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Form 990-PF

Department of the Treasury

Return of Private Foundation

or Section 4947(a)(1) Nonexempt Charitable Trust
Treated as a Private Foundation
Note. The foundation may be able to use a copy of this return to satisfy state reporting requirements.

2009

OMB No 1545-0052

Otherwise, print or type. 3657 PEACH See Specific City or town, state, as ATLANTA, CHARLES ATLANTA, CHARLES ATLANTA, COMPACT AND	Initial return Amended return ND PAULA MCE JAMES F. MC O box number if mail is not of HTREE ROAD N nd ZIP code GA 30319-12 X Section 501(c)(3) enert charitable trust end of year J Account in 0 B, 084. (Part I, column (a)) and Expenses arms (b), (c), and (d) may not als in column (a)) and sin of required to attach Sch B over or securities	elivered to street address) IE 276 xempt private foundation Other taxable private founda	tion Accrual (b) Net investment income 20,904. 156,660.		7005 ending, check here s, check here enting the 85% test, induction tus was terminated (A), check here 60-month termination (B), check here (d) Disbursements for charitable purposes (cash basis only) STATEMENT 1 STATEMENT 2
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Dividends and interest from the following of the followin	assets not on line 10	~ 3			1000
b Net rental income or (loss) 6a Net gain or (loss) from sale of 6 Gross sales price for all 6 assets on line 6a 7 Capital gain net income (from 8 Net short-term capital ga 9 Income modifications 6 Gross sales less returns		<4,464.		,	, ,
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9 Income modifications				FOECE	VED
9 Income modifications Gross sales less returns	Part IV, line 2)		0.	NL OL	1
100 0000 0000 1000 1000 100	un		1. July 1. 4		
100 0000 0000 1000 1000 100		4. " " " " " " " " " " " " " " " " " " "	F. B. S. F.	E MAY I	1. 2010 (G) - 437 · 5
b Less Cost of goods sold . C Gross profit or (loss)		J. 1974 J. S. 28 4 1.5	されない まっこっこ		(A. 17) (A. 17) (A. 17)
c Gross profit or (loss)		6,5	,	OGDE	- TIP 31
			新华外野村	OGDE	
11 Other income					5、10 (1) 新疆大学
12 Total. Add lines 1 through	gh 11	376,334.	177,564		论的新疆等等
(I) 13 Compensation of officers, dire	rectors, trustees, etc	50,000.	25,000	,	25,000
14 Other employee salaries	and wages				<u> </u>
15 Pension plans, employee					
16a Legal fees	<u></u> . <u></u> .				
b Accounting fees	STMT 3	2,300.	0	•	1,150
c Other professional fees				<u> </u>	
§ 17 Interest					
18 Taxes				ļ	100 100 100 100 100 100 100 100 100 100
19 Depreciation and depletic				<u> </u>	沙洲的"中海"
E 20 Occupancy				 	
21 Travel, conferences, and				ļ	
22 Printing and publications	s		· · · · · · · · · · · · · · · · · · ·		
23 Other expenses					
24 Total operating and adm		F0 300	25 000		26 150
<i>=</i> 1 ·	through 23	52,300.	25,000		26,150
- 25 Contributions, girls, gran		259,132.	3/4/2003/11/11/11/20		259,132
26 Total expenses and dist		211 420	25 222		1 205 200
		311,432.	25,000		285,282
27 Subtract line 26 from line	e 12:	64,902.	100 mg		· · · · · · · · · · · · · · · · · · ·
8 Excess of revenue over expe		64,902.	1 50 50	The same with the same	新元子のある·本品にもの
· · · · · · · · · · · · · · · · · · ·		128	152,564		
c Adjusted net income (rr	(if negative, enter -0-)	Section of the sectio			"

923501 02-02-10 LHA For Privacy Act and Paperwork Reduction Act Notice, see the Instructions.

Form 990-PF (2009)

TRUST C/O JAMES F. MCDONALD

58-6429849

Page 2

Б	art	Balance Sheets Attached schedules and amounts in the description	Beginning of year	End of	
	arı	column should be for end-of-year amounts only	(a) Book Value	(b) Book Value	(c) Fair Market Value
	1	Cash - non-interest-bearing			
	2	Savings and temporary cash investments	492,971.	379,170.	379,170.
		Accounts receivable			
	-	Less; allowance for doubtful accounts ▶			
		Pledges receivable ►	·····		
	7	Less allowance for doubtful accounts			
	۔ ا	Grants receivable			
		}-			
	6	Receivables due from officers, directors, trustees, and other		1	
		disqualified persons			
	7	Other notes and loans receivable		İ	
		Less: allowance for doubtful accounts			···
ts		Inventories for sale or use			
Assets		Prepaid expenses and deferred charges			<u> </u>
⋖	10a	Investments - U.S. and state government obligations			
	Ь	Investments - corporate stock STMT 4	3,505,996.	3,934,071.	5,068,914.
	C	Investments - corporate bonds			
	11	Investments - land, buildings, and equipment basis			
		Less accumulated depreciation			
	12	Investments - mortgage loans			
	13	Investments - other			
	14	Land, buildings, and equipment: basis ▶			4
		Less accumulated depreciation			
	15	Other assets (describe ►		· · · · · · · · · · · · · · · · · · ·	
	16	Total assets (to be completed by all filers) .	3,998,967.	4,313,241.	5,448,084.
		Accounts payable and accrued expenses			; , ,
		Grants payable			
g)	19	Deferred revenue			
Liabilities	20	Loans from officers, directors, trustees, and other disqualified persons			
ige		Mortgages and other notes payable			
=		Other liabilities (describe)			
	23	Total liabilities (add lines 17 through 22)	0.	0.	
		Foundations that follow SFAS 117, check here			
		and complete lines 24 through 26 and lines 30 and 31.			1 35 35 1 1 3 5 5 5 5 5 5 5 5 5 5 5 5 5
ces	24	Unrestricted			
ᇣ	25	Temporarily restricted			
Ва	26	Permanently restricted			
or Fund Bal	1	Foundations that do not follow SFAS 117, check here			
Ĭ		and complete lines 27 through 31.			
S	27	Capital stock, trust principal, or current funds	486,960.	486,960.	
set	28	Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
As	29	Retained earnings, accumulated income, endowment, or other funds	3,512,007.	3,826,281.	
Net Assets	30	Total net assets or fund balances	3,998,967.	4,313,241.	
_					
	31	Total liabilities and net assets/fund balances	3,998,967.	4,313,241.	
ГР	a říť	Analysis of Changes in Net Assets or Fund B	alances		
=					
1		I net assets or fund balances at beginning of year - Part II, column (a), line		1.	3 000 067
_	(mu	st agree with end-of-year figure reported on prior year's return)			3,998,967.
2	FUIG	r amount from Part I, line 27a r increases not included in line 2 (itemize) UNREALIZED			249,372.
3	Uthe	increases not included in line 2 (nemize) UNKEALLZED	GUIN		
		lines 1, 2, and 3			4,313,241.
		reases not included in line 2 (itemize) I net assets or fund balances at end of year (line 4 minus line 5) - Part II, co	olumn (b) line 30		4,313,241.
<u>6</u>	100	inter assess of fund balances at end of year fune 4 fillings line 37 - Fart II, or	ordina (o), and oo		Form 990-PF (2009)
					(2000)

Form 990-PF (2009)

TRUST C/O JAMES F. MCDONALD

58-6429849

Page 3

Pai	rt IV Capital Gains a	ind Loss	es for Tax on Ir	vestment	Income						
	(a) List and descri 2-story brick war	be the kind(ehouse; or c	s) of property sold (e.g common stock, 200 sh	., real estate, s. MLC Co.)		(b) F	low ac - Purcl - Dona	iase į ',) Date acq (mo., day,		(d) Date sold (mo., day, yr.)
1a V	VELLS FARGO CAS	H IN	LIEU					P 0	1/01/	796	01/02/09
	COMCAST CORP							P 1	2/07/	707	07/21/09
c (CAPITAL GAINS I	OIVIDE	NDS								
d							,				
е						<u> </u>		<u> </u>			<u> </u>
	(e) Gross sales price		reciation allowed r allowable)		t or other basis xpense of sale				(h) Gain (e) plus (f)		
a	4.										4.
b	72,793.				99,31	ا ، 9					<26,526.
C	22,058.			ļ					_,		22,058.
ď			·								
е				<u> </u>							
	Complete only for assets showing							(I) G	lains (Col. c), but not	(h) gain	minus
	(i) F.M V. as of 12/31/69		Adjusted basis of 12/31/69		cess of col. (i) col. (j), if any				Losses (fre	om col.	(h))
a				ļ							4.
b											<26,526.
C				ļ							22,058.
<u>d</u>											
<u>e</u>			- · · · - · · · · · · · · · · · · · · ·	<u> </u>							
			∫ If gain, also ente			١٦					-1 161
2 Ca	apital gain net income or (net cap	oital loss)	f (loss), enter -0	ın Part I, line ا	7	기	2				<4,464.
	et short-term capital gain or (loss	•	l ın sections 1222(5) ai	nd (6):		٦					
	gain, also enter in Part I, line 8, o	column (c).				- }				NT / 7	
	(loss), enter -0- in Part I, line 8 rt V Qualification Ui	nder Sec	tion 4940/e) for	Reduced	Tay on Nat	Inv	oetn	ent Inco	me	N/A	
	optional use by domestic private										
נרטו נ	optional use by domestic private	luulidations	Subject to the Section	4940(a) lax bii	tiet investitient ii	ICUITIE	i-)				
If sec	tion 4940(d)(2) applies, leave th	ıs part blank	•								
Mac	the foundation liable for the secti	ion 4042 tay	on the distributable as	nount of any w	ar in the bace no	riod?					Yes X No
					•	i lou :	•	•	• • •		165 [2 <u>1</u>] NU
	s," the foundation does not quali nter the appropriate amount in e					es.					
	(a) Base period years	1	(b)		1	(c)			Ι		(d) bution ratio
Ca	Base periód years lendar year (or tax year beginnin	na in)	Adjusted qualifying dis	tributions	Net value of no			use assets	(00	Distri ol. (b) di	butión ratio vided by col. (c))
	2008	9/	31	1,683.		5	. 18	7,699.		(5/ 5.	.060081
	2007			6,644.				6,762.			.056646
	2006			4,000.				1,704.			.055794
	2005			7,597.				6,579.			.060328
	2004			6,688.				6,542.			.047986
	2001			-,			,	-,			
2 T	otal of line 1, column (d)								2		.28083
	verage distribution ratio for the 5										
	e foundation has been in existen				•	•		<i></i>	3		.056167
			• • • • • • • • • • • • • • • • • • • •								
4 Er	nter the net value of noncharitable	le-use assets	s for 2009 from Part X,	line 5					4		4,679,253
5 M	ultiply line 4 by line 3								5		262,820
			• • • • • • • • • • • • • • • • • • • •			••					······································
6 E	nter 1% of net investment incom	e (1% of Pa	rt I, line 27b)						6		1,526
		•	• ', ., .,		· · · · ·						
7 A	dd lines 5 and 6								7		264,346
		•••••				••					
	nter qualifying distributions from								8		285,282
	line 8 is equal to or greater than ee the Part VI instructions.	line 7, checl	k the box in Part VI, line	e 1b, and com	olete that part usi	ng a 1	% tax	rate.			

58-6429849 TRUST C/O JAMES F. MCDONALD Form 990-PF (2009) Part VI | Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see instructions 1a Exempt operating foundations described in section 4940(d)(2), check here ▶ ____ and enter *N/A* on line 1. Date of ruling or determination letter: (attach copy of letter if necessary-see instructions) 1,526. b Domestic foundations that meet the section 4940(e) requirements in Part V, check here X and enter 1% of Part I, line 27b 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 3 Add lines 1 and 2 4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) 5 526 5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-6 Credits/Payments: 1,800. a 2009 estimated tax payments and 2008 overpayment credited to 2009 6a b Exempt foreign organizations - tax withheld at source 6b c Tax paid with application for extension of time to file (Form 8868) 6с d Backup withholding erroneously withheld 6d 7 Total credits and payments. Add lines 6a through 6d 1,800. 8 Enter any penalty for underpayment of estimated tax. Check here X 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 9 274. 10 10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid 274 . Refunded ▶ 11 Enter the amount of line 10 to be: Credited to 2010 estimated tax 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 Х any political campaign? 1a X b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? 1b 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? 1c d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: 0 • (2) On foundation managers. ▶ \$ (1) On the foundation. > \$ e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. > \$ X 2 Has the foundation engaged in any activities that have not previously been reported to the IRS? 2 If "Yes," attach a detailed description of the activities. 3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or 3 bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes 4a Did the foundation have unrelated business gross income of \$1,000 or more during the year? b If "Yes," has it filed a tax return on Form 990-T for this year? 4b 5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T. 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 s Br remain in the governing instrument? 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. 8a Enter the states to which the foundation reports or with which it is registered (see instructions) XX 2181 b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation 8b

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)? If "Yes," complete Part XIV

10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses

1.

58-6429849 Form 990-PF (2009) TRUST C/O JAMES F. MCDONALD Page 5 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 Х section 512(b)(13)? If "Yes," attach schedule (see instructions) 11 12 Did the foundation acquire a direct or indirect interest in any applicable insurance contract before 12 August 17, 2008? 13 13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address Telephone no. ► (847) 277-7005 14 The books are in care of ► ASHLEY M. TAYLOR ▶30097 Located at ► 3264 LOCKETT TRACE, DULUTH, GA 15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here N/A and enter the amount of tax-exempt interest received or accrued during the year Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required Yes No File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. 1a During the year did the foundation (either directly or indirectly): Yes X No (1) Engage in the sale or exchange, or leasing of property with a disqualified person? (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) Yes X No a disqualified person? Yes X No (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? Yes X No (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? (5) Transfer any income or assets to a disqualified person (or make any of either available Yes X No for the benefit or use of a disqualified person)? (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 Yes X No termination of government service, if terminating within 90 days.) b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations N/A 16 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 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? 10 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(1)(3) or 4942(1)(5)): a At the end of tax year 2009, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning Yes X No before 2009? If "Yes," list the years b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach N/A statement - see instructions.) c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. 3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? 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

had not been removed from jeopardy before the first day of the tax year beginning in 2009? ...

Form 990-PF (2009)

4a

TRUST C/O JAMES F. MCDONALD 58-6429849 Form 990-PF (2009) Page 6 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: Yes X No (1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? (2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, Yes X No any voter registration drive? Yes X No (3) Provide a grant to an individual for travel, study, or other similar purposes? (4) Provide a grant to an organization other than a charitable, etc., organization described in section Yes X No 509(a)(1), (2), or (3), or section 4940(d)(2)? (5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for Yes X No the prevention of cruelty to children or animals? b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations N/A section 53.4945 or in a current notice regarding disaster assistance (see instructions)? 5b Organizations relying on a current notice regarding disaster assistance check here c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained Yes No N/A expenditure responsibility for the grant? 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 Yes X No a personal benefit contract? b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? 6b X If "Yes" to 6b, file Form 8870. Yes X No 7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? N/A b If yes, did the foundation receive any proceeds or have any net income attributable to the transaction? 7b Information About Officers, Directors, Trustees, Foundation Managers, Highly Part VIII Paid Employees, and Contractors 1 List all officers, directors, trustees, foundation managers and their compensation. (d) Contributions to employee benefit plans and deferred (b) Title, and average hours per week devoted to position (c) Compensation (e) Expense account, other (If not paid, enter -0-) (a) Name and address allowances compensation TRUSTEE JAMES F. MCDONALD 3657 PEACHTREE ROAD NE, 0.00 0 0 0. ATLANTA, GA 30319 PAULA S. MCDONALD DIRECTOR 3657 PEACHTREE ROAD NE, #11A ATLANTA, GA 30319 0 0. 0.00 0 ASHLEY M. TAYLOR DIRECTOR 3264 LOCKETT TRACE 7.00 50,000 0. 0. DULUTH, GA 30097 2 Compensation of five highest-paid employees (other than those included on line 1). If none, enter "NONE." (d) Contributions to employee benefit plans and deferred compensation (b) Title, and average (e) Expense hours per week devoted to position (a) Name and address of each employee paid more than \$50,000 (c) Compensation allowances NONE Total number of other employees paid over \$50,000

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TRUST C/O JAMES F. MCDONALD

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Part VIII Information About Officers, Directors, Trustees, Foundation Paid Employees, and Contractors (continued)	on Managers, Highly	-
3 Five highest-paid independent contractors for professional services. If none, enter "I	NONE."	
(a) Name and address of each person paid more than \$50,000	- (b) Type of service	(c) Compensation
NONE		
		
		İ
		
Total number of others receiving over \$50,000 for professional services		▶ 0
Part IX-A Summary of Direct Charitable Activities		· · · · · · · · · · · · · · · · · · ·
List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical	al information such as the	Expenses
number of organizations and other beneficiaries served, conferences convened, research papers produc	ed, etc.	Expenses
1 N/A		
2		<u> </u>
3		
* <u></u>		
A		
4	· · · · · · · · · · · · · · · · · · ·	
Part IX-B Summary of Program-Related Investments		
Describe the two largest program-related investments made by the foundation during the tax year on lin	es 1 and 2	Amount
1 N/A	os rande.	Allount
1 N/A		
		
2		
All other program-related investments. See instructions.		
3		
Total. Add lines 1 through 3		0.
		Form 990-PF (2009)

Form 990-PF (2009) TRUST C/O JAMES F. MCDONALD Page 8 Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see instructions.) Part X Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes: 4,223,982. a Average monthly fair market value of securities 1a 1b 526,529. b Average of monthly cash balances 1c c Fair market value of all other assets 4,750, 1d d Total (add lines 1a, b, and c) e Reduction claimed for blockage or other factors reported on lines 1a and 0. 1c (attach detailed explanation) 1e 2 Acquisition indebtedness applicable to line 1 assets 750.511. Subtract line 2 from line 1d 3 71,258. Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions) 4 4,679,253. 5 Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4 233,963. Minimum investment return. Enter 5% of line 5 6 6 Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain Part XI foreign organizations check here
and do not complete this part.) 233,963. 1 Minimum investment return from Part X, line 6 1,526. 2a Tax on investment income for 2009 from Part VI, line 5 b Income tax for 2009. (This does not include the tax from Part VI.) 2b 2c 1.526. c Add lines 2a and 2b 3 Distributable amount before adjustments. Subtract line 2c from line 1 4 Recoveries of amounts treated as qualifying distributions 232,437 5 5 Add lines 3 and 4 6 Deduction from distributable amount (see instructions) 6 Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1 Part XII Qualifying Distributions (see instructions) Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes: 285,282. a Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26 1a 16 b Program-related investments - total from Part IX-B 2 Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes 2 Amounts set aside for specific charitable projects that satisfy the: 3a a Suitability test (prior IRS approval required) b Cash distribution test (attach the required schedule) 36 285,282. Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4 4 Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment 1,526. 5 income. Enter 1% of Part I, line 27b

. . . 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

Form 990-PF (2009)

6

Adjusted qualifying distributions. Subtract line 5 from line 4

4940(e) reduction of tax in those years.

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Part XIII Undistributed Income (see instructions)

					
	(a) Corpus	Years	(b) prior to 2008	(c) 2008	(d) 2009
1 Distributable amount for 2009 from Part XI,					
line 7					232,437.
2 Undistributed income, if any, as of the end of 2009					
a Enter amount for 2008 only	_			0.	<u></u>
b Total for prior years:					
			0.		
3 Excess distributions carryover, if any, to 2009					
a From 2004 b From 2005 24,159.					
cFrom 2006 79,104. dFrom 2007 37,754.			l		
eFrom 2008 55,872.					
f Total of lines 3a through e	196,889.				
4 Qualifying distributions for 2009 from					
Part XII, line 4: ►\$ 285, 282.					
a Applied to 2008, but not more than line 2a				0.	
b Applied to undistributed income of prior					
years (Election required - see instructions)			0.		
c Treated as distributions out of corpus	•				
(Election required - see instructions)	0.				232,437.
d Applied to 2009 distributable amount	E2 0/E				232,437.
e Remaining amount distributed out of corpus	52,845.				0.
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:	, ·			, , , , ,	
8 Corpus Add lines 3f, 4c, and 4e Subtract line 5	249,734.		,	, 4	. ,
b Prior years' undistributed income. Subtract	12 W 124 5	1		4.	
line 4b from line 2b	- """		0.		
c Enter the amount of prior years'	12 120				1
undistributed income for which a notice of deficiency has been issued, or on which					E 13 EN
the section 4942(a) tax has been previously			•		
assessed			0.		786
d Subtract line 6c from line 6b. Taxable			0.	- 3. (3) - 3 - 5 (3) (3)	
amount - see instructions	大学 (また *** *** *** **** **** **** **** ***	₹* ₹		1 1 1 W W W W W W	97.45 24 5 5 5 5 6 4 5 5 5 5 6 5 6 5 6 5 6 5 6
4a from line 2a. Taxable amount - see instr.		4.5		0.	
f Undistributed income for 2009. Subtract	The state of the state of the state of	±36.40 ()	(2.78.7 G. 78.2)	1、19年本人的報告を	202 120 130 2 3 -10 2 3 CA
lines 4d and 5 from line 1. This amount must		部數		15. Wash 1986 1986	
be distributed in 2010	, , , , , , , , , , , , , , , , , , , ,	100 mg	- 1 - 1 - 1 - 1 - 1 - 1 - 1 - 1 - 1 - 1		0.
7 Amounts treated as distributions out of		.o.,		Est in the state of the state o	一次的人的
corpus to satisfy requirements imposed by					
section 170(b)(1)(F) or 4942(g)(3)	0.		1, 1, 1, 1, 1, 1, 1, 1, 1, 1, 1, 1, 1, 1	Mary Service Services	· 新文字文字像者是这位认识。
8 Excess distributions carryover from 2004					
not applied on line 5 or line 7	0.		200 C. J. (2007)	1.0	The second secon
9 Excess distributions carryover to 2010.	249,734.	1	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1		
Subtract lines 7 and 8 from line 6a	249,734.	100	7 78 3 28 2	1 30,450 Carrier 10,00 Carrier	2 24-28-3 (Max 3 2 3 3 3 5 5 5 6 6 6 6 6 6 6 6 6 6 6 6 6 6
10 Analysis of line 9: a Excess from 2005 24, 159.		Par S	AND PARTY OF		
b Excess from 2006 79, 104.	建造器 据设计			1577。 "次"为277 至了。 1623年人身不是专家"是人	
c Excess from 2007 37,754.		1000			
dExcess from 2008 55,872.	1200年1200年1200年	[海紫]	1700		
e Excess from 2009 52,845.	THE WAR SELECT			1、据是"家民党"。	The same of the same
	· ····································				Form 990-PF (2009)

THE JIM AND PAULA MCDONALD CHARITABLE 58-6429849 TRUST C/O JAMES F. MCDONALD Page 10 Form 990-PF (2009) Part XIV Private Operating Foundations (see instructions and Part VII-A, question 9) N/A 1 a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2009, enter the date of the ruling **b** Check box to indicate whether the foundation is a private operating foundation described in section 4942(j)(3) or 4942(j)(5) Tax year Prior 3 years 2 a Enter the lesser of the adjusted net (a) 2009 (b) 2008 (d) 2006 (e) Total (c) 2007 income from Part I or the minimum investment return from Part X for each year listed b 85% of line 2a c Qualifying distributions from Part XII, line 4 for each year listed d Amounts included in line 2c not used directly for active conduct of exempt activities e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c 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 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 | Supplementary Information (Complete this part only if the foundation had \$5,000 or more in assets Part XV at any time during the year-see the instructions.) 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).) b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest. NONE Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs: Check here \(\sum \big| \sum \big| \sum \big| \sum \big| \sum if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. (see instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d. a The name, address, and telephone number of the person to whom applications should be addressed:

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

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

Form 990-PF (2009)

c Any submission deadlines:

Form 990-PF (2009) TRUST C/O JAMES F. MCDONALD

Part XV Supplementary Information (continued)

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3 Grants and Contributions Paid During	the Year or Approved for Future	Payment		
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation	Purpose of grant or contribution	Amount
Name and address (home or business)	any foundation manager or substantial contributor	status of recipient	contribution	Amount
a Paid during the year	or substantial contributor	recipient		
SEE STATEMENT 5				
Takat				259,132
b Approved for future payment NONE				
Talai			26	

Form 990-PF (2009) Part XVI-A

Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.		ed business income		ed by section 512, 513, or 514	(e)
1 Program service revenue:	(a) Business code	(b) Amount	Exclu- sion code	(d) Amount	Related or exempt function income
a			+		
			1		
b	-		+-+	····	
	-		+		
	-		+		
e	-		+		
·	_		++		
g Fees and contracts from government agencies			1		
2 Membership dues and assessments			1		
3 Interest on savings and temporary cash				20 004	
investments	<u> </u>	<u> </u>	14	20,904.	
4 Dividends and interest from securities			14	156,660.	
5 Net rental income or (loss) from real estate:		`			
a Debt-financed property					
b Not debt-financed property	L				
6 Net rental income or (loss) from personal			1 1		
property					
7 Other investment income					
8 Gain or (loss) from sales of assets other					
than inventory		ļ	14	22,058.	<26,522.>
9 Net income or (loss) from special events			7		
10 Gross profit or (loss) from sales of inventory					
11 Other revenue:					
a	-	1	1 1		
b	_				
C	-		1		
d	-	1			
e	-		1		
12 Subtotal. Add columns (b), (d), and (e)		0		199,622.	<26.522.>
12 Total Add line 12 columns (h) (d) and (e)	· 		ملسب لل	. 13	<26,522.> 173,100.
(See worksheet in line 13 instructions to verify calculations.)	• • • •		•		
Part_XVI-B Relationship of Activities Line No. Explain below how each activity for which into the foundation's exempt purposes (other that	come is reported	in column (e) of Part XVI-			olishment of
une tournation's exempt purposes (other the	in by providing in	unus nor suum purposes).			
	 				
923621					5 000 PF (ass)
923621 02-02-10					Form 990-PF (2009)

TRUST C/O JAMES F. MCDONALD

58-6429849 Page 13

Pa	rt XVII	Information Regarding T	ransfers To and	Transactions and Relationships With	n Noncharitable
		Exempt Organizations			
1	Did the orga	nization directly or indirectly engage in	any of the following with	any other organization described in section 501(c) of	TY.

1	Did the organization directly or indirectly engage in any of the following	on with any other organization	n described in section	501(c) of	Yes	No
١	the Code (other than section 501(c)(3) organizations) or in section 52			. 55 1(0) 51	1	110
_			Zaliulis		1 1	1
a	Transfers from the reporting foundation to a noncharitable exempt org	ganization of.			1	_U
	(1) Cash		•		1a(1)	X
	(2) Other assets				1a(2)	X
b	Other transactions:				1 1	
	(1) Sales of assets to a noncharitable exempt organization				16(1)	X
	(2) Purchases of assets from a noncharitable exempt organization				1b(2)	X
	(3) Rental of facilities, equipment, or other assets				1b(3)	X
	(4) Reimbursement arrangements				1b(4)	X
	(5) Loans or loan guarantees				1b(5)	X
	(6) Performance of services or membership or fundraising solicitatio	nns			1b(6)	X
C	Sharing of facilities, equipment, mailing lists, other assets, or paid em				10	X
	If the answer to any of the above is "Yes," complete the following sche		ave show the fair ma	rket value of the goods of	L	
٠	or services given by the reporting foundation. If the foundation receive					
			c in any transaction o	s sharing arrangement, s	TOW III	
۵۱.	column (d) the value of the goods, other assets, or services received.		(4) 0	(4		
ajı	ine no (b) Amount involved (c) Name of noncharitable	e exempt organization	(U) Description o	f transfers, transactions, and s	inaring arranger	nents
	N/A	·				
		· ·				
				· · · · · · · · · · · · · · · · · · ·		
				·		
				······································		
					_	
		· · · · · · · · · · · · · · · · · · ·	· 			
	-					
	- 			<u>-</u>		
_						
2a	Is the foundation directly or indirectly affiliated with, or related to, one		zations described	_		₹₹7
	in section 501(c) of the Code (other than section 501(c)(3)) or in sec	ction 527?		L	Yes	X No
b	If "Yes," complete the following schedule.					
	(a) Name of organization	(b) Type of organization	(() Description of relations	hip	
	N/A					
Т	Under penalties of perjury, I declare that I have examined this return, including according	ompanying schedules and statem	nents, and to the best of	my knowledge and belief, it is	true, correct,	
- 1	and complete Declaration of preparer (other than taxpayer or fiduciary) is based on	n all information of which preparer	has any knowledge.	Λ		
-	is (AVACOUNTHAM)	15/11/10	· Mary	MA) LA BOOK	7 19 5	
2	Signature of officer or trustee	Date	Title	W WALL	-40.	
半			Date Che		er's identifying r	number
Sign Here	Preparer's Signature Wristin C. Sories	<u> </u>	n n n nan Iseli	• — —		
<u> </u>	DELOTMOR MAY LID		· ~ o zoro lemi	ployed		
J	Rim's name (or yours DELOITTE TAX LLP	MID CITTUD 200	^	EIN ►		
1	191 PEACHTREE ST.,	NE SUITE 200	٧	Dh	\ 220	1 5 0 0
[address, and ZIP code ATLANTA, GA 30303-1	L924		Phone no. (404		
				Fo	orm 990-P l	⊢ (2009)

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

THE JIM AND PAULA MCDONALD CHARITABLE TRUST C/O JAMES F. MCDONALD

Employer identification number

58-6429849

Organization type (check one):								
Filers of	:	Section:						
Form 99	0 or 990-EZ	501(c)() (enter number) organization						
		4947(a)(1) nonexempt charitable trust not treated as a private foundation						
		527 political organization						
Form 99	0-PF	X 501(c)(3) exempt private foundation						
		4947(a)(1) nonexempt charitable trust treated as a private foundation						
		501(c)(3) taxable private foundation						
	nly a section 501(c)	s covered by the General Rule or a Special Rule. 7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.						
X	For an organization contributor. Comp	n filing Form 990, 990-EZ, or 990-PF that received, during the year, \$5,000 or more (in money or property) from any one ete Parts I and II.						
Special	Rules							
	509(a)(1) and 170(c)(3) organization filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 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% 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.							
	contributions for u If this box is check purpose. Do not co	c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, se exclusively for religious, charitable, etc., purposes, but these contributions did not aggregate to more than \$1,000. sed, enter here the total contributions that were received during the year for an exclusively religious, charitable, etc., complete any of the parts unless the General Rule applies to this organization because it received nonexclusively e, etc., contributions of \$5,000 or more during the year.						
but it m	ust answer "No" on	nat is not covered by the General Rule and/or the Special Rules does not file Schedule B (Form 990, 990-EZ, or 990-PF), Part IV, line 2 of its Form 990, or check the box on line H of its Form 990-EZ, or on line 2 of its Form 990-PF, to certify ng requirements of Schedule B (Form 990, 990-EZ, or 990-PF).						

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

Name of organization THE JIM AND PAULA MCDONALD CHARITABLE TRUST C/O JAMES F. MCDONALD

Employer identification number

58-6429849

Pa	rt	(Con	trib	utor	S (se	e instru	uctions)
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	<i>IL</i> \	(-)	(4)
(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
1	JAMES F. MCDONALD 3657 PEACHTREE ROAD, NUMBER 11A ATLANTA, GA 30319	\$ 130,006.	Person Payroll Noncash X (Complete Part II if there is a noncash contribution)
(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
2	JAMES F. MCDONALD 3657 PEACHTREE ROAD, NUMBER 11A ATLANTA, GA 30319	\$\$	Person Payroll Noncash (Complete Part II if there is a noncash contribution)
(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
		\$	Person Payroli Noncash (Complete Part II if there is a noncash contribution.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
		\$	Person Payroll Noncash Complete Part II if there is a noncash contribution.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
		- - \$	Person Payroll Oncash Complete Part II if there is a noncash contribution.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
		_ \$	Person Payroll Noncash (Complete Part II if there is a noncash contribution.)
923452 02-0	11-10	Schedule B (Form	990, 990-EZ, or 990-PF) (2009)

Name of organization

THE JIM AND PAULA MCDONALD CHARITABLE TRUST C/O JAMES F. MCDONALD

Page 1 of 1 of Part II
Employer identification number

58-6429849

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	660 SHARES OF APPLE, INC.	-	
		\$ 130,006.	12/14/09
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
2	250 SHARES INTUITIVE SURGICAL, INC.	-	
		\$ 73,228.	12/14/09
(a) No. from Part i	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		- - - - \$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see Instructions)	(d) Date received
-		- - - _{\$}	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		- - - - \$	
(a) No. from Part I	(b) Description of noncash property glven	(c) FMV (or estimate) (see instructions)	· (d) Date received
23453 02-0		Schodula B (Form	990, 990-EZ, or 990-PF) (200

FORM 990-PF INTEREST ON SAVI	NGS A	ND TEM	PORARY CA	SH IN	VESTMENTS	STATEMENT	1
SOURCE						AMOUNT	
WELLS FARGO ADVISORS					-	20,90	04.
TOTAL TO FORM 990-PF, PART I,	LINE	3, CO	LUMN A		:	20,90	04.
FORM 990-PF DIVIDEND	S AND	INTER	EST FROM	SECUI	RITIES	STATEMENT	2
SOURCE		GROSS	AMOUNT		ITAL GAINS IVIDENDS	COLUMN (A AMOUNT)
WELLS FARGO ADVISORS		· · · ·	178,718. 22,058.		22,058.	156,660.	
TOTAL TO FM 990-PF, PART I, L	N 4		178,718. 22,058.		156,660.		
FORM 990-PF	AC	COUNTI	NG FEES			STATEMENT	3
DESCRIPTION	EXPE	A) ENSES BOOKS	(B) NET INVI MENT INC		(C) ADJUSTED NET INCOM		
ACCOUNTING FEES		2,300.	0.		1,150.		
TO FORM 990-PF, PG 1, LN 16B		2,300.		0.		1,1	50.
FORM 990-PF	CC	ORPORAT	E STOCK			STATEMENT	4
DESCRIPTION				во	OK VALUE	FAIR MARKE VALUE	T
WACHOVIA					3,934,071.	5,068,9	14.
TOTAL TO FORM 990-PF, PART II	, LII	NE 10B		-	3,934,071.	5,068,9	14.

FORM 990-PF GRANTS PAID	STATEMENT 5		
RECIPIENT NAME AND ADDRESS	RECIPIENT RELATIONSHIP AND PURPOSE OF GRANT	RECIPIENT STATUS	AMOUNT
AMERICAN HEART ASSOCIATION	NONE UNRESTRICTED	PUBLIC	1,000.
AMERICAN HEART ASSOCIATION	NONE UNRESTRICTED	PUBLIC	1,000.
GREATER ATLANTA CHRISTIAN SCHOOL	NONE UNRESTRICTED	PUBLIC	5,000.
GREATER ATLANTA CHRISTIAN SCHOOL	NONE UNRESTRICTED	PUBLIC	348.
GREATER ATLANTA CHRISTIAN SCHOOL	NONE UNRESTRICTED	PUBLIC	347.
GREATER ATLANTA CHRISTIAN SCHOOL	NONE UNRESTRICTED	PUBLIC	437.
HOSPICE	NONE UNRESTRICTED	PUBLIC	10,000.
JUVENILE DIABETES RESEARCH FOUNDATION	NONE UNRESTRICTED	PUBLIC	10,000.

" THE JIM AND PAULA MCDONALD CHAR	ITABLE TR		58-6429849
JUVENILE DIABETES RESEARCH FOUNDATION	NONE UNRESTRICTED	PUBLIC	20,000.
JUVENILE DIABETES RESEARCH FOUNDATION	NONE UNRESTRICTED	PUBLIC	200,000.
NATIONAL ASSOCIATION OF BASKETBALL COACHES FOUNDATION	NONE UNRESTRICTED	PUBLIC	5,000.
NORCROSS YOUTH BASEBALL SOFTBALL ASSOCIATION	NONE UNRESTRICTED	PUBLIC	1,000.
ST. XAVIER HIGH SCHOOL	NONE UNRESTRICTED	PUBLIC	5,000.
TOTAL TO FORM 990-PF, PART XV, LI	:NE 3A		259,132.
		_	