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

OMB No 1545-0052

2009

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 change

Use the IRS label. Otherwise, print or type. See Specific Instructions.	Name of foundation PROTECTIVE LIFE FOUNDATION		A Employer identification number 63-1129596
	Number and street (or P O box number if mail is not delivered to street address) P.O. BOX 13008	Room/suite	B Telephone number (see page 10 of the instructions) (205) 268-1395
	City or town, state, and ZIP code BIRMINGHAM, AL 35202-3008		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			
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ▶ \$ 144,178.		J Accounting method ☐ Cash ☒ Accrual ☐ Other (specify) _____ (Part I, column (d) must be on cash basis)	
E If private foundation status was terminated under section 507(b)(1)(A), check here ☐			
F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐			

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (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)	1,700,000.			
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				
5a Gross receipts				
5b Net rental income or (loss)				
6a Net gain or (loss) from sale of assets not on line 10				
6b Gross sales price for all assets on line 6a				
7 Capital gain net income (from Part IV, line 2)				
8 Net short-term capital gain				
9 Income modifications				
10a Gross sales less returns and allowances				
b Less Cost of goods sold				
c Gross profit or (loss) (attach schedule)				
11 Other income (attach schedule)				
12 Total. Add lines 1 through 11	1,700,000.			
13 Compensation of officers, directors, trustees, etc.	0.			
14 Other employee salaries and wages				
15 Pension plans, employee benefits				
16a Legal fees (attach schedule)				
b Accounting fees (attach schedule)				
c Other professional fees (attach schedule)				
17 Interest				
18 Taxes (attach schedule) (see page 14 of the instructions)				
19 Depreciation (attach schedule) and depletion				
20 Occupancy				
21 Travel, conferences, and meetings	21,409.			
22 Printing and publications	16,122.			
23 Other expenses (attach schedule) [1]	12,759.			
24 Total operating and administrative expenses. Add lines 13 through 23	50,290.			
25 Contributions, gifts, grants paid	1,681,502.			1,681,502.
26 Total expenses and disbursements. Add lines 24 and 25	1,731,792.			1,681,502.
27 Subtract line 26 from line 12.	-31,792.			
a Excess of revenue over expenses and disbursements		-0-		
b Net investment income (if negative, enter -0-)			-0-	
c Adjusted net income (if negative, enter -0-)				

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

JSA

Form 990-PF (2009)

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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	125,969.	144,178.	144,178.
	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 (attach schedule) ▶ Less: allowance for doubtful accounts ▶			
	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)			
	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)	125,969.	144,178.	144,178.	
Liabilities	17 Accounts payable and accrued expenses	0.	50,001.	
	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.	50,001.	
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	125,969.	94,177.	
	30 Total net assets or fund balances (see page 17 of the instructions)	125,969.	94,177.	
31 Total liabilities and net assets/fund balances (see page 17 of the instructions)	125,969.	144,178.		

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	125,969.
2 Enter amount from Part I, line 27a	2	-31,792.
3 Other increases not included in line 2 (itemize) ▶	3	
4 Add lines 1, 2, and 3	4	94,177.
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	94,177.

Form 990-PF (2009)

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					
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) F M V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any			
a					
b					
c					
d					
e					
2 Capital gain net income or (net capital loss)			2		
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 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.

(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	2,134,082.	361,330.	5.906185
2007	2,238,480.	338,613.	6.610733
2006	2,348,715.	323,601.	7.258059
2005	2,567,473.	216,579.	11.854672
2004	2,341,307.	287,348.	8.147984
2 Total of line 1, column (d)			2 39.777633
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 7.955527
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5			4 373,991.
5 Multiply line 4 by line 3			5 2,975,295.
6 Enter 1% of net investment income (1% of Part I, line 27b)			6
7 Add lines 5 and 6			7 2,975,295.
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 1,681,502.

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)		1	0.
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☐ 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 Add lines 1 and 2		3	0.
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	0.
6 Credits/Payments:			
a 2009 estimated tax payments and 2008 overpayment credited to 2009	6a		
b Exempt foreign organizations-tax withheld at source	6b		0.
c Tax paid with application for extension of time to file (Form 8868)	6c		0.
d Backup withholding erroneously withheld	6d		
7 Total credits and payments. Add lines 6a through 6d	7		0.
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		0.
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10		
11 Enter the amount of line 10 to be Credited to 2010 estimated tax ☐ Refunded ☐	11		

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		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) ☐ AL, _____		
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

Form 990-PF (2009)

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 ▶ N/A				
14	The books are in care of ▶ KATE H. COTTON Telephone no. ▶ 205-268-4434			
Located at ▶ ATTACHMENT 2 ZIP + 4 ▶ 35223				
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 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 ▶ ☐	1b	
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2009?	1c	X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)).		
a At the end of tax year 2009, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2009? ☐ Yes ☒ No If "Yes," list the years ▶		
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. ▶		
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

Form 990-PF (2009)

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required (continued)**5a** During the year did the foundation pay or incur any amount to:

- (1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☒ No
- (2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☒ No
- (3) Provide a grant to an individual for travel, study, or other similar purposes? ☒ Yes ☐ No
- (4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see page 22 of the instructions) ☐ Yes ☒ No
- (5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☒ No

b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see page 22 of the instructions)? **5b** ☐

Organizations relying on a current notice regarding disaster assistance check here ☐

c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? ☐ Yes ☐ No

If "Yes," attach the statement required by Regulations section 53.4945-5(d)

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? ☐ Yes ☒ No

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? **6b** ☐ 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? **7b** ☐ Yes ☒ No

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
ATTACHMENT 3	/	0.	0.	0.

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

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

Total number of other employees paid over \$50,000 ☐

Form 990-PF (2009)

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		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 NOT APPLICABLE (THIS IS A NONOPERATING PRIVATE FOUNDATION)	
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 N/A	
2	
All other program-related investments. See page 24 of the instructions.	
3 NONE	
Total. Add lines 1 through 3	

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	
b	Average of monthly cash balances	1b	379,686.
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	379,686.
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	0.
3	Subtract line 2 from line 1d	3	379,686.
4	Cash deemed held for charitable activities. Enter 1 1/2 % of line 3 (for greater amount, see page 25 of the instructions)	4	5,695.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	373,991.
6	Minimum investment return. Enter 5% of line 5	6	18,700.

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	18,700.
2a	Tax on investment income for 2009 from Part VI, line 5	2a	0.
b	Income tax for 2009. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	0.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	18,700.
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	18,700.
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	18,700.

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	1,681,502.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	0.
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	0.
b	Cash distribution test (attach the required schedule)	3b	0.
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	1,681,502.
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	N/A
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	1,681,502.

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				18,700.
2 Undistributed income, if any, as of the end of 2009				
a Enter amount for 2008 only				
b Total for prior years 20 07, 20 06, 20 05				
3 Excess distributions carryover, if any, to 2009:				
a From 2004	2,326,940.			
b From 2005	2,556,644.			
c From 2006	2,332,535.			
d From 2007	2,221,549.			
e From 2008	2,116,015.			
f Total of lines 3a through e	11,553,683.			
4 Qualifying distributions for 2009 from Part XII, line 4: ► \$ 1,681,502.				
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				18,700.
e Remaining amount distributed out of corpus	1,662,802.			
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	13,216,485.			
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)	2,326,940.			
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a	10,889,545.			
10 Analysis of line 9:				
a Excess from 2005	2,556,644.			
b Excess from 2006	2,332,535.			
c Excess from 2007	2,221,549.			
d Excess from 2008	2,116,015.			
e Excess from 2009	1,662,802.			

4942(j)(5)

PAGE 10

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 ATTACHED SCHEDULE				1,681,502.
Total.			▶ 3a	1,681,502.
b Approved for future payment				
Total.			▶ 3b	

Form 990-PF (2009)

Schedule of Contributors

OMB No 1545-0047

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

2009

Name of the organization

PROTECTIVE LIFE FOUNDATION

Employer identification number

63-1129596

Organization type (check one):

Filers of:

Section:

Form 990 or 990-EZ

☒ 501(c)(³) (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 $\frac{1}{3}$ % 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 on line H 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).

Name of organization **PROTECTIVE LIFE FOUNDATION**Employer identification number
63-1129596**Part I Contributors** (see instructions)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
1	PROTECTIVE LIFE INSURANCE COMPANY 2801 HIGHWAY 280 SOUTH BIRMINGHAM, AL 35223	\$ 1,700,000.	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.)
		\$	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.)

ATTACHMENT 1FORM 990PF, PART I - OTHER EXPENSES

<u>DESCRIPTION</u>	<u>REVENUE AND EXPENSES PER BOOKS</u>
MISCELLANEOUS	9,391.
DUES	1,287.
OFFICE EXPENSES	2,081.
TOTALS	<u>12,759.</u>

FORM 990PF, PART VII-A, LINE 14 - LOCATION OF BOOKS

PROTECTIVE LIFE CORPORATION
BIRMINGHAM, ALABAMA

PROTECTIVE LIFE FOUNDATION

63-1129596

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

ATTACHMENT 3

CONTRIBUTIONS
TO EMPLOYEE
BENEFIT PLANS

EXPENSE ACCT
AND OTHER
ALLOWANCES

TITLE AND AVERAGE HOURS PER
WEEK DEVOTED TO POSITION

NAME AND ADDRESS

COMPENSATION

0.

0.

0.

DIRECTOR/PRESIDENT

JOHN D. JOHNS
2801 HIGHWAY 280 SOUTH
BIRMINGHAM, AL 35223

0.

0.

0.

DIRECTOR/SECRETARY

KATE H. COTTON
2801 HIGHWAY 280 SOUTH
BIRMINGHAM, AL 35223

0.

0.

0.

ASSISTANT TREASURER

CHARLES D. EVERS, JR.
2801 HIGHWAY 280 SOUTH
BIRMINGHAM, AL 35223

GRAND TOTALS

0.

0.

0.

FORM 990PF, PART XV - NAME, ADDRESS AND PHONE FOR APPLICATIONS

KATE H. COTTON
P.O. BOX 2606
BIRMINGHAM, AL 35202-2606
205-268-4434

990PF, PART XV - SUBMISSION DEADLINES

NO SUBMISSION DEADLINE WITH THE EXCEPTION OF THE SCHOLARSHIP PROGRAM
WHICH GENERALLY HAS A SUBMISSION DEADLINE OF APRIL 15 EACH YEAR TO
ALLOW TIME FOR THE SELECTION PROCESS AND AWARDING OF THE FUNDS

990PF, PART XV - RESTRICTIONS OR LIMITATIONS ON AWARDS

NO RESTRICTIONS OR LIMITATIONS WITH THE EXCEPTION OF THE SCHOLARSHIP PROGRAM WHICH IS LIMITED TO THE CHILDREN OF THE EMPLOYEES OF PROTECTIVE LIFE ENTITIES. THIS SCHOLARSHIP PROGRAM HAS RECEIVED APPROVAL FROM THE IRS.

PROTECTIVE LIFE FOUNDATION

EIN: 63-1129596

CONTRIBUTIONS MADE RECONCILIATION

FORM 990-PF, PAGE 1, LINE 25, col. (a)

Tax Year Ending: 12/31/2009

Payments Made Per Attached Foundation Report:	1,681,690
Less payments made by separate entity:	
Protective Life Insurance Company - National Diversity Council - 04/06/09	(1,000)
Plus other contributions:	
Zoo Passes for Food Drive Winners - 07/01/09	330
Movie Passes for McWane Science Center - 07/07/09	250
Transportation of Minor School Students - 12/23/09	232
Total, Form 990-PF, Page1, Line 25, Column (a)	<u>1,681,502</u>

3/15/2010

Payee Organization Project Title, Grant Amount	Grant No. Ref. No.	Payment Date	Payment Amount	Payment Fund	Check Number Notes
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American Cancer Society 2009 Corporate Friends \$ 2,500.00	2764	1/12/2009	\$2,500.00	Protective Life Foundation	1002770
Birmingham-Southern College 2009 Summer Faculty Leadership Institute \$ 7,000.00	2768	1/12/2009	\$7,000.00	Protective Life Foundation	1002771
Cystic Fibrosis Foundation 2009 matching funds on EE's team effort in Minneapolis, MN \$ 500.00	2779	1/12/2009	\$500.00	Protective Life Foundation	1002772
Greater Birmingham Ministries 2009 CROP Walk \$ 1,000.00	2774	1/12/2009	\$1,000.00	Protective Life Foundation	1002773
Jessie's Place of the Jimmie Hale Mission 2009 match on EE's fundraising efforts \$ 600.00	2778	1/12/2009	\$600.00	Protective Life Foundation	1002774
National Multiple Sclerosis Society 2008 Legacy of Leadership Campaign \$ 5,000.00	2700	1/12/2009	\$5,000.00	Protective Life Foundation	1002775
PLF Scholar - Chealen K. Martin PLF Scholar for 2008-2009 Academic Year \$ 2,500.00	2631	1/12/2009	\$396.00	Protective Life Foundation	1002777

Payee Organization Project Title, Grant Amount	Grant No. Ref. No.	Payment Date	Payment Amount	Payment Fund	Check Number Notes
PLF Scholar - James W. Gardner III 2008-2009, 2009-2010 and 2010-2011 Academic Years \$ 7,500.00	2634	1/12/2009	\$1,193.00	Protective Life Foundation	1002776
Total January 2009 (8 items)			\$18,189.00		
February 2009					
Easter Seals of the Birmingham Area 2009 The Opportunity Project \$ 2,000.00	2792	2/13/2009	\$2,000.00	Protective Life Foundation	1002779
The Horizons School 2006 Funding for the "Building Independence Campaign" \$ 25,000.00	1812	2/13/2009	\$5,000.00	Protective Life Foundation	1002784
Junior Achievement of Greater Birmingham, Inc. 2009 Operating Support \$ 2,500.00	2797	2/13/2009	\$2,500.00	Protective Life Foundation	1002780
Kid One Transport System 2009 Kid One Gala - 100% donation, no table. \$ 2,500.00	2723	2/13/2009	\$2,500.00	Protective Life Foundation	1002785
The Leading Edge Institute 2009 Winter Summit \$ 500.00	2800	2/13/2009	\$500.00	Protective Life Foundation	1002782
Metropolitan Development Board One-Year Extension of Momentum 21 Campaign \$ 40,000.00	2754	2/13/2009	\$40,000.00	Protective Life Foundation	1002778

Payee Organization Project Title, Grant Amount	Grant No. Ref. No.	Payment Date	Payment Amount	Payment Fund	Check Number Notes
Mitchell's Place 2009 "A Night at the Oscars" - 100% donation, no table \$ 2,500.00	2699	2/13/2009	\$2,500.00	Protective Life Foundation	1002783
Operation New Birmingham ImplementationNow \$ 60,000.00	1498	2/16/2009	\$12,000.00	Protective Life Foundation	1002786
		Total February 2009 (8 items)	\$67,000.00		
March 2009					
Alabama Kidney Foundation 2009 Walk-a-Thon - 100% contribution, no team \$ 500.00	2811	3/16/2009	\$500.00	Protective Life Foundation	5110636
American Cancer Society 2009 West Shelby Relay for Life \$ 500.00	2829	3/16/2009	\$500.00	Protective Life Foundation	5110637
Birmingham Children's Theatre 2009 "A Night in Oz" \$ 250.00	2787	3/5/2009	\$250.00	Protective Life Foundation	1002788
Birmingham Historical Society 2009 Corporate Membership \$ 1,000.00	2814	3/17/2009	\$1,000.00	Protective Life Foundation	5110593
The Charity League, Inc. 2009 Corporate Sponsorship - 100% donation \$ 500.00	2827	3/17/2009	\$500.00	Protective Life Foundation	5110597

Payee Organization Project Title, Grant Amount	Grant No. Ref. No.	Payment Date	Payment Amount	Payment Fund	Check Number Notes
Greater Los Angeles Zoo Association 2009 Corporate Support \$ 2,500 00	2831	3/17/2009	\$2,500.00	Protective Life Foundation	5110594
Leadership Birmingham 2009 Operating Support \$ 10,000.00	2828	3/17/2009	\$10,000.00	Protective Life Foundation	1002801
One-Way-2-Play Drug Free 2009 Sponsor of the Bama Coaches Clinic FCA Breakfast \$ 10,000 00	2820	3/17/2009	\$10,000.00	Protective Life Foundation	1002802
Pathways (formerly Bread and Roses) Matching gift on EEs' fundraising efforts \$ 500.00	2833	3/16/2009	\$500.00	Protective Life Foundation	5110638
PLF Scholar - Meisha D. Oliver PLF Scholarship Award of up to \$2,500 for the 2008-2009 academic year \$ 10,000.00	2573	3/5/2009	\$50.00	Protective Life Foundation	1002789
The Rise School 2009 Gene Stallings Golf Tournament - 100% donation, no team. \$ 500 00	2832	3/16/2009	\$500.00	Protective Life Foundation	5110640
St. Baldrick's Foundation 2009 donation on behalf of PLC associate, Roger Channell, Elgin, IL \$ 500 00	2822	3/16/2009	\$500.00	Protective Life Foundation	5110639

Payee Organization Project Title, Grant Amount	Grant No. Ref. No.	Payment Date	Payment Amount	Payment Fund	Check Number Notes
UAB Department of Ophthalmology and the Low Vision Center 2009 "Songs for Sight" sponsorship - 100% donation, no tickets \$ 1,000.00	2821	3/16/2009	\$1,000.00	Protective Life Foundation	5110641
Total March 2009 (13 items)			\$27,800.00		
April 2009					
100 Black Men of Greater Mobile, Inc. 2009 Gala - 100% donation, no table \$ 1,000.00	2810	4/29/2009	\$1,000.00	Protective Life Foundation	1002824
Alabama School of Mathematics and Science Foundation 2008 capital campaign for a new student center \$ 25,000.00	2491	4/29/2009	\$8,333.33	Protective Life Foundation	1002825
Alabama Symphony Orchestra 2009 Series Sponsorships \$ 30,000.00	2834	4/21/2009	\$30,000.00	Protective Life Foundation	1002809
Alys Stephens Performing Arts Center 2009 - 2010 Sponsorship of the Eclectic Palate Series \$ 15,000.00	2835	4/21/2009	\$15,000.00	Protective Life Foundation	1002810
American Cancer Society 2009 Relay for Life of Metro Mobile \$ 1,000.00	2848	4/21/2009	\$1,000.00	Protective Life Foundation	1002811
Amos House 2009 Operating Support \$ 1,500.00	2849	4/30/2009	\$1,500.00	Protective Life Foundation	1002830

Payee Organization Project Title, Grant Amount	Grant No. Ref. No.	Payment Date	Payment Amount	Payment Fund	Check Number Notes
Auburn University 2009 Donation to the MIS Advisory Council \$ 300.00	2852	4/21/2009	\$300.00	Protective Life Foundation	1002812
Big Brothers Big Sisters of Greater Birmingham 2009 matching on PLC associate's involvement with Bowl for Kids' Sake \$ 1,200.00	2813	4/3/2009	\$1,200.00	Protective Life Foundation	1002804
Birmingham Business Alliance 2009 Crimestoppers Golf Tournament - 100% donation, no golf team \$ 500.00	2853	4/21/2009	\$500.00	Protective Life Foundation	1002813
Child & Family Services 2009 Operating Support \$ 1,500.00	2850	4/29/2009	\$1,500.00	Protective Life Foundation	1002826
Children's Harbor Family Center 2009 "Friends of Children's Harbor" fundraiser \$ 1,000.00	2855	4/21/2009	\$1,000.00	Protective Life Foundation	1002814
The Exceptional Foundation Capital campaign - expansion of existing facility \$ 50,000.00	1792	4/21/2009	\$10,000.00	Protective Life Foundation	1002816
Juvenile Diabetes Research Foundation 2009 Night of Hope Gala - 100% contribution, no tickets \$ 1,000.00	2872	4/29/2009	\$1,000.00	Protective Life Foundation	1002827
Laps for CF 2009 Operating Support \$ 5,000.00	2839	4/21/2009	\$5,000.00	Protective Life Foundation	1002815

Payee Organization Project Title, Grant Amount	Grant No. Ref. No.	Payment Date	Payment Amount	Payment Fund	Check Number Notes
The Michael J. Fox Foundation for Parkinson's Research <i>Memorial gift for Mohammad Barati, father of PLC associate, Mahmoud Barati</i> \$ 100 00	2867	4/21/2009	\$100.00	Protective Life Foundation	1002817
National Diversity Council <i>2009 "Women in Leadership" Forum</i> \$ 1,000 00	2802	4/6/2009	\$1,000.00	Protective Life Foundation	1291963
The Salvation Army <i>2009 "Century of Compassion" Ride</i> \$ 9,000 00	2873	4/29/2009	\$9,000.00	Protective Life Foundation	1002829
Shelby County Junior Miss <i>2009 Scholarship Funding</i> \$ 500 00	2874	4/29/2009	\$500.00	Protective Life Foundation	1002828
Studio By The Tracks <i>20th annual "Art from the Heart" benefit</i> \$ 2,500 00	2806	4/3/2009	\$2,500.00	Protective Life Foundation	1002805
Trussville City School Foundation <i>Memorial gift in honor of Mr Ormond Bentley, retired PLC executive</i> \$ 100 00	2868	4/21/2009	\$100.00	Protective Life Foundation	1002818
UAB School of Nursing <i>Reconsideration of 2009 M*A*S*H</i> \$ 1,000 00	2869	4/21/2009	\$1,000.00	Protective Life Foundation	1002819
YouthServe, Inc. <i>2009 Programming Support</i> \$ 5,000.00	2845	4/21/2009	\$5,000.00	Protective Life Foundation	1002820

Payee Organization Project Title, Grant Amount	Grant No. Ref. No.	Payment Date	Payment Amount	Payment Fund	Check Number Notes
Total April 2009 (22 items)			\$96,533.33		
June 2009					
A+ Coalition and/or A+ Education Foundation Renewal of 5-year pledge commitment to the A+ Education Foundation \$ 100,000.00	1473	6/3/2009	\$20,000.00	Protective Life Foundation	1002833
Alabama Giving 2009 Membership Dues \$ 400.00	2881	6/23/2009	\$400.00	Protective Life Foundation	1002851
The ALS Association - Alabama Chapter 2009 Walkt to Defeat ALS \$ 1,000.00	2870	6/3/2009	\$1,000.00	Protective Life Foundation	1002839
American Heart Association 2009 Heart Walk - Mr David Atkinson \$ 500.00	2885	6/23/2009	\$500.00	Protective Life Foundation	1002852
Auburn University Scholarships for the Diversity Advancement Program to increase Auburn's minority student enrollment \$ 150,000.00	1914	6/23/2009	\$30,000.00	Protective Life Foundation	1002850
Camp Smile-A-Mile 2009 Motorcycle Ride \$ 250.00	2887	6/23/2009	\$250.00	Protective Life Foundation	1002853
Children's Harbor Family Center Reconsideration of the capital campaign, "Building Bridges of Hope" \$ 60,000.00	2150	6/3/2009	\$20,000.00	Protective Life Foundation	1002835

Payee Organization Project Title, Grant Amount	Grant No. Ref. No.	Payment Date	Payment Amount	Payment Fund	Check Number Notes
Children's Health System 2008 Capital Expansion of Children's Hospital \$ 250,000 00	2494	6/3/2009	\$50,000.00	Protective Life Foundation	1002831
Crohn's and Colitis Foundation 2009 Fundraising - Mr. Jeff Halwes \$ 250 00	2888	6/23/2009	\$250.00	Protective Life Foundation	1002854
Freshwater Land Trust 2009 Operating Support \$ 1,000.00	2889	6/24/2009	\$1,000.00	Protective Life Foundation	1002858
Junior Achievement of Greater Birmingham, Inc. 2009 Golf-a-Thon \$ 1,000.00	2871	6/3/2009	\$1,000.00	Protective Life Foundation	1002837
Leadership Alabama 2009 Operating Support \$ 10,000.00	2890	6/24/2009	\$10,000 00	Protective Life Foundation	1002859
The McWane Science Center Minor's 2009 visit to McWane \$ 8,000.00	2735	6/3/2009	\$8,000.00	Protective Life Foundation	1002838
MOMENTUM (formerly part of the YWCA) 2009 Tuition - Kathy D Britton \$ 3,000.00	2918	6/24/2009	\$3,000.00	Protective Life Foundation	1002861
The NAILBA Charitable Foundation 2009 contribution in honor of the BGA respondents who submitted a survey on behalf of WCL \$ 2,775 00	2916	6/24/2009	\$2,775.00	Protective Life Foundation	1002860

Payee Organization Project Title, Grant Amount	Grant No. Ref. No.	Payment Date	Payment Amount	Payment Fund	Check Number Notes
PLF Scholar - Meisha D. Oliver <i>PLF Scholarship Award of up to \$2,500 for the 2008-2009 academic year.</i> \$ 10,000.00	2573	6/3/2009	\$612.00	Protective Life Foundation	1002836
PLF Scholar - Mikalah Briget Coleman <i>PLF Academic Excellence Award of \$1,000 for the 2008-2009 academic year & the PLF Scholarship Award of up to \$2,500 for the 2008-2009 academic year</i> \$ 11,000.00	2570	6/3/2009	\$1,600.00	Protective Life Foundation	1002834
PLF Scholar - Mikalah Briget Coleman <i>PLF Academic Excellence Award of \$1,000 for the 2008-2009 academic year & the PLF Scholarship Award of up to \$2,500 for the 2008-2009 academic year</i> \$ 11,000.00	2570	6/4/2009	\$424.60	Protective Life Foundation	1002844
PLF Scholar - Mikalah Briget Coleman <i>PLF Academic Excellence Award of \$1,000 for the 2008-2009 academic year & the PLF Scholarship Award of up to \$2,500 for the 2008-2009 academic year</i> \$ 11,000.00	2570	6/9/2009	\$1,475.40	Protective Life Foundation	1002848
PLF Scholar - Stephanie Asiddao <i>2008-2009 Academic Scholarship</i> \$ 2,500.00	2633	6/3/2009	\$135.47	Protective Life Foundation	1002840
PLF Scholar - Steven A. Mathe <i>PLF Scholar 2009 - 2010, 2010 - 2011, 2011 - 2012, 2012 - 2013</i> \$ 10,000.00	2917	6/24/2009	\$2,500.00	Protective Life Foundation	1002857

Payee Organization Project Title, Grant Amount	Grant No. Ref. No.	Payment Date	Payment Amount	Payment Fund	Check Number Notes
Sun City Center United Methodist Church <i>Donation in memory of Donald R. Gue, father of PLC employee, Bonnie Bartlett</i> \$ 100.00	2882	6/23/2009	\$100.00	Protective Life Foundation	1002855
The Susan G. Komen for the Cure, Inc. <i>2009 gift in honor of PLC associate's involvement</i> \$ 250.00	2892	6/23/2009	\$250.00	Protective Life Foundation	1002856
The United Way Community Food Bank <i>2009 Food Drive</i> \$ 17,000.00	2879	6/4/2009	\$17,000.00	Protective Life Foundation	1002845
YWCA Central Alabama <i>2008 Capital Campaign - Woodlawn revitalization</i> \$ 105,000.00	2515	6/3/2009	\$35,000.00	Protective Life Foundation	1002832
Total June 2009 (25 items)			\$207,272.47		
July 2009					
American Cancer Society <i>2009 Life Inspiration Awards - donated table</i> \$ 2,500.00	2952	7/8/2009	\$2,500.00	Protective Life Foundation	1002873
American Enterprise Institute for Public Policy Research <i>2009 Operating Support</i> \$ 2,000.00	2938	7/21/2009	\$2,000.00	Protective Life Foundation	1002883
Barrels of Love, Inc. <i>2009 Operating Support</i> \$ 1,000.00	2939	7/22/2009	\$1,000.00	Protective Life Foundation	1002887

Payee Organization Project Title, Grant Amount	Grant No. Ref. No.	Payment Date	Payment Amount	Payment Fund	Check Number Notes
The Bell Center for Early Intervention Programs (The Service Guild of Birmingham) 2008 Capital Campaign \$ 50,000 33	2601	7/17/2009	\$16,666.67	Protective Life Foundation	1002878
Big Brothers Big Sisters of Greater Birmingham 2009-2010 funding for its school-based program \$ 5,000.00	2908	7/1/2009	\$5,000.00	Protective Life Foundation	1002864
Junior Achievement of Greater Birmingham, Inc. 2009 Bowling Classic - matching on PLC associates' involvement \$ 1,500.00	2943	7/17/2009	\$1,500.00	Protective Life Foundation	1002877
PLF Scholar - Ashley R. Eubanks PLF Scholar 2009-2010, 2010-2011, 2011-2012, 2012-2013 \$ 10,000.00	2923	7/30/2009	\$2,500.00	Protective Life Foundation	1002894
PLF Scholar - Caroline B. Evers PLF Scholar - 2009-2010 Academic Excellence Award \$ 1,000 00	2924	7/21/2009	\$1,000.00	Protective Life Foundation	1002884
PLF Scholar - Carter J. Bielen PLF Scholar - 2009 - 2010 Academic Excellence Award \$ 1,000.00	2920	7/1/2009	\$1,000.00	Protective Life Foundation	1002866
PLF Scholar - Jessica M. Shierling PLF Scholar for 2008-2009, 2009-2010 and 2010-2011 - up to \$2,500 each year \$ 7,500 00	2635	7/1/2009	\$2,500.00	Protective Life Foundation	1002869

Payee Organization Project Title, Grant Amount	Grant No. Ref. No.	Payment Date	Payment Amount	Payment Fund	Check Number Notes
PLF Scholar - Jon Mitchell Edge <i>PLF "Doing the Right Thing" Award of \$1,000 for the 2008-2009 academic year AND the Scholarship Award of up to \$2,500 for the 2008-2009 academic year</i> \$ 11,000 00	2571	7/22/2009	\$2,500.00	Protective Life Foundation	1002885
PLF Scholar - Meisha D. Oliver <i>PLF Scholarship Award of up to \$2,500 for the 2008-2009 academic year</i> \$ 10,000.00	2573	7/30/2009	\$2,500.00	Protective Life Foundation	1002892
PLF Scholar - Meisha D. Oliver <i>PLF Scholarship Award of up to \$2,500 for the 2008-2009 academic year</i> \$ 10,000.00	2573	7/30/2009	\$1,146.00	Protective Life Foundation	1002892 Reissue of Payment [3977] for \$2,500.00, paid on 7/30/2009.
PLF Scholar - Miguel V. Marshall <i>PLF Scholar 2009-2010, 2010-2011, 2011-2012, 2012-2013</i> \$ 10,000.00	2932	7/30/2009	\$2,500.00	Protective Life Foundation	1002893
PLF Scholar - Rachel E. Hammer <i>PLF Scholar - 2009 - 2010 Academic Excellence Award</i> \$ 1,000.00	2925	7/8/2009	\$1,000 00	Protective Life Foundation	1002874
PLF Scholar - Sarah A. Cruce <i>2008 - 2009 PLF Scholarship (up to \$2,500) & 2009 - 2010 Scholarship (up to \$2,500)</i> \$ 5,000 00	2653	7/30/2009	\$2,500.00	Protective Life Foundation	1002888
PLF Scholar - Stephanie Asiddao <i>2008-2009 Academic Scholarship</i> \$ 2,500 00	2633	7/30/2009	\$462.70	Protective Life Foundation	1002889

Payee Organization Project Title, Grant Amount	Grant No. Ref. No.	Payment Date	Payment Amount	Payment Fund	Check Number Notes
PLF Scholar - Tempest West PLF Scholar - 2009-2010 "Doing the Right Thing" Award & 2009 - 2010 Scholarship Award \$ 3,500.00	2935	7/30/2009	\$3,500.00	Protective Life Foundation	1002895
PLF Scholar - Thomas B. Jenkins PLF Scholar - 2009-2010 "Doing the Right Thing" Award \$ 1,000.00	2927	7/30/2009	\$1,000.00	Protective Life Foundation	1002890
PLF Scholar - W. Connor McCarty PLF Scholar - 2009-2010 Academic Excellence Award \$ 1,000.00	2933	7/30/2009	\$1,000.00	Protective Life Foundation	1002891
PLF Scholar - W. JaCorey Carter PLF Scholar 2009-2010, 2010-2011, 2011-2012, 2012-2013 \$ 10,000.00	2921	7/22/2009	\$2,500.00	Protective Life Foundation	1002886
Preschool Partners 2009 Operating Support \$ 10,000.00	2915	7/1/2009	\$10,000.00	Protective Life Foundation	1002867
Studio By The Tracks 2009 Memorial Gift in honor of Nick Reynolds \$ 250.00	2954	7/20/2009	\$250.00	Protective Life Foundation	1002881
The Virginia Samford Theatre and The Metropolitan Arts Center Corporate Sponsorship of the 2009-2010 season \$ 5,000.00	2949	7/17/2009	\$5,000.00	Protective Life Foundation	1002879
Washington Legal Foundation 2009 Programming Support \$ 2,500.00	2950	7/20/2009	\$2,500.00	Protective Life Foundation	1002882

Payee Organization Project Title, Grant Amount	Grant No. Ref. No.	Payment Date	Payment Amount	Payment Fund	Check Number Notes
August 2009 Total July 2009 \$74,025.37 (25 items)					
Alabama Heritage 2009 Sponsorship \$ 5,000.00	2971	8/12/2009	\$5,000.00	Protective Life Foundation	1002898
Community Grief Support Service 2009 Programming Support \$ 1,500.00	2960	8/12/2009	\$1,500.00	Protective Life Foundation	1002899
Creutzfeldt-Jakob Disease Foundation, Inc. One-time memorial gift \$ 100.00	2972	8/19/2009	\$100.00	Protective Life Foundation	1002912
First Light 2009 Matching Funds on IT's Charity Golf Tournament \$ 4,801.00	2883	8/12/2009	\$4,801.00	Protective Life Foundation	1002900
Jones Valley Urban Farm 2009 Educational Program Access Fund \$ 2,500.00	2951	8/17/2009	\$2,500.00	Protective Life Foundation	1002910
Junior League of Birmingham 2009-2010 Community Partner \$ 5,000.00	2963	8/12/2009	\$5,000.00	Protective Life Foundation	1002902
The Oliver Robinson Foundation 2009 - 2010 Corporate Support/Ads in "The Community Reinvestor" \$ 1,000.00	2967	8/12/2009	\$1,000.00	Protective Life Foundation	1002906

Payee Organization Project Title, Grant Amount	Grant No. Ref. No.	Payment Date	Payment Amount	Payment Fund	Check Number Notes
PLF Scholar - Allison D. Ellis PLF Scholar for 2009-2010 Academic Year \$ 2,500.00	2630	8/12/2009	\$2,500.00	Protective Life Foundation	1002907
PLF Scholar - Alysha R. Barr PLF Scholar. 2009-2010, 2010-2011, 2011-2012, 2012-2013 \$ 10,000.00	2919	8/19/2009	\$456.80	Protective Life Foundation	1002913
PLF Scholar - Alysha R. Barr PLF Scholar. 2009-2010, 2010-2011, 2011-2012, 2012-2013 \$ 10,000.00	2919	8/20/2009	\$807.00	Protective Life Foundation	1002914
PLF Scholar - David M. Summey PLF Scholar - 2009-2010 Academic Excellence Award \$ 1,000.00	2934	8/12/2009	\$1,000.00	Protective Life Foundation	1002901
PLF Scholar - James W. Gardner III 2008-2009, 2009-2010 and 2010-2011 Academic Years \$ 7,500.00	2634	8/14/2009	\$1,250.00	Protective Life Foundation	1002909
PLF Scholar - Jessica L. Hulsey PLF Scholar 2009-2010, 2010-2011, 2012-2012, 2012-2013 \$ 10,000.00	2926	8/14/2009	\$2,500.00	Protective Life Foundation	1002908
PLF Scholar - Justin H. Jones PLF Scholar - 2009-2010 "Doing the Right Thing" Award \$ 1,000.00	2928	8/25/2009	\$930.00	Protective Life Foundation	1002917

Payee Organization Project Title, Grant Amount	Grant No. Ref. No.	Payment Date	Payment Amount	Payment Fund	Check Number Notes
PLF Scholar - Kathleen A. West 2008 - 2009, 2009 - 2010, and 2010 - 2011 remaining scholarship years - \$2,500 per year, for a total remaining "due" of \$7,500 \$ 7,500.00	2632	8/12/2009	\$2,500.00	Protective Life Foundation	1002904
PLF Scholar - Kayla Bland PLF Scholarship Award Recipient of up to \$2,500 for the 2008 - 2009 Academic Year \$ 10,000.00	2568	8/19/2009	\$2,500.00	Protective Life Foundation	1002911
PLF Scholar - Kayla Bland PLF Scholarship Award Recipient of up to \$2,500 for the 2008 - 2009 Academic Year \$ 10,000.00	2568	8/19/2009	(\$2,500.00)	Protective Life Foundation	VOID - 1002911 Void of Payment [3980] for \$2,500.00, paid on 8/19/2009.
PLF Scholar - Kayla Bland PLF Scholarship Award Recipient of up to \$2,500 for the 2008 - 2009 Academic Year \$ 10,000.00	2568	8/19/2009	\$1,285.00	Protective Life Foundation	1002911 Reissue of Payment [3980] for \$2,500.00, paid on 8/19/2009.
PLF Scholar - Malia B. Maddox PLF Scholar 2009-2010, 2010-2011, 2011-2012, 2012-2013 \$ 10,000.00	2930	8/20/2009	\$1,250.00	Protective Life Foundation	1002915
PLF Scholar - Sarah R. Chauvin PLF Scholar - 2009-2010 Academic Excellence Award \$ 1,000.00	2922	8/4/2009	\$1,000.00	Protective Life Foundation	1002896
Public Affairs Research Council of Alabama 2009 Operating Support \$ 6,000.00	2968	8/12/2009	\$6,000.00	Protective Life Foundation	1002903

Payee Organization Project Title, Grant Amount	Grant No. Ref. No.	Payment Date	Payment Amount	Payment Fund	Check Number Notes
Old Firehouse Shelter (The) 2009 Matching Funds on IT's Charity Golf Tournament \$ 4,801.00	2884	8/12/2009	\$4,801.00	Protective Life Foundation	1002905
United Cerebral Palsy of Greater Birmingham Tapestry of Life Capital Campaign - Building that will house services for adults with disabilities \$ 25,000.00	1796	8/20/2009	\$5,000.00	Protective Life Foundation	1002916
Total August 2009 (23 items)			\$51,180.80		
September 2009					
Alabama Appleseed Center for Law & Justice, Inc. 2009 gift in honor of Nick Gaede \$ 2,500.00	2990	9/1/2009	\$2,500.00	Protective Life Foundation	1002919
Alabama Association of Nonprofits (formerly the Nonprofit Resource Center of Alabama) 2009 Operating Support \$ 2,500.00	3001	9/18/2009	\$2,500.00	Protective Life Foundation	1002931
Alabama Humanities Foundation 2009 Programming Support \$ 5,000.00	2993	9/18/2009	\$5,000.00	Protective Life Foundation	1002927
The Birmingham Zoo Capital Campaign for the "Elephant Trails" and a naming opportunity within for the Educational Treetop Facility \$ 100,000.00	1952	9/14/2009	\$20,000.00	Protective Life Foundation	1002924

Payee Organization Project Title, Grant Amount	Grant No. Ref. No.	Payment Date	Payment Amount	Payment Fund	Check Number Notes
CASA of Shelby County 2009 Annual CASA Roast - 100% donation \$ 1,000.00	3004	9/18/2009	\$1,000.00	Protective Life Foundation	1002929
Cornerstone Schools of Alabama, Inc. 2009 operating support for the Cornerstone Academy of Early Learning \$ 65,000.00	2996	9/18/2009	\$65,000.00	Protective Life Foundation	1002926
Holy Family Cristo Rey Catholic High School 2009 Operating Support \$ 2,500.00	2989	9/1/2009	\$2,500.00	Protective Life Foundation	1002920
Impact Alabama: A Student Service Initiative 2009 Operating Support \$ 15,000.00	3000	9/18/2009	\$15,000.00	Protective Life Foundation	1002930
Lakeshore Foundation 2009 "A Hero's Welcome" Ball - 100% donation, no table \$ 1,000.00	2980	9/1/2009	\$1,000.00	Protective Life Foundation	1002921
Oasis Counseling for Women and Children 2009 Operating Support \$ 5,000.00	3007	9/18/2009	\$5,000.00	Protective Life Foundation	1002932
PLF Scholar - Catherine A. Beck 2009-2010 PLF Scholar \$ 2,500.00	2652	9/1/2009	\$2,500.00	Protective Life Foundation	1002922
PLF Scholar - Meisha D. Oliver PLF Scholarship Award of up to \$2,500 for the 2008-2009 academic year \$ 10,000.00	2573	9/30/2009	VOID - VOID - 1002892 Void of Payment [3977] for \$2,500.00, paid on 7/30/2009.	Protective Life Foundation	VOID - VOID - 1002892

Payee Organization Project Title, Grant Amount	Grant No. Ref. No.	Payment Date	Payment Amount	Payment Fund	Check Number Notes
PLF Scholar - Shazia S. Manji <i>PLF Scholar - 2009-2010 Academic Excellence Award</i> \$ 1,000 00	2931	9/14/2009	\$1,000.00	Protective Life Foundation	1002925
The Three Parks Fund <i>Funding for the "Greening of the Community"</i> \$ 250,000 00	2263	9/14/2009	\$50,000.00	Protective Life Foundation	1002923
The University of Alabama <i>2009 Alabama I-Day</i> \$ 1,000.00	3008	9/18/2009	\$1,000.00	Protective Life Foundation	1002928
October 2009					
Total September 2009 (15 items)			\$171,500.00		
American Cancer Society <i>Memorial gift - Carol Keating</i> \$ 200 00	3009	10/1/2009	\$200.00	Protective Life Foundation	1002934
Birmingham-Southern College <i>Funding for Phase I of BSC's Comprehensive Campaign</i> \$ 250,000 00	2332	10/15/2009	\$50,000.00	Protective Life Foundation	1002942
PLF Scholar - Anne L. Kendrick <i>PLF Scholar - 2009-2010 Academic Excellence Award</i> \$ 1,000.00	2929	10/1/2009	\$1,000.00	Protective Life Foundation	1002935
UAB Medical West <i>2009 Cheers to Charity Gala - 100% donation; no table</i> \$ 850 00	3010	10/2/2009	\$850.00	Protective Life Foundation	1002939

Payee Organization Project Title, Grant Amount	Grant No. Ref. No.	Payment Date	Payment Amount	Payment Fund	Check Number Notes
November 2009					
<i>Total October 2009</i> (4 items)			\$52,050.00		
The Alabama Governor's School 2009 Operating Support \$ 5,000.00	3022	11/11/2009	\$5,000.00	Protective Life Foundation	1002961
Episcopal Charities 2009 Corporate Gift \$ 1,000.00	3021	11/11/2009	\$1,000.00	Protective Life Foundation	1002960
Green Resource Center of Alabama 2009 Energy Forum \$ 250.00	3019	11/4/2009	\$250.00	Protective Life Foundation	1002948
March of Dimes 2009 AL Citizen of the Year Dinner - 100% gift; no table \$ 2,000.00	3013	11/4/2009	\$2,000.00	Protective Life Foundation	1002949
PLF Scholar - Meisha D. Oliver PLF Scholarship Award of up to \$2,500 for the 2008-2009 academic year \$ 10,000.00	2573	11/4/2009	\$170.00	Protective Life Foundation	1002953
St. Martin's in the Pines Capital funding for "The Green House" Project \$ 50,000.00	2160	11/4/2009	\$10,000.00	Protective Life Foundation	1002950
The Susan G. Komen for the Cure, Inc. 2009 matching funds in honor of PLF associate's involvement in the "Race for the Cure" \$ 1,000.00	3014	11/4/2009	\$1,000.00	Protective Life Foundation	1002951

Payee Organization Project Title, Grant Amount	Grant No. Ref. No.	Payment Date	Payment Amount	Payment Fund	Check Number Notes
UAB Pediatric Neuro Oncology Research <i>Memorial gift in honor of Lily Price Rushton</i> \$ 1,000.00	3020	11/4/2009	\$1,000.00	Protective Life Foundation	1002952
United Way of Metropolitan Nashville <i>2009 Corporate Gift</i> \$ 28,000.00	3024	11/11/2009	\$28,000.00	Protective Life Foundation	1002959
December 2009					
<i>Total November 2009</i> (9 items)			\$48,420.00		
Alabama Archives and History Foundation <i>2004 Capital Campaign. Naming Opportunity: the</i> <i>"Park at the Archives"</i> \$ 200,000.00	1247	12/23/2009	\$40,000.00	Protective Life Foundation	1002975
The Alabama Child Caring Foundation <i>2009 matching on AA's fundraising</i> \$ 4,000 00	3011	12/14/2009	\$4,000.00	Protective Life Foundation	1002965
Birmingham Athletic Partnership <i>Business Partners Program</i> \$ 100,000.00	1942	12/23/2009	\$25,000.00	Protective Life Foundation	1002980
Birmingham Civil Rights Institute <i>"Expanding the Legacy" Capital Campaign</i> \$ 300,000 00	1567	12/22/2009	\$60,000.00	Protective Life Foundation	1002968
The Foundry Rescue Mission and Recovery Center <i>2005 Capital Campaign</i> \$ 100,000 00	1654	12/22/2009	\$20,000.00	Protective Life Foundation	1002973

Payee Organization Project Title, Grant Amount	Grant No. Ref. No.	Payment Date	Payment Amount	Payment Fund	Check Number Notes
Glenwood, Inc. 2005 'Building a Future of Care' Capital Campaign \$ 50,000.00	1657	12/17/2009	(\$10,000.00)	Protective Life Foundation	VOID - 1002671 Void of Payment [3271] for \$10,000.00, paid on 8/21/2008.
Glenwood, Inc. 2005 'Building a Future of Care' Capital Campaign \$ 50,000.00	1657	12/22/2009	\$10,000.00	Protective Life Foundation	1002969
Miles College Miles Ahead Capital Campaign \$ 250,000.00	2500	12/22/2009	\$50,000.00	Protective Life Foundation	1300645
Partners in Neighborhood Growth, Inc. (PING) 2009 Operating Support \$ 25,000.00	2746	12/22/2009	\$25,000.00	Protective Life Foundation	1002970
PLF Scholar - Justin H. Jones PLF Scholar - 2009-2010 "Doing the Right Thing" Award \$ 1,000.00	2928	12/23/2009	\$70.00	Protective Life Foundation	1002984
PLF Scholar - Kayla Bland PLF Scholarship Award Recipient of up to \$2,500 for the 2008 - 2009 Academic Year \$ 10,000.00	2568	12/23/2009	\$1,215.00	Protective Life Foundation	1002979
PLF Scholar - Meisha D. Oliver PLF Scholarship Award of up to \$2,500 for the 2008-2009 academic year \$ 10,000.00	2573	12/23/2009	\$1,184.00	Protective Life Foundation	1002981

Payee Organization Project Title, Grant Amount	Grant No. Ref. No.	Payment Date	Payment Amount	Payment Fund	Check Number Notes
Ronald McDonald House Charities of Alabama, Inc. 2005 Capital Campaign \$ 50,000.00	1721	12/22/2009	\$10,000.00	Protective Life Foundation	1002971
Sloss Furnace Capital Campaign - Phase II \$ 75,000.00	2409	12/22/2009	\$15,000.00	Protective Life Foundation	1002972
Old Firehouse Shelter (The) 2009 Fundraising Dinner - 100% donation. \$ 500 00	3036	12/4/2009	\$500 00	Protective Life Foundation	1002962
UAB Capital Campaign Renewal of Clinical Initiative Awards for 2005 - 2009 \$ 1,125,000.00	1270	12/23/2009	\$225,000.00	Protective Life Foundation	1002976
United Way of Central Alabama 2009 Corporate Gift \$ 330,750.00	3038	12/23/2009	\$330,750 00	Protective Life Foundation	1002977
The University of Alabama School of Law Renewal of three-year gift for support of the Women's Leadership Event and the Moot Court Team \$ 30,000.00	2411	12/23/2009	\$10,000.00	Protective Life Foundation	1002982
The University of Alabama Multi-year funding for IRMAS (Insurance & Financial Services, Risk Management, and Actuarial Science) programs \$ 250,000 00	2842	12/23/2009	\$50,000.00	Protective Life Foundation	1002978
Total December 2009 (19 items)			\$867,719.00		

Payee Organization Project Title, Grant Amount	Grant No. Ref. No.	Payment Date	Payment Amount	Payment Fund	Check Number Notes
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Grand Total \$1,681,689.97
(171 items)