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Form **990-PF**

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

OMB No 1545-0052

2009Department of the Treasury
Internal Revenue Service

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

For calendar year 2009, or tax year beginning , and ending

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 THE SUNSHINE LADY FOUNDATION, INC.		A Employer identification number 56-1977987
	Number and street (or P O box number if mail is not delivered to street address) P.O. BOX 1074	Room/suite	B Telephone number (see page 10 of the instructions) 252-240-2788
	City or town, state, and ZIP code MOREHEAD CITY NC 28557		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 ☐
H Check type of organization ☐ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☒ Other taxable private foundation			E If private foundation status was terminated under section 507(b)(1)(A), check here ☐
I Fair market value of all assets at end of year (from Part II, col (c), line 16) \$ 1,936,246 (Part I, column (d) must be on cash basis)		J Accounting method ☒ Cash ☐ Accrual ☐ Other (specify)	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) (see page 11 of the instructions))

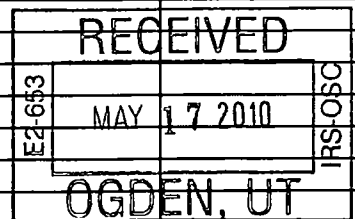
	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received (attach schedule)	10,108,279			
2 Check ☐ if the foundation is not required to attach Sch B				
3 Interest on savings and temporary cash investments				
4 Dividends and interest from securities	12	12	12	
5a Gross rents				
b Net rental income or (loss)				
6a Net gain or (loss) from sale of assets not on line 10	-735,011			
b Gross sales price for all assets on line 6a	10,032,107			
7 Capital gain net income (from Part IV, line 2)		4,345,447		
8 Net short-term capital gain			0	
9 Income modifications				
10a Gross sales less returns & allowances				
b Less Cost of goods sold				
c Gross profit or (loss) (attach schedule)				
11 Other income (attach schedule)				
12 Total. Add lines 1 through 11	9,373,280	4,345,459	12	
13 Compensation of officers, directors, trustees, etc				
14 Other employee salaries and wages	108,557	5,500		108,557
15 Pension plans, employee benefits	65,627	3,300		65,627
16a Legal fees (attach schedule) See Stmt 1	3,494			3,494
b Accounting fees (attach schedule) Stmt 2	7,500	500		7,000
c Other professional fees (attach schedule)				
17 Interest				
18 Taxes (attach schedule) (see page 14 of the instructions) Stmt 3	70,000			
19 Depreciation (attach schedule) and depletion Stmt 4	1,588	80		
20 Occupancy	5,699	300		
21 Travel, conferences, and meetings	99,771			
22 Printing and publications	3,420			
23 Other expenses (att sch) Stmt 5	190,004			
24 Total operating and administrative expenses. Add lines 13 through 23	555,660	9,680		184,678
25 Contributions, gifts, grants paid	9,457,588			9,457,588
26 Total expenses and disbursements. Add lines 24 and 25	10,013,248	9,680	0	9,642,266
27 Subtract line 26 from line 12	-639,968			
a Excess of revenue over expenses and disbursements		4,335,779		
b Net investment income (if negative, enter -0-)				
c Adjusted net income (if negative, enter -0-)			12	

For Privacy Act and Paperwork Reduction Act Notice, see page 30 of the instructions.

Form **990-PF** (2009)

SCANNED MAY 19 2010

Operating and Administrative Expenses



F5050

F5050

07

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value		
Assets	1	Cash—non-interest-bearing		222,917	428,429	428,429
	2	Savings and temporary cash investments				
	3	Accounts receivable ▶ Less allowance for doubtful accounts ▶				
	4	Pledges receivable ▶ Less allowance for doubtful accounts ▶				
	5	Grants receivable				
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see page 16 of the instructions)				
	7	Other notes and loans receivable (att. schedule) ▶ 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 (attach schedule)				
	b	Investments—corporate stock (attach schedule) See Stmt 6	2,572,594	1,319,968	1,097,524	
	c	Investments—corporate bonds (attach schedule)				
	11	Investments—land, buildings, and equipment basis ▶ Less accumulated depreciation (attach sch) ▶				
	12	Investments—mortgage loans				
	13	Investments—other (attach schedule)				
	14	Land, buildings, and equipment basis ▶ 38,984 Less accumulated depreciation (attach sch) ▶ Stmt 7 37,425	3,147	1,559	1,559	
15	Other assets (describe ▶ See Statement 8)		408,734	408,734		
16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	2,798,658	2,158,690	1,936,246		
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	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				
	28	Paid-in or capital surplus, or land, bldg, and equipment fund				
	29	Retained earnings, accumulated income, endowment, or other funds	2,798,658	2,158,690		
30	Total net assets or fund balances (see page 17 of the instructions)	2,798,658	2,158,690			
31	Total liabilities and net assets/fund balances (see page 17 of the instructions)	2,798,658	2,158,690			

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	2,798,658
2	Enter amount from Part I, line 27a	2	-639,968
3	Other increases not included in line 2 (itemize) ▶	3	
4	Add lines 1, 2, and 3	4	2,158,690
5	Decreases not included in line 2 (itemize) ▶	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	2,158,690

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	44 SHARES CL A BERKSHIRE HATHAWAY	D	Various	Various
b	100 SHARES CL B BERKSHIRE HATHAWAY	D	05/09/96	Various
c	52 SHARES CL A BERKSHIRE HATHAWAY	D	Various	Various
d	188 SHARES CL B BERKSHIRE HATHAWAY	D	05/09/96	Various
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 4,140,419		946	4,139,473
b 321,974		116,000	205,974
c 4,995,522		4,995,522	
d 574,192		574,192	
e			

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

(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a			4,139,473
b			205,974
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	4,345,447
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	11,140,801	5,356,721	2.079780
2007	14,509,170	7,397,416	1.961384
2006	8,369,525	2,454,614	3.409711
2005	6,907,875	1,408,480	4.904489
2004	6,741,160	1,618,743	4.164441

2 Total of line 1, column (d)	2	16.519805
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	3.303961
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4	2,545,862
5 Multiply line 4 by line 3	5	8,411,429
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	43,358
7 Add lines 5 and 6	7	8,454,787
8 Enter qualifying distributions from Part XII, line 4 If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions on page 18.	8	9,642,266

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	43,358
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	43,358
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	43,358
6	Credits/Payments		
a	2009 estimated tax payments and 2008 overpayment credited to 2009	6a	89,935
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	89,935
8	Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached	8	
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	46,577
11	Enter the amount of line 10 to be Credited to 2010 estimated tax 21,800 Refunded	11	24,777

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
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)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities		X
c Did the foundation file Form 1120-POL for this year?		X
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		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), and Part XV	X	
8a Enter the states to which the foundation reports or with which it is registered (see page 19 of the instructions) NC		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2009 or the taxable year beginning in 2009 (see instructions for Part XIV on page 27)? If "Yes," complete Part XIV	X	
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

N/A

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		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 ► WWW.SUNSHINELADYFDN.ORG	13	X	
14	The books are in care of ► JUDY WOOTEN P.O. BOX 1074 Located at ► MOREHEAD CITY, NC	Telephone no ► 252-240-2788 ZIP+4 ► 28557		
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 ► ☐	
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?	1b	
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))	1c	X
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? 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	
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	N/A	
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	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 2009?	4b	X

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

5a During the year did the foundation pay or incur any amount to			
(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	☐ Yes	☒ No	
(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?	☐ Yes	☒ No	
(3) Provide a grant to an individual for travel, study, or other similar purposes?	☐ Yes	☒ No	
(4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see page 22 of the instructions)	☐ Yes	☒ No	
(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?	☐ Yes	☒ No	
b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see page 22 of the instructions)? Organizations 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? If "Yes," attach the statement required by Regulations section 53.4945-5(d)	N/A ☐ Yes ☐ No		
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? If "Yes" to 6b, file Form 8870			6b 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?	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 (see page 22 of the instructions).**

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
See Statement 9				

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
ANNE EWING P.O. BOX 1074 MOREHEAD CITY NC 28557	EXEC DIRECTO 40.00	65,000	14,817	0

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 ▶**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 COMMUNITY ORGANIZATIONS: GRANTS GIVEN TO VARIOUS COMMUNITY ORGANIZATIONS TO ASSIST YOUTH AND FAMILIES GRANT AMOUNT: \$3,422,029	133,267
2 EDUCATIONAL ORGANIZATIONS/SCHOOLS: GRANTS GIVEN TO VARIOUS EDUCATIONAL AND MENTORING ORGANIZATIONS TO ASSIST INDIVIDUALS GRANT AMOUNT: \$1,830,766	71,297
3 HUMANITARIAN GRANTS-FAMILIES IN CRISIS: PROVIDING FINANCIAL ASSISTANCE TO INDIVIDUALS AND FAMILIES IN NEED GRANT AMOUNT: \$1,166,987	123,762
4 SCHOLARSHIPS: EDUCATION ASSISTANCE GRANT AMOUNT: \$687,311	59,825

Part IX-B Summary of Program-Related Investments (see page 24 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 N/A	
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	4,111,927
b	Average of monthly cash balances	1b	328,200
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	4,440,127
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	4,440,127
4	Cash deemed held for charitable activities Enter 1½ % of line 3 (for greater amount, see page 25 of the instructions) See Statement 10	4	1,894,265
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	2,545,862
6	Minimum investment return. Enter 5% of line 5	6	127,293

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	
2a	Tax on investment income for 2009 from Part VI, line 5	2a	
b	Income tax for 2009 (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 page 25 of the 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 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	9,642,266
b	Program-related investments—total from Part IX-B	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
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	9,642,266
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	43,358
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	9,598,908

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				
2 Undistributed income, if any, as of the end of 2009:				
a Enter amount for 2008 only				
b Total for prior years 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2009:				
a From 2004				
b From 2005				
c From 2006				
d From 2007				
e From 2008				
f Total of lines 3a through e				
4 Qualifying distributions for 2009 from Part XII, line 4 ▶ \$ _____				
a Applied to 2008, but not more than line 2a				
b Applied to undistributed income of prior years (Election required—see page 26 of the instructions)				
c Treated as distributions out of corpus (Election required—see page 26 of the instructions)				
d Applied to 2009 distributable amount				
e Remaining amount distributed out of corpus				
5 Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a))				
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5				
b Prior years' undistributed income Subtract line 4b from line 2b				
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				
d Subtract line 6c from line 6b Taxable amount—see page 27 of the instructions				
e Undistributed income for 2008 Subtract line 4a from line 2a Taxable amount—see page 27 of the instructions				
f Undistributed income for 2009 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2010				
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)				
8 Excess distributions carryover from 2004 not applied on line 5 or line 7 (see page 27 of the instructions)				
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a				
10 Analysis of line 9:				
a Excess from 2005				
b Excess from 2006				
c Excess from 2007				
d Excess from 2008				
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					N/A
b	Check box to indicate whether the foundation is a private operating foundation described in section	☒ 4942(j)(3) or	☐ 4942(j)(5)			
2a	Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed	Tax year	Prior 3 years			(e) Total
		(a) 2009	(b) 2008	(c) 2007	(d) 2006	
		12	3,265	16,262	9,740	29,279
b	85% of line 2a	10	2,775	13,823	8,279	24,887
c	Qualifying distributions from Part XII, line 4 for each year listed	9,642,266	11,140,801	14,509,170	8,433,658	43,725,895
d	Amounts included in line 2c not used directly for active conduct of exempt activities	8,083,003	7,859,062	12,399,065	6,998,689	35,339,819
e	Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c	1,559,263	3,281,739	2,110,105	1,434,969	8,386,076
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	84,862	178,557	246,581	81,821	591,821
c	"Support" alternative test—enter					
	(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
	(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					
	(3) Largest amount of support from an exempt organization					
	(4) Gross investment income					

Part XV Supplementary Information (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year—see page 28 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)) DORIS BUFFETT \$9,514,492
b	List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest N/A
2	Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:
	Check here ☐ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. (see page 28 of the instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d
a	The name, address, and telephone number of the person to whom applications should be addressed THE SUNSHINE LADY FOUNDATION, INC. 252-240-2788 P.O. BOX 1074 MOREHEAD CITY NC 28557
b	The form in which applications should be submitted and information and materials they should include SEE ATTACHED APPLICATIONS
c	Any submission deadlines SEE ATTACHED APPLICATIONS
d	Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors SEE ATTACHED APPLICATIONS

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 MOREHEAD CITY GRANTS P.O. BOX 1074 MOREHEAD CITY NC 28557	NONE	N/A VARIOUS-SEE ATTACHMENT		454,306
SUNBEAM GRANTS P.O. BOX 1074 MOREHEAD CITY NC 28557	NONE	N/A VARIOUS-SEE ATTACHMENT		8,835,682
PEN BAY HEALTHCARE FOUNDA 22 WHITE STREET ROCKLAND ME 04841	NONE	N/A MENTAL HEALTH PROGRAM		167,600
Total				9,457,588
b Approved for future payment N/A				
Total				

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated

Enter gross amounts unless otherwise indicated		Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See page 28 of the instructions)
		(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue:						
a _____				18		
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						
4 Dividends and interest from securities				14	12	
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	-735,011	
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		-734,999	0
13 Total. Add line 12, columns (b), (d), and (e)					-734,999	-734,999

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

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

[illegible]

Schedule B
(Form 990, 990-EZ,
or 990-PF)
Department of the Treasury
Internal Revenue Service

Schedule of Contributors

► Attach to Form 990, 990-EZ, or 990-PF.

OMB No 1545-0047

2009

Name of the organization

Employer identification number

THE SUNSHINE LADY FOUNDATION, INC.

56-1977987

Organization type (check one)

Filers of:

Section:

Form 990 or 990-EZ

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

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

☐ 527 political organization

Form 990-PF

☐ 501(c)(3) exempt private foundation

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

☒ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.

Note. Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

General Rule

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

Special Rules

- ☐ For a section 501(c)(3) organization filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), and received from any one contributor, during the year, a contribution of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, aggregate contributions of more than \$1,000 for use exclusively for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals. Complete Parts I, II, and III.
- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions for use exclusively for religious, charitable, etc., purposes, but these contributions did not aggregate to more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an exclusively religious, charitable, etc., purpose. Do not complete any of the parts unless the General Rule applies to this organization because it received nonexclusively religious, charitable, etc., contributions of \$5,000 or more during the year. ► \$

Caution. An organization that is not covered by the General Rule and/or the Special Rules does not file Schedule B (Form 990, 990-EZ, or 990-PF), but it must answer "No" on Part IV, line 2 of its Form 990, or check the box in the heading of its Form 990-EZ, or on line 2 of its Form 990-PF, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

For Privacy Act and Paperwork Reduction Act Notice, see the Instructions for Form 990, 990-EZ, or 990-PF.

Schedule B (Form 990, 990-EZ, or 990-PF) (2009)

Name of organization THE SUNSHINE LADY FOUNDATION, INC.	Employer identification number 56-1977987
---	---

Part I Contributors (see instructions)

(a) No	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
1	DORIS BUFFET P.O. BOX 1074 MOREHEAD CITY NC 28557	\$ 9,514,492	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II if there is a noncash contribution)
2	JONATHAN L. BRANDT 617 WEST END AVENUE, APT. 5B NEW YORK NY 10024-1607	\$ 5,000	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
3	NEW VISION FBO, INC 1705 WILLIAM ST FREDERICKSBURG VA 22401-5234	\$ 576,334	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II if there is a noncash contribution)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)

Name of organization

THE SUNSHINE LADY FOUNDATION, INC.

Employer identification number

56-1977987

Part II Noncash Property (see instructions)

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
1	60 SHS BERKSHIRE HATHAWAY CL A	\$ 6,156,000	01/05/09
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
1	30 SHS BERKSHIRE HATHAWAY CL A	\$ 2,862,402	07/28/09
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
1	5 SHS BERKSHIRE HATHAWAY CL A	\$ 496,090	12/21/09
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
3	407 PLEASANT ST PROPERTY	\$ 167,600	08/14/09
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
3	1705 WILLIAM ST PROPERTY	\$ 408,734	07/13/09
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	

Form **4562**Department of the Treasury
Internal Revenue Service

(99)

Depreciation and Amortization
(Including Information on Listed Property)

OMB No 1545-0172

2009Attachment
Sequence No **67**

▶ See separate instructions.

▶ Attach to your tax return.

Name(s) shown on return

THE SUNSHINE LADY FOUNDATION, INC.

Identifying number

56-1977987

Business or activity to which this form relates

Indirect Depreciation**Part I Election To Expense Certain Property Under Section 179****Note:** If you have any listed property, complete Part V before you complete Part I.

1	Maximum amount See the instructions for a higher limit for certain businesses	1	250,000
2	Total cost of section 179 property placed in service (see instructions)	2	
3	Threshold cost of section 179 property before reduction in limitation (see instructions)	3	800,000
4	Reduction in limitation Subtract line 3 from line 2. If zero or less, enter -0-	4	
5	Dollar limitation for tax year Subtract line 4 from line 1. If zero or less, enter -0-. If married filing separately, see instructions	5	
6	(a) Description of property	(b) Cost (business use only)	(c) Elected cost
7	Listed property Enter the amount from line 29	7	
8	Total elected cost of section 179 property Add amounts in column (c), lines 6 and 7	8	
9	Tentative deduction Enter the smaller of line 5 or line 8	9	
10	Carryover of disallowed deduction from line 13 of your 2008 Form 4562	10	
11	Business income limitation Enter the smaller of business income (not less than zero) or line 5 (see instructions)	11	
12	Section 179 expense deduction Add lines 9 and 10, but do not enter more than line 11	12	
13	Carryover of disallowed deduction to 2010 Add lines 9 and 10, less line 12	13	

Note: Do not use Part II or Part III below for listed property. Instead, use Part V.**Part II Special Depreciation Allowance and Other Depreciation (Do not include listed property.) (See instr.)**

14	Special depreciation allowance for qualified property (other than listed property) placed in service during the tax year (see instructions)	14	
15	Property subject to section 168(f)(1) election	15	
16	Other depreciation (including ACRS)	16	1,588

Part III MACRS Depreciation (Do not include listed property.) (See instructions.)**Section A**

17	MACRS deductions for assets placed in service in tax years beginning before 2009	17	0
18	If you are electing to group any assets placed in service during the tax year into one or more general asset accounts, check here ☐		

Section B—Assets Placed in Service During 2009 Tax Year Using the General Depreciation System

(a) Classification of property	(b) Month and year placed in service	(c) Basis for depreciation (business/investment use only—see instructions)	(d) Recovery period	(e) Convention	(f) Method	(g) Depreciation deduction
19a 3-year property						
b 5-year property						
c 7-year property						
d 10-year property						
e 15-year property						
f 20-year property						
g 25-year property			25 yrs		S/L	
h Residential rental property			27 5 yrs	MM	S/L	
i Nonresidential real property			27 5 yrs	MM	S/L	
			39 yrs	MM	S/L	

Section C—Assets Placed in Service During 2009 Tax Year Using the Alternative Depreciation System

20a Class life					S/L	
b 12-year			12 yrs		S/L	
c 40-year			40 yrs	MM	S/L	

Part IV Summary (See instructions.)

21	Listed property Enter amount from line 28	21	
22	Total. Add amounts from line 12, lines 14 through 17, lines 19 and 20 in column (g), and line 21 Enter here and on the appropriate lines of your return Partnerships and S corporations—see instructions	22	1,588
23	For assets shown above and placed in service during the current year, enter the portion of the basis attributable to section 263A costs	23	

For Paperwork Reduction Act Notice, see separate instructions.

Form **4562** (2009)

DAA

There are no amounts for Page 2

Federal Statements**Statement 1 - Form 990-PF, Part I, Line 16a - Legal Fees**

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
Indirect Legal Fees	\$ 3,494	\$	\$	\$ 3,494
Total	\$ 3,494	\$ 0	\$ 0	\$ 3,494

Statement 2 - Form 990-PF, Part I, Line 16b - Accounting Fees

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
Indirect Accounting Fees	\$ 7,500	\$ 500	\$	\$ 7,000
Total	\$ 7,500	\$ 500	\$ 0	\$ 7,000

Statement 3 - Form 990-PF, Part I, Line 18 - Taxes

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
EXCISE TAXES	\$ 70,000	\$	\$	\$
Total	\$ 70,000	\$ 0	\$ 0	\$ 0

Statement 4 - Form 990-PF, Part I, Line 19 - Depreciation

Description	Date Acquired	Cost Basis	Prior Year Depreciation	Method	Life	Current Year Depreciation	Net Investment Income	Adjusted Net Income
Depreciation		\$	\$			\$ 1,588	\$	\$
Total		\$ 0	\$ 0			\$ 1,588	\$ 0	\$ 0

Federal Statements

Statement 5 - Form 990-PF, Part I, Line 23 - Other Expenses

<u>Description</u>	<u>Total</u>	<u>Net Investment</u>	<u>Adjusted Net</u>	<u>Charitable Purpose</u>
	\$	\$	\$	\$
Expenses				
REFERENCE MATERIALS	1,095			
OFFICE SUPPLIES	4,697			
TELEPHONE	9,125			
POSTAGE & SHIPPING	4,436			
REPAIRS & MAINTENANCE	5,339			
INSURANCE	24,461			
DUES & SUBSCRIPTIONS	992			
WEBSITE EXPENSE	5,000			
UTILITIES	1,472			
CONSULTING FEES	128,546			
FEES	2,267			
MEALS	2,083			
GIFTS	491			
Total	\$ <u>190,004</u>	\$ <u>0</u>	\$ <u>0</u>	\$ <u>0</u>

Statement 6 - Form 990-PF, Part II, Line 10b - Corporate Stock Investments

<u>Description</u>	<u>Beginning of Year</u>	<u>End of Year</u>	<u>Basis of Valuation</u>	<u>Fair Market Value</u>
1 SH BERKSHIRE HATHAWAY CLASS A	\$ 114,450	\$		\$
622 SHS BERKSHIRE HATHAWAY CLASS B	2,458,144	1,319,968	Cost	1,097,524
Total	\$ 2,572,594	\$ 1,319,968		\$ 1,097,524

Federal Statements

FYE: 12/31/2009

Statement 7 - Form 990-PF, Part II, Line 14 - Land, Building, and Equipment

Description	Beginning Net Book	End Cost / Basis	End Accumulated Depreciation	Net FMV
COMPUTER	\$ 102	\$ 1,244	\$ 1,244	\$
PHONES & PRINTER	42	942	942	
2 FILING CABINETS	20	554	554	
SLF COMPUTER	46	1,443	1,443	
ASB COMPUTER		4,129	4,129	
CHAIR, MAT, BOOKCASES		610	610	
COPIER		1,908	1,908	
COMPUTER	11	1,588	1,588	
PHONES & TRANSCRIBER	19	466	466	
FILING CABINETS		563	563	
COPIER/SHREDDER		479	479	
2 COMPUTERS		2,622	2,622	
COPIER		1,278	1,278	
OKIDATA PRINTER	33	1,917	1,917	
COMPUTER (MHC OFFICE)	67	1,927	1,860	67
COMPUTER, MONITOR, PRINTER	20	2,204	2,184	20
FURNITURE FOR WISP OFFICE	63	611	548	63
TELEPHONES		1,193	1,193	
COMPUTER, DESK, CHAIR		2,002	2,002	
LAPTOP COMPUTER	83	2,500	2,500	
LAPTOP COMPUTER	158	1,881	1,881	
COMPUTER (2)	296	2,211	2,211	
PHONE EQUIPMENT	1,408	2,884	1,888	996
LAPTOP COMPUTER	529	1,270	995	275
PRINTER	250	558	420	138
Total	\$ 3,147	\$ 38,984	\$ 37,425	\$ 1,559

Statement 8 - Form 990-PF, Part II, Line 15 - Other Assets

<u>Description</u>	<u>Beginning of Year</u>	<u>End of Year</u>	<u>Fair Market Value</u>
1705 WILLIAM STREET PROPERTY	\$ <u> </u>	\$ <u>408,734</u>	\$ <u>408,734</u>
Total	\$ <u> 0</u>	\$ <u>408,734</u>	\$ <u>408,734</u>

Federal Statements

Statement 9 - Form 990-PF, Part VIII, Line 1 - List of Officers, Directors, Trustees, Etc.

<u>Name and Address</u>	<u>Title</u>	<u>Average Hours</u>	<u>Compensation</u>	<u>Benefits</u>	<u>Expenses</u>
DORIS BUFFETT P.O. BOX 1074 MOREHEAD CITY NC 28557	PRESIDENT	15.00	0	0	0
DIANE GRIMSLEY P.O. BOX 1074 MOREHEAD CITY NC 28557	V-PRES/TREAS	15.00	0	0	0
MITTY BEAL P.O. BOX 1074 MOREHEAD CITY NC 28557	SECRETARY	15.00	0	0	0
REBECCA CURRIE P.O. BOX 1074 MOREHEAD CITY NC 28557	MEMBER	15.00	0	0	0
ALEX BUFFETT ROZEK P.O. BOX 1074 MOREHEAD CITY NC 28557	MEMBER	15.00	0	0	0

Statement 10 - Form 990-PF, Part X, Line 4 - Cash Deemed Held - Greater Amount Explanation

Description	Amount
The Sunshine Lady Foundation, Inc. required a minimum cash balance of \$1,894,265 in order to cover current administrative expenses and normal charitable disbursements during the month of January 2010. Of this total amount, \$41,822 was needed for administrative expenses and \$1,852,443 was disbursed for charitable and educational purposes.	<u>1,894,265</u>
Total	<u><u>1,894,265</u></u>

Federal Statements

FYE: 12/31/2009

Form 990-PF, Part XV, Line 1a - Managers Who Contributed Over 2% or \$5,000

<u>Name of Manager</u>	<u>Amount</u>
DORIS BUFFETT	\$ 9,514,492
Total	\$ 9,514,492

Form 990-PF, Part XV, Line 2b - Application Format and Required Contents

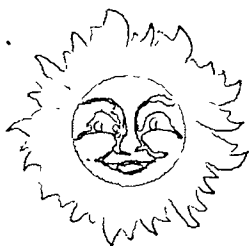
Description
SEE ATTACHED APPLICATIONS

Form 990-PF, Part XV, Line 2c - Submission Deadlines

Description
SEE ATTACHED APPLICATIONS

Form 990-PF, Part XV, Line 2d - Award Restrictions or Limitations

Description
SEE ATTACHED APPLICATIONS



2009 SUNBEAM GRANT APPLICATION FORM

The Sunshine Lady Foundation mission is to invest in organizations and programs dedicated to providing opportunities for the advancement of education, well being and new life choices for disadvantaged people, with special empathy for the working poor and families in crisis.

DATE SUBMITTED _____

RECIPIENT ORGANIZATION (attach IRS letter of determination of tax exemption)

Address _____

Phone / email _____

Contact person _____

PROJECT OR FUND NAME

DESCRIBE BRIEFLY HOW THE FUNDS WILL BE USED

(Please include all requested supporting materials with this application)

AMOUNT REQUESTED _____

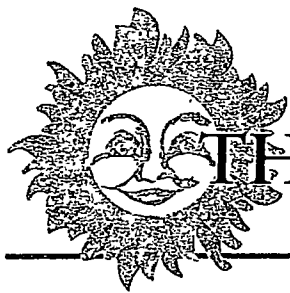
WHEN WILL FUNDS BE NEEDED _____

SUNBEAM'S NAME _____

Phone / email _____

APPROVED or REJECTED by review committee

AUTHORIZED BY: _____, on _____



THE SUNSHINE LADY Foundation, Inc.

SLF Scholarships – PO Box 454 • Morehead City, NC 28557
252-393-7146 • slfscholarships@usa.net

The SUNSHINE LADY Foundation is a private foundation working primarily with students from North Carolina.

Education is the key to success. Every student who is capable, motivated and willing to work hard should have the opportunity to earn a college degree. Our scholarships are for young people who show the greatest promise of success, have financial need, and have made education a number one priority. We expect each student's family to do all that they can to ensure a better future for their children through education. We view each scholarship as an investment in an individual's future as well as an investment in the future of our country.

1. Academic Ability:

Unweighted GPA of 3.2 or better; SAT score preferences:
Old SAT: 1000/1600; new SAT: 1500/2400; ACT: 25 or better

2. Proper Use of English:

Ability to write and speak grammatically correct English;
SAT writing score: minimum 500 on new SAT essay section

3. Financial Need:

Proven need (FAFSA application & results; tax returns)

4. Family/Friend Support:

Willingness to make financial sacrifices and offer advice, support, and encouragement.

We expect all Sunshine Lady scholarship recipients to abstain from self-destructive behaviors that sabotage efforts to be successful. As you become a Sunshine Lady Scholar you will sign a contract pledging to refrain from:

Body piercing (except ears)

Tattooing

Using illegal substances, alcohol or tobacco

Being involved in criminal activity

Having a credit card

Sustaining unhealthy body weight

A healthy lifestyle in terms of nutrition, exercise and general daily activities is necessary to attain your objectives and live life to the fullest. Good citizenship is mandatory.

You are required to maintain a 3.0 GPA for each term of funding.

(attach additional pages if necessary – put your name on each page)

Biographical Information

Full name _____ Birthdate _____ SS# _____
Home address _____ Mailing address _____
Email address _____ County _____ Driver's lic. # _____
Home phone _____ Cell phone _____
Parent/Guardian/Spouse's Name _____
Everyone who lives in your home (give name, age, relationship to you) _____

Name, address, phone number of parent if not living in the home _____

Grandparent's names and professions (before retirement, if retired now) _____

Family members' occupations (for everyone living in your home, list name, occupation and work phone, even if part-time occupation) _____

Who is the one person from whom you seek guidance and advice? _____
What is his/her relationship to you? _____
How will he/she be supportive of your educational endeavors? _____
Describe your community service history. _____
How did you find out about this scholarship? _____
Do you plan to live and work in your home county when you graduate from college? _____
Explain. _____

Academic Information

School you currently attend (name, address, phone number) _____

Your cumulative GPA (unweighted) _____ Your combined SAT score _____
The college you plan to attend _____ Major _____
Reason you chose this college _____

Expected month and year of graduation from college _____

Financial Information

Total annual income of all family members in your home (including part-time work) _____
Annual income of 2nd parent if he/she is not living in the home _____

If your family owns their home, how much is still owed? _____
The monthly mortgage payment _____ The home's tax value _____
Would your family be willing to re-finance/take out a 2nd mortgage or to take out loans for your education?
If not, why not? _____
If your family rents, what is the monthly rent? _____
List of family's major debts (cars, other property, etc.) _____

List of family's major assets (savings, stocks, property, etc.) _____

Amount of money your family has put aside for your education _____
If none (or very little) has been put aside, why? _____

(attach additional pages if necessary – put your name on each page)

—Financial Information; continued—

Name, address and phone number of your current employer _____

If you did not include a letter of reference from your employer, explain _____

Hours you work per week _____ Hourly rate of pay _____

Your job duties _____

What you do with your earnings _____

If you plan to work while at college, the number of hours per week _____

Name of employer _____ Hourly rate _____

If you have a car, what is the year, make and model? _____ Year purchased _____

Purchase price _____ Amount owed _____ Monthly payment _____

Will you take the car to college? _____ If so, who would pay expenses? _____

Would you sell the car to improve your financial situation if necessary? _____

In addition to completing the FAFSA form (copy must be attached to this application), list the other forms of financial assistance/grants/scholarships for which you have applied, and the results so far _____

Estimate your total annual college expenses: Total _____ Tuition/Fees _____

Books _____ Computer _____ Room/Board _____ Travel _____

Other (please give details) _____

Amount you have or expect to have toward this total _____

List sources and amounts included in the expected total: _____

Your own savings/income _____ Federal Loans _____

Scholarships/grants _____

Parents' contributions from savings _____ from loans _____

Parents' contributions from other sources (explain) _____

Grandparents' contributions _____

Other family contributions (explain) _____

Other resources (explain) _____

Explain in detail any unusual family or personal circumstances that have an impact on your financial situation and your ability to pay for college (for example siblings in college, medical crisis expenses, loss of primary income, etc.) _____

How much are you asking the Sunshine Lady Foundation to award for this year's college expenses? _____

I understand that:

- The foundation reserves the right, at its discretion, to cancel or reduce any awards without liability.
- The foundation may do a criminal record check using my driver's license and/or social security number. I give permission for such a check and release any government agency and/or its personnel or representatives and The Sunshine Lady Foundation from any and all liability for sharing such information.
- I am submitting this application for a scholarship award, subject to the terms of The Sunshine Lady Foundation's scholarship program, and I certify that the information in this application is true and correct to the best of my knowledge.

Signature of Applicant

Date

Applicant's Narratives

(Your answers will be used to further assess your writing skills.)
(Handwrite your answers and put your name on each page.
Spelling, grammar and neatness will be considered and WILL
make a difference. Please do your best work.)

1. Define what being a "good citizen" means to you.
 2. Name someone, not in your family, that you believe is a good citizen and explain why.
 3. Describe yourself in 10 years, in terms of the "good citizen" you have become. What goals must you achieve to get there? What are you doing now to achieve those goals?
 4. Choose any one social issue of today and explain how you feel about this issue and why.
 5. If you could ask one question of any living or deceased U.S. president, to whom and what would you ask? Why?
 6. Why are you going to college? How will your college degree contribute to your life in general and to being a good citizen?
 7. Who influenced you to want to go to college? When did this occur? How? What did he or she do?
 8. Which of your accomplishments, thus far, makes you the proudest? Why?
 9. What are your greatest strengths? Weaknesses? How are/will you overcome your weaknesses? Maximize your strengths?
 10. Would you consider delaying college for a year to earn money to improve your finances? Explain.
-

Additional Questions for Applicants Already Attending College

1. How has your life changed since you began college?
 2. What have been your biggest surprises? Disappointments? Satisfactions?
 3. Who/what has been the greatest help to you? Who/what has discouraged you the most?
 4. Have you ever considered dropping out of school? Why? What convinced you to stay?
 5. What new time management and study skills have you found most helpful?
-

Parent/Guardian/Mentor's Narrative

1. What is your name? Your age and relationship to the applicant?
2. What is the highest level of school you completed? Do you wish you had gone further? Why or why not?
3. Why do you want this applicant to go to college? How long have you been planning for it?
4. What are your goals for this applicant?
5. What do you think are the major obstacles to reaching these goals?
6. Describe the applicant as you would like to see him/her in 10 years.
7. What are the applicant's strengths and weaknesses? How will they affect his/her goals?
8. Explain your thoughts on the applicant's having a "full college experience", which includes not coming home often. What will you do to support such an experience?
9. Explain your level of commitment (financial, emotional, other) to the applicant's college education opportunity and how you are carrying out this commitment.

Grants Made through Morehead City Account
January through December 2009

Grants	<u>Exempt Status</u>	<u>Awarded to</u>	<u>Amount</u>
Scholarships			
Adjunct Scholarship Expense			
Resolution		Christina Long	500 00
Resolution		Glen Lennox-Grubb Properties	500 00
Resolution		Cheryl Ann Sola	1,000 00
Resolution		Sarah Katherine Noe	1,000 00
Resolution		Amanda C Lockhart	500 00
Resolution		Evan Patton	500 00
Resolution		The Greenhouse Apartments	4,000 00
Resolution		Amanda C Lockhart	500 00
Resolution		Cheryl Ann Sola	1,000 00
Resolution		Amanda C Lockhart	500 00
Resolution		Glen Lennox-Grubb Properties	500 00
Resolution		Minxue Lin	500 00
Resolution		Amanda C Lockhart	500 00
Resolution		Cheryl Ann Sola	1,000 00
Resolution		Minxue Lin	500 00
Resolution		Glen Lennox-Grubb Properties	500 00
Resolution		Glen Lennox-Grubb Properties	500 00
Resolution		Glen Lennox-Grubb Properties	0 00
Resolution		Evan Patton	500 00
Resolution		Rachel Potter	500 00
Resolution		Amanda C Lockhart	400 00
Resolution		Amanda C Lockhart	400 00
Resolution		Weatherbee Realty	225 00
Resolution		N H Bragg	1,600 00
Resolution		Amanda C Lockhart	400 00
Resolution		Weatherbee Realty	225 00
Resolution		Rex Healthcare	1,945 00
Resolution		US Department of Education	2,250 00
Resolution		Amanda C Lockhart	400 00

Grants Made through Morehead City Account
January through December 2009

<u>Exempt Status</u>	<u>Awarded to</u>	<u>Amount</u>
Resolution	Weatherbee Realty	225 00
Resolution	Weatherbee Realty	225 00
Total Adjunct Scholarship Expense		23,295 00
GEMS		
509(a)1 Community College	Cape Fear Community College	2,000 00
501(c)3 Educational Organization	University of NC @ Chapel Hill	2,000 00
Total GEMS		4,000 00
Other Scholarship Expenses		
Resolution	Pomegranate-planners for scholars	719 29
Resolution	Amazon-reference books for scholars	236 40
Resolution	Amazon-reference books for scholars	244 08
Resolution	Amazon-reference books for scholars	261 60
Total Other Scholarship Expenses		1,461 37
Post Secondary		
509(a)1 College Summer Scholarship	University of NC @ Wilmington	2,500 00
501(c)3 College Scholarship	East Carolina University	2,500 00
501(c)3 College Scholarship	NC State University	2,500 00
501(c)3 College Scholarship	Appalachian State University	2,500 00
509(a)1 College Summer Scholarship	University of NC @ Wilmington	1,500 00
509(a)1 College Summer Scholarship	University of NC @ Wilmington	2,500 00
501(c)3 College Scholarship	Clemson University	2,500 00
501(c)3 College Scholarship	NC State University	2,500 00
501(c)3 College Scholarship	Elon University	2,500 00
501(c)3 Educational Organization	Mount Olive College	2,500 00
501(c)3 College Scholarship	East Carolina University	2,500 00
501(c)3 College Scholarship	Gardner-Webb University	3,000 00
501(c)3 College Scholarship	East Carolina University	2,500 00
501(c)3 Educational Organization	Johnson C Smith University	2,500 00
509(a)1 College Summer Scholarship	University of NC @ Wilmington	2,500 00
509(a)1 College Summer Scholarship	University of NC @ Wilmington	3,000 00

Grants Made through Morehead City Account
January through December 2009

Exempt Status	Awarded to	Amount
501(c)3 Educational Organization	Carteret Community College	2,000 00
509(a)1 College Summer Scholarship	University of NC @ Wilmington	2,000 00
501(c)3 College Scholarship	NC State University	2,500 00
501(c)3 College Scholarship	East Carolina University	2,500 00
501(c)3 College Scholarship	NC State University	2,500 00
501(c)3 College Scholarship	NC State University	2,500 00
509(a)1 College Summer Scholarship	University of NC @ Wilmington	3,000 00
501(c)3 Educational Organization	Johnson & Wales University	3,000 00
509(a)1 College Summer Scholarship	University of NC @ Wilmington	2,500 00
501(c)3 College Scholarship	East Carolina University	1,500 00
509(a)1 College Summer Scholarship	Cartert Community College	1,000 00
501(c)3 College Scholarship	Brigham Young University	2,500 00
509(a)1 College Summer Scholarship	University of NC @ Wilmington	2,500 00
501(c)3 College Scholarship	East Carolina University	4,500 00
501(c)3 College Scholarship	NC State University	2,500 00
501(c)3 College Scholarship	East Carolina University	3,000 00
501(c)3 College Scholarship	NC State University	2,500 00
501(c)3 College Scholarship	NC State University	0 00
501(c)3 College Scholarship	East Carolina University	2,500 00
501(c)3 College Scholarship	NC State University	2,000 00
501(c)3 College Scholarship	NC State University	2,500 00
501(c)3 College Scholarship	NC State University	2,500 00
501(c)3 Educational Organization	Campbell University-Graduate Studies	2,000 00
501(c)3 College Scholarship	NC State University	0 00
501(c)3 College Scholarship	East Carolina University	2,000 00
501(c)3 College Scholarship	East Carolina University	2,500 00
501(c)3 College Scholarship	Penn State University	2,500 00
501(c)3 College Scholarship	University of West Georgia	2,500 00
501(c)3 College Scholarship	Lee University	1,500 00
501(c)3 Educational Organization	University of NC @ Greensboro	3,000 00
501(c)3 College Scholarship	University Of NC @ Charlotte	2,500 00
501(c)3 Educational Organization	University of NC @ Chapel Hill	2,500 00
501(c)3 Educational Organization	University of NC @ Chapel Hill	2,500 00

Grants Made through Morehead City Account
January through December 2009

Exempt Status	Awarded to	Amount
501(c)3 College Scholarship	Wake Forest University	2,500 00
501(c)3 Educational Organization	University of NC @ Chapel Hill	2,500 00
501(c)3 College Scholarship	Appalachian State University	2,500 00
501(c)3 Educational Organization	University of South Carolina Upstate	3,000 00
501(c)3 Educational Organization	University of NC @ Chapel Hill	2,500 00
501(c)3 Educational Organization	University of NC @ Chapel Hill	3,000 00
501(c)3 College Scholarship	The Eastman School of Music	3,000 00
501(c)3 College Scholarship	Penn State University	2,500 00
501(c)3 Educational Organization	University of NC @ Chapel Hill	2,500 00
501(c)3 Educational Organization	University of NC @ Chapel Hill	2,500 00
501(c)3 Educational Organization	Wright State University	5,000 00
501(c)3 Educational Organization	University of NC @ Chapel Hill	3,000 00
501(c)3 Educational Organization	Virginia Tech	2,500 00
501(c)3 College Scholarship	Meredith College	2,500 00
501(c)3 Educational Organization	Randolph College	2,500 00
509(a)1 College Summer Scholarship	Cartert Community College	0 00
501(c)3 College Scholarship	Bridgewater College	2,500 00
501(c)3 College Scholarship	Rivier College	2,500 00
501(c)3 College Scholarship	East Carolina University	3,000 00
501(c)3 Educational Organization	New York University	2,500 00
501(c)3 Educational Organization	Wright State University	5,000 00
501(c)3 Educational Organization	Hampshire College	2,500 00
501(c)3 College Scholarship	NC State University	2,500 00
501(c)3 Educational Organization	University of NC @ Chapel Hill	2,000 00
501(c)3 Educational Organization	New York University	5,000 00
501(c)3 Educational Organization	Biola University	2,500 00
501(c)3 College Scholarship	Texas Woman's University	2,500 00
501(c)3 Educational Organization	Biola University	3,000 00
501(c)3 College Scholarship	VOID	0 00
501(c)3 College Scholarship	Rhode Is College School of Social Work	2,500 00
501(c)3 Educational Organization	Spelman College	3,000 00
501(c)3 College Scholarship	NC State University	2,000 00
501(c)3 Educational Organization	Carteret Community College	0 00

Grants Made through Morehead City Account
January through December 2009

Exempt Status	Awarded to	Amount
501(c)3 College Scholarship	Penn State University	1,400 00
501(c)3 College Scholarship	NCSU Summer School	1,250 00
501(c)3 Educational Organization	University of NC @ Chapel Hill	1,000 00
501(c)3 Educational Organization	Campbell University-Gratuade Studies	1,200 00
501(c)3 Educational Organization	Johnson & Wales University	3,000 00
501(c)3 College Scholarship	Rivier College	0 00
501(c)3 College Scholarship	Penn State University	1,200 00
501(c)3 College Scholarship	NC State University	1,400 00
509(a)1 College Summer Scholarship	University of NC @ Wilmington	1,000 00
501(c)3 Educational Organization	Mount Olive College	2,000 00
501(c)3 College Scholarship	East Carolina University	1,000 00
501(c)3 Educational Organization	University of NC @ Chapel Hill	5,000 00
509(a)1 College Summer Scholarship	University of NC @ Wilmington	600 00
509(a)1 College Summer Scholarship	Cartert Community College	0 00
509(a)1 College Summer Scholarship	Cartert Community College	1,000 00
501(c)3 College Scholarship	NC State University	2,200 00
501(c)3 College Scholarship	East Carolina University	1,000 00
501(c)3 College Scholarship	NC State University	2,500 00
501(c)3 College Scholarship	East Carolina University	2,500 00
501(c)3 College Scholarship	Penn State University	2,500 00
501(c)3 College Scholarship	NC State University	2,500 00
509(a)1 College Summer Scholarship	University of NC @ Wilmington	2,500 00
501(c)3 College Scholarship	Appalachian State University	2,500 00
509(a)1 College Summer Scholarship	University of NC @ Wilmington	2,500 00
501(c)3 College Scholarship	The Eastman School of Music	3,000 00
501(c)3 College Scholarship	NC State University	2,000 00
501(c)3 Educational Organization	University of NC @ Chapel Hill	2,500 00
501(c)3 Educational Organization	Campbell University-Gratuade Studies	1,000 00
501(c)3 Educational Organization	Mount Olive College	0 00
509(a)1 College Summer Scholarship	University of NC @ Wilmington	2,500 00
501(c)3 College Scholarship	East Carolina University	2,000 00
501(c)3 College Scholarship	NC State University	2,500 00
501(c)3 College Scholarship	Lee University	2,500 00

Grants Made through Morehead City Account
January through December 2009

Exempt Status	Awarded to	Amount
501(c)3 College Scholarship	Texas Woman's University	2,500 00
509(a)1 College Summer Scholarship	University of NC @ Wilmington	2,500 00
509(a)1 College Summer Scholarship	University of NC @ Wilmington	2,500 00
501(c)3 Educational Organization	Randolph College	2,500 00
501(c)3 Educational Organization	Biola University	3,000 00
501(c)3 College Scholarship	NC State University	2,500 00
501(c)3 College Scholarship	NC State University	2,500 00
501(c)3 College Scholarship	University Of NC @ Charlotte	2,500 00
501(c)3 Educational Organization	Virginia Tech	2,500 00
501(c)3 College Scholarship	Meredith College	2,500 00
501(c)3 College Scholarship	NC State University	2,500 00
501(c)3 College Scholarship	NC State University	2,500 00
501(c)3 College Scholarship	East Carolina University	2,500 00
501(c)3 College Scholarship	East Carolina University	2,000 00
501(c)3 Educational Organization	Biola University	2,500 00
501(c)3 College Scholarship	Brigham Young University	2,500 00
501(c)3 Educational Organization	University of NC @ Chapel Hill	2,500 00
501(c)3 College Scholarship	NC State University	2,500 00
501(c)3 College Scholarship	Clemson University	2,500 00
501(c)3 Educational Organization	University of NC @ Chapel Hill	1,500 00
501(c)3 Educational Organization	University of NC @ Chapel Hill	2,500 00
501(c)3 College Scholarship	East Carolina University	2,500 00
501(c)3 College Scholarship	East Carolina University	2,500 00
509(a)1 College Summer Scholarship	University of NC @ Wilmington	2,500 00
501(c)3 Educational Organization	University of NC @ Chapel Hill	2,500 00
501(c)3 Educational Organization	University of NC @ Chapel Hill	2,500 00
509(a)1 College Summer Scholarship	University of NC @ Wilmington	2,500 00
501(c)3 College Scholarship	NC State University	2,500 00
501(c)3 College Scholarship	Meredith College	2,500 00
501(c)3 Educational Organization	Mount Olive College	0 00
501(c)3 Educational Organization	University of NC @ Chapel Hill	2,000 00
509(a)1 College Summer Scholarship	University of NC @ Wilmington	2,500 00
501(c)3 College Scholarship	Asbury College	2,500 00

Grants Made through Morehead City Account
January through December 2009

Exempt Status	Awarded to	Amount
509(a)1 College Summer Scholarship	University of NC @ Wilmington	2,500 00
501(c)3 College Scholarship	Emmanuel College	2,500 00
501(c)3 College Scholarship	Covenant College	2,500 00
501(c)3 College Scholarship	Tulane University	2,500 00
501(c)3 Educational Organization	Hampshire College	2,500 00
501(c)3 College Scholarship	Penn State Schreyer Honors College	2,500 00
509(a)1 College Summer Scholarship	University of NC @ Wilmington	2,500 00
509(a)1 College Summer Scholarship	University of NC @ Wilmington	2,000 00
509(a)1 College Summer Scholarship	University of NC @ Wilmington	2,500 00
Beloit College	Beloit College	2,500 00
501(c)3 College Scholarship	Bridgewater College	2,500 00
501(c)3 Educational Organization	University of NC @ Chapel Hill	2,500 00
501(c)3 College Scholarship	Elon University	2,500 00
501(c)3 College Scholarship	NC State University	2,000 00
501(c)3 College Scholarship	NC State University	2,500 00
509(a)1 College Summer Scholarship	University of NC @ Wilmington	2,500 00
501(c)3 College Scholarship	Boston University	2,500 00
501(c)3 College Scholarship	University of West Georgia	2,500 00
501(c)3 Educational Organization	University of NC @ Chapel Hill	2,500 00
501(c)3 Educational Organization	University of NC @ Greensboro	1,500 00
501(c)3 College Scholarship	College of Charleston	2,000 00
501(c)3 College Scholarship	East Carolina University	1,500 00
509(a)1 College Summer Scholarship	University of NC @ Wilmington	2,500 00
501(c)3 College Scholarship	East Carolina University	2,500 00
501(c)3 Educational Organization	New York University	5,000 00
501(c)3 College Scholarship	East Carolina University	2,500 00
501(c)3 College Scholarship	Elon University	2,500 00
501(c)3 College Scholarship	East Carolina University	1,500 00
501(c)3 College Scholarship	Tyler Junior College	5,000 00
501(c)3 College Scholarship	Appalachian State University	3,000 00
501(c)3 College Scholarship	NC State University	2,500 00
refund		-1,000 00
509(a)1 College Summer Scholarship	Cartert Community College	1,000 00

Grants Made through Morehead City Account
January through December 2009

<u>Exempt Status</u>	<u>Awarded to</u>	<u>Amount</u>
509(a)1 College Summer Scholarship	Cartert Community College	1,000 00
501(c)3 Educational Organization	Spelman College	3,000 00
501(c)3 College Scholarship	NC State University	1,100 00
Total Post Secondary		422,350 00
Secondary		
509(a)1 High School Scholarship	Blue Ridge School	2,000 00
Total Secondary		2,000 00
Special Studies		
501(c)3	Duke TIP Summer Studies	1,200 00
University of Glasgow-Study Abroad	University of Glasgow-Study Abroad	0 00
Doris Buffett - Sunbeam	Bank of America	310 00
Sunshine Lady Foundation - Sunbeam Acct		-310 00
Total Special Studies		1,200 00
Total Scholarships		454,306 37

Grants through Sunbeam and Mercantile Brokerage Accounts
January through December 2009

<u>Recipient</u>	<u>Account</u>	<u>Amount</u>
Grants		
Afghanistan		
Margold Fund	New Sunbeam First Citizens	32,500 00
Friends American University Afghanistan	Mercantile brokerage	44,371 48
Friends American University Afghanistan	New Sunbeam First Citizens	5,628 52
Initiative to Educate Afghan Women	New Sunbeam First Citizens	5,230 02
Initiative to Educate Afghan Women	Mercantile brokerage	44,769 98
Margold Fund	Mercantile brokerage	90,801 54
Initiative to Educate Afghan Women	Mercantile brokerage	148,195 79
Margold Fund	Mercantile brokerage	66,698 20
Margold Fund	New Sunbeam First Citizens	4,500 26
Total Afghanistan		442,695 79
 Camps- Organizational support		
Circle de Luz	New Sunbeam First Citizens	2,300 00
Clemson University Outdoor Lab	New Sunbeam First Citizens	34,000 00
Total Camps- Organizational support		36,300 00
 Camps - Individual scholarships		
Camp Sea Gull	New Sunbeam First Citizens	410.00
Camp Diversity Foundation, Inc	New Sunbeam First Citizens	3,500 00
Kenny Brooks	New Sunbeam First Citizens	2,750 00
Communities in Schools - Brunswick, Inc	New Sunbeam First Citizens	3,000 00
Eastside YMCA	New Sunbeam First Citizens	557 00
Nature Camp	New Sunbeam First Citizens	1,400 00
Boys & Girls Club of Coastal Carolina	New Sunbeam First Citizens	770 00
Total Camps - Individual scholarships		12,387 00
 Community Organization -Family		
Challenge Grants		
Saint Francis of Assisi Service Dog Fdn	New Sunbeam First Citizens	50,000 00
Prospect Hill Cemetery	Mercantile brokerage	90,800 00
Total Challenge Grants		140,800 00

Grants through Sunbeam and Mercantile Brokerage Accounts
January through December 2009

<u>Recipient</u>	<u>Account</u>	<u>Amount</u>
Friendship Home		
Friendship Home	Mercantile brokerage	243,345 21
Friendship Home	New Sunbeam First Citizens	6,654 79
Total Friendship Home		<u>250,000 00</u>
 Micah Ecumenical Ministries		
Micah Ecumenical Ministries	New Sunbeam First Citizens	68,951 00
Total Micah Ecumenical Ministries		<u>68,951 00</u>
 Rescue Mission		
Rescue Mission of Roanoke	Mercantile brokerage	100,111 00
Total Rescue Mission		<u>100,111 00</u>
 Community Organization -Family - Other		
Catholic Charities Diocese St Petersburg	New Sunbeam First Citizens	100,000 00
Area Interfaith Outreach Food Pantry	New Sunbeam First Citizens	5,000 00
Boston Health Care for the Homeless	New Sunbeam First Citizens	10,000 00
Faith Community Homes	New Sunbeam First Citizens	10,000 00
House of Possibilities	New Sunbeam First Citizens	25,000 00
Elwyn Genetics	New Sunbeam First Citizens	10,000 00
Community Fdn of Rappahannock River	New Sunbeam First Citizens	1,000 00
RDC Counseling & Human Development	New Sunbeam First Citizens	5,000 00
Rappahannock Legal Services, Inc	New Sunbeam First Citizens	1,000 00
Total Community Organization -Family - Other		<u>167,000 00</u>
 Total Community Organization -Family		 726,862 00
 Community Organizations - Youth		
Balkan Sunflowers		
Balkan Sunflowers	New Sunbeam First Citizens	50,000 00
Balkan Sunflowers	New Sunbeam First Citizens	20,000 00
Balkan Sunflowers	New Sunbeam First Citizens	38,000 00
Balkan Sunflowers	New Sunbeam First Citizens	46,500 00

Grants through Sunbeam and Mercantile Brokerage Accounts
January through December 2009

<u>Recipient</u>	<u>Account</u>	<u>Amount</u>
Balkan Sunflowers	New Sunbeam First Citizens	37,000 00
Total Balkan Sunflowers		191,500 00
Cal Ripken		
Cal Ripken Sr Foundation	Mercantile brokerage	107,772 54
Cal Ripken Sr Foundation	Mercantile brokerage	492,805 33
Total Cal Ripken		600,577 87
City Pool		
City of Fredericksburg	New Sunbeam First Citizens	39,151 00
Total City Pool		39,151 00
Hearts and Homes for Youth		
Hearts and Homes for Youth	Mercantile brokerage	136,050 00
Hearts and Homes for Youth	New Sunbeam First Citizens	13,950 00
Total Hearts and Homes for Youth		150,000 00
Community Organizations - Youth - Other		
Adventure Center at Pretty Lake, Inc	New Sunbeam First Citizens	2,000 00
5th Judicial District NC Guardian adLitem	New Sunbeam First Citizens	11,347 50
Child Support Link	New Sunbeam First Citizens	1,000 00
Fredericksburg Police Department	New Sunbeam First Citizens	1,700 00
Front Porch Alliance	New Sunbeam First Citizens	5,900 00
Child Support Link	New Sunbeam First Citizens	1,200 00
A Better Chance Strath Haven	New Sunbeam First Citizens	10,000 00
Total Community Organizations - Youth - Other		33,147 50
Total Community Organizations - Youth		1,014,376 37
Discretionary Funds/individuals		
15th District Court Service Unit	New Sunbeam First Citizens	50,000 00
St Katharine Drexel Catholic Church	New Sunbeam First Citizens	10,000 00
UVA Children's Hospital	New Sunbeam First Citizens	10,000 00
15th District Court Service Unit	New Sunbeam First Citizens	50,000 00

Grants through Sunbeam and Mercantile Brokerage Accounts
January through December 2009

<u>Recipient</u>	<u>Account</u>	<u>Amount</u>
St Katharine Drexel Catholic Church	New Sunbeam First Citizens	10,000 00
Carteret County Schools-	New Sunbeam First Citizens	7,500 00
Pathways to Spirit	New Sunbeam First Citizens	30,000 00
Jackson Public Schools	New Sunbeam First Citizens	5,000 00
Fenway Community Health Center, Inc	New Sunbeam First Citizens	175,000 00
Total Discretionary Funds/individuals		347,500 00

Domestic Violence - individuals

PEACE client assistance

Marin Abused Womens' Services	New Sunbeam First Citizens	5,000 00
SafeNet, Inc	New Sunbeam First Citizens	5,000 00
Crisis Intervention Shelter Services, Inc	New Sunbeam First Citizens	5,000 00
American Domestic Violence Crisis Line	New Sunbeam First Citizens	5,000 00
Safe Place, Inc	New Sunbeam First Citizens	5,000 00
Women's Center of Durham	New Sunbeam First Citizens	4,876 00
Volunteers of Northern America	New Sunbeam First Citizens	5,000 00
Womens Coalition of St Croix	New Sunbeam First Citizens	10,000 00
Downtown Women's Center	New Sunbeam First Citizens	5,000 00
WomanCare Aegis	New Sunbeam First Citizens	5,000 00
Bridges of Williamson City	New Sunbeam First Citizens	5,000 00
Lutheran Settlement House	New Sunbeam First Citizens	5,000 00
Columbus Regional Shelter	New Sunbeam First Citizens	5,000 00
CASA, Inc	New Sunbeam First Citizens	5,000 00
Strengthen our Sisters	New Sunbeam First Citizens	5,000 00
St Christopher's Children	New Sunbeam First Citizens	5,000 00
Domestic Abuse Services	New Sunbeam First Citizens	5,000 00
Caring Unlimited, Inc	New Sunbeam First Citizens	5,000 00
Hope of East Central Illinois	New Sunbeam First Citizens	5,000 00
New House	New Sunbeam First Citizens	5,000 00
Center for Abuse & Rape Emergencies	New Sunbeam First Citizens	5,000 00
Carteret County Domestic Violence Program	New Sunbeam First Citizens	5,000 00
Legal Advocates for Abused Women	New Sunbeam First Citizens	5,000 00
Hope Family Services	New Sunbeam First Citizens	5,000 00
Christians as Family Advocates	New Sunbeam First Citizens	5,000 00

Grants through Sunbeam and Mercantile Brokerage Accounts
January through December 2009

<u>Recipient</u>	<u>Account</u>	<u>Amount</u>
Victims Services of Cullman	New Sunbeam First Citizens	5,000 00
SafeNet, Inc	New Sunbeam First Citizens	5,000 00
Marin Abused Womens' Services	New Sunbeam First Citizens	5,000 00
Total PEACE client assistance		144,876 00
 Domestic Violence - individuals - Other		
Domestic Violence Shelter and Services, I	New Sunbeam First Citizens	5,000 00
Interfaith Hospitality Network Ocean Co	New Sunbeam First Citizens	5,000 00
Domestic Violence Shelter and Services,	New Sunbeam First Citizens	5,000 00
Total Domestic Violence - individuals - Other		15,000 00
 Total Domestic Violence - individuals		 159,876 00
 Domestic Violence Organizations		
D.V. Capital Campaign		
Middle Way House	New Sunbeam First Citizens	10,057 28
Women's Aid in Crisis	Mercantile brokerage	133,695 59
Women's Aid in Crisis	New Sunbeam First Citizens	12,304 41
Total D V Capital Campaign		156,057 28
 Domestic Violence Organizations - Other		
Siren-Eaton Shelter, Inc	New Sunbeam First Citizens	15,000 00
Kene-Me-Wu	New Sunbeam First Citizens	2,500 00
Women's Law org	New Sunbeam First Citizens	10,000 00
Carteret County Rape Crisis Program, Inc	New Sunbeam First Citizens	5,000 00
Total Domestic Violence Organizations - Other		32,500 00
 Total Domestic Violence Organizations		 188,557 28
 Educare		
Ounce of Prevention Fund	New Sunbeam First Citizens	18,880 00
Kennebec Valley Community Action Program	Mercantile brokerage	825,280 09
Kennebec Valley Community Action Program	Mercantile brokerage	719,518 30
Total Educare		1,563,678 39

Grants through Sunbeam and Mercantile Brokerage Accounts
January through December 2009

<u>Recipient</u>	<u>Account</u>	<u>Amount</u>
Educational Organization/School		
Chester School of the Arts		
The Chester Fund	Mercantile brokerage	133,700 00
The Chester Fund	New Sunbeam First Citizens	3,650 00
Total Chester School of the Arts		<u>137,350 00</u>
 Effective Schools - Fburg VA		
Fredericksburg City Public Schools	New Sunbeam First Citizens	20,616 08
Fredericksburg City Public Schools	New Sunbeam First Citizens	5,146 08
Total Effective Schools - Fburg VA		<u>25,762 16</u>
 Fburg Mentoring programs		
Riverbend High School	New Sunbeam First Citizens	5,475 48
Walker Grant Middle School	New Sunbeam First Citizens	2,000 00
Fredericksburg City Public Schools	New Sunbeam First Citizens	2,000 00
Total Fburg Mentoring programs		<u>9,475 48</u>
 Fburg mentoring scholarships		
Massaponax High School	New Sunbeam First Citizens	3,500 00
Riverbend High School	New Sunbeam First Citizens	4,500 00
Total Fburg mentoring scholarships		<u>8,000 00</u>
 Mentoring programs - other		
Claflin University - GEMS	New Sunbeam First Citizens	20,000 00
Total Mentoring programs - other		<u>20,000 00</u>
 Partnership for Academic Excell		
Partnership for Academic Excellence	New Sunbeam First Citizens	15,000 00
Total Partnership for Academic Excell		<u>15,000 00</u>
 UVA Families & Law - salary		
UVA - Center for Children, Families & the	New Sunbeam First Citizens	25,000 00
Total UVA Families & Law - salary		<u>25,000 00</u>

Grants through Sunbeam and Mercantile Brokerage Accounts
January through December 2009

<u>Recipient</u>	<u>Account</u>	<u>Amount</u>
Educational Organization/School - Other		
Mariposa School	New Sunbeam First Citizens	50,000 00
North Stafford High School	New Sunbeam First Citizens	1,500 00
Five Town Communities That Care	New Sunbeam First Citizens	25,000 00
Mt Vernon	New Sunbeam First Citizens	1,775 00
Total Educational Organization/School - Other		<u>78,275 00</u>
Total Educational Organization/School		318,862 64
Health Care/Medical Research		
Rappahannock Shelters		
Rappahannock Area Community Services Brd`	Mercantile brokerage	177,750 00
Rappahannock Area Community Services Brd`	Mercantile brokerage	183,710 00
Rappahannock Area Community Services Brd`	Mercantile brokerage	87,010 00
Rappahannock Area Community Services Brd`	Mercantile brokerage	183,460 00
Rappahannock Area Community Services Brd`	Mercantile brokerage	509,425 16
Rappahannock Area Community Services Brd`	Mercantile brokerage	199,240 00
Rappahannock Area Community Services Brd`	Mercantile brokerage	200,360 00
Rappahannock Area Community Services Brd`	Mercantile brokerage	102,310 00
Rappahannock Area Community Services Brd`	Mercantile brokerage	100,101 00
Rappahannock Area Community Services Brd`	Mercantile brokerage	52,424 68
Total Rappahannock Shelters		<u>1,795,790 84</u>
Health Care/Medical Research - Other		
NY Citizens Health Care Decisions	New Sunbeam First Citizens	10,000 00
Total Health Care/Medical Research - Other		<u>10,000 00</u>
Total Health Care/Medical Research		1,805,790 84
Historic Preservation/Museums		
General Henry Knox		
General Henry Knox Museum	Mercantile brokerage	74,856 71
General Henry Knox Museum	New Sunbeam First Citizens	6,198 29

Grants through Sunbeam and Mercantile Brokerage Accounts
January through December 2009

<u>Recipient</u>	<u>Account</u>	<u>Amount</u>
Total General Henry Knox		81,055.00
Total Historic Preservation/Museums		81,055 00
Humanitarian - medical crisis		
Matching grants - community		
Sight for Grace Summer	New Sunbeam First Citizens	11,981 77
Total Matching grants - community		11,981 77
Total Humanitarian - medical crisis		11,981 77
Humanitarian Grants		
Car/Van donation		
Mobility Works	New Sunbeam First Citizens	20,000 00
First Commonwealth Bank	New Sunbeam First Citizens	6,375 80
Sumter County Treasurer	New Sunbeam First Citizens	315 07
Bob Ferdon	New Sunbeam First Citizens	900 00
Covington's Used Cars	New Sunbeam First Citizens	5,195 00
Access Vans of Louisiana	New Sunbeam First Citizens	18,237 50
Nationwide Insurance	New Sunbeam First Citizens	1,142 90
Toyota of Longview	New Sunbeam First Citizens	10,148 97
State Farm Insurance	New Sunbeam First Citizens	511 41
Centennial Hyundai	New Sunbeam First Citizens	8,000 00
Farmers Insurance	New Sunbeam First Citizens	653 90
Downing Auto Sales	New Sunbeam First Citizens	8,211 00
The Insurance Specialists	New Sunbeam First Citizens	361 00
Obrien Hyundai	New Sunbeam First Citizens	3,466 12
GMAC	New Sunbeam First Citizens	5,001 26
Mayberry Auto Sales	New Sunbeam First Citizens	3,776 00
Farm Bureau Insurance	New Sunbeam First Citizens	149 96
Mobility Medical Equipment	New Sunbeam First Citizens	18,125 00
State Farm Insurance	New Sunbeam First Citizens	298 40
Auto Rama Retail	New Sunbeam First Citizens	7,000 00
Hunt Insurance	New Sunbeam First Citizens	1,002 00

Grants through Sunbeam and Mercantile Brokerage Accounts
January through December 2009

<u>Recipient</u>	<u>Account</u>	<u>Amount</u>
19th Street Auto Recyclers	New Sunbeam First Citizens	1,502 20
Bedford Auto Wholesale	New Sunbeam First Citizens	8,500 00
Barber Ford, Inc	New Sunbeam First Citizens	3,181 95
Tracy Lynn Lane	New Sunbeam First Citizens	17,656 00
State Farm Insurance	New Sunbeam First Citizens	237 93
USBANK	New Sunbeam First Citizens	6,122 53
Tomcat Motors	New Sunbeam First Citizens	8,708 00
Protection Insurance Agency	New Sunbeam First Citizens	417 50
Jack O Diamonds	New Sunbeam First Citizens	22,186 55
Safeco Lloyds Insurance Co	New Sunbeam First Citizens	517 90
Haddad Dodge	New Sunbeam First Citizens	7,500 00
Sacramento Auto Insurance Center	New Sunbeam First Citizens	582 90
Norway Savings Bank	New Sunbeam First Citizens	3,218 80
Champion Ford	New Sunbeam First Citizens	8,570 00
Mobility Medical Equipment	New Sunbeam First Citizens	17,973 00
Hampton Automotive	New Sunbeam First Citizens	9,000 00
Victorville Hyundai	New Sunbeam First Citizens	9,000 00
GEICO	New Sunbeam First Citizens	462 90
Cherokee County Tax Commissioner	New Sunbeam First Citizens	231 50
AmeriCredit	New Sunbeam First Citizens	2,180 84
Shelter Insurance Co	New Sunbeam First Citizens	294 29
Durst Motor Co	New Sunbeam First Citizens	5,232 23
Car Mart of Muskogee	New Sunbeam First Citizens	4,851 00
RMO Auto, Inc	New Sunbeam First Citizens	7,025 93
Arbella Insurance	New Sunbeam First Citizens	279 00
Carl Stone Auto Sales, LLC	New Sunbeam First Citizens	9,648 00
Georgia Insurance Specialists	New Sunbeam First Citizens	429 00
Toyota West	New Sunbeam First Citizens	7,500 00
GEICO	New Sunbeam First Citizens	284 86
Grand Auto, Inc	New Sunbeam First Citizens	7,999 99
Palmer Dodge	New Sunbeam First Citizens	23,472 53
County of Fairfax	New Sunbeam First Citizens	300 00
Gesswein Motors, Inc	New Sunbeam First Citizens	18,540 00
Dakota Financial	New Sunbeam First Citizens	215 00

Grants through Sunbeam and Mercantile Brokerage Accounts
January through December 2009

<u>Recipient</u>	<u>Account</u>	<u>Amount</u>
Magnum Finance, Inc	New Sunbeam First Citizens	1,600 00
Toyota Financial Services	New Sunbeam First Citizens	350 52
Alpine Auto Doctors	New Sunbeam First Citizens	2,183 12
Ride Away	New Sunbeam First Citizens	8,000 00
Saturn of Philadelphia	New Sunbeam First Citizens	8,000 00
Shaw's Service Center	New Sunbeam First Citizens	336 44
Nationwide Sales Solutions	New Sunbeam First Citizens	724 00
Alexander Chevrolet	New Sunbeam First Citizens	8,000 00
PFF Inc	New Sunbeam First Citizens	431 00
Total Car/Van donation		<u>362,318 70</u>
Credit card- loan debt		
Funeral Expense		
Campbell Funeral Home	New Sunbeam First Citizens	2,500 00
Total Funeral Expense		<u>2,500 00</u>
Medical debt		
SSM St Mary's Health Center	New Sunbeam First Citizens	1,180 61
Good Shepherd Medical Center	New Sunbeam First Citizens	338 90
Diagnostic Clinic of Longview	New Sunbeam First Citizens	51 00
Total Medical debt		<u>1,570 51</u>
Pay Day Loans		
EZMONEY Loan Services	New Sunbeam First Citizens	825 49
Total Pay Day Loans		<u>825 49</u>
Credit card- loan debt - Other		
Prime Time Home Furnishings	New Sunbeam First Citizens	548 64
Discover Card Visa	New Sunbeam First Citizens	6,492 36
American Express	New Sunbeam First Citizens	8,956 69
BB&T	New Sunbeam First Citizens	749 94
VISA	New Sunbeam First Citizens	1,020 57
LoanMax	New Sunbeam First Citizens	768 00
Directions Credit Union	New Sunbeam First Citizens	2,145 51

Grants through Sunbeam and Mercantile Brokerage Accounts
January through December 2009

<u>Recipient</u>	<u>Account</u>	<u>Amount</u>
Chase Home Finance, LLC	New Sunbeam First Citizens	1,300 00
American General Finance Services	New Sunbeam First Citizens	3,729 57
United Collection Bureau	New Sunbeam First Citizens	4,292 37
Money to Lend	New Sunbeam First Citizens	684 37
Credit Central South	New Sunbeam First Citizens	885 45
City National Bank	New Sunbeam First Citizens	1,186 95
Home Federal Savings & Loan	New Sunbeam First Citizens	300 05
American Express	New Sunbeam First Citizens	1,088 99
Third Fifth Bank	New Sunbeam First Citizens	816 75
RJM Acquisitions, LLC	New Sunbeam First Citizens	1,113 24
Capital One Bank, NA	New Sunbeam First Citizens	1,133 44
PDR Group	New Sunbeam First Citizens	2,500 00
Capitol One	New Sunbeam First Citizens	349 84
BB&T	New Sunbeam First Citizens	524 47
BB&T	New Sunbeam First Citizens	520 58
Blaze Mastercard	New Sunbeam First Citizens	342 80
CorTrust Bank	New Sunbeam First Citizens	242 87
First Financial Bank, USA	New Sunbeam First Citizens	2,182 33
ER Solutions, Inc	New Sunbeam First Citizens	2,235 90
World Omni Financial Corp/Mercantile	New Sunbeam First Citizens	2,000 00
Total Credit card- loan debt - Other		<u>48,111 68</u>
Total Credit card- loan debt		53,007 68
Delaware County Community FDN		
Delaware County Community Foundation	New Sunbeam First Citizens	<u>50,000 00</u>
Total Delaware County Community FDN		50,000 00
Foresclosure		
Select Portfolio Servicing Inc	New Sunbeam First Citizens	4,520 84
Citi Mortgage Inc	New Sunbeam First Citizens	1,395 70
HSBC	New Sunbeam First Citizens	<u>3,459 54</u>
Total Foreclosure		9,376 08

Grants through Sunbeam and Mercantile Brokerage Accounts
January through December 2009

<u>Recipient</u>	<u>Account</u>	<u>Amount</u>
Home downpayment		
Evergreen Title Co	New Sunbeam First Citizens	32,000 00
Total Home downpayment		32,000 00
House repairs		
Furniture/appliances		
Fireplace Professionals	New Sunbeam First Citizens	5,358 00
BBBBB Distribution	New Sunbeam First Citizens	246 45
Campbell's Furniture and Appliances	New Sunbeam First Citizens	1,004 68
Cardmember Services	New Sunbeam First Citizens	109 71
Bank of America	New Sunbeam First Citizens	1,381 32
Bank of America	New Sunbeam First Citizens	1,652 73
J C Penney furniture	New Sunbeam First Citizens	2,698 35
Select Comfort	New Sunbeam First Citizens	1,887 31
Bank of America	New Sunbeam First Citizens	6,508 07
Value City Furniture	New Sunbeam First Citizens	1,091 38
J C Penney furniture	New Sunbeam First Citizens	2,138 64
Sears	New Sunbeam First Citizens	1,414 28
Big Lots	New Sunbeam First Citizens	274 97
Total Furniture/appliances		25,765 89
Roofing		
Willis Roofing & Siding	New Sunbeam First Citizens	3,130 00
Cumberland Roofing	New Sunbeam First Citizens	2,600 00
Willis Roofing & Siding	New Sunbeam First Citizens	3,130 00
Total Roofing		8,860 00
House repairs - Other		
BRJ Company	New Sunbeam First Citizens	2,000 00
Arkwood Specialties	New Sunbeam First Citizens	6,000 00
BRJ Company	New Sunbeam First Citizens	1,700 00
Randall Robertson (construction)	New Sunbeam First Citizens	5,500 00
Autuaga Tree Service	New Sunbeam First Citizens	2,500 00

Grants through Sunbeam and Mercantile Brokerage Accounts
January through December 2009

Recipient	Account	Amount
MLGW	New Sunbeam First Citizens	598 22
Empire Today, LLC	New Sunbeam First Citizens	5,300 00
Muhammed & Son Plumbing	New Sunbeam First Citizens	600 00
Robert Reynolds Construction	New Sunbeam First Citizens	4,794 00
Flooring America Mill Store	New Sunbeam First Citizens	931 47
Campbell's Home Improvement	New Sunbeam First Citizens	3,375 00
American General	New Sunbeam First Citizens	1,000 00
Campbell's Home Improvement	New Sunbeam First Citizens	3,375 00
Pat Curran	New Sunbeam First Citizens	2,576 00
Epperson	New Sunbeam First Citizens	677 06
DBA Crouch Enterprise	New Sunbeam First Citizens	650 00
Miller & Sons, Inc	New Sunbeam First Citizens	5,250 00
Buckland Builders	New Sunbeam First Citizens	4,983 92
Miller & Sons, Inc	New Sunbeam First Citizens	5,250 00
Bay State Re-Bath	New Sunbeam First Citizens	5,492 00
Baltimore Housing	New Sunbeam First Citizens	50,000 00
C&S Construction	New Sunbeam First Citizens	4,000 00
C&S Construction	New Sunbeam First Citizens	1,512 00
Grace Construction	New Sunbeam First Citizens	4,656 00
Broome County Habitat for Humanity	New Sunbeam First Citizens	567 17
Suncoast School Federal Credit Union	New Sunbeam First Citizens	418 89
Bridgeway Waterproofing, Inc	New Sunbeam First Citizens	3,537 00
Everything in Between	New Sunbeam First Citizens	2,647 28
Total House repairs - Other		<u>129,891 01</u>
Total House repairs		164,516 90
Legal fees		
Friedman & Mirman Co , L P A	New Sunbeam First Citizens	4,033 50
Friedman & Mirman Co , L P A	New Sunbeam First Citizens	10,854 50
Friedman & Mirman Co , L P A	New Sunbeam First Citizens	4,871 50
Debra A Matthews Attorney at Law	New Sunbeam First Citizens	2,000 00
John O Avery	New Sunbeam First Citizens	1,387 00
Chang & Carlin, LLP	New Sunbeam First Citizens	1,888 00

Grants through Sunbeam and Mercantile Brokerage Accounts
January through December 2009

<u>Recipient</u>	<u>Account</u>	<u>Amount</u>
John Carter, Attorney	New Sunbeam First Citizens	1,500 00
Thomas Y Savage	New Sunbeam First Citizens	3,000 00
Securty Exchange	New Sunbeam First Citizens	1,286 40
Michael W Patrick, attorney	New Sunbeam First Citizens	3,679 50
The Antonini Law Firm	New Sunbeam First Citizens	2,070 00
Total Legal fees		36,570 40

Medical expense

Dental expense

Aesthetic Dentistry of Texoma	New Sunbeam First Citizens	183 00
David Kuhn, DMD	New Sunbeam First Citizens	2,000 00
John Shepard DDS	New Sunbeam First Citizens	3,300 00
Jay Arlick, DMD	New Sunbeam First Citizens	1,430 00
Jon Ward, DMD	New Sunbeam First Citizens	1,685 00
The Dental Clinic	New Sunbeam First Citizens	6,573 00
Sam Nechankin, DDS	New Sunbeam First Citizens	185 00
Warren Dental Reflections	New Sunbeam First Citizens	5,000 00
Aesthetic Dentistry of Texoma	New Sunbeam First Citizens	3,537 00
Nogales Dental Clinic	New Sunbeam First Citizens	5,100 00
New Opportunity School for Women	New Sunbeam First Citizens	10,000 00
Advanced Family Dental Care, LLC	New Sunbeam First Citizens	1,518 00
Dr James D George	New Sunbeam First Citizens	1,785.00
S R Katana, DDS	New Sunbeam First Citizens	6,800 00
Stephen J Chermol, DMD	New Sunbeam First Citizens	9,600 00
Dan Tritton, DDS, SC	New Sunbeam First Citizens	3,416 04
Salem Family & Cosmetic Dentistry	New Sunbeam First Citizens	750 00
Dennis R Huebner, DDS	New Sunbeam First Citizens	2,465 25
New Opportunity School for Women	New Sunbeam First Citizens	10,000 00
Allcare Dental & Dentures	New Sunbeam First Citizens	4,500 00
U-Save Dentistry	New Sunbeam First Citizens	1,059 00
John W Rose D D S	New Sunbeam First Citizens	7,136 00
Hunting Hills Family Dentistry	New Sunbeam First Citizens	8,000 00
Melanie R Newbill, DDS	New Sunbeam First Citizens	2,000 00
Melanie R Newbill, DDS	New Sunbeam First Citizens	2,391 00

Grants through Sunbeam and Mercantile Brokerage Accounts
January through December 2009

<u>Recipient</u>	<u>Account</u>	<u>Amount</u>
Wells Fargo Financial	New Sunbeam First Citizens	1,286 90
Jack Luftman, DDS	New Sunbeam First Citizens	197 00
Park Dental Associates	New Sunbeam First Citizens	10,002 80
Total Dental expense		111,899 99
Health insurance		
Anthem Insurance	New Sunbeam First Citizens	1,410 30
Total Health insurance		1,410 30
Hearing aids		
Advanced Hearing Centers, Inc	New Sunbeam First Citizens	1,600 00
Advanced Hearing Centers, Inc	New Sunbeam First Citizens	423 00
Hearing Resources	New Sunbeam First Citizens	1,988 73
Sears	New Sunbeam First Citizens	4,320 00
Advanced Hearing Centers, Inc	New Sunbeam First Citizens	1,063 00
Advanced Hearing Centers, Inc	New Sunbeam First Citizens	728 00
Total Hearing aids		10,122 73
Medical expense - Other		
Pura Vida Fit	New Sunbeam First Citizens	960 00
Boulder Valley Anesthesia	New Sunbeam First Citizens	864 00
Boulder Valley Pathology, P C	New Sunbeam First Citizens	547 13
Dr Sunil Lalla	New Sunbeam First Citizens	2,416 00
Robert N Smith, OD	New Sunbeam First Citizens	186 00
Alpha One Medical	New Sunbeam First Citizens	6,172 52
Elelift, LLC	New Sunbeam First Citizens	20,000 00
OB/GYN Associates	New Sunbeam First Citizens	435 00
Avista Adventist Hospital	New Sunbeam First Citizens	636 82
Hampton Inn	New Sunbeam First Citizens	439 60
The Surgical Clinic	New Sunbeam First Citizens	65 38
Mullaney's Home Health Care	New Sunbeam First Citizens	299 00
Fed Ex	New Sunbeam First Citizens	85 00
Ashland Family Medicine	New Sunbeam First Citizens	522 82
McMeans Pharmacy	New Sunbeam First Citizens	151 00

Grants through Sunbeam and Mercantile Brokerage Accounts
January through December 2009

<u>Recipient</u>	<u>Account</u>	<u>Amount</u>
Pro Scan Imaging of AR	New Sunbeam First Citizens	743 09
Eau Claire Co Chapter Thrivent Financial	New Sunbeam First Citizens	3,802 82
Mayo Clinic	New Sunbeam First Citizens	215 00
Monika Shah, D O	New Sunbeam First Citizens	131 00
Franklin Memorial Hospital	New Sunbeam First Citizens	180 00
Franklin Memorial Hospital	New Sunbeam First Citizens	987 00
All Saints Episcopal Church	New Sunbeam First Citizens	4,000 00
Various Little Rock Medical establishments	New Sunbeam First Citizens	2,637 28
1800wheelchair.com	New Sunbeam First Citizens	564 00
Omega Massage, Inc	New Sunbeam First Citizens	3,488 00
Bank of America-mtg pmts during med Crisis	New Sunbeam First Citizens	2,100 00
Total Medical expense - Other		<u>52,628 46</u>
 Total Medical expense		 176,061 48
 Rent/Mortgage payments		
Graham Realty, Inc	New Sunbeam First Citizens	2,450 00
Hoosier Hills Credit Union	New Sunbeam First Citizens	4,100 94
Angela T Sicuranza - landlord	New Sunbeam First Citizens	2,120 00
Fayetteville Housing Authority	New Sunbeam First Citizens	2,300 00
Laverne Roquemore - landlord	New Sunbeam First Citizens	1,700 00
3175 Grand Concourse LLC	New Sunbeam First Citizens	9,469 10
Silverwood Apartments	New Sunbeam First Citizens	1,086 00
Dharma Investments, LLC	New Sunbeam First Citizens	800 00
William Halbig - landlord	New Sunbeam First Citizens	322 00
Jay Miller - landlord	New Sunbeam First Citizens	1,080 00
USAA	New Sunbeam First Citizens	1,046 13
Provident Funding	New Sunbeam First Citizens	1,873 79
Keith Donnachie	New Sunbeam First Citizens	468 00
Wells Fargo	New Sunbeam First Citizens	457 71
Terri Jennings, landlord	New Sunbeam First Citizens	2,650 00
Randy Leggett, Landlord	New Sunbeam First Citizens	2,200 00
HFC	New Sunbeam First Citizens	838 11
Lillian Glickman - landlord	New Sunbeam First Citizens	1,725 00

Grants through Sunbeam and Mercantile Brokerage Accounts
January through December 2009

<u>Recipient</u>	<u>Account</u>	<u>Amount</u>
Alfa Hsieh	New Sunbeam First Citizens	4,000 00
Preserve at Southwind	New Sunbeam First Citizens	2,007 00
Jay Miller - landlord	New Sunbeam First Citizens	2,160 00
Vanderbilt Apartments	New Sunbeam First Citizens	1,107 96
The Commons at Cowan	New Sunbeam First Citizens	1,005 43
R & S Properties	New Sunbeam First Citizens	1,500 00
Roberta Curry - landlord	New Sunbeam First Citizens	1,275 00
Regional Transportation District	New Sunbeam First Citizens	770 00
Colonial Oaks Apartments	New Sunbeam First Citizens	3,504 00
Fillers Properties LLC	New Sunbeam First Citizens	3,600 00
Arcadia Kirby Apartments	New Sunbeam First Citizens	855 00
Coleman Kidd - Master Realty	New Sunbeam First Citizens	2,725 00
James Wilson, landlord	New Sunbeam First Citizens	2,420 84
California Lifestyles Realty	New Sunbeam First Citizens	2,625.00
Philip F Parker, landlord	New Sunbeam First Citizens	3,900 00
Mary Kossick - landlord	New Sunbeam First Citizens	5,900 00
Primas Properties	New Sunbeam First Citizens	5,700 00
State Bank of Drummond	New Sunbeam First Citizens	2,375 68
Preserve at Southwind	New Sunbeam First Citizens	2,232 80
Oakbrook Properties	New Sunbeam First Citizens	625 00
W Couch, Landlord	New Sunbeam First Citizens	1,100 00
Vernon R Close	New Sunbeam First Citizens	4,500 00
Larry & Pam Sykes landlord	New Sunbeam First Citizens	600 00
Total Rent/Mortgage payments		93,175 49
 Taxes -Property/income		
Rock Island County Clerk	New Sunbeam First Citizens	6,077 85
Broome County Receiver of Taxes	New Sunbeam First Citizens	2,562 12
Sutter County Tax Assessor	New Sunbeam First Citizens	416 68
Total Taxes -Property/income		9,056 65
 Utilities		
AT&T	New Sunbeam First Citizens	392 52
Flint EMC	New Sunbeam First Citizens	298 50

Grants through Sunbeam and Mercantile Brokerage Accounts
January through December 2009

Recipient	Account	Amount
ABCD Storage	New Sunbeam First Citizens	514 38
ABCD Storage	New Sunbeam First Citizens	319 50
Dominion Power	New Sunbeam First Citizens	654 19
UGI Utilities	New Sunbeam First Citizens	816 63
Alliant Energy	New Sunbeam First Citizens	604 50
Alliant Energy	New Sunbeam First Citizens	1,165 01
Progress Eneregy	New Sunbeam First Citizens	261 97
Dominion Power	New Sunbeam First Citizens	541 64
Allstate	New Sunbeam First Citizens	760 35
ABCD Storage	New Sunbeam First Citizens	277 96
ABCD Storage	New Sunbeam First Citizens	277 96
AT&T	New Sunbeam First Citizens	100 51
Ferrellgas	New Sunbeam First Citizens	1,400 00
Mesa Propane	New Sunbeam First Citizens	1,001 72
Total Utilties		9,387 34
Humanitarian Grants - Other		
Keepit Safe Security Storage	New Sunbeam First Citizens	2,375 60
Ludlum & Vann Appraisals	New Sunbeam First Citizens	150 00
Affordable Movers	New Sunbeam First Citizens	300 00
LASERS	New Sunbeam First Citizens	5,024 74
Nutrisystem	New Sunbeam First Citizens	5,173 00
Total Humanitarian Grants - Other		13,023 34
Total Humanitarian Grants		1,008,494 06
Learning By Giving		
Cornell University School - Human Ecology	New Sunbeam First Citizens	10,000 00
University of Montana	New Sunbeam First Citizens	10,000 00
Cornell University School - Human Ecology	New Sunbeam First Citizens	10,000 00
University of Mary Washington Foundation	New Sunbeam First Citizens	10,000 00
Total Learning By Giving		40,000 00
Prison - after prison		

Grants through Sunbeam and Mercantile Brokerage Accounts
January through December 2009

<u>Recipient</u>	<u>Account</u>	<u>Amount</u>
Fund for the City of New York	New Sunbeam First Citizens	60,000 00
Providence House, Inc	New Sunbeam First Citizens	10,000 00
Mercy College	New Sunbeam First Citizens	10,688 00
Harmon, Jones & Sanford, LLP	New Sunbeam First Citizens	1,139 00
Allen Agency Rockland	New Sunbeam First Citizens	903 00
Maranacook Adult & Community Education	New Sunbeam First Citizens	5,500 00
Passage Home	Mercantile brokerage	120,964 88
Passage Home	New Sunbeam First Citizens	4,035 12
New Vision, Inc	New Sunbeam First Citizens	7,780 00
Fund for the City of New York	New Sunbeam First Citizens	30,000 00
Bank of America	New Sunbeam First Citizens	1,388 82
Bank of America	New Sunbeam First Citizens	947 48
Total Prison - after prison		253,346 30
Prison education		
Germanna Community College	New Sunbeam First Citizens	775 35
Froguts, Inc	New Sunbeam First Citizens	308 00
Cornell University	New Sunbeam First Citizens	50,000 00
The McGraw-Hill Companies	New Sunbeam First Citizens	3,565 72
Dabney S Lancaster C C Bookstore	New Sunbeam First Citizens	2,760 00
Dabney S Lancaster Community College	New Sunbeam First Citizens	6,061 65
Germanna Community College	New Sunbeam First Citizens	19,814 50
Rappahannock Community College	New Sunbeam First Citizens	18,542 80
FHEG Rappahannock Comm Coll Bookstore	New Sunbeam First Citizens	4,702 29
Walla Walla Community College	New Sunbeam First Citizens	60,000 00
University of Maine at Augusta	New Sunbeam First Citizens	6,692 40
University of Maine at Augusta	New Sunbeam First Citizens	4,199 14
Meetingbrook Bookshop	New Sunbeam First Citizens	1,493 34
University of Maine at Augusta	New Sunbeam First Citizens	28,828 80
Prison University Project	New Sunbeam First Citizens	10,000 00
John Tyler Community College	New Sunbeam First Citizens	8,920 40
University of Maine at Fort Kent	New Sunbeam First Citizens	1,360 50
University of Maine at Machias	New Sunbeam First Citizens	1,818 00
FHEG Piedmont VA Com Coll Bookstore	New Sunbeam First Citizens	2,887 62

Grants through Sunbeam and Mercantile Brokerage Accounts
January through December 2009

<u>Recipient</u>	<u>Account</u>	<u>Amount</u>
Piedmont VA Community College	New Sunbeam First Citizens	5,061 60
Rehabilitation through the Arts	New Sunbeam First Citizens	10,000 00
University of Maine at Augusta	New Sunbeam First Citizens	2,100 45
FHEG Germanna Bookstore #687	New Sunbeam First Citizens	2,911 35
Walla Walla Community College	New Sunbeam First Citizens	50,000 00
FHEG Germanna Bookstore #687	New Sunbeam First Citizens	9,149 87
University of Maine at Augusta	New Sunbeam First Citizens	16,726 40
Dabney S Lancaster C C Bookstore	New Sunbeam First Citizens	790 65
Hudson Link, Inc	Mercantile brokerage	102,410 00
Cornell University	New Sunbeam First Citizens	50,000 00
Piedmont VA Community College	New Sunbeam First Citizens	6,007 95
FHEG Piedmont VA Com Coll Bookstore	New Sunbeam First Citizens	1,333 50
Dabney S Lancaster C C Bookstore	New Sunbeam First Citizens	2,352 00
Dabney S Lancaster Community College	New Sunbeam First Citizens	6,796 80
University of Maine at Augusta	New Sunbeam First Citizens	12,117 60
University of Maine at Augusta	New Sunbeam First Citizens	36,379 20
University of Maine at Augusta	New Sunbeam First Citizens	223 95
University of Maine at Augusta	New Sunbeam First Citizens	3,939 93
FHEG Follett Bookstore	New Sunbeam First Citizens	3,501 29
FHEG Follett Bookstore	New Sunbeam First Citizens	149 08
Total Prison education		554,682 13
Research/workshops/Trips		
Michigan Parents of Children with Visual	New Sunbeam First Citizens	2,000 00
Foundation of Morris Hall/St Lawrence	New Sunbeam First Citizens	6,500 00
Total Research/workshops/Trips		8,500 00
Scholarships		
Adjunct scholarship assistance		
Bank of America	New Sunbeam First Citizens	862 40
Bank of America	New Sunbeam First Citizens	840 05
B McKinney, tutor	New Sunbeam First Citizens	1,600 00
Apple Store, Short Pump Tower Center	New Sunbeam First Citizens	1,304 15
Total Adjunct scholarship assistance		4,606 60

Grants through Sunbeam and Mercantile Brokerage Accounts
January through December 2009

<u>Recipient</u>	<u>Account</u>	<u>Amount</u>
After school/extracurricular		
Community Arts Center	New Sunbeam First Citizens	5,000 00
Total After school/extracurricular		5,000 00
Buffett Fellows - UVA		
UVA - Center for Children, Families & the	New Sunbeam First Citizens	25,000 00
Total Buffett Fellows - UVA		25,000 00
Hungarian scholarships		
Hungarian Scholarship Fund	New Sunbeam First Citizens	25,000 00
Total Hungarian scholarships		25,000 00
Jeanette Rankin Foundation		
Jeanette Rankin Foundation	Mercantile brokerage	97,776 49
Jeanette Rankin Foundation	New Sunbeam First Citizens	10,223 51
Total Jeanette Rankin Foundation		108,000 00
Scholarships - Other		
Beth McKinney	New Sunbeam First Citizens	600 00
HCR Cares, Inc	New Sunbeam First Citizens	5,000 00
Apollo Career Center	New Sunbeam First Citizens	4,889 25
UW-Stout	New Sunbeam First Citizens	2,000 00
Adult Basic Skills Schools	New Sunbeam First Citizens	997 75
Appalachian State University	New Sunbeam First Citizens	481 88
HCR Cares, Inc	New Sunbeam First Citizens	5,000 00
ASU	New Sunbeam First Citizens	883 76
Blackstone Career Institute	New Sunbeam First Citizens	767 00
Drexel Medical College - Woman One	New Sunbeam First Citizens	35,000 00
Hodges Education Foundation	New Sunbeam First Citizens	10,000 00
Appalachian State University	New Sunbeam First Citizens	922 75
CCC Bookstore	New Sunbeam First Citizens	344 85
Partnership for Academic Excellence	New Sunbeam First Citizens	1,788 37
CMCC	New Sunbeam First Citizens	310 00

Grants through Sunbeam and Mercantile Brokerage Accounts
January through December 2009

<u>Recipient</u>	<u>Account</u>	<u>Amount</u>
Madison Square Boys & Girls Club	New Sunbeam First Citizens	5,000 00
Total Scholarships - Other		<u>73,985 61</u>
Total Scholarships		241,592 21
 Student Sunbeams		
Ada Jenkins Center	New Sunbeam First Citizens	9,144 22
HealthReach Community Clinic	New Sunbeam First Citizens	10,000 00
Total Student Sunbeams		<u>19,144 22</u>
Total Grants		<u><u>8,835,682 00</u></u>