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990-PF

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

OMB No 1545-0052

2009

Form
Department of the Treasury
Internal Revenue Service

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

For calendar year 2009, or tax year beginning

, 2009, and ending

, 20

G Check all that apply:

☐ Initial return☐ Initial return of a former public charity☐ Final return☐ Amended return☐ Address change☐ Name changeUse the IRS
label.
Otherwise,
print
or type.
See Specific
Instructions.

Name of foundation

TR UW R D BUCHAN 47-1916290

Number and street (or P O box number if mail is not delivered to street address)

Room/suite

P.O. BOX 1908

City or town, state, and ZIP code

ORLANDO, FL 32802-1908

A Employer identification number

58-6141637

B Telephone number (see page 10 of the instructions)

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 ☐

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	-9,766.		
	2 Savings and temporary cash investments	35,342.	30,284.	30,284.
	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 (attach schedule) ▶ *		207,981.	
	Less: allowance for doubtful accounts ▶	206,368.	207,981.	207,981.
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10 a Investments - U S and state government obligations (attach schedule)			
	b Investments - corporate stock (attach schedule) . STMT 5.	705,602.	674,212.	727,560.
	c Investments - corporate bonds (attach schedule)			
	11 Investments - land, buildings, and equipment basis Less: accumulated depreciation (attach schedule) ▶			
	12 Investments - mortgage loans			
	13 Investments - other (attach schedule)			
14 Land, buildings, and equipment basis Less: accumulated depreciation (attach schedule) ▶				
15 Other assets (describe ▶)				
16 Total assets (to be completed by all filers - see the instructions Also, see page 1, item I)	937,546.	912,477.	965,825.	
Liabilities	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable (attach schedule)			
	22 Other liabilities (describe ▶)			
23 Total liabilities (add lines 17 through 22)				
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ ☐			
	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	937,546.	912,477.	
	28 Paid-in or capital surplus, or land, bldg, and equipment fund			
29 Retained earnings, accumulated income, endowment, or other funds				
30 Total net assets or fund balances (see page 17 of the instructions)	937,546.	912,477.		
31 Total liabilities and net assets/fund balances (see page 17 of the instructions)	937,546.	912,477.		

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	937,546.
2 Enter amount from Part I, line 27a	2	-30,403.
3 Other increases not included in line 2 (itemize) ▶ SEE STATEMENT 6	3	9,351.
4 Add lines 1, 2, and 3	4	916,494.
5 Decreases not included in line 2 (itemize) ▶ SEE STATEMENT 7	5	4,017.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	912,477.

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)			(b) How acquired P-Purchase D-Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a SEE PART IV DETAIL					
b					
c					
d					
e					
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)		
a					
b					
c					
d					
e					
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))		
(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any			
a					
b					
c					
d					
e					
2 Capital gain net income or (net capital loss)			2	-16,320.	
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.					

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

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 ruling letter if necessary - see instructions)			
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☐ and enter 1% of Part I, line 27b		1	401.
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	
3 Add lines 1 and 2		3	401.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		4	NONE
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-		5	401.
6 Credits/Payments			
a 2009 estimated tax payments and 2008 overpayment credited to 2009	6a	480.	
b Exempt foreign organizations-tax withheld at source	6b	NONE	
c Tax paid with application for extension of time to file (Form 8868)	6c	NONE	
d Backup withholding erroneously withheld	6d		
7 Total credits and payments. Add lines 6a through 6d	7	480.	
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	79.	
11 Enter the amount of line 10 to be: Credited to 2010 estimated tax ▶ 79. Refunded ▶	11		

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?	13	X	
Website address ▶ <u>N/A</u>				
14	The books are in care of ▶ <u>SUNTRUST BANK</u> Telephone no ▶ <u>(888) 942-3272</u>			
	Located at ▶ <u>P.O. BOX 1908, ORLANDO, FL</u> ZIP + 4 ▶ <u>32802-1908</u>			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year ▶ 15			

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

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

	Yes	No
1a During the year did the foundation (either directly or indirectly):		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ 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		

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

- 5a During the year did the foundation pay or incur any amount to
- (1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☒ No
- (2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☒ No
- (3) Provide a grant to an individual for travel, study, or other similar purposes? ☒ Yes ☐ No
- (4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see page 22 of the instructions) ☐ Yes ☒ No
- (5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☒ No
- b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see page 22 of the instructions)? ☐ Yes ☒ No
Organizations relying on a current notice regarding disaster assistance check here ☐ ☒
- c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? *N/A* ☐ Yes ☐ No
If "Yes," attach the statement required by Regulations section 53.4945-5(d).
- 6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? ☐ Yes ☒ No
- b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? ☐ Yes ☒ No
If "Yes" to 6b, file Form 8870
- 7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☒ No
- b If yes, did the foundation receive any proceeds or have any net income attributable to the transaction? ☐ Yes ☒ No

5b

X

6b

X

7b

N/A

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
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Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)**3 Five highest-paid independent contractors for professional services** (see page 23 of the instructions). If none, enter "NONE."

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

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

Part IX-A Summary of Direct Charitable Activities

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

Expenses

1 NONE	
2	
3	
4	

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

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2

Amount

1 NEW STUDENT LOANS	
	13,000.
2	
All other program-related investments See page 24 of the instructions	
3 NONE	
Total. Add lines 1 through 3	13,000.

Form 990-PF (2009)

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	666,143.
b	Average of monthly cash balances	1b	38,827.
c	Fair market value of all other assets (see page 24 of the instructions)	1c	NONE
d	Total (add lines 1a, b, and c)	1d	704,970.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	
2	Acquisition indebtedness applicable to line 1 assets	2	NONE
3	Subtract line 2 from line 1d	3	704,970.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see page 25 of the instructions)	4	10,575.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	694,395.
6	Minimum investment return. Enter 5% of line 5	6	34,720.

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	34,720.
2a	Tax on investment income for 2009 from Part VI, line 5	2a	401.
b	Income tax for 2009. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	401.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	34,319.
4	Recoveries of amounts treated as qualifying distributions	4	16,685.
5	Add lines 3 and 4	5	51,004.
6	Deduction from distrib		

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				51,004.
2 Undistributed income, if any, as of the end of 2009				
a Enter amount for 2008 only			25,286.	
b Total for prior years 20 07, 20 , 20		NONE		
3 Excess distributions carryover, if any, to 2009:				
a From 2004	NONE			
b From 2005	NONE			
c From 2006	NONE			
d From 2007	NONE			
e From 2008	NONE			
f Total of lines 3a through e	NONE			
4 Qualifying distributions for 2009 from Part XII, line 4: ► \$ 47,777.				
a Applied to 2008, but not more than line 2a			25,286.	
b Applied to undistributed income of prior years (Election required - see page 26 of the instructions)		NONE		
c Treated as distributions out of corpus (Election required - see page 26 of the instructions)	NONE			
d Applied to 2009 distributable amount				22,491.
e Remaining amount distributed out of corpus	NONE			
5 Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a).)	NONE			NONE
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f				

Part XV Supplementary Information (continued)**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year SEE STATEMENT 11				
Total			▶ 3a	26,000.
b Approved for future payment				
Total			▶ 3b	

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated

	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See page 28 of the instructions)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue:					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities			14	27,909.	
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	-16,327.	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue. a					
b					
c					

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

Kind of Property		Description				P or D	Date acquired	Date sold
Gross sale price less expenses of sale	Depreciation allowed/ allowable	Cost or other basis	FMV as of 12/31/69	Adj basis as of 12/31/69	Excess of FMV over adj basis		Gain or (loss)	
		TOTAL LONG-TERM CAPITAL GAIN DIVIDENDS					678.	
663.00		116. BANK OF AMERICA CORP COM PROPERTY TYPE: SECURITIES 2,639.00					11/24/2008 -1,976.00	01/21/2009
343.00		60. BANK OF AMERICA CORP COM PROPERTY TYPE: SECURITIES 3,050.00					09/12/2007 -2,707.00	01/21/2009
1,215.00		44. BERKLEY W R CORP COM PROPERTY TYPE: SECURITIES 1,393.00					10/15/2007 -178.00	01/28/2009
177.00		3. NORTHERN TR CORP COM PROPERTY TYPE: SECURITIES 238.00					08/18/2008 -61.00	01/28/2009
827.00		14. NORTHERN TR CORP COM PROPERTY TYPE: SECURITIES 917.00					08/09/2007 -90.00	01/28/2009
628.00		13. ACE LTD CHF 33.74 SHS PROPERTY TYPE: SECURITIES 815.00					06/12/2007 -187.00	01/28/2009
163.00		3. ABBOTT LABS COM PROPERTY TYPE: SECURITIES 178.00					08/18/2008 -15.00	02/02/2009

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Gross sale price less expenses of sale	Depreciation allowed/ allowable	Cost or other basis	FMV as of 12/31/69	Adj. basis as of 12/31/69	Excess of FMV over adj basis		Gain or (loss)	
116.00		2. BAXTER INTL INC COM PROPERTY TYPE: SECURITIES 117.00					11/06/2008 -1.00	02/02/2009
53.00		2. CVS CORP COM PROPERTY TYPE: SECURITIES 72.00					07/24/2007 -19.00	02/02/2009
208.00		3. CHEVRONTXACO CORP COM PROPERTY TYPE: SECURITIES 254.00					08/18/2008 -46.00	02/02/2009
138.00		3. CONOCOPHILLIPS COM PROPERTY TYPE: SECURITIES 205.00					12/05/2006 -67.00	02/02/2009
212.00		9.393 DREYFUS BOSTON CO SMALLCAP EQTY TE PROPERTY TYPE: SECURITIES 381.00					08/27/2007 -169.00	02/02/2009
65.00		2. EDISON INTERNATIONAL COM PROPERTY TYPE: SECURITIES 94.00					12/06/2006 -29.00	02/02/2009
75.00		8.611 FORUM FDS ABSOLUTE STRATEGIES INST PROPERTY TYPE: SECURITIES 94.00					10/30/2007 -19.00	02/02/2009
102.00		2. GILEAD SCIENCES INC COM PROPERTY TYPE: SECURITIES 93.00					11/17/2008 9.00	02/02/2009
334.00		1. GOOGLE INC CL A COM PROPERTY TYPE: SECURITIES 469.00					07/21/2008 -135.00	02/02/2009
87.00		2. HARRIS CORP DEL COM PROPERTY TYPE: SECURITIES 87.00						

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Kind of Property		Description				P or D	Date acquired	Date sold
Gross sale price less expenses of sale	Depreciation allowed/ allowable	Cost or other basis	FMV as of 12/31/69	Adj basis as of 12/31/69	Excess of FMV over adj basis		Gain or (loss)	
177.00		7. J P MORGAN CHASE & CO COM PROPERTY TYPE: SECURITIES 311.00					09/12/2007 -134.00	02/02/2009
115.00		2. JOHNSON & JOHNSON COM PROPERTY TYPE: SECURITIES 143.00					08/18/2008 -28.00	02/02/2009
59.00		1. LABORATORY CORP OF AMERICA HLDGS COM PROPERTY TYPE: SECURITIES 77.00					05/20/2008 -18.00	02/02/2009
173.00		3. MCDONALDS CORP COM PROPERTY TYPE: SECURITIES 166.00					11/24/2008 7.00	02/02/2009
663.00		72.222 PIMCO FOREIGN BOND FUND PROPERTY TYPE: SECURITIES 740.00					04/28/2008 -77.00	02/02/2009
61.00		1. PRAXAIR INC COM PROPERTY TYPE: SECURITIES 59.00					10/10/2008 2.00	02/02/2009
97.00		2. RAYTHEON CO COM NEW PROPERTY TYPE: SECURITIES 124.00					08/18/2008 -27.00	02/02/2009
49.00		1. RAYTHEON CO COM NEW PROPERTY TYPE: SECURITIES 53.00					12/06/2006 -4.00	02/02/2009
660.00		100.152 RIDGEWORTH FD-MIDCAP VAL EQTY #4 PROPERTY TYPE: SECURITIES 1,333.00					08/27/2007 -673.00	02/02/2009
4,448.00		431.845 RIDGEWORTH FD-INTERMEDIATE BD #8 PROPERTY TYPE: SECURITIES 4						

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CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME

Kind of Property		Description				P or D	Date acquired	Date sold
Gross sale price less expenses of sale	Depreciation allowed/ allowable	Cost or other basis	FMV as of 12/31/69	Adj basis as of 12/31/69	Excess of FMV over adj basis		Gain or (loss)	
10,313.00		472. VANGUARD INTL EQTY INDX EMRG MKTS PROPERTY TYPE: SECURITIES 10,358.00					11/24/2008 -45.00	02/03/2009
127.00		5. AT & T INC COM PROPERTY TYPE: SECURITIES 174.00					12/06/2006 -47.00	02/04/2009
234.00		3. EXXON MOBIL CORP PROPERTY TYPE: SECURITIES 230.00					11/24/2008 4.00	02/04/2009
1,109.00		21. PROCTER & GAMBLE CO COM PROPERTY TYPE: SECURITIES 1,364.00					11/24/2008 -255.00	02/04/2009
1,796.00		34. PROCTER & GAMBLE CO COM PROPERTY TYPE: SECURITIES 2,174.00					10/30/2006 -378.00	02/04/2009
26,477.00		2411.423 RIDGEWORTH FD-US GOVT SECS #532 PROPERTY TYPE: SECURITIES 25,161.00					12/11/2008 1,316.00	02/04/2009
4,000.00		364.322 RIDGEWORTH FD-US GOVT SECS #532 PROPERTY TYPE: SECURITIES 3,636.00					06/28/2000 364.00	02/04/2009
371.00		42.207 ROWE T PRICE REAL ESTATE FD COM PROPERTY TYPE: SECURITIES 933.00					08/27/2007 -562.00	02/04/2009
67.00		4. TEXAS INSTRS INC COM PROPERTY TYPE: SECURITIES 112.00					06/08/2005 -45.00	02/04

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

Kind of Property		Description				P or D	Date acquired	Date sold
Gross sale price less expenses of sale	Depreciation allowed/ allowable	Cost or other basis	FMV as of 12/31/69	Adj basis as of 12/31/69	Excess of FMV over adj basis		Gain or (loss)	
90.00		5. WELLS FARGO & CO NEW COM PROPERTY TYPE: SECURITIES 153.00					03/26/2008 -63.00	02/04/2009
312.00		16. AFLAC INC COM PROPERTY TYPE: SECURITIES 623.00					11/24/2008 -311.00	02/26/2009
935.00		48. AFLAC INC COM PROPERTY TYPE: SECURITIES 2,933.00					11/20/2007 -1,998.00	02/26/2009
710.00		17. NIKE INC CL B PROPERTY TYPE: SECURITIES 882.00					11/24/2008 -172.00	02/27/2009
2,254.00		54. NIKE INC CL B PROPERTY TYPE: SECURITIES 2,945.00					08/21/2007 -691.00	02/27/2009
639.00		48. NORDSTROM INC COM PROPERTY TYPE: SECURITIES 1,463.00					11/24/2008 -824.00	02/27/2009
196.00		5. UNITED TECHNOLOGIES CORP COM PROPERTY TYPE: SECURITIES 334.00					08/18/2008 -138.00	03/02/2009
904.00		23. UNITED TECHNOLOGIES CORP COM PROPERTY TYPE: SECURITIES 1,420.00					08/21/2007 -516.00	03/02/2009
3,135.00		33. GENENTECH INC COM PROPERTY TYPE: SECURITIES 2,706.00					11/24/2008 429.00	03/25/2009
1,051.00		21. PROCTER & GAMBLE CO COM PROPERTY TYPE: SECURITIES 1,298.00						

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

Kind of Property		Description				P or D	Date acquired	Date sold
Gross sale price less expenses of sale	Depreciation allowed/ allowable	Cost or other basis	FMV as of 12/31/69	Adj basis as of 12/31/69	Excess of FMV over adj basis		Gain or (loss)	
141.00		2. C R BARD INC COMMON STOCK PROPERTY TYPE: SECURITIES 167.00					07/11/2007 -26.00	05/18/2009
100.00		2. BAXTER INTL INC COM PROPERTY TYPE: SECURITIES 117.00					11/06/2008 -17.00	05/18/2009
95.00		4. BERKLEY W R CORP COM PROPERTY TYPE: SECURITIES 127.00					10/16/2007 -32.00	05/18/2009
248.00		8. CVS CORP COM PROPERTY TYPE: SECURITIES 289.00					07/24/2007 -41.00	05/18/2009
266.00		4. CHEVRONTExACO CORP COM PROPERTY TYPE: SECURITIES 313.00					11/24/2008 -47.00	05/18/2009
707.00		39. CISCO SYSTEMS COM STK PROPERTY TYPE: SECURITIES 714.00					11/24/2008 -7.00	05/18/2009
107.00		6. CONAGRA INC COM PROPERTY TYPE: SECURITIES 106.00					02/04/2009 1.00	05/18/2009
134.00		3. CONOCOPHILLIPS COM PROPERTY TYPE: SECURITIES 205.00					12/05/2006 -71.00	05/18/2009
167.00		12. CORNING INC PROPERTY TYPE: SECURITIES 287.00					10/26/2007 -120.00	05/18/2009
120.00		4. CUMMINS ENGINE CO COM PROPERTY TYPE: SECURITIES 75.00					03/02/20	

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

Kind of Property		Description				P or D	Date acquired	Date sold
Gross sale price less expenses of sale	Depreciation allowed/ allowable	Cost or other basis	FMV as of 12/31/69	Adj basis as of 12/31/69	Excess of FMV over adj basis		Gain or (loss)	
244.00		10. DIRECTV GROUP INC COM PROPERTY TYPE: SECURITIES 277.00					08/18/2008 -33.00	05/18/2009
401.00		17. WALT DISNEY CO PROPERTY TYPE: SECURITIES 572.00					12/05/2006 -171.00	05/18/2009
288.00		24. E M C CORP MASS COM PROPERTY TYPE: SECURITIES 423.00					05/15/2008 -135.00	05/18/2009
170.00		6. EDISON INTERNATIONAL COM PROPERTY TYPE: SECURITIES 282.00					12/06/2006 -112.00	05/18/2009
102.00		3. EMERSON ELEC CO COM PROPERTY TYPE: SECURITIES 149.00					08/18/2008 -47.00	05/18/2009
170.00		5. EMERSON ELEC CO COM PROPERTY TYPE: SECURITIES 237.00					04/30/2007 -67.00	05/18/2009
235.00		5. EXELON CORPORATION COM PROPERTY TYPE: SECURITIES 366.00					08/18/2008 -131.00	05/18/2009
94.00		2. EXELON CORPORATION COM PROPERTY TYPE: SECURITIES 125.00					12/06/2006 -31.00	05/18/2009
117.00		2. EXPRESS SCRIPTS INC CL-A PROPERTY TYPE: SECURITIES 150.00					08/18/2008 -33.00	05/18/2009
176.00		3. EXPRESS SCRIPTS INC CL-A PROPERTY TYPE: SECURITIES 174.00					10/17/200	

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

Kind of Property		Description				P or D	Date acquired	Date sold
Gross sale price less expenses of sale	Depreciation allowed/ allowable	Cost or other basis	FMV as of 12/31/69	Adj. basis as of 12/31/69	Excess of FMV over adj basis		Gain or (loss)	
449.00		47.065 FORUM FDS ABSOLUTE STRATEGIES INS PROPERTY TYPE: SECURITIES 516.00					10/30/2007 -67.00	05/18/2009
185.00		4. FREEPORT-MCMORAN COPPER & GOLD I CL PROPERTY TYPE: SECURITIES 139.00					10/10/2008 46.00	05/18/2009
472.00		36. GENERAL ELEC CO COM PROPERTY TYPE: SECURITIES 1,323.00					07/26/2007 -851.00	05/18/2009
130.00		3. GILEAD SCIENCES INC COM PROPERTY TYPE: SECURITIES 139.00					11/17/2008 -9.00	05/18/2009
108.00		5. HALLIBURTON CO COM PROPERTY TYPE: SECURITIES 235.00					07/10/2008 -127.00	05/18/2009
89.00		3. HARRIS CORP DEL COM PROPERTY TYPE: SECURITIES 131.00					12/06/2006 -42.00	05/18/2009
317.00		9. HEWLETT PACKARD COM PROPERTY TYPE: SECURITIES 410.00					08/18/2008 -93.00	05/18/2009
387.00		11. HEWLETT PACKARD COM PROPERTY TYPE: SECURITIES 441.00					12/06/2006 -54.00	05/18/2009
309.00		12. HOME DEPOT INC COM PROPERTY TYPE: SECURITIES 300.00					09/30/2008 9.00	05/18/2009
183.00		12. INTEL CORP COM PROPERTY TYPE: SECURITIES 292.00						

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

Kind of Property		Description				P or D	Date acquired	Date sold
Gross sale price less expenses of sale	Depreciation allowed/ allowable	Cost or other basis	FMV as of 12/31/69	Adj basis as of 12/31/69	Excess of FMV over adj basis		Gain or (loss)	
357.00		10. J P MORGAN CHASE & CO COM PROPERTY TYPE: SECURITIES 445.00					09/12/2007 -88.00	05/18/2009
168.00		3. JOHNSON & JOHNSON COM PROPERTY TYPE: SECURITIES 215.00					08/18/2008 -47.00	05/18/2009
335.00		6. JOHNSON & JOHNSON COM PROPERTY TYPE: SECURITIES 397.00					12/05/2006 -62.00	05/18/2009
252.00		6. KOHL'S CORP COM STK PROPERTY TYPE: SECURITIES 211.00					02/27/2009 41.00	05/18/2009
224.00		9. KRAFT FOODS INC-A COM PROPERTY TYPE: SECURITIES 258.00					10/13/2008 -34.00	05/18/2009
185.00		3. LABORATORY CORP OF AMERICA HLDGS COM PROPERTY TYPE: SECURITIES 230.00					05/20/2008 -45.00	05/18/2009
267.00		5. MCDONALDS CORP COM PROPERTY TYPE: SECURITIES 277.00					11/24/2008 -10.00	05/18/2009
154.00		6. MERCK & CO INC COM PROPERTY TYPE: SECURITIES 302.00					08/14/2007 -148.00	05/18/2009
284.00		14. MICROSOFT CORP COM PROPERTY TYPE: SECURITIES 390.00					08/18/2008 -106.00	05/18/2009
243.00		12. MICROSOFT CORP COM PROPERTY TYPE: SECURITIES 311.00						

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

Kind of Property		Description				P or D	Date acquired	Date sold
Gross sale price less expenses of sale	Depreciation allowed/ allowable	Cost or other basis	FMV as of 12/31/69	Adj. basis as of 12/31/69	Excess of FMV over adj basis		Gain or (loss)	
55.00		1. NORTHERN TR CORP COM PROPERTY TYPE: SECURITIES 65.00					08/09/2007 -10.00	05/18/2009
245.00		4. OCCIDENTAL PETE CORP COM PROPERTY TYPE: SECURITIES 278.00					09/10/2008 -33.00	05/18/2009
168.00		9. ORACLE SYSTEMS CORP COM PROPERTY TYPE: SECURITIES 208.00					08/18/2008 -40.00	05/18/2009
205.00		11. ORACLE SYSTEMS CORP COM PROPERTY TYPE: SECURITIES 220.00					07/26/2007 -15.00	05/18/2009
152.00		3. PEPSICO INC COM PROPERTY TYPE: SECURITIES 210.00					08/18/2008 -58.00	05/18/2009
304.00		6. PEPSICO INC COM PROPERTY TYPE: SECURITIES 327.00					02/18/2005 -23.00	05/18/2009
129.00		3. PHILIP MORRIS INTL COM PROPERTY TYPE: SECURITIES 166.00					08/18/2008 -37.00	05/18/2009
215.00		5. PHILIP MORRIS INTL COM PROPERTY TYPE: SECURITIES 273.00					01/15/2008 -58.00	05/18/2009
807.00		115.121 PIMCO COMMODITY REALRTN STRATEGY PROPERTY TYPE: SECURITIES 709.00					02/02/2009 98.00	05/18/2009
212.00		3. PRAXAIR INC COM PROPERTY TYPE: SECURITIES 178.00			</			

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

Kind of Property		Description				P or D	Date acquired	Date sold
Gross sale price less expenses of sale	Depreciation allowed/ allowable	Cost or other basis	FMV as of 12/31/69	Adj. basis as of 12/31/69	Excess of FMV over adj basis		Gain or (loss)	
246.00		6. QUALCOMM CORP COM STK PROPERTY TYPE: SECURITIES 211.00					11/10/2008 35.00	05/18/2009
135.00		3. RAYTHEON CO COM NEW PROPERTY TYPE: SECURITIES 158.00					12/06/2006 -23.00	05/18/2009
576.00		75.294 RIDGEWORTH FD-EMERGING GROWTH #59 PROPERTY TYPE: SECURITIES 1,088.00					08/27/2007 -512.00	05/18/2009
2,447.00		230.414 RIDGEWORTH FD-INTL EQ INDEX #530 PROPERTY TYPE: SECURITIES 2,318.00					12/15/2008 129.00	05/18/2009
30,233.00		2781.31 RIDGEWORTH FD-US GOVT SECS #532 PROPERTY TYPE: SECURITIES 27,757.00					06/28/2000 2,476.00	05/18/2009
159.00		3. SCHLUMBERGER LTD COM PROPERTY TYPE: SECURITIES 288.00					01/07/2008 -129.00	05/18/2009
155.00		9. SCHWAB CHARLES CORP NEW COM PROPERTY TYPE: SECURITIES 142.00					01/28/2009 13.00	05/18/2009
219.00		8. TJX COS INC NEW COM PROPERTY TYPE: SECURITIES 265.00					02/26/2008 -46.00	05/18/2009
245.00		6. TARGET CORP COM PROPERTY TYPE: SECURITIES 373.00					07/27/2007 -128.00	05/18/2009</

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

DESCRIPTION -----	REVENUE AND EXPENSES PER BOOKS -----	NET INVESTMENT INCOME -----
DIVIDENDS & INTEREST	27,909.	27,366.
	-----	-----
TOTAL	27,909.	27,366.
	=====	=====

FORM 990PF, PART I - ACCOUNTING FEES
=====

DESCRIPTION -----	REVENUE AND EXPENSES PER BOOKS -----	NET INVESTMENT INCOME -----	ADJUSTED NET INCOME -----	CHARITABLE PURPOSES -----
TAX PREP FEES	600.			600.
TOTALS	600.	NONE	NONE	600.
	=====	=====	=====	=====

FORM 990PF, PART I - TAXES
=====

DESCRIPTION -----	REVENUE AND EXPENSES PER BOOKS -----	NET INVESTMENT INCOME -----
FOREIGN TAXES		86.
TOTALS		86.
		=====

FORM 990PF, PART I - OTHER EXPENSES
=====

DESCRIPTION -----	REVENUE AND EXPENSES PER BOOKS -----	NET INVESTMENT INCOME -----
ADR FOREIGN FEES	1.	1.
TOTALS	1.	1.
	=====	=====

TR UW R D BUCHAN 47-1916290

58-6141637

FORM 990PF, PART II - CORPORATE STOCK
=====

DESCRIPTION

ENDING
BOOK VALUE

ENDING
FMV

SEE ATTACHED STATEMENT

674,212.

727,560.

TOTALS

674,212.
=====

727,560.
=====

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

DESCRIPTION -----	AMOUNT -----
BV ADJ HARRIS STRATES	51.
BV ADJ CHARLES BRENT LOWE	3,000.
BV ADJ HEATHER MARIE MATHIS	250.
BV ADJ DEANGELO OCTAVIS MILLER	1,000.
BV ADJ HEATHER MULLIS OWENS	1,000.
BV ADJ BRITTANY HOLT	2,000.
BV ADJ VALERIE POPLIN SANGSTER	1,000.
BV ADJ MIRANDA DEESE	1,000.
BV ADJ PORTIA YATES	50.

TOTAL	9,351.
	=====

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

DESCRIPTION -----	AMOUNT -----
BV ADJ MICHAEL DAWSON	2.
BV ADJ LARA LYNN HOLT	1,000.
BV ADJ LISA MARIE THOMPSON	1,000.
BV ADJ KRISTEN NOEL GIDDENS	2,000.
PAYROLL TIMING DIFFERENCE	15.

TOTAL	4,017.
	=====

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

GA

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

=====

OFFICER NAME:

SUNTRUST BANK

ADDRESS:

606 CHERRY STREET

MACON, GA 31201

TITLE:

TRUSTEE, AS REQ'D

COMPENSATION 14,415.

TOTAL COMPENSATION: 14,415.

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TR ÜW R D BUCHAN 47-1916290
FORM 990PF, PART XV - LINES 2a - 2d
=====

58-6141637

RECIPIENT NAME:

BETTY ANN GROSS

ADDRESS:

SUNMARK BANK

HAWKINSVILLE, GA

FORM, INFORMATION AND MATERIALS:

CONTACT SUNMARK BANK FOR AN APPLICATION

SUBMISSION DEADLINES:

APPLICATIONS ARE TO BE SUBMITTED ON A
QUARTERLY BASIS

RESTRICTIONS OR LIMITATIONS ON AWARDS:

RESIDENTS OF PULASKI COUNTY GEORGIA

