this part. Foreign foundations, see page 24 of the instructions.)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes		
a	Average monthly fair market value of securities	1a	1,239,158
b	Average of monthly cash balances	1b	392
c	Fair market value of all other assets (see page 24 of the instructions)	1c	0
d	**Total** (add lines 1a, b, and c)	1d	1,239,550
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	1,239,550
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see page 25 of the instructions)	4	18,593
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3 Enter here and on Part V, line 4	5	1,220,957
6	**Minimum investment return.** Enter 5% of line 5	6	61,048

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

1	Minimum investment return from Part X, line 6	1	61,048
2a	Tax on investment income for 2009 from Part VI, line 5 — 2a: 718		
b	Income tax for 2009 (This does not include the tax from Part VI) — 2b:		
c	Add lines 2a and 2b	2c	718
3	Distributable amount before adjustments Subtract line 2c from line 1	3	60,330
4	Recoveries of amounts treated as qualifying distributions	4	3,000
5	Add lines 3 and 4	5	63,330
6	Deduction from distributable amount (see page 25 of the instructions)	6	0
7	**Distributable amount** as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1	7	63,330

Part XII **Qualifying Distributions** (see page 25 of the instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc , purposes		
a	Expenses, contributions, gifts, etc —total from Part I, column (d), line 26	1a	61,011
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	0
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required)	3a	0
b	Cash distribution test (attach the required schedule)	3b	0
4	**Qualifying distributions.** Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	61,011
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see page 26 of the instructions)	5	0
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	61,011

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

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

		(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
1 Distributable amount for 2009 from Part XI, line 7					63,330
2 Undistributed income, if any, as of the end of 2008					
a Enter amount for 2008 only.				0	
b Total for prior years 2007 , 20___ , 20___			0		
3 Excess distributions carryover, if any, to 2009					
a From 2004.	8,541				
b From 2005.	8,665				
c From 2006.	3,480				
d From 2007.	505				
e From 2008.	3,012				
f **Total** of lines 3a through e.		24,203			
4 Qualifying distributions for 2009 from Part XII, line 4 ▶ $ 61,011					
a Applied to 2008, but not more than line 2a				0	
b Applied to undistributed income of prior years (Election required—see page 26 of the instructions)			0		
c Treated as distributions out of corpus (Election required—see page 26 of the instructions). . .		0			
d Applied to 2009 distributable amount.					61,011
e Remaining amount distributed out of corpus		0			
5 Excess distributions carryover applied to 2009 *(If an amount appears in column (d), the same amount must be shown in column (a).)*		2,319			2,319
6 **Enter the net total of each column as indicated below:**					
a Corpus Add lines 3f, 4c, and 4e Subtract line 5		21,884			
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 page 27 of the instructions . . .			0		
e Undistributed income for 2008 Subtract line 4a from line 2a Taxable amount—see page 27 of the instructions				0	
f Undistributed income for 2009 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2010					0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see page 27 of the instructions)		0			
8 Excess distributions carryover from 2004 not applied on line 5 or line 7 (see page 27 of the instructions)		6,222			
9 **Excess distributions carryover to 2010.** Subtract lines 7 and 8 from line 6a		15,662			
10 Analysis of line 9					
a Excess from 2005. . . .	8,665				
b Excess from 2006. . . .	3,480				
c Excess from 2007. . . .	505				
d Excess from 2008. . . .	3,012				
e Excess from 2009. . . .					

Part XIV Private Operating Foundations (see page 27 of the instructions and Part VII-A, question 9)

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2009, enter the date of the ruling . . . . ▶

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

	Tax year	Prior 3 years			(e) Total
	(a) 2009	**(b)** 2008	**(c)** 2007	**(d)** 2006	
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon **a** "Assets" alternative test—enter **(1)** Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed . . .					
c "Support" alternative test—enter **(1)** Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

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

1 Information Regarding Foundation Managers:

a List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than $5,000) (See section 507(d)(2))

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

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

BOARD OF DIRECTORS CLARENCE ROBEY
PO BOX 181
PURCELLVILLE, VA 22132
(540) 338-6621

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

WRITTEN EXPLANATION OF WHAT THE DONATION WILL BE USED FOR AND A BRIEF DESCRIPTION OF THE CHARITABLE ORGANIZATION REQUESTING THE FUNDS

c Any submission deadlines

NONE

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

NONE

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* See Additional Data Table				
Total . . . . ▶ **3a**				59,825
b *Approved for future payment*				
Total . . . . ▶ **3b**				

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See page 28 of the instructions)
	(a) Business code	(b) Amount	(c) Exclusion 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	4,599	
4 Dividends and interest from securities			14	34,659	
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	-2,192	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue a LITIGATION PROCEED			01	97	
b					
c					
d					
e					
12 Subtotal Add columns (b), (d), and (e)				37,163	

13 Total. Add line 12, columns (b), (d), and (e) **13** 37,163

(See worksheet in line 13 instructions on page 28 to verify calculations)

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

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the organization's exempt purposes (other than by providing funds for such purposes) (See page 28 of the instructions)

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

		Line	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	1a(1)		No
	(2) Other assets	1a(2)		No
b	Other transactions			
	(1) Sales of assets to a noncharitable exempt organization	1b(1)		No
	(2) Purchases of assets from a noncharitable exempt organization	1b(2)		No
	(3) Rental of facilities, equipment, or other assets	1b(3)		No
	(4) Reimbursement arrangements	1b(4)		No
	(5) Loans or loan guarantees	1b(5)		No
	(6) Performance of services or membership or fundraising solicitations	1b(6)		No
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c		No

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

(a) Line No	(b) Amount involved	(c) Name of noncharitable exempt organization	(d) Description of transfers, transactions, and sharing arrangements

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

b If "Yes," complete the following schedule

(a) Name of organization	(b) Type of organization	(c) Description of relationship

Sign Here

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

****** | 2010-05-07 | ******

Signature of officer or trustee | Date | Title

Paid Preparer's Use Only

Preparer's Signature	Date	Check if self-employed ☐	Preparer's identifying number (see **Signature** on page 30 of the instructions)
Firm's name (or yours if self-employed), address, and ZIP code		EIN	
		Phone no	

Additional Data

Software ID: 09000072
Software Version: 09-0
EIN: 54-6138649
Name: CLARENCE L ROBEY CHARITABLE TRUST

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(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)
200 ACUITY BRANDS, INC COMMON		2009-09-14	2009-12-02
240 AGILENT TECHNOLOGIES		2009-09-14	2009-10-06
562 114 INVESCO INTERNATIONAL GROWTH FUND CL I F		2009-02-12	2009-10-06
100 ARCHER DANIELS MIDLAND COMPANY		2008-11-03	2009-02-12
190 ARCHER DANIELS MIDLAND COMPANY		2008-11-03	2009-09-14
381 971 ARTISAN MID CAP VALUE #1464 CLD TO NEW I		2008-11-03	2009-09-14
2555 153 ARTISAN MID CAP VALUE #1464 CLD TO NEW I			2009-09-14
223 589 ARTISAN MID CAP VALUE #1464 CLD TO NEW I		2008-03-25	2009-10-06
280 ADR AXA-UAP F/K/A AXA SA SPONSORED ADR			2009-12-04
195 BANK OF AMER CORP COMMON			2009-03-27
40000 BELLSOUTH TELECOMM 5 875% 1/15/09		2002-08-08	2009-01-15
1 BERKSHIRE HATHAWAY INC DEL CLASS B		2008-11-03	2009-12-02
26 CME GROUP INC COMMON		2009-09-14	2009-12-02
115 CARDINAL HEALTH INC		2008-11-03	2009-01-06
75 CISCO SYSTEMS		2004-06-23	2009-12-02
100 CLOROX		2008-02-05	2009-09-14
10 CLOROX		2008-11-03	2009-12-02
150 COACH INC		2009-02-12	2009-09-14
125 DELL INC		2006-09-07	2009-09-14
15 DELL INC		2006-10-16	2009-10-06
225 EBAY INC			2009-09-14
10 EBAY INC		2008-11-03	2009-10-06
387 354 FIDELITY ADVISOR SMALL CAP FUND INSTITUTIONAL CLASS FUND 298			2009-09-14
38 087 FIDELITY ADVISOR SMALL CAP FUND INSTITUTIONAL CLASS FUND 298		2009-01-20	2009-10-06
516 331 FIDELITY ADVISOR SMALL CAP FUND INSTITUTIONAL CLASS FUND 298			2009-10-06
30000 GTE CALIFORNIA 6 7% 9/1/09		2001-04-24	2009-09-01
1502 404 GOLDMAN SACHS MID CAP VALUE CL I FUND #		2008-03-25	2009-09-14
244 858 GOLDMAN SACHS MID CAP VALUE CL I FUND #		2009-01-20	2009-10-06
421 108 GOLDMAN SACHS GROWTH OPPORTUNITY FD			2009-09-14
1342 305 GOLDMAN SACHS GROWTH OPPORTUNITY FD			2009-09-14

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
6,765		6,799	-34
6,550		6,742	-192
13,485		10,000	3,485
2,777		2,186	591
5,431		4,153	1,278
6,429		5,000	1,429
43,003		48,914	-5,911
3,750		4,000	-250
168			168
1,480		7,937	-6,457
40,000		41,500	-1,500
3,339		3,877	-538
8,756		7,214	1,542
4,093		4,383	-290
1,802		1,786	16
5,780		5,936	-156
617		623	-6
4,771		2,131	2,640
2,043		2,719	-676
230		370	-140
5,348		6,868	-1,520
237		152	85
8,429		9,170	-741
837		641	196
11,349		12,170	-821
30,000		30,240	-240
41,722		50,000	-8,278
6,832		5,000	1,832
7,908		6,000	1,908
25,208		30,124	-4,916

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			**(l)** Gains (Col (h) gain minus col (k), but not less than -0-) **or** Losses (from col (h))
(i) F M V as of 12/31/69	**(j)** Adjusted basis as of 12/31/69	**(k)** Excess of col (i) over col (j), if any	
			-34
			-192
			3,485
			591
			1,278
			1,429
			-5,911
			-250
			168
			-6,457
			-1,500
			-538
			1,542
			-290
			16
			-156
			-6
			2,640
			-676
			-140
			-1,520
			85
			-741
			196
			-821
			-240
			-8,278
			1,832
			1,908
			-4,916

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(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)
332 322 GOLDMAN SACHS GROWTH OPPORTUNITY FD		2006-08-02	2009-10-06
1528 509 HARBOR INTERNATIONAL FUND			2009-09-14
881 095 HARBOR INTERNATIONAL FUND			2009-09-14
481 67 HARBOR INTERNATIONAL FUND			2009-10-06
200 HOME DEPOT INCORPORATED			2009-09-14
130 MARATHON OIL CORPORATION COMMON		2008-11-03	2009-09-14
22 MARKEL CORP		2009-10-06	2009-12-02
50 MERCK & COMPANY INCORPORATED		2006-10-16	2009-10-06
50 MERCK & CO INC		2006-12-21	2009-12-02
320 922 NORTHERN SMALL CAP VALUE FUND # 603		2009-01-20	2009-09-14
2567 865 NORTHERN SMALL CAP VALUE FUND # 603		2008-03-25	2009-09-14
2851 711 PIMCO TOTAL RETURN FUND 35		2008-09-17	2009-09-14
779 365 PIMCO TOTAL RETURN FUND 35		2007-08-27	2009-10-06
95 PFIZER INCORPORATED		2001-03-21	2009-09-14
50 PFIZER INCORPORATED		2004-11-15	2009-10-06
50 PFIZER INCORPORATED		2007-07-30	2009-12-02
150 PRICE GROUP INC FORMERLY AKA PRICE TO ROWE & ASSOC		2009-03-27	2009-09-14
50 S & P 500 DEPOSITARY RECEIPT COMMON		2008-11-17	2009-02-12
184 S & P 500 DEPOSITARY RECEIPT COMMON		2008-11-17	2009-10-06
400 AMEX FINANCIAL SELECT SPDR		2009-03-27	2009-12-02
140 SILGAN HOLDINGS INC		2009-09-14	2009-12-02
180 SNAP ON INC FKA SNAP ON TOOLS		2009-09-14	2009-12-02
50 SYSCO CORPORATION		2001-06-13	2009-02-12
90 TARGET CORP COM		2003-09-25	2009-09-14
25 TARGET CORP COM		2003-09-25	2009-10-06
50 THE TRAVELERS COMPANIES INC		2004-06-14	2009-12-02
2095 808 VANGUARD MID CAP GROWTH FUND FUND 301		2008-03-25	2009-09-14
581 395 VANGUARD MID CAP GROWTH FUND FUND 301		2009-01-20	2009-10-06
105 VERIZON COMMUNICATIONS INC		1985-09-25	2009-03-27
100 WYETH		2008-12-22	2009-03-27

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
6,274		7,012	-738
79,758		58,183	21,575
45,976		54,000	-8,024
25,292		25,000	292
5,502		7,980	-2,478
4,252		3,879	373
7,504		7,281	223
1,621		2,196	-575
1,842		2,168	-326
3,803		2,853	950
30,429		35,000	-4,571
30,884		30,000	884
8,526		8,051	475
1,551		3,463	-1,912
840		1,377	-537
940		1,194	-254
6,694		4,476	2,218
4,097		4,293	-196
19,441		15,796	3,645
5,864		3,784	2,080
7,457		6,990	467
6,716		6,529	187
1,159		1,456	-297
4,268		3,560	708
1,199		989	210
2,631		2,039	592
29,970		35,000	-5,030
8,343		6,000	2,343
3,176		978	2,198
4,304		3,692	612

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			**(l)** Gains (Col (h) gain minus col (k), but not less than -0-) **or** Losses (from col (h))
(i) F M V as of 12/31/69	**(j)** Adjusted basis as of 12/31/69	**(k)** Excess of col (i) over col (j), if any	
			-738
			21,575
			-8,024
			292
			-2,478
			373
			223
			-575
			-326
			950
			-4,571
			884
			475
			-1,912
			-537
			-254
			2,218
			-196
			3,645
			2,080
			467
			187
			-297
			708
			210
			592
			-5,030
			2,343
			2,198
			612

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(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)
160 COVIDIEN PLC		2009-09-14	2009-10-06
20 TRANSOCEAN LTD		2008-11-03	2009-10-06

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
6,730		6,645	85
1,726		1,601	125

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			**(l)** Gains (Col (h) gain minus col (k), but not less than -0-) **or** Losses (from col (h))
(i) F M V as of 12/31/69	**(j)** Adjusted basis as of 12/31/69	**(k)** Excess of col (i) over col (j), if any	
			85
			125

Form 990PF Part VIII Line 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
KEITH BROWER 39320 RICKARD ROAD LOVETTSVILLE,VA 22132	DIRECTOR 1	200		
A MIKE PEERY PO BOX 181 PURCELLVILLE,VA 22132	VICE-CHAIRMAN 1	200		
DORIS L WHITMAN PO BOX 663 PURCELLVILLE,VA 22132	DIRECTOR 1	200		
WILLIAM L WHITMORE JR PO BOX 595 PURCELLVILLE,VA 20134	DIRECTOR 1	200		
MARGARET VAUGHN PO BOX 581 PURCELLVILLE,VA 22132	DIRECTOR 1	200		
BRANCH BANKING AND TRUST COMPANY 6400 ARLINGTON BLVD FALLS CHURCH,VA 22042	TRUSTEE 1	2,470		

Form 990PF Part XV Line 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*				
MULLEN JESSICA - BRIGWATER COLLEGE402 EAST COLLEGE ST BRIDGEWATER, VA 22813	NONE	N/A	COLLEGE SCHOLARSHIP	1,500
CLAY SAMUEL - UNIV OF VIRGINIA PO BOX 400160 CHARLOTTESVILLE, VA 229044160	NONE	N/A	COLLEGE SCHOLARSHIP	1,500
COWELL JULIA - NORTHERN VIRGINIA COMMUNITY COLLEGE1000 HARRY FLOOD BYRD HIGHWAY STERLING, VA 20164	NONE	N/A	COLLEGE SCHOLARSHIP	1,500
FLEMMING AUDREY - BOSTON UNIVERSITY881 COMM AVE BOSTON, MA 02215	NONE	N/A	COLLEGE SCHOLARSHIP	2,000
GEORGE KATHERINE - JAMES UNIVERSITYRM 107 MSC 7606 HARRISONBURG, VA 22807	NONE	N/A	COLLEGE SCHOLARSHIP	1,500
BASS EMILY - UNIV OF PENNSYLVANIA3451 WALNUT ST PHILADELPHIA, PA 19104	NONE	N/A	COLLEGE SCHOLARSHIP	1,500
POTTS CHRISTOPHER - VIRGINIA TECH201 BURRUSS HALL BLACKSBURG, VA 24061	NONE	N/A	COLLEGE SCHOLARSHIP	1,500
LEE SANG WON - VIRGINIA201 BURRUSS HALL BLACKSBURG, VA 24061	NONE	N/A	COLLEGE SCHOLARSHIP	1,500
BEKSEL ERIN M - VIRGINIA TECH 201 BURRUSS HALL BLACKSBURG, VA 24061	NONE	N/A	COLLEGE SCHOLARSHIP	1,500
CARNEAL JESSICA - BRIDGEWATER COLLEGE402 EAST COLLEGE ST BRIDGEWATER, VA 22812	NONE	N/A	COLLEGE SCHOLARSHIP	1,500
CASTIN HEATHER - VA COMMONWEALTH UNIVERSITY821 W FRANKLIN ST RICHMOND, VA 232842526	NONE	N/A	COLLEGE SCHOLARSHIP	2,000
LEE SANG MIN - JAMES MADISON UNIVERSITYRM 107 MSC 7606 HARRISONBURG, VA 22807	NONE	N/A	COLLEGE SCHOLARSHIP	1,500
LOVETT JOHANNAH - LIBERTY UNIVERSITY1971 UNIVERSITY BOLUEVARD LYNCHBURG, VA 24504	NONE	N/A	COLLEGE SCHOLARSHIP	1,500
MARKHAM GALIN - JAMES MADISON UNIVERSITYRM 107 MSC 7606 HARRISONBURG, VA 22807	NONE	N/A	COLLEGE SCHOLARSHIP	1,500
PRATT HEATHER - PHILADELPHIA UNIVERSITY4201 HENRY AVE PHILADELPHIA, PA 191445497	NONE	N/A	COLLEGE SCHOLARSHIP	1,500
Total . . . . ▶ **3a**				59,825

Form 990PF Part XV Line 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*				
PARK MEREDITH K - VIRGINIA TECH201 BURRUSS HALL BLACKSBURG, VA 24061	NONE	N/A	COLLEGE SCHOLARSHIP	2,000
HEMPHILL JAMES - JAMES MA UNIVERSITYRM 107 MSC 7606 HARRISONBURG, VA 22807	NONE	N/A	COLLEGE SCHOLARSHIP	1,000
MULLEN CECILY - UNIV OF VIRGINIAPO BOX 400160 CHARLOTTESVILLE, VA 229044160	NONE	N/A	COLLEGE SCHOLARSHIP	1,500
McWILLIAMS MEGAN - VANDERBILT UNIVERSITY2201 WEST END AVE NASHVILLE, TN 37240	NONE	N/A	COLLEGE SCHOLARSHIP	1,500
TRADER THERESA - VA COMMONWEALTH UNIVERSITY821 W FRANKLIN ST RICHMOND, VA 232842526	NONE	N/A	COLLEGE SCHOLARSHIP	1,500
UMBAUGH ASHLEY - LONGWOOD UNIVERSITY201 HIGH STREET FARMVILLE, VA 23909	NONE	N/A	COLLEGE SCHOLARSHIP	1,500
WILSON KARI - UNIV OF MARY WASHINGTON1301 COLLEGE AVENUE FREDERICKSBURG, VA 22401	NONE	N/A	COLLEGE SCHOLARSHIP	1,500
KANE THOMAS - GROVE CITY COLLEGE100 CAMPUS DRIVE GROVE CITY, PA 16127	NONE	N/A	COLLEGE SCHOLARSHIP	1,500
FUSSELLS JENNIFER - LYNCHBURG 1501 LAKESIDE DRIVE LYNCHBURG, VA 24501	NONE	N/A	COLLEGE SCHOLARSHIP	1,500
LOUDOUN LYRIC OPERA525 K EAST MARKET ST 226 LEESBURG, VA 20176	NONE	EXEMPT	GENERAL FUNDS	750
GRACE ANNEX UNITED METHODIST CHURCHCHURCH PURCELLVILLE, VA 20134	NONE	PUBLIC	GENERAL FUNDING	1,000
BLUE RIDGE SPEECH & HEARING 19465 DEERFIELD AVENUE SUITE 201 LANSDOWNE, VA 20176	NONE	PUBLIC	GENERAL FUNDING	500
PURCELLVILLE PRESERVATION ASSOCIATION INC PURCELLVILLE, VA 20132	NONE	PUBLIC	GENERAL FUNDING	1,000
LOUDOUN VALLEY HIGH SCHOOL ATTN MS MARTHA AKERS340 N MAPLE AVE PURCELLVILLE, VA 20132	NONE	PUBLIC	PRIVIDE FUNDS FOR STUDENT FUNCTIONS	3,750
WATERFORD FOUNDATION INCPO BOX 275 WATERFORD, VA 20197	NONE	PUBLIC	MAINTENANCE OF HISTORIC CEMETERY	500
Total . . . . ▶ **3a**				59,825

Form 990PF Part XV Line 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*				
ST PETERS EPISCOPAL CHURCHPO BOX 548 PURCELLVILLE,VA 20134	NONE	PUBLIC	GENERAL FUNDING	1,000
PURCELLVILLE BAPTIST CHURCH 601 YAXLEY DRIVE PURCELLVILLE,VA 20132	NONE	PUBLIC	GENERAL FUNDING	1,000
BETHANY UNITED METHODIST CHURCHPO BOX 487 PURCELLVILLE,VA 20134	NONE	PUBLIC	GENERAL FUNDING	1,000
PURCELLVILLE ASSEMBLY OF GOD PO BOX 26 PURCELLVILLE,VA 20134	NONE	PUBLIC	GENERAL FUNDING	1,000
ST ANDREWS PRESBYTERIAN CHURCH711 W MAIN STREET PURCELLVILLE,VA 20132	NONE	PUBLIC	GENERAL FUNDING	2,000
VSA ARTS OF LOUDOUN COUNTY PO BOX 6645 LEESBURG,VA 20178	NONE	PUBLIC	GENERAL FUNDING	1,000
LOUDOUN SYMPHONYPO BOX 4478 LEESBURG,VA 201778552	NONE	PUBLIC	COMMUNITY CONCERTS	2,000
PURCELLVILLE LIBRARY ADVISORYBOARD PURCELLVILLE,VA 201340613	NONE	PUBLIC	GENERAL FUNDING	3,000
FRIENDS OF FRANKLIN PARK ARTS CENTERPO BOX 2127 PURCELLVILLE,VA 20134	NONE	PUBLIC	FUNDING FOR STUDIO TOUR	1,000
MOUNTAIN VIEW ELEMENTARY SCHOOL36803 ALLDER SCHOOL ROAD PURCELLVILLE,VA 20132	NONE	EDUCATIONAL	GENERAL FUNDING	2,325
Total . . . . ▶ **3a**				59,825

TY 2009 Investments Corporate Bonds Schedule

Name: CLARENCE L ROBEY CHARITABLE TRUST

EIN: 54-6138649

Name of Bond	End of Year Book Value	End of Year Fair Market Value
BANK OF AMERICA 4.875% 1/15/13	24,604	25,999
CISCO SYSTEMS INC 5.5% 2/22/16	24,118	27,447
FHLM 4.5% 7/15/13	24,643	26,984
FHLM 4.75% 11/17/15	24,541	27,047
FNMA 5% 4/15/15	51,187	54,953
FNMA 5.375% 11/15/11	52,622	53,906
FNMA 4.25% 8/15/10	24,882	25,609
FNMA 4.75% 12/15/10	24,720	25,985
GOLDMAN SACHS GROUP INC 5.7%	26,485	26,892
GOLDMAN SACHS GROUP INC 5.15%	24,695	26,447
MORGAN STANLEY 4.25% 5/15/10	24,943	25,307
PFIZER INC 4.5% 2/15/14	24,271	26,498
CITIGROUP INC 5.625% 8/27/12	26,296	25,714
BELLSOUTH TELECOMM 5.875%		
GTE CALIFORNIA DEB 6.7%		

TY 2009 Investments Corporate Stock Schedule

Name: CLARENCE L ROBEY CHARITABLE TRUST
EIN: 54-6138649

Name of Stock	End of Year Book Value	End of Year Fair Market Value
ABB LTD SPONS ADR	11,455	13,179
AT&T INC	5,398	5,466
ABBOTT LABORATORIES	4,450	4,319
AMGEN INC	6,387	6,506
ANADARKO PETE CORP	2,671	6,242
APACHE CORPORATION	2,441	3,095
APPLIED MATERIALS	4,349	4,600
ARCHER-DANIELS-MIDLAND CO		
AVERY DENNISON CORP	5,642	5,838
BANK OF AMERICA CORP		
BERKSHIRE HATHAWAY INC CLASS B	9,782	9,858
CVS CAREMARK CORP	6,363	6,603
CARDINAL HEALTH INC		
CHEVRON CORP	4,467	4,619
CISCO SYSTEMS	2,936	6,584
CLOROX CO		
COMCAST CORP CLASS A	4,241	4,299
CONOCOPHILLIPS	3,502	5,362
CORNING INC	3,245	5,600
DELL INC		
DISNEY, WALT COMPANY	6,527	6,450
DUPONT, E.I. DE NEMOURS CO	3,865	4,040
EBAY INC		
EDISON INTL	1,761	1,739
EMERSON ELECTRIC COMPANY	2,573	3,408
GENERAL ELECTRIC COMPANY	1,321	5,447
HOME DEPOT INC		
INTEL	2,887	6,834
JOHNSON & JOHNSON	3,815	4,509
KRAFT FOODS INC A	6,345	5,300
MARATHON OIL CORPORATION		
MEDTRONIC INC	6,727	6,157
MERCK & OC INC	8,000	8,952
MICROSOFT CORP	10,709	12,344
MONSANTO CO	5,440	4,905
ORACLE SYS CORP	6,358	8,463
PFIZER INC		
PROCTER AND GAMBLE	2,836	4,244
QUAL COMM INC	6,384	6,939
S&P 500 DEPOSITORY RECEIPT		
SCHLUMBERGER LTD	2,812	3,580
SMITH INTL INC	2,516	2,038
STAPLES INC	3,617	4,549
SYSCO CORPORATION	2,896	5,588
TARGET CORP		
TRAVELERS COMPANIES INC	4,049	4,986
US BANCORP	2,965	2,251
VERIZON COMMUNICATIONS INC		
WELLPOINT INC	5,122	7,578
WELLS FARGO & CO	5,829	6,073
WYETH		
TRANSOCEAN LTD	6,973	7,038
ADIDAS AG	6,924	7,621
AMETEK INC	6,928	7,648
AMPHENOL CORP CL A	6,912	8,312
ADR AXA-UAP FKA AXA SA SPONS	7,108	6,630
BANCO BRADESCO S A	6,691	6,998
BANCO SANTANDER CENT HISPANO	6,938	6,905
BANK OF NOVA SCOTIA	7,197	7,478
BHP BILLITON LIMITED	6,600	7,658
BIO-RAD LABS CLASS A	6,996	7,234
BRIGGS & STRATTON CORP	6,910	6,736
CAMPBELL SOUP COMPANY	6,859	7,098
CREDIT SUISSE GROUP SPONS ADR	7,144	6,391
DISCOVERY COMMUNICATIONS A	6,798	7,361
DREAMWORKS ANIMATION SKG INC	6,698	7,591
ENI SPA SPONSORED ADR	6,588	6,579
EXELON CORP	6,913	6,842
FISERV	7,219	7,272
FLOWERS FOOD INC WI	6,682	6,415
GOOGLE INC	1,796	3,100
HANOVER INSURANCE GROUP INC	6,846	7,109
HEWITT ASSOCIATES INC CLASS A	7,120	7,184
HEWLETT PACKARD COMPANY	6,857	7,727
INDEX LABORATORIES	6,877	6,949
IHS INC	6,905	7,125
INFOSYS TECHNOLOGIES SP ADR	6,936	7,738
INTERCONTINENTALEXCHANGE INC	7,060	7,300
INTL BUSINESS MACHINES	7,138	7,854
INTERVAL LEISURE GORUP	6,912	6,609
LABORATORY CORP OF AMERICAN	6,928	7,484
LEUCADIA NATIONAL CORP	6,798	6,661
MANULIFE FINL CORP	6,875	6,236
MCKESSON CORPORATION	6,986	7,500
METLIFE INC	6,973	7,070
NEUTRAL TANDEM INC	6,573	5,915
NOBLE ENERGY INC	7,365	7,834
PALL CORPORATION	3,541	4,525
PEPSOCO INC	3,822	4,560
PHASE FORWARD INC	6,915	7,670
ROCHE HOLDING LTD ADR	6,909	7,228
ROCK-TENN COMPANY 'A'	6,745	7,057
ROPER INDS INC	6,797	7,332
RUDDICK CORPORATION	6,773	6,433
SEI INVESTMENTS COMPANY	6,808	6,307
SAP AKTIENGESELLSCHAFT ADR	6,728	6,085
STEEL DYNAMICS INC	6,950	6,911
STERICYCLE INC	6,784	7,724
SUNCOR ENERGY, INC	6,878	7,062
SYBASE INC	7,072	7,812
TELEFONICA S A	6,871	7,099
TOYOTA MOTOR CORPORATION ADR	6,642	6,733
UNILEVER PLC SPONSORED ADR	7,102	8,294
VALSPAR CORP	6,939	7,056
VODAFONE GROUP PLC	8,554	8,543
WESTERN UNION COMPANY	6,869	6,786
WHITING PETROLEUM CORP	6,797	8,574
WILEY, JOHN & SONS INC CLASS A	6,926	8,376
WOLVERINE WORLD WIDE INC	6,729	7,077
ZENITH NATIONAL INSURANCE CORP	6,952	6,547
NOBLE CORPORATION	6,991	7,326

TY 2009 Investments - Other Schedule

Name: CLARENCE L ROBEY CHARITABLE TRUST

EIN: 54-6138649

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
FORWARD INTL SMALL CO #111	AT COST	30,918	30,616
LAZARD EMERGING MKTS #638	AT COST	57,291	58,944
CREDIT SUISSE COMMODITY RTN	AT COST	31,101	32,901
ISHARES SILVER TRUST	AT COST	6,691	6,781
SPDR GOLD TRUST	AT COST	3,595	5,366
ARTISAN MID CAP VAL #1464			
FIDELITY ADV SMALL CAP #298			
GOLDMAN SACHS GROWTH #1132			
HARBOR INTERNATIONAL #11			
NORTHERN SMALL CAP VAL #603			
GOLDMAN SACHS MID CAP VAL			
PIMCO TOTAL RTN #35			
VANGUARD MID CAP GROWTH #301			

TY 2009 Other Decreases Schedule

Name: CLARENCE L ROBEY CHARITABLE TRUST

EIN: 54-6138649

Description	Amount
DIFF IN MUTUAL FDS REC/REPORTED	1,840
ADJUSTMENT FOR ROUNDING	3

TY 2009 Other Increases Schedule

Name: CLARENCE L ROBEY CHARITABLE TRUST

EIN: 54-6138649

Description	Amount
ACCRUED INTEREST PAID 2008	168