Form **990-PF** | Department of the Treasury Internal Revenue Service

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

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

OMB No 1545-0052

2009

For calendar year 2009, or tax year beginning , 2009, and ending , 20

G Check all that apply: [ ] Initial return [ ] Initial return of a former public charity [ ] Final return
[ ] Amended return [X] Address change [ ] Name change

Use the IRS label. Otherwise, print or type. See Specific Instructions.	
Name of foundation	THE THOMAS H. AND JARMAN F. LOWDER FOUNDATION
Number and street (or P O box number if mail is not delivered to street address) / Room/suite	C/O PATHSTONE FAMILY OFFICE P.O. BOX 52047
City or town, state, and ZIP code	ATLANTA, GA 30355

A Employer identification number: 63-1139498

B Telephone number (see page 10 of the instructions): (404) 592-0180

C If exemption application is pending, check here ▶ [ ]

D 1 Foreign organizations, check here ▶ [ ]

2 Foreign organizations meeting the 85% test, check here and attach computation ▶ [ ]

E If private foundation status was terminated under section 507(b)(1)(A), check here ▶ [ ]

F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ▶ [ ]

H Check type of organization: [X] 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)* ▶ $ 16,732,964.

J Accounting method: [X] Cash [ ] Accrual
[ ] Other (specify) ______
(Part I, column (d) must be on cash basis.)

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

		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)				
	2 Check ▶ [ ] if the foundation is **not** required to attach Sch B				
	3 Interest on savings and temporary cash investments	825.	185.		ATCH 1
	4 Dividends and interest from securities	462,647.	462,647.		ATCH 2
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	-1,306,260.			
	b Gross sales price for all assets on line 6a 12,031,924.				
	7 Capital gain net income (from Part IV, line 2)		0.		
	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)	10,236.	6,209.		ATCH 3
	12 **Total.** Add lines 1 through 11	-832,552.	469,041.	0.	
Operating and Administrative Expenses	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) *	50,560.	50,560.		
	17 Interest				
	18 Taxes (attach schedule) (see page 14 of the instructions) **	18,375.	4,148.		
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)				
	24 **Total operating and administrative expenses.** Add lines 13 through 23	68,935.	54,708.		
	25 Contributions, gifts, grants paid	735,100.			735,100.
	26 **Total expenses and disbursements** Add lines 24 and 25	804,035.	54,708.		735,100.
	27 Subtract line 26 from line 12				
	a **Excess of revenue over expenses and disbursements**	-1,636,587.			
	b **Net investment income** (if negative, enter -0-)		414,333.		
	c **Adjusted net income** (if negative, enter -0-)			-0-.	

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For Privacy Act and Paperwork Reduction Act Notice, see page 30 of the instructions. * ATCH 4 JSA ** ATCH 5

4

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

		Beginning of year (a) Book Value	End of year (b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing			
	2 Savings and temporary cash investments	610,027.	21,364.	21,364.
	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) ATCH 6	10,432,101.	16,711,600.	16,711,600.
	c Investments - corporate bonds (attach schedule) ATCH 7	3,364,771.	0.	0.
	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)	14,406,899.	16,732,964.	16,732,964.
Liabilities	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable (attach schedule)			
	22 Other liabilities (describe ▶)			
	23 **Total liabilities** (add lines 17 through 22)			
Net Assets or Fund Balances	**Foundations that follow SFAS 117, check here ▶ ☐ and complete lines 24 through 26 and lines 30 and 31.**			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. ▶ X			
	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	14,406,899.	16,732,964.	
	30 **Total net assets or fund balances** (see page 17 of the instructions)	14,406,899.	16,732,964.	
	31 **Total liabilities and net assets/fund balances** (see page 17 of the instructions)	14,406,899.	16,732,964.	

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	14,406,899.
2	Enter amount from Part I, line 27a	2	-1,636,587.
3	Other increases not included in line 2 (itemize) ▶ ATTACHMENT 8	3	3,962,652.
4	Add lines 1, 2, and 3	4	16,732,964.
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	16,732,964.

Part IV Capital Gains and Losses for Tax on Investment Income

	(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)	(b) How acquired P-Purchase D-Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
1a	SEE PART IV SCHEDULE			
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) 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	(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
a				
b				
c				
d				
e				

2 Capital gain net income or (net capital loss) ..... { If gain, also enter in Part I, line 7 / If (loss), enter -0- in Part I, line 7 }	2	-1,306,260.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see pages 13 and 17 of the instructions). If (loss), enter -0- in Part I, line 8	3	-157,228.

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? .... ☐ Yes ☒ No

If "Yes," the foundation does not qualify under section 4940(e) Do not complete this part

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2008	973,337.	19,560,355.	0.049761
2007	1,124,466.	23,462,370.	0.047926
2006	869,443.	19,348,102.	0.044937
2005	821,633.	16,770,836.	0.048992
2004	708,568.	13,453,378.	0.052668

2 **Total** of line 1, column (d)	2	0.244284
3 Average distribution ratio for the 5-year base period - divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	0.048857
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4	14,957,560.
5 Multiply line 4 by line 3	5	730,782.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	4,143.
7 Add lines 5 and 6	7	734,925.
8 Enter qualifying distributions from Part XII, line 4	8	735,100.

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

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

1a	Exempt operating foundations described in section 4940(d)(2), check here ▶ ☐ and enter "N/A" on line 1. Date of ruling or determination letter ____________ (attach copy of ruling letter if necessary - see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ▶ ☒ and enter 1% of Part I, line 27b	1	4,143.
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	4,143.
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	4,143.
6	Credits/Payments.		
a	2009 estimated tax payments and 2008 overpayment credited to 2009 — 6a: 9,227.		
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	9,227.
8	Enter any **penalty** for underpayment of estimated tax Check here ☐ if Form 2220 is attached	8	
9	**Tax due.** If the total of lines 5 and 8 is more than line 7, enter **amount owed** ▶	9	
10	**Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶	10	5,084.
11	Enter the amount of line 10 to be **Credited to 2010 estimated tax** ▶ 5,084. **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?	1a		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)?	1b		X
	*If the answer is "Yes" to **1a** or **1b**, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities*			
c	Did the foundation file **Form 1120-POL** for this year?	1c		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*	2		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*	3		X
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		X
b	If "Yes," has it filed a tax return on **Form 990-T** for this year?	4b	N/A	
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? *If "Yes," attach the statement required by General Instruction T*	5		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?	6	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*	7	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*	8b	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*	9		X
10	Did any persons become substantial contributors during the tax year? *If "Yes," attach a schedule listing their names and addresses*	10		X

Part VII-A Statements Regarding Activities (continued)

		Line	Yes	No
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 ▶ PATHSTONE FAMILY OFFICE Telephone no ▶ 404-592-0180

Located at ▶ PO BOX 52047 ATLANTA, GA ZIP + 4 ▶ 30355

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 ▶ 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.

			Line	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)?		1b	N/A	
	Organizations relying on a current notice regarding disaster assistance check here ▶ ☐				
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2009?		1c		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	N/A	
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	N/A	
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

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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** N/A
Organizations relying on a current notice regarding disaster assistance check here ▶ ☐

c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? N/A ☐ Yes ☐ No
If "Yes," attach the statement required by Regulations section 53 4945-5(d)

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

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? **6b** No: X
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** N/A

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors

1 List all officers, directors, trustees, foundation managers and their compensation (see page 22 of the instructions).

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
ATTACHMENT 9		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 ▶ NONE

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 N/A	
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 NONE	
2	
All other program-related investments See page 24 of the instructions 3 NONE	
Total. Add lines 1 through 3 ▶	

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
a	Average monthly fair market value of securities	1a	14,348,566.
b	Average of monthly cash balances	1b	836,774.
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	15,185,340.
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	15,185,340.
4	Cash deemed held for charitable activities Enter 1 1/2 % of line 3 (for greater amount, see page 25 of the instructions)	4	227,780.
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3. Enter here and on Part V, line 4	5	14,957,560.
6	**Minimum investment return.** Enter 5% of line 5	6	747,878.

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	747,878.
2a	Tax on investment income for 2009 from Part VI, line 5	2a	4,143.		
b	Income tax for 2009 (This does not include the tax from Part VI)	2b			
c	Add lines 2a and 2b			2c	4,143.
3	Distributable amount before adjustments Subtract line 2c from line 1			3	743,735.
4	Recoveries of amounts treated as qualifying distributions			4	
5	Add lines 3 and 4			5	743,735.
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	743,735.

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	735,100.
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	735,100.
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	4,143.
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	730,957.

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				743,735.
2	Undistributed income, if any, as of the end of 2009				
a	Enter amount for 2008 only			0.	
b	Total for prior years 20 07 ,20 06 ,20 05		0.		
3	Excess distributions carryover, if any, to 2009				
a	From 2004 — 0.				
b	From 2005 — 10,444.				
c	From 2006 — 0.				
d	From 2007 — 0.				
e	From 2008 — 12,845.				
f	**Total** of lines 3a through e	23,289.			
4	Qualifying distributions for 2009 from Part XII, line 4 ▶ $ 735,100.				
a	Applied to 2008, but not more than line 2a			0.	
b	Applied to undistributed income of prior years (Election required - see page 26 of the instructions)		0.		
c	Treated as distributions out of corpus (Election required - see page 26 of the instructions)	0.			
d	Applied to 2009 distributable amount				735,100.
e	Remaining amount distributed out of corpus	0.			
5	Excess distributions carryover applied to 2009 *(If an amount appears in column (d), the same amount must be shown in column (a).)*	8,635.			8,635.
6	**Enter the net total of each column as indicated below:**				
a	Corpus Add lines 3f, 4c, and 4e Subtract line 5	14,654.			
b	Prior years' undistributed income Subtract line 4b from line 2b		0.		
c	Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d	Subtract line 6c from line 6b Taxable amount - see page 27 of the instructions		0.		
e	Undistributed income for 2008 Subtract line 4a from line 2a Taxable amount - see page 27 of the instructions			0.	
f	Undistributed income for 2009 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2010				0.
7	Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see page 27 of the instructions)	0.			
8	Excess distributions carryover from 2004 not applied on line 5 or line 7 (see page 27 of the instructions)	0.			
9	**Excess distributions carryover to 2010.** Subtract lines 7 and 8 from line 6a	14,654.			
10	Analysis of line 9				
a	Excess from 2005 — 1,809.				
b	Excess from 2006 — 0.				
c	Excess from 2007 — 0.				
d	Excess from 2008 — 12,845.				
e	Excess from 2009 — 0.				

Part XIV Private Operating Foundations (see page 27 of the instructions and Part VII-A, question 9) NOT APPLICABLE

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

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

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

Part XV Supplementary Information (Complete this part only if the foundation had $5,000 or more in assets at any time during the year - see page 28 of the instructions.)

1 **Information Regarding Foundation Managers:**

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

THOMAS H. LOWDER

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

NOT APPLICABLE

2 **Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:**

Check here ▶ [X] if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc (see page 28 of the instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d.

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

ATTACHMENT 10

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

NOT APPLICABLE

c Any submission deadlines.

NOT APPLICABLE

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

NOT APPLICABLE

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*				
ATTACHMENT 11				
Total . . . . ▶ **3a**				735,100.
b *Approved for future payment*				
Total . . . . ▶ **3b**				

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See page 28 of the instructions.)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments			14	825.	
4 Dividends and interest from securities			14	462,647.	
5 Net rental income or (loss) from real estate					
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal property					
7 Other investment income			14	6,209.	
8 Gain or (loss) from sales of assets other than inventory			18	-1,306,260.	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue a					
b					
c					
d					
e					
12 Subtotal Add columns (b), (d), and (e)				-836,579.	

13 Total. Add line 12, columns (b), (d), and (e) . . . 13 -836,579.

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

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

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes). (See page 29 of the instructions.)
	NOT APPLICABLE

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

1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?

		Yes	No
a Transfers from the reporting foundation to a noncharitable exempt organization of			
(1) Cash	1a(1)		X
(2) Other assets	1a(2)		X
b Other transactions			
(1) Sales of assets to a noncharitable exempt organization	1b(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 solicitations	1b(6)		X
c Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c		X

d If the answer to any of the above is "Yes," complete the following schedule Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received

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

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

b If "Yes," complete the following schedule

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

Sign Here

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete Declaration of preparer (other than taxpayer or fiduciary) is based on all information of which preparer has any knowledge

Signature of officer or trustee: [signature] Date: 11/12/10 Title: President

Paid Preparer's Use Only

Preparer's signature	[signature] CPA	Date 11/10/10	Check if self-employed ☐	Preparer's identifying number (See Signature on page 30 of the instructions) P00294031
Firm's name (or yours if self-employed), address, and ZIP code	PATHSTONE FAMILY OFFICE P.O. BOX 52047 ATLANTA, GA 30355	EIN 27-1957427 Phone no 404-592-0180	

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

Kind of Property		Description				P or D	Date acquired	Date sold
Gross sale price less expenses of sale	Depreciation allowed/ allowable	Cost or other basis	FMV as of 12/31/69	Adj basis as of 12/31/69	Excess of FMV over adj basis		Gain or (loss)	
		TOTAL LONG-TERM COMMON TRUST FUND AND PARTNERSHIP, S CORPORATION, AND OTHER ESTATES OR TRUST GAIN OR LOSS					5,004.	
		TOTAL CAPITAL GAIN DISTRIBUTIONS					8,869.	
		ATTACHMENT A-SS#MY1576				P	VAR	VAR
544,993.		508,983.					36,010.	
		ATTACHMENT B-SS#MY1578				P	VAR	05/29/2009
30,497.		41,051.					-10,554.	
		ATTACHMENT C-SS#MY1579				P	VAR	VAR
1,754,921.		2,141,615.					-386,694.	
		ATTACHMENT D-SS#MY2292				P	VAR	VAR
1,008,424.		1,024,734.					-16,310.	
		ATTACHMENT E-SS#MY2295				P	12/23/2008	08/24/2009
5,517.		4,848.					669.	
		ATTACHMENT F-SS#MY2298				P	VAR	VAR
19,602.		21,551.					-1,949.	
		ATTACHMENT G-PERSHING#2364				P	VAR	VAR
331,294.		284,480.					46,814.	
		ATTACHMENT H-PERSHING#4317				P	VAR	VAR
1,190,915.		1,016,129.					174,786.	
		ATTACHMENT I-SS#MY1576				P	VAR	VAR
647,244.		815,207.					-167,963.	
		ATTACHMENT J-SS#MY1577				P	07/28/2003	08/24/2009
693,836.		672,724.					21,112.	
		ATTACHMENT K-SS#MY1578				P	VAR	VAR
1,973,747.		2,211,675.					-237,928.	
		ATTACHMENT L-SS#MY1579				P	VAR	VAR
1,638,125.		2,017,053.					-378,928.	

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

Kind of Property		Description				P or D	Date acquired	Date sold
Gross sale price less expenses of sale	Depreciation allowed/ allowable	Cost or other basis	FMV as of 12/31/69	Adj basis as of 12/31/69	Excess of FMV over adj basis		Gain or (loss)	
		ATTACHMENT M-SS#MY2290				P	01/01/1997	07/31/2009
51,751.		9,680.					42,071.	
		ATTACHMENT N-SS#MY2291				P	VAR	03/18/2009
653,351.		926,417.					-273,066.	
		ATTACHMENT O-SS#MY2295				P	02/12/2008	08/24/2009
356,783.		500,000.					-143,217.	
		ATTACHMENT P-SS#MY2298				P	VAR	03/18/2009
218,478.		280,871.					-62,393.	
		ATTACHMENT Q-PERSHING#4333				P	08/01/2003	12/02/2009
645,193.		569,804.					75,389.	
		ATTACHMENT R-PERSHING#5389				P	02/12/2008	12/02/2009
253,380.		291,362.					-37,982.	
TOTAL GAIN(LOSS)							-1306260.	

FORM 990PF, PART I - INTEREST ON TEMPORARY CASH INVESTMENTS

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
COLONIAL BANK	185.	185.
TAX EXEMPT	640.	
TOTAL	825.	185.

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

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
STATE STREET 1570	1,311.	1,311.
STATE STREET 1576	193,506.	193,506.
STATE STREET 1577	34.	34.
STATE STREET 1578	28,174.	28,174.
STATE STREET 1579	20,786.	20,786.
STATE STREET 2291	99.	99.
STATE STREET 2292	9,946.	9,946.
STATE STREET 2293	6,783.	6,783.
STATE STREET 2294		
STATE STREET 2295	1.	1.
STATE STREET 2296		
STATE STREET 2297	10,312.	10,312.
STATE STREET 2298	4,385.	4,385.
STATE STREET 2299	5,755.	5,755.
PERSHING 2364	6,347.	6,347.
PERSHING 4317	119,373.	119,373.
PERSHING 4325	736.	736.
PERSHING 4333	9,040.	9,040.
PERSHING 4341	9,868.	9,868.
PERSHING 5371	4,203.	4,203.
PERSHING 5389	4,657.	4,657.
PERSHING 5397	9,627.	9,627.
PERSHING 5413	5,101.	5,101.
PERSHING 5421	11,567.	11,567.
PERSHING 7203	1,036.	1,036.
TOTAL	462,647.	462,647.

FORM 990PF, PART I - OTHER INCOME

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
NON DIVIDEND DISTRIBUTIONS	6,209.	6,209.
FEDERAL REFUND	4,027.	
TOTALS	10,236.	6,209.

FORM 990PF, PART I - OTHER PROFESSIONAL FEES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
FIDUCIARY FEES-SS 1570	31,186.	31,186.
FIDUCIARY FEES-SS 1579	7,817.	7,817.
FIDUCIARY FEES-SS 2290	64.	64.
FIDUCIARY FEES-SS 2292	5,190.	5,190.
FIDUCIARY FEES-SS 2293	182.	182.
FIDUCIARY FEES-SS 2294	80.	80.
FIDUCIARY FEES-SS 2295	90.	90.
FIDUCIARY FEES-SS 2296	84.	84.
FIDUCIARY FEES-SS 2297	80.	80.
FIDUCIARY FEES-SS 2298	34.	34.
FIDUCIARY FEES-SS 2299	126.	126.
FIDUCIARY FEES-P 2364	3,069.	3,069.
FIDUCIARY FEES-P 4317	999.	999.
FIDUCIARY FEES-P 4333	181.	181.
FIDUCIARY FEES-P 5371	142.	142.
FIDUCIARY FEES-P 5389	102.	102.
FIDUCIARY FEES-P 5397	104.	104.
FIDUCIARY FEES-P 5413	56.	56.
FIDUCIARY FEES-P 5421	191.	191.
FIDUCIARY FEES-P 7203	134.	134.
FIDUCIARY FEES-P 7245	126.	126.
FIDUCIARY FEES-P 4309	523.	523.
TOTALS	50,560.	50,560.

FORM 990PF, PART I - TAXES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
FOREIGN TAXES	4,148.	4,148.
FEDERAL TAXES	14,227.	
TOTALS	18,375.	4,148.

FORM 990PF, PART II - CORPORATE STOCK

ATTACHMENT 6

DESCRIPTION	ENDING BOOK VALUE	ENDING FMV
CMS STRUCTURED FUND III	59,048.	59,048.
STATE STREET 1577	0.	0.
STATE STREET 1578	0.	0.
STATE STREET - FIDELITY	0.	0.
STATE STREET - 1579	0.	0.
FOUNDATION HUNTER FD	1,224,767.	1,224,767.
STATE STREET- CNB STOCK	0.	0.
STATE STREET - 2292	0.	0.
STATE STREET - 2294	0.	0.
STATE STREET - 2295	0.	0.
STATE STREET - 2293	0.	0.
STATE STREET - 2296	0.	0.
PERSHING - 4309	3,179.	3,179.
PERSHING - 4317	6,102,056.	6,102,056.
PERSHING - 4325	608,807.	608,807.
PERSHING - 4333	504,547.	504,547.
PERSHING - 2364	1,475,622.	1,475,622.
PERSHING - 5371	892,146.	892,146.
PERSHING - 5389	391,300.	391,300.
PERSHING - 5397	640,019.	640,019.
PERSHING - 5413	345,141.	345,141.
PERSHING - 5421	967,499.	967,499.
PERSHING - 4341	1,023,262.	1,023,262.
PERSHING - 7203	796,231.	796,231.
PERSHING - 7245	777,976.	777,976.
DORCHESTER	900,000.	900,000.
TOTALS	16,711,600.	16,711,600.

FORM 990PF, PART II - CORPORATE BONDS

ATTACHMENT 7

DESCRIPTION	ENDING BOOK VALUE	ENDING FMV
PIMCO	0.	0.
TEMPLETON GLOBAL	0.	0.
TOTALS	0.	0.

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

DESCRIPTION	AMOUNT
UNREALIZED APPRECIATION OF SECURITIES	3,962,652.
TOTAL	3,962,652.

THE THOMAS H. AND JARMAN F. LOWDER FOUNDATION 63-1139498

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

ATTACHMENT 9

NAME AND ADDRESS	TITLE AND AVERAGE HOURS PER WEEK DEVOTED TO POSITION	COMPENSATION
THOMAS H. LOWDER 38 COUNTRY CLUB ROAD BIRMINGHAM, AL 35213	PRESIDENT/TREASURER 1.00	0.
	GRAND TOTALS	0.

ATTACHMENT 9

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

NOT APPLICABLE

FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

ATTACHMENT 11

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
UNITED WAY OF CENTRAL ALABAMA 3600 8TH AVENUE SOUTH PO BOX 320189 BIRMINGHAM, AL 35232	NONE PUBLIC	FUND GENERAL PROGRAM EXPENDITURES	200,000
SAINT FRANCNIS XAVIER PARISH 2 XAVIER CIRCLE BIRMINGHAM, AL 35213	NONE PUBLIC	FUND HAITI RELIEF EFFORTS	2,500
MICHAEL J FOX FOUNDATION CHURCH STREET STATION PO BOX 780 NEW YORK, NY 10008	NONE PUBLIC	FUND PARKINSON'S RESEARCH	100
CATHOLIC CHARITIES PO BOX 12047 BIRMINGHAM, AL 35202	NONE PUBLIC	RELIGIOUS CONTRIBUTION	25,000
ALABAMA SYMPHONY ORCHESTRA 3621 SIXTH AVENUE SOUTH BIRMINGHAM, AL 35222	NONE PUBLIC	FUND GENERAL PROGRAM EXPENDITURES	5,000
UAB DEPT OF NEUROLOGY 1530 3RD AVE S BIRMINGHAM, AL 35294-0112	NONE PUBLIC	NEUROLOGICAL RESEARCH	500,000.

FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

ATTACHMENT 11 (CONT'D)

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
AMERICAN RED CROSS PO BOX 4002018 DES MOINES, IA 50340	NONE PUBLIC	FUND HAITI RELIEF EFFORTS	2,500
		TOTAL CONTRIBUTIONS PAID	735,100.

SCHEDULE D (Form 1041)

Department of the Treasury Internal Revenue Service

Capital Gains and Losses

▶ Attach to Form 1041, Form 5227, or Form 990-T. See the instructions for Schedule D (Form 1041) (also for Form 5227 or Form 990-T, if applicable).

OMB No 1545-0092

2009

Name of estate or trust: THE THOMAS H. AND JARMAN F. LOWDER FOUNDATION

Employer identification number: 63-1139498

Note: *Form 5227 filers need to complete **only** Parts I and II.*

Part I Short-Term Capital Gains and Losses - Assets Held One Year or Less

(a) Description of property (Example 100 shares 7% preferred of "Z" Co)	(b) Date acquired (mo , day, yr)	(c) Date sold (mo , day, yr)	(d) Sales price	(e) Cost or other basis (see page 4 of the instructions)	(f) Gain or (loss) for the entire year Subtract (e) from (d)
1a					

b Enter the short-term gain or (loss), if any, from Schedule D-1, line 1b	1b	-157,228.
2 Short-term capital gain or (loss) from Forms 4684, 6252, 6781, and 8824	2	
3 Net short-term gain or (loss) from partnerships, S corporations, and other estates or trusts	3	
4 Short-term capital loss carryover Enter the amount, if any, from line 9 of the 2008 Capital Loss Carryover Worksheet	4	( )
5 **Net short-term gain or (loss).** Combine lines 1a through 4 in column (f) Enter here and on line 13, column (3) on the back ▶	5	-157,228.

Part II Long-Term Capital Gains and Losses - Assets Held More Than One Year

(a) Description of property (Example 100 shares 7% preferred of "Z" Co)	(b) Date acquired (mo , day, yr)	(c) Date sold (mo , day, yr)	(d) Sales price	(e) Cost or other basis (see page 4 of the instructions)	(f) Gain or (loss) for the entire year Subtract (e) from (d)
6a					

b Enter the long-term gain or (loss), if any, from Schedule D-1, line 6b	6b	-1,162,905.
7 Long-term capital gain or (loss) from Forms 2439, 4684, 6252, 6781, and 8824	7	
8 Net long-term gain or (loss) from partnerships, S corporations, and other estates or trusts	8	5,004.
9 Capital gain distributions	9	8,869.
10 Gain from Form 4797, Part I	10	
11 Long-term capital loss carryover Enter the amount, if any, from line 14 of the 2008 Capital Loss Carryover Worksheet	11	( )
12 **Net long-term gain or (loss).** Combine lines 6a through 11 in column (f) Enter here and on line 14a, column (3) on the back ▶	12	-1,149,032.

For Paperwork Reduction Act Notice, see the Instructions for Form 1041.

Part III **Summary of Parts I and II**
Caution: *Read the instructions* ***before*** *completing this part.*

			(1) Beneficiaries' (see page 5)	(2) Estate's or trust's	(3) Total
13	**Net short-term gain or (loss)**	13			-157,228.
14	**Net long-term gain or (loss):**				
a	Total for year	14a			-1,149,032.
b	Unrecaptured section 1250 gain (see line 18 of the wrksht.)	14b			
c	28% rate gain	14c			
15	**Total net gain or (loss).** Combine lines 13 and 14a ▶	15			-1,306,260.

Note: *If line 15, column (3), is a net gain, enter the gain on Form 1041, line 4 (or Form 990-T, Part I, line 4a) If lines 14a and 15, column (2), are net gains, go to Part V, and* ***do not*** *complete Part IV. If line 15, column (3), is a net loss, complete Part IV and the* ***Capital Loss Carryover Worksheet,*** *as necessary*

Part IV **Capital Loss Limitation**

16 Enter here and enter as a (loss) on Form 1041, line 4 (or Form 990-T, Part I, line 4c, if a trust), the **smaller** of
a The loss on line 15, column (3) **or** b $3,000 ..... 16 (3,000.)

Note: *If the loss on line 15, column (3), is more than $3,000,* ***or*** *if Form 1041, page 1, line 22 (or Form 990-T, line 34), is a loss, complete the* ***Capital Loss Carryover Worksheet*** *on page 7 of the instructions to figure your capital loss carryover*

Part V **Tax Computation Using Maximum Capital Gains Rates**

Form 1041 filers. Complete this part **only** if both lines 14a and 15 in column (2) are gains, or an amount is entered in Part I or Part II and there is an entry on Form 1041, line 2b(2), **and** Form 1041, line 22, is more than zero

Caution: *Skip this part and complete the worksheet on page 8 of the instructions if:*

- *Either line 14b, col. (2) or line 14c, col (2) is more than zero, or*
- *Both Form 1041, line 2b(1), and Form 4952, line 4g are more than zero.*

Form 990-T trusts. Complete this part **only** if both lines 14a and 15 are gains, or qualified dividends are included in income in Part I of Form 990-T, **and** Form 990-T, line 34, is more than zero Skip this part and complete the worksheet on page 8 of the instructions if either line 14b, col (2) or line 14c, col (2) is more than zero

17	Enter taxable income from Form 1041, line 22 (or Form 990-T, line 34)	17	
18	Enter the **smaller** of line 14a or 15 in column (2) but not less than zero	18	
19	Enter the estate's or trust's qualified dividends from Form 1041, line 2b(2) (or enter the qualified dividends included in income in Part I of Form 990-T)	19	
20	Add lines 18 and 19	20	
21	If the estate or trust is filing Form 4952, enter the amount from line 4g, otherwise, enter -0- ▶	21	
22	Subtract line 21 from line 20. If zero or less, enter -0-	22	
23	Subtract line 22 from line 17 If zero or less, enter -0-	23	
24	Enter the **smaller** of the amount on line 17 or $2,300	24	
25	Is the amount on line 23 equal to or more than the amount on line 24? ☐ **Yes.** Skip lines 25 and 26, go to line 27 and check the "No" box ☐ **No.** Enter the amount from line 23	25	
26	Subtract line 25 from line 24	26	
27	Are the amounts on lines 22 and 26 the same? ☐ **Yes.** Skip lines 27 thru 30, go to line 31 ☐ **No.** Enter the **smaller** of line 17 or line 22	27	
28	Enter the amount from line 26 (If line 26 is blank, enter -0-)	28	
29	Subtract line 28 from line 27	29	
30	Multiply line 29 by 15% (.15)	30	
31	Figure the tax on the amount on line 23 Use the 2009 Tax Rate Schedule for Estates and Trusts (see the Schedule G instructions in the instructions for Form 1041)	31	
32	Add lines 30 and 31	32	
33	Figure the tax on the amount on line 17 Use the 2009 Tax Rate Schedule for Estates and Trusts (see the Schedule G instructions in the instructions for Form 1041)	33	
34	**Tax on all taxable income.** Enter the **smaller** of line 32 or line 33 here and on Form 1041, Schedule G, line 1a (or Form 990-T, line 36)	34	

SCHEDULE D-1
(Form 1041)

Department of the Treasury
Internal Revenue Service

Continuation Sheet for Schedule D (Form 1041)

▶ See instructions for Schedule D (Form 1041).
▶ Attach to Schedule D to list additional transactions for lines 1a and 6a.

OMB No 1545-0092

2009

Name of estate or trust: THE THOMAS H. AND JARMAN F. LOWDER FOUNDATION

Employer identification number: 63-1139498

Part I Short-Term Capital Gains and Losses - Assets Held One Year or Less

(a) Description of property (Example 100 sh 7% preferred of "Z" Co)	(b) Date acquired (mo , day, yr)	(c) Date sold (mo , day, yr)	(d) Sales price (see page 4 of the instructions)	(e) Cost or other basis (see page 4 of the instructions)	(f) Gain or (loss) Subtract (e) from (d)
1a					
ATTACHMENT A-SS#MY1576	VAR	VAR	544,993.	508,983.	36,010.
ATTACHMENT B-SS#MY1578	VAR	05/29/2009	30,497.	41,051.	-10,554.
ATTACHMENT C-SS#MY1579	VAR	VAR	1,754,921.	2,141,615.	-386,694.
ATTACHMENT D-SS#MY2292	VAR	VAR	1,008,424.	1,024,734.	-16,310.
ATTACHMENT E-SS#MY2295	12/23/2008	08/24/2009	5,517.	4,848.	669.
ATTACHMENT F-SS#MY2298	VAR	VAR	19,602.	21,551.	-1,949.
ATTACHMENT G-PERSHING#2364	VAR	VAR	331,294.	284,480.	46,814.
ATTACHMENT H-PERSHING#4317	VAR	VAR	1,190,915.	1,016,129.	174,786.

1b Total. Combine the amounts in column (f) Enter here and on Schedule D, line 1b . . . . -157,228.

Name of estate or trust as shown on Form 1041 Do not enter name and employer identification number if shown on the other side | **Employer identification number**

Part II Long-Term Capital Gains and Losses - Assets Held More Than One Year

	(a) Description of property (Example 100 sh 7% preferred of "Z" Co)	(b) Date acquired (mo , day, yr)	(c) Date sold (mo , day, yr)	(d) Sales price (see page 4 of the instructions)	(e) Cost or other basis (see page 4 of the instructions)	(f) Gain or (loss) Subtract (e) from (d)
6a	ATTACHMENT I-SS#MY1576	VAR	VAR	647,244.	815,207.	-167,963.
	ATTACHMENT J-SS#MY1577	07/28/2003	08/24/2009	693,836.	672,724.	21,112.
	ATTACHMENT K-SS#MY1578	VAR	VAR	1,973,747.	2,211,675.	-237,928.
	ATTACHMENT L-SS#MY1579	VAR	VAR	1,638,125.	2,017,053.	-378,928.
	ATTACHMENT M-SS#MY2290	01/01/1997	07/31/2009	51,751.	9,680.	42,071.
	ATTACHMENT N-SS#MY2291	VAR	03/18/2009	653,351.	926,417.	-273,066.
	ATTACHMENT O-SS#MY2295	02/12/2008	08/24/2009	356,783.	500,000.	-143,217.
	ATTACHMENT P-SS#MY2298	VAR	03/18/2009	218,478.	280,871.	-62,393.
	ATTACHMENT Q-PERSHING#4333	08/01/2003	12/02/2009	645,193.	569,804.	75,389.
	ATTACHMENT R-PERSHING#5389	02/12/2008	12/02/2009	253,380.	291,362.	-37,982.
6b	**Total.** Combine the amounts in column (f) Enter here and on Schedule D, line 6b					-1,162,905.

The Thomas H. & Jarman F. Lowder Foundation
EIN: 63-1139498
State Street MY1576
Short Term Capital Gain/(Loss)

Security	Date Acquired	Date Sold	Quantity	Sales Prices	Cost Basis	Short Term G/L
PIMCO FDS PAC INVT HIGH YIELD FD	05/02/2008	03/23/2009	504.889	$3,286.83	$4,791.40	($1,504 57)
PIMCO FDS PAC INVT HIGH YIELD FD	09/02/2008	08/24/2009	592.146	$4,790 46	$5,204.96	($414.50)
FRANKLIN HIGH INCM TR FD ADVISORS CL	09/10/2008	08/24/2009	134920 64	$241,507.93	$255,000.00	($13,492.07)
PIMCO FDS PAC INVT HIGH YIELD FD	10/01/2008	08/24/2009	612 21	$4,952.78	$4,836.46	$116.32
FRANKLIN HIGH INCM TR FD ADVISORS CL	10/03/2008	08/24/2009	996.209	$1,783.21	$1,713.48	$69.73
PIMCO FDS PAC INVT HIGH YIELD FD	11/04/2008	08/24/2009	779.914	$6,309.50	$5,350.21	$959.29
FRANKLIN HIGH INCM TR FD ADVISORS CL	11/05/2008	08/24/2009	1166.311	$2,087.70	$1,726.14	$361.56
PIMCO FDS PAC INVT HIGH YIELD FD	12/01/2008	08/24/2009	775.396	$6,272.96	$4,877.24	$1,395.72
FRANKLIN HIGH INCM TR FD ADVISORS CL	12/03/2008	08/24/2009	1800.485	$3,222 87	$2,412 65	$810.22
PIMCO FDS PAC INVT HIGH YIELD FD	01/05/2009	08/24/2009	782.178	$6,327.82	$5,232 77	$1,095.05
FRANKLIN HIGH INCM TR FD ADVISORS CL	01/07/2009	08/24/2009	1190.429	$2,130.87	$1,749 93	$380.94
PIMCO FDS PAC INVT HIGH YIELD FD	02/02/2009	08/24/2009	697.908	$5,646.08	$4,780.67	$865.41
FRANKLIN HIGH INCM TR FD ADVISORS CL	02/04/2009	08/24/2009	1176.627	$2,106.16	$1,764.94	$341.22
PIMCO FDS PAC INVT HIGH YIELD FD	03/03/2009	08/24/2009	788.339	$6,377.66	$5,076.90	$1,300.76
FRANKLIN HIGH INCM TR FD ADVISORS CL	03/04/2009	08/24/2009	1155.692	$2,068.69	$1,652 64	$416.05
FRANKLIN HIGH INCM TR FD ADVISORS CL	03/23/2009	08/24/2009	117196.41	$209,781.58	$169,934.80	$39,846.78
PIMCO FDS PAC INVT HIGH YIELD FD	04/01/2009	08/24/2009	594.191	$4,807.00	$3,897.89	$909.11
FRANKLIN HIGH INCM TR FD ADVISORS CL	04/03/2009	08/24/2009	2094.724	$3,749.55	$3,037.35	$712.20
PIMCO FDS PAC INVT HIGH YIELD FD	05/01/2009	08/24/2009	410.6	$3,321 75	$2,886 52	$435.23
FRANKLIN HIGH INCM TR FD ADVISORS CL	05/05/2009	08/24/2009	1925.704	$3,447.01	$3,061.87	$385.14
PIMCO FDS PAC INVT HIGH YIELD FD	06/01/2009	08/24/2009	456.238	$3,690.97	$3,380.72	$310.25
FRANKLIN HIGH INCM TR FD ADVISORS CL	06/03/2009	08/24/2009	1858.066	$3,325.94	$3,084 39	$241.55
PIMCO FDS PAC INVT HIGH YIELD FD	07/01/2009	08/24/2009	416 063	$3,365.95	$3,128.79	$237.16
FRANKLIN HIGH INCM TR FD ADVISORS CL	07/06/2009	08/24/2009	1837.947	$3,289.93	$3,106.13	$183 80
PIMCO FDS PAC INVT HIGH YIELD FD	08/03/2009	08/24/2009	520 871	$4,213.85	$4,166.97	$46.88
FRANKLIN HIGH INCM TR FD ADVISORS CL	08/05/2009	08/24/2009	1747 279	$3,127.63	$3,127.63	$0 00
Total				$544,992.68	$508,983 45	$36,009.23

ATTACHMENT A

The Thomas H. & Jarman F. Lowder Foundation
EIN: 63-1139498
State Street MY1578
Short Term Capital Gain/(Loss)

Security	Date Acquired	Date Sold	Quantity	Sales Prices	Cost Basis	Short Term G/L
VANGUARD INDEX FDS 500 IDX FD SHS	06/27/2008	05/29/2009	199.456	$14,003.81	$19,460.92	($5,457.11)
VANGUARD INDEX FDS 500 IDX FD SHS	09/26/2008	05/29/2009	234.908	$16,492.89	$21,590.42	($5,097.53)
Total				$30,496.70	$41,051.34	($10,554.64)

ATTACHMENT B

The Thomas H. & Jarman F. Lowder Foundation
EIN: 63-1139498
State Street MY1579
Short Term Capital Gain/(Loss)

Security	Date Acquired	Date Sold	Quantity	Sales Prices	Cost Basis	Short Term G/L
GAZPROM O A O SPONSOREDADR ISIN#US36828720	01/25/2008	01/22/2009	1050	$13,313 92	$52,815.00	($39,501.08)
SCHLUMBERGER LTD COMCOM	02/12/2008	01/22/2009	840	$30,906 53	$69,450 36	($38,543 83)
TESCO PLCSPONSORED ADR	02/28/2008	01/22/2009	1570	$22,733.47	$38,412 72	($15,679 25)
ALCON INC COMSHS ISIN#CH0013826497 SEDOL#2	02/29/2008	01/22/2009	20	$1,653 05	$2,886.78	($1,233 73)
ADR ROCHE HLDG LTD SPONSORED ADR	03/03/2008	01/22/2009	200	$7,295 96	$9,818.02	($2,522 06)
FRESENI MED CARE AKTIENGESELLSCHAFT	03/05/2008	01/22/2009	460	$19,972 63	$24,187 77	($4,215 14)
L OREAL CO ADR	03/10/2008	01/22/2009	1630	$21,972 27	$38,806.88	($16,834.61)
ADR ROCHE HLDG LTD SPONSORED ADR	05/30/2008	01/22/2009	460	$16,780.70	$19,893 55	($3,112 85)
DASSAULT SYS SA	06/18/2008	01/22/2009	330	$12,371.27	$21,086 97	($8,715 70)
SAP AKTIENGESELLSCHAFT SPONSORED ADR	06/23/2008	01/22/2009	760	$26,431 82	$39,377 12	($12,945 30)
ALLIANZ SE	06/24/2008	01/22/2009	4400	$35,436 52	$79,706 88	($44,270 36)
NOVA NORDISK AS	07/17/2008	01/22/2009	160	$8,134.40	$10,216 32	($2,081 92)
NOVARTIS A GSPONSORED ADR	09/11/2008	01/22/2009	900	$40,511.74	$48,048.03	($7,536 29)
GAZPROM O A O SPONSOREDADR ISIN#US36828720	09/19/2008	01/22/2009	1830	$23,204 27	$58,885 01	($35,680 74)
HDFC BK LTDADR REPSTG 3 SHS	09/22/2008	01/22/2009	540	$29,850.54	$48,385 78	($18,535 24)
ERSTE GROUP BANK AG	09/23/2008	01/22/2009	1160	$7,806 76	$34,898 60	($27,091 84)
ADR NOKIA CORP SPONSORED ADR	10/17/2008	01/22/2009	2920	$35,244 20	$49,930 25	($14,686.05)
HOYA CORP SPONSORED ADR	10/21/2008	01/22/2009	810	$14,361 22	$14,534.64	($173.42)
TAIWAN SEMICONDUCTOR MFG CO LTDSPONSORED A	10/28/2008	01/22/2009	3020	$22,130 43	$21,566 42	$564 01
HUTCHISON WHAMPOA LTDADR	11/24/2008	01/22/2009	870	$20,326 21	$19,409.00	$917 21
WPP PLC	12/18/2008	01/22/2009	720	$20,122.94	$22,138 63	($2,015.69)
PANASONIC CORPORATION	12/18/2008	01/22/2009	2000	$23,996 46	$23,458 00	$538 46
ISHARES TRMSCI EAFE INDEX FD	01/22/2009	03/18/2009	36374	$1,300,363 21	$1,393,702 55	($93,339 34)
Total				$1,754,920 52	$2,141,615 28	($386,694 76)

ATTACHMENT C

The Thomas H. & Jarman F. Lowder Foundation
EIN: 63-1139498
State Street MY2292
Short Term Capital Gain/(Loss)

Security	Date Acquired	Date Sold	Quantity	Sales Prices	Cost Basis	Short Term G/L
ISHARES RUSSELL GROWTH 1000	12/17/2008	01/27/2009	20500	$737,145.11	$756,281.90	($19,136 79)
BOEING COCOM	01/27/2009	06/24/2009	10	$411.71	$435.05	($23 34)
ALTERA CORP COM	01/27/2009	07/15/2009	30	$516.71	$509.56	$7.15
GAMESTOP CORPNEW CL A	01/27/2009	06/02/2009	40	$967 79	$1,058.31	($90.52)
CAMERON INTERNATIONAL CORPORATION	01/27/2009	04/13/2009	50	$1,202.16	$1,183.65	$18.51
GAMESTOP CORPNEW CL A	01/27/2009	04/23/2009	50	$1,515 16	$1,322 89	$192 27
CF INDS HLDGS INC COM	01/27/2009	03/13/2009	60	$4,107 31	$2,813.77	$1,293.54
PEPSICO INCCOM	01/27/2009	03/23/2009	70	$3,520.73	$3,628.49	($107.76)
DEERE & CO COM	01/27/2009	04/16/2009	70	$2,792.52	$2,521.48	$271 04
BAXTER INTL INCCOM	01/27/2009	02/27/2009	80	$4,148 38	$4,663.43	($515.05)
EXPRESS SCRIPTS INC COM	01/27/2009	02/27/2009	80	$4,113 77	$4,388.35	($274.58)
GAMESTOP CORPNEW CL A	01/27/2009	04/16/2009	90	$2,748.68	$2,381.19	$367 49
SUNOCO INCCOM	01/27/2009	02/02/2009	100	$4,355 78	$4,443.71	($87.93)
AFLAC INCCOM	01/27/2009	02/03/2009	100	$2,468.10	$2,155.57	$312 53
WESTERN UN CO	01/27/2009	04/21/2009	100	$1,618.07	$1,481.70	$136.37
ALTERA CORP COM	01/27/2009	04/22/2009	100	$1,660.02	$1,698.53	($38.51)
GAMESTOP CORPNEW CL A	01/27/2009	04/23/2009	100	$3,024.25	$2,645.77	$378.48
GAMESTOP CORPNEW CL A	01/27/2009	06/02/2009	100	$2,446.29	$2,645.77	($199.48)
NATIONAL-OILWELL VARCO INC	01/27/2009	07/09/2009	100	$3,037.40	$2,707.17	$330 23
CF INDS HLDGS INC COM	01/27/2009	02/26/2009	110	$6,962 43	$5,158 58	$1,803.85
SUNOCO INCCOM	01/27/2009	02/02/2009	120	$5,210.54	$5,332.45	($121 91)
AFLAC INCCOM	01/27/2009	02/05/2009	120	$2,781.21	$2,586.68	$194.53
EXPRESS SCRIPTS INC COM	01/27/2009	03/23/2009	120	$5,623 46	$6,582.53	($959.07)
WESTERN UN CO	01/27/2009	04/21/2009	120	$1,943.64	$1,778.04	$165.60
GAMESTOP CORPNEW CL A	01/27/2009	05/26/2009	120	$2,806.11	$3,174 92	($368.81)
NATIONAL-OILWELL VARCO INC	01/27/2009	07/09/2009	120	$3,649.74	$3,248.60	$401.14
DANAHER CORPCOM	01/27/2009	03/23/2009	130	$7,162.51	$7,369.10	($206.59)
THERMO FISHER SCIENTIFIC INC	01/27/2009	03/23/2009	130	$4,455.36	$4,715.95	($260.59)
ABBOTT LABSCOM	01/27/2009	02/27/2009	140	$6,683.42	$7,629 01	($945.59)
DEERE & CO COM	01/27/2009	06/24/2009	140	$5,571.91	$5,042 95	$528.96
HALLIBURTON CO COM	01/27/2009	04/16/2009	160	$2,977.15	$2,976.96	$0.19
PROCTER & GAMBLE CO	01/27/2009	03/23/2009	180	$8,438.44	$10,202.80	($1,764.36)
GEN DYNAMICS CORP COM	01/27/2009	03/23/2009	190	$7,377.52	$10,562.67	($3,185.15)
WESTERN UN CO	01/27/2009	04/13/2009	200	$2,850 26	$2,963.40	($113.14)
ALTERA CORP COM	01/27/2009	04/22/2009	220	$3,616 39	$3,736.77	($120.38)
CONSTELLATION BRANDS INC CL A	01/27/2009	03/11/2009	250	$3,230.68	$3,682.73	($452.05)
INTEL CORPCOM	01/27/2009	04/16/2009	260	$4,103.55	$3,603.86	$499 69
ALTERA CORP COM	01/27/2009	07/15/2009	370	$6,353 40	$6,284.56	$68.84
MEMC ELECTR MATLS INCCOM	01/27/2009	05/06/2009	390	$7,188 25	$5,543.27	$1,644 98
APPLE INCCOM	02/20/2009	04/16/2009	10	$1,225.07	$916 73	$308 34

ATTACHMENT D

The Thomas H. & Jarman F. Lowder Foundation
EIN: 63-1139498
State Street MY2292
Short Term Capital Gain/(Loss)

Security	Date Acquired	Date Sold	Quantity	Sales Prices	Cost Basis	Short Term G/L
GOOGLE INCCL A	02/20/2009	04/16/2009	10	$3,921.79	$3,461.34	$460.45
AFLAC INCCOM	02/20/2009	04/13/2009	50	$1,222.13	$857.53	$364.60
AFLAC INCCOM	02/20/2009	04/13/2009	50	$1,222.13	$857.36	$364.77
CONSTELLATION BRANDS INC CL A	02/20/2009	03/11/2009	100	$1,292.27	$1,395 48	($103.21)
AFLAC INCCOM	02/20/2009	04/13/2009	100	$2,435.56	$1,715 05	$720.51
AFLAC INCCOM	02/20/2009	04/16/2009	150	$4,054.23	$2,572.07	$1,482.16
CONSTELLATION BRANDS INC CL A	02/20/2009	03/11/2009	170	$2,196 87	$2,367.54	($170.67)
MOSAIC CO COM	03/04/2009	06/24/2009	20	$878.92	$866.75	$12.17
MOSAIC CO COM	03/04/2009	07/17/2009	30	$1,483.79	$1,300.13	$183.66
HANSEN NAT CORP COM	03/04/2009	08/20/2009	30	$986.11	$1,064.34	($78.23)
MOSAIC CO COM	03/04/2009	04/16/2009	50	$2,188.27	$2,166.88	$21 39
MOSAIC CO COM	03/04/2009	07/17/2009	60	$2,967.59	$2,591 90	$375.69
GOOGLE INCCL A	03/23/2009	04/13/2009	10	$3,780 80	$3,477 90	$302.90
APPLE INCCOM	03/23/2009	04/16/2009	50	$6,125.33	$5,303.34	$821 99
HANSEN NAT CORP COM	03/23/2009	08/07/2009	50	$1,817.75	$1,807.17	$10 58
HANSEN NAT CORP COM	03/23/2009	08/20/2009	70	$2,300 94	$2,530 03	($229.09)
NATIONAL-OILWELL VARCO INC	03/24/2009	07/09/2009	40	$1,216.58	$1,306.92	($90.34)
NATIONAL-OILWELL VARCO INC	03/24/2009	04/13/2009	50	$1,710.92	$1,633.65	$77.27
CAMERON INTERNATIONAL CORPORATION	03/24/2009	04/13/2009	60	$1,442 60	$1,488.23	($45.63)
USX STEEL GROUP COM	03/25/2009	05/06/2009	60	$1,886 05	$1,477.64	$408.41
USX STEEL GROUP COM	03/25/2009	05/06/2009	100	$3,143 16	$2,462.73	$680.43
NOBLE CORP	03/26/2009	05/27/2009	300	$9,414.47	$7,860.57	$1,553.90
MASTERCARD INC COM	05/13/2009	06/24/2009	20	$3,202.57	$3,453.04	($250.47)
MICROSOFT CORPCOM	06/02/2009	07/24/2009	240	$5,654.44	$5,214 74	$439.70
MASTERCARD INC COM	06/03/2009	06/24/2009	30	$4,803.86	$5,014.80	($210.94)
BECTON DICKINSON & CO COM	06/03/2009	07/30/2009	30	$2,024.58	$2,066.10	($41.52)
APPLE INCCOM	06/03/2009	06/24/2009	60	$8,187.23	$8,437.20	($249.97)
MOSAIC CO COM	06/03/2009	06/24/2009	60	$2,636.76	$3,167.39	($530.63)
DEERE & CO COM	06/03/2009	06/24/2009	80	$3,183.95	$3,606.40	($422.45)
HANSEN NAT CORP COM	06/03/2009	08/07/2009	100	$3,664.50	$3,641.00	$23.50
BOEING COCOM	06/03/2009	06/24/2009	130	$5,352 30	$6,292.00	($939.70)
NATIONAL-OILWELL VARCO INC	06/03/2009	07/09/2009	150	$4,562.17	$5,578.50	($1,016.33)
HANSEN NAT CORP COM	06/03/2009	08/07/2009	150	$5,453.24	$5,461.50	($8.26)
ALTERA CORP COM	06/03/2009	07/15/2009	470	$8,095.16	$7,863.71	$231.45
MICROSOFT CORPCOM	06/25/2009	07/24/2009	100	$2,356.02	$2,384.37	($28.35)
BECTON DICKINSON & CO COM	06/25/2009	07/30/2009	100	$6,784.78	$7,093.34	($308.56)
BECTON DICKINSON & CO COM	06/26/2009	07/30/2009	20	$1,349.72	$1,416.02	($66 30)
MICROSOFT CORPCOM	06/26/2009	07/24/2009	60	$1,413 61	$1,420.83	($7.22)
Total				$1,008,424.13	$1,024,734.34	($16,310.21)

The Thomas H. & Jarman F. Lowder Foundation
EIN: 63-1139498
State Street MY2295
Short Term Capital Gain/(Loss)

Security	Date Acquired	Date Sold	Quantity	Sales Prices	Cost Basis	Short Term G/L
VIRTUS OPPORTUNITIES T VIRTUS	12/23/2008	08/24/2009	299.682	$5,517.15	$4,848.85	$668 30
Total				$5,517.15	$4,848.85	$668.30

ATTACHMENT E

The Thomas H. & Jarman F. Lowder Foundation
EIN: 63-1139498
State Street MY2298
Short Term Capital Gain/(Loss)

Security	Date Acquired	Date Sold	Quantity	Sales Prices	Cost Basis	Short Term G/L
PIMCO FDS PAC INVT MGM EMRG MKTBD INS	04/02/2008	03/18/2009	140.848	$1,169.04	$1,504.25	($335.21)
PIMCO FDS PAC INVT MGM EMRG MKTBD INS	05/02/2008	03/18/2009	139.808	$1,160 41	$1,508.53	($348.12)
PIMCO FDS PAC INVT MGM EMRG MKTBD INS	06/02/2008	03/18/2009	147.666	$1,225.63	$1,581.50	($355.87)
PIMCO FDS PAC INVT MGM EMRG MKTBD INS	07/01/2008	03/18/2009	137.316	$1,139 72	$1,421 22	($281.50)
PIMCO FDS PAC INVT MGM EMRG MKTBD INS	08/01/2008	03/18/2009	153.808	$1,276.61	$1,591.91	($315.30)
PIMCO FDS PAC INVT MGM EMRG MKTBD INS	09/02/2008	03/18/2009	159.44	$1,323.35	$1,643.83	($320 48)
PIMCO FDS PAC INVT MGM EMRG MKTBD INS	10/01/2008	03/18/2009	155.111	$1,287.42	$1,465.80	($178.38)
PIMCO FDS PAC INVT MGM EMRG MKTBD INS	11/03/2008	03/18/2009	201.038	$1,668.62	$1,578.15	$90.47
PIMCO FDS PAC INVT MGM EMRG MKTBD INS	12/01/2008	03/18/2009	168.918	$1,402.02	$1,359.79	$42 23
PIMCO FDS PAC INVT MGM EMRG MKTBD INS	12/11/2008	03/18/2009	346.999	$2,880.09	$2,775.99	$104 10
PIMCO FDS PAC INVT MGM EMRG MKTBD INS	01/02/2009	03/18/2009	195.55	$1,623.07	$1,656.31	($33.24)
PIMCO FDS PAC INVT MGM EMRG MKTBD INS	02/02/2009	03/18/2009	204.128	$1,694.26	$1,733.05	($38.79)
PIMCO FDS PAC INVT MGM EMRG MKTBD INS	03/02/2009	03/18/2009	211.023	$1,751.49	$1,730.39	$21.10
Total				$19,601 73	$21,550.72	($1,948.99)

ATTACHMENT F

The Thomas H. & Jarman F. Lowder Foundation
EIN: 63-1139498
Pershing 2364
Short Term Capital Gain/(Loss)

Security	Date Acquired	Date Sold	Quantity	Sales Prices	Cost Basis	Short Term G/L
APPLE INCCOM	01/27/2009	10/19/2009	10	$2,026.63	$904.12	$1,122.51
NASDAQ OMX GROUPCOM	01/27/2009	12/11/2009	40	$784.97	$869 26	($84.29)
OCCIDENTAL PETE CORP COM	01/27/2009	11/04/2009	50	$4,038.45	$2,831 37	$1,207.08
BOEING COCOM	01/27/2009	09/16/2009	80	$4,178.18	$3,480.36	$697 82
NASDAQ OMX GROUPCOM	01/27/2009	12/10/2009	90	$1,759.87	$1,955.84	($195.97)
MONSANTO CO NEWCOM	01/27/2009	09/16/2009	110	$8,714.49	$8,685.45	$29.04
NIKE INC CL B	01/27/2009	09/16/2009	150	$8,569.99	$6,809.69	$1,760.30
CAMERON INTERNATIONAL CORPORATION	01/27/2009	11/04/2009	150	$5,824 54	$3,550 95	$2,273 59
NASDAQ OMX GROUPCOM	01/27/2009	12/10/2009	200	$3,912 47	$4,346 30	($433.83)
EMC CORPORATION MASS	01/27/2009	09/16/2009	210	$3,604.50	$2,270.64	$1,333.86
HALLIBURTON CO COM	01/27/2009	09/10/2009	470	$11,979.36	$8,744.82	$3,234.54
HANSEN NAT CORP COM	02/20/2009	09/04/2009	10	$318.59	$339.25	($20 66)
APPLE INCCOM	02/20/2009	10/19/2009	30	$6,079.91	$2,750 18	$3,329 73
HANSEN NAT CORP COM	02/20/2009	09/04/2009	200	$6,387.35	$6,785 04	($397.69)
HANSEN NAT CORP COM	03/04/2009	09/04/2009	50	$1,592 94	$1,773.89	($180.95)
EMERSON ELEC COCOM	03/23/2009	09/15/2009	60	$2,405 68	$1,727.73	$677.95
EMERSON ELEC COCOM	03/23/2009	09/16/2009	70	$2,808.90	$2,015 69	$793 21
APOLLO GROUP INC CL A	03/24/2009	10/28/2009	70	$4,328 59	$5,401.17	($1,072.58)
NASDAQ OMX GROUPCOM	03/24/2009	12/10/2009	110	$2,150.96	$2,485.18	($334 22)
BOEING COCOM	03/24/2009	09/16/2009	120	$6,267.27	$4,386.42	$1,880.85
EMERSON ELEC COCOM	04/24/2009	09/15/2009	110	$4,410.41	$3,724 46	$685.95
NASDAQ OMX GROUPCOM	06/03/2009	12/14/2009	10	$190.91	$214 55	($23 64)
APPLE INCCOM	06/03/2009	10/19/2009	60	$12,159.81	$8,437.20	$3,722.61
MONSANTO CO NEWCOM	06/03/2009	09/16/2009	70	$5,545 59	$5,711.01	($165.42)
EMERSON ELEC COCOM	06/03/2009	09/15/2009	80	$3,207 57	$2,743 60	$463.97
EMC CORPORATION MASS	06/03/2009	09/16/2009	90	$1,544.79	$1,120.96	$423.83
OCCIDENTAL PETE CORP COM	06/03/2009	09/08/2009	100	$7,446.40	$6,663.00	$783.40
NIKE INC CL B	06/03/2009	09/16/2009	100	$5,713.32	$5,790.00	($76.68)

The Thomas H. & Jarman F. Lowder Foundation
EIN: 63-1139498
Pershing 2364
Short Term Capital Gain/(Loss)

Security	Date Acquired	Date Sold	Quantity	Sales Prices	Cost Basis	Short Term G/L
NASDAQ OMX GROUPCOM	06/03/2009	12/11/2009	160	$3,139.86	$3,432.85	($292 99)
CVS CAREMARK CORPORATION	06/03/2009	11/20/2009	180	$5,681.13	$5,511.58	$169.55
CVS CAREMARK CORPORATION	06/03/2009	11/09/2009	200	$6,102.86	$6,123.98	($21.12)
CVS CAREMARK CORPORATION	06/03/2009	11/20/2009	200	$6,292.25	$6,123.98	$168 27
TJX COS INC NEW COM	06/03/2009	12/03/2009	200	$7,339.93	$6,129.00	$1,210.93
TJX COS INC NEW COM	06/03/2009	12/03/2009	250	$9,347.93	$7,661 25	$1,686.68
HALLIBURTON CO COM	06/03/2009	09/08/2009	280	$7,021.39	$6,311.20	$710.19
DIRECTTV GTOUP INC COM	06/03/2009	11/24/2009	400	$12,809.83	$9,039.80	$3,770.03
EMC CORPORATION MASS	06/03/2009	09/16/2009	600	$10,269 89	$7,473.06	$2,796.83
AFLAC INCCOM	07/21/2009	09/16/2009	100	$4,288.22	$3,309.46	$978.76
AFLAC INCCOM	07/21/2009	09/16/2009	100	$4,288.23	$3,313.14	$975 09
AFLAC INCCOM	07/21/2009	09/16/2009	100	$4,288.84	$3,309.46	$979.38
APPLE INCCOM	07/21/2009	09/16/2009	100	$18,227.93	$15,240.87	$2,987.06
GOOGLE INCCL A	07/21/2009	10/06/2009	100	$49,526.29	$43,056.20	$6,470 09
EMERSON ELEC COCOM	07/29/2009	09/15/2009	100	$4,009.00	$3,601.45	$407.55
EMERSON ELEC COCOM	07/29/2009	09/15/2009	150	$6,014.20	$5,402.18	$612.02
CAMERON INTERNATIONAL CORPORATION	08/17/2009	11/04/2009	50	$1,941.52	$1,614.23	$327.29
HALLIBURTON CO COM	08/17/2009	09/10/2009	80	$2,039.04	$1,800.31	$238.73
CAMERON INTERNATIONAL CORPORATION	08/17/2009	09/08/2009	100	$3,690.02	$3,232.44	$457.58
CAMERON INTERNATIONAL CORPORATION	08/17/2009	09/08/2009	150	$5,535.04	$4,883.25	$651.79
CAMERON INTERNATIONAL CORPORATION	08/17/2009	09/08/2009	150	$5,535.04	$4,842.68	$692.36
HALLIBURTON CO COM	08/17/2009	09/08/2009	320	$8,024.44	$7,201.25	$823.19
APOLLO GROUP INC CL A	09/16/2009	10/28/2009	130	$8,038.81	$8,738.54	($699 73)
CVS CAREMARK CORPORATION	10/28/2009	11/09/2009	200	$6,102.86	$7,197.38	($1,094.52)
CVS CAREMARK CORPORATION	11/05/2009	11/20/2009	120	$3,787.42	$3,412.73	$374.69
Total				$331,294.41	$284,480.40	$46,814.01

ATTACHMENT G

The Thomas H. & Jarman F. Lowder Foundation
EIN: 63-1139498
Pershing 4317
Short Term Capital Gain/(Loss)

Security	Date Acquired	Date Sold	Quantity	Sales Prices	Cost Basis	Short Term G/L
FRANKLIN INVS SECS TR FLT RATE DAILY	03/23/2009	12/02/2009	134770.89	$1,173,854 44	$1,000,000.00	$173,854.44
FRANKLIN INVS SECS TR FLT RATE DAILY	04/01/2009	12/02/2009	98.437	$857.39	$738 28	$119.11
FRANKLIN INVS SECS TR FLT RATE DAILY	05/01/2009	12/02/2009	380 325	$3,312 63	$2,993 16	$319 47
FRANKLIN INVS SECS TR FLT RATE DAILY	06/01/2009	12/02/2009	400.369	$3,487.21	$3,230.98	$256.23
FRANKLIN INVS SECS TR FLT RATE DAILY	07/01/2009	12/02/2009	359.562	$3,131.79	$2,987 96	$143 83
FRANKLIN INVS SECS TR FLT RATE DAILY	08/03/2009	12/02/2009	357.244	$3,111 60	$3,047.29	$64 31
FRANKLIN INVS SECS TR FLT RATE DAILY	09/01/2009	12/02/2009	362.849	$3,160.41	$3,131.39	$29.02
Total				$1,190,915.47	$1,016,129.06	$174,786 41

ATTACHMENT H

The Thomas H. & Jarman F. Lowder Foundation
EIN: 63-1139498
State Street MY1576
Long Term Capital Gain/(Loss)

Security	Date Acquired	Date Sold	Quantity	Sales Prices	Cost Basis	Long Term G/L
PIMCO FDS PAC INVT HIGH YIELD FD	07/22/2003	03/23/2009	10366 58	$67,486 40	$97,342 14	($29,855.74)
PIMCO FDS PAC INVT HIGH YIELD FD	07/22/2003	08/24/2009	49537.58	$400,759 00	$465,157.86	($64,398.86)
PIMCO FDS PAC INVT HIGH YIELD FD	08/05/2003	08/24/2009	109.429	$885.28	$1,004.56	($119.28)
PIMCO FDS PAC INVT HIGH YIELD FD	09/05/2003	08/24/2009	375 088	$3,034 46	$3,477 07	($442.61)
PIMCO FDS PAC INVT HIGH YIELD FD	10/07/2003	03/23/2009	362 075	$2,357 11	$3,410.75	($1,053 64)
PIMCO FDS PAC INVT HIGH YIELD FD	06/03/2004	08/24/2009	385 871	$3,121.70	$3,607 89	($486 19)
PIMCO FDS PAC INVT HIGH YIELD FD	07/06/2004	03/23/2009	364.278	$2,371.45	$3,427.86	($1,056.41)
PIMCO FDS PAC INVT HIGH YIELD FD	12/06/2004	03/23/2009	396.394	$2,580.52	$3,765 74	($1,185.22)
PIMCO FDS PAC INVT HIGH YIELD FD	07/06/2006	03/23/2009	477 379	$3,107.74	$4,544.65	($1,436 91)
PIMCO FDS PAC INVT HIGH YIELD FD	07/10/2006	03/23/2009	12555.35	$81,735.33	$119,652 50	($37,917.17)
PIMCO FDS PAC INVT HIGH YIELD FD	09/26/2006	03/23/2009	518 009	$3,372.24	$4,993 61	($1,621.37)
PIMCO FDS PAC INVT HIGH YIELD FD	10/06/2006	03/23/2009	437.003	$2,844 89	$4,243.30	($1,398.41)
PIMCO FDS PAC INVT HIGH YIELD FD	11/03/2006	03/23/2009	421.103	$2,741.38	$4,109.96	($1,368.58)
PIMCO FDS PAC INVT HIGH YIELD FD	12/05/2006	03/23/2009	465.534	$3,030.63	$4,590 17	($1,559 54)
PIMCO FDS PAC INVT HIGH YIELD FD	12/15/2006	03/23/2009	49 109	$319.70	$485 20	($165.50)
PIMCO FDS PAC INVT HIGH YIELD FD	01/08/2007	03/23/2009	462.719	$3,012.30	$4,545.55	($1,533.25)
PIMCO FDS PAC INVT HIGH YIELD FD	02/02/2007	03/23/2009	429.536	$2,796.28	$4,243.81	($1,447.53)
PIMCO FDS PAC INVT HIGH YIELD FD	03/02/2007	03/23/2009	414.067	$2,695.58	$4,128.24	($1,432.66)
PIMCO FDS PAC INVT HIGH YIELD FD	04/05/2007	03/23/2009	497 248	$3,237.08	$4,942.65	($1,705.57)
PIMCO FDS PAC INVT HIGH YIELD FD	05/02/2007	03/23/2009	446.255	$2,905 12	$4,467.01	($1,561.89)
PIMCO FDS PAC INVT HIGH YIELD FD	06/04/2007	03/23/2009	475.727	$3,096.98	$4,766.78	($1,669.80)
PIMCO FDS PAC INVT HIGH YIELD FD	07/03/2007	03/23/2009	511.771	$3,331.63	$5,000 00	($1,668.37)
PIMCO FDS PAC INVT HIGH YIELD FD	08/02/2007	08/24/2009	521.832	$4,221 62	$4,889 57	($667 95)
PIMCO FDS PAC INVT HIGH YIELD FD	09/05/2007	03/23/2009	571.147	$3,718.17	$5,408.76	($1,690.59)
PIMCO FDS PAC INVT HIGH YIELD FD	10/02/2007	03/23/2009	416.257	$2,709.83	$4,033.53	($1,323.70)
PIMCO FDS PAC INVT HIGH YIELD FD	11/06/2007	03/23/2009	478 011	$3,111.85	$4,641 48	($1,529.63)
PIMCO FDS PAC INVT HIGH YIELD FD	12/04/2007	03/23/2009	500.459	$3,257.99	$4,794 39	($1,536.40)
PIMCO FDS PAC INVT HIGH YIELD FD	12/14/2007	03/23/2009	51.494	$335 23	$492.80	($157.57)
PIMCO FDS PAC INVT HIGH YIELD FD	01/03/2008	03/23/2009	507.547	$3,304 13	$4,842 00	($1,537.87)
PIMCO FDS PAC INVT HIGH YIELD FD	02/04/2008	03/23/2009	508 364	$3,309.45	$4,814.21	($1,504.76)
PIMCO FDS PAC INVT HIGH YIELD FD	03/04/2008	08/24/2009	565 349	$4,573.67	$5,274.71	($701 04)

ATTACHMENT I

The Thomas H. & Jarman F. Lowder Foundation
EIN: 63-1139498
State Street MY1576
Long Term Capital Gain/(Loss)

Security	Date Acquired	Date Sold	Quantity	Sales Prices	Cost Basis	Long Term G/L
PIMCO FDS PAC INVT HIGH YIELD FD	04/02/2008	08/24/2009	507.044	$4,101.99	$4,664.80	($562 81)
PIMCO FDS PAC INVT HIGH YIELD FD	06/02/2008	08/24/2009	563 14	$4,555.80	$5,282.25	($726.45)
PIMCO FDS PAC INVT HIGH YIELD FD	07/01/2008	08/24/2009	540.718	$4,374.41	$4,882 68	($508.27)
PIMCO FDS PAC INVT HIGH YIELD FD	08/01/2008	08/24/2009	599.152	$4,847.14	$5,278.53	($431.39)
Total				$647,244.08	$815,207.01	($167,962.93)

The Thomas H. & Jarman F. Lowder Foundation
EIN: 63-1139498
State Street MY1577
Long Term Capital Gain/(Loss)

Security	Date Acquired	Date Sold	Quantity	Sales Prices	Cost Basis	Long Term G/L
ROYCE FD LOW PRICED	07/28/2003	08/24/2009	57058 88	$693,836.00	$672,724.22	$21,111 78
Total				$693,836.00	$672,724.22	$21,111.78

ATTACHMENT J

The Thomas H. & Jarman F. Lowder Foundation
EIN: 63-1139498
State Street MY1578
Long Term Capital Gain/(Loss)

Security	Date Acquired	Date Sold	Quantity	Sales Prices	Cost Basis	Long Term G/L
VANGUARD INDEX FDS 500 IDX FD SHS	08/01/2003	08/25/2009	3051.97	$239,701 64	$228,557.25	$11,144.39
VANGUARD INDEX FDS 500 IDX FD SHS	08/14/2003	08/25/2009	3961	$311,096.93	$300,000.00	$11,096.93
VANGUARD INDEX FDS 500 IDX FD SHS	09/22/2003	07/06/2009	2922.7	$200,000.00	$228,933 61	($28,933.61)
VANGUARD INDEX FDS 500 IDX FD SHS	09/22/2003	08/25/2009	3108.96	$244,177.71	$243,523.68	$654 03
VANGUARD INDEX FDS 500 IDX FD SHS	09/22/2003	05/29/2009	3412.35	$239,580.75	$267,287.71	($27,706 96)
VANGUARD INDEX FDS 500 IDX FD SHS	09/29/2003	08/25/2009	118	$9,267 72	$9,020 49	$247.23
VANGUARD INDEX FDS 500 IDX FD SHS	12/30/2003	05/29/2009	141	$9,899.61	$11,786.47	($1,886.86)
VANGUARD INDEX FDS 500 IDX FD SHS	02/18/2004	05/29/2009	3149	$221,091.29	$277,241.00	($56,149 71)
VANGUARD INDEX FDS 500 IDX FD SHS	03/29/2004	05/29/2009	121	$8,495.41	$10,183.87	($1,688 46)
VANGUARD INDEX FDS 500 IDX FD SHS	06/28/2004	05/29/2009	116	$8,144.36	$10,032.81	($1,888.45)
VANGUARD INDEX FDS 500 IDX FD SHS	09/27/2004	05/29/2009	138	$9,688.98	$11,665.30	($1,976.32)
VANGUARD INDEX FDS 500 IDX FD SHS	02/02/2005	05/29/2009	6047.03	$424,561.64	$549,599.21	($125,037 57)
VANGUARD INDEX FDS 500 IDX FD SHS	03/28/2005	05/29/2009	245	$17,201.45	$21,924.58	($4,723.13)
VANGUARD INDEX FDS 500 IDX FD SHS	06/27/2005	05/29/2009	237	$16,639.77	$21,531.80	($4,892.03)
VANGUARD INDEX FDS 500 IDX FD SHS	03/28/2008	05/29/2009	202.251	$14,200 04	$20,386.87	($6,186 83)
Total				$1,973,747.30	$2,211,674.65	($237,927 35)

ATTACHMENT K

The Thomas H. & Jarman F. Lowder Foundation
EIN: 63-1139498
State Street MY1579
Long Term Capital Gain/(Loss)

Security	Date Acquired	Date Sold	Quantity	Sales Prices	Cost Basis	Long Term G/L
HSBC HLDGS PLCSPONSORED ADR	02/21/2000	01/22/2009	350	$12,751 29	$20,396 25	($7,644 96)
NESTLE S ASPONSORED ADR REPSTG REG SHS	03/21/2000	01/22/2009	1175	$41,230 51	$20,915 00	$20,315 51
UNILEVER PLC SPONSORED NEW	03/28/2000	01/22/2009	1332	$30,017 65	$18,888 50	$11,129.15
HSBC HLDGS PLCSPONSORED ADR	01/17/2002	01/22/2009	100	$3,643 23	$5,788 57	($2,145 34)
HSBC HLDGS PLCSPONSORED ADR	04/25/2002	01/22/2009	100	$3,643.23	$6,004 29	($2,361 06)
HSBC HLDGS PLCSPONSORED ADR	04/26/2002	01/22/2009	65	$2,368 10	$3,913 65	($1,545 55)
TESCO PLCSPONSORED ADR	07/15/2002	01/22/2009	1600	$23,167 87	$17,013 76	$6,154 11
HSBC HLDGS PLCSPONSORED ADR	03/04/2005	01/22/2009	30	$1,092.97	$2,478 30	($1,385 33)
NESTLE S ASPONSORED ADR REPSTG REG SHS	03/04/2005	01/22/2009	375	$13,158 68	$10,447 50	$2,711.18
SWISS REINSURANCE	03/04/2005	01/22/2009	440	$12,649 84	$32,379 60	($19,729 76)
SAP AKTIENGESELLSCHAFT SPONSORED ADR	03/04/2005	01/22/2009	450	$15,650.41	$18,320 49	($2,670 08)
TESCO PLCSPONSORED ADR	03/04/2005	01/22/2009	700	$10,135 94	$12,635 00	($2,499.06)
BG GROUP PLCADR FINAL INSTALLMENT NEW	03/04/2005	01/22/2009	740	$45,679 94	$29,830.66	$15,849 28
DASSAULT SYS SA	03/04/2005	01/22/2009	750	$28,116 52	$34,820 93	($6,704 41)
KOMATSU LTD	03/04/2005	01/22/2009	820	$35,366 40	$25,649 60	$9,716.80
HUTCHISON WHAMPOA LTDADR	03/04/2005	01/22/2009	900	$21,027.12	$39,762.00	($18,734.88)
WPP PLC	03/04/2005	01/22/2009	970	$27,110 09	$58,025 01	($30,914 92)
ENCANA CORP ISIN#CA2925051047 SEDOL#279319	03/04/2005	01/22/2009	1060	$44,072 85	$37,061.89	$7,010 96
IMPERIAL OIL LTDCOM	03/04/2005	01/22/2009	1400	$42,714 88	$35,161 19	$7,553 69
SASOL LTDSPONSORED ADR	03/04/2005	01/22/2009	1420	$36,140 21	$34,850 78	$1,289 43
SKF AB	03/04/2005	01/22/2009	1440	$11,767 04	$18,568 80	($6,801 76)
ADR ROCHE HLDG LTD SPONSORED ADR	03/04/2005	01/22/2009	1560	$56,908 47	$41,441 40	$15,467 07
PANASONIC CORPORATION	03/04/2005	01/22/2009	1720	$20,636.96	$25,826 32	($5,189.36)
WAL MART DE MEX S A DE C V SPONSOREDADR RE	03/04/2005	01/22/2009	1720	$38,490 46	$32,155 40	$6,335 06
QIAGEN NV	03/04/2005	01/22/2009	1980	$34,528 43	$24,742 08	$9,786 35
L OREAL CO ADR	03/04/2005	01/22/2009	2310	$31,138 63	$36,729 00	($5,590.37)
AIR LIQUIDE ADR	03/04/2005	01/22/2009	3557 4	$53,467 42	$53,875.50	($408.08)

ATTACHMENT L

The Thomas H. & Jarman F. Lowder Foundation
EIN: 63-1139498
State Street MY1579
Long Term Capital Gain/(Loss)

Security	Date Acquired	Date Sold	Quantity	Sales Prices	Cost Basis	Long Term G/L
TAIWAN SEMICONDUCTOR MFG CO LTDSPONSORED A	03/04/2005	01/22/2009	4980 1946	$36,494 66	$40,622 08	($4,127.42)
ATLAS COPCO SP ADR A NEW	03/04/2005	01/22/2009	5040	$34,689.61	$44,142 00	($9,452 39)
SAP AKTIENGESELLSCHAFT SPONSORED ADR	04/27/2005	01/22/2009	340	$11,824 76	$13,412 25	($1,587 49)
SKF AB	04/28/2005	01/22/2009	1440	$11,767 03	$15,253 20	($3,486.17)
BUNGE LTD	08/30/2005	01/22/2009	510	$22,414 53	$29,858 92	($7,444 39)
ERSTE GROUP BANK AG	09/27/2005	01/22/2009	1470	$9,893 04	$38,469 90	($28,576 86)
BUNGE LTD	11/16/2005	01/22/2009	350	$15,382 52	$17,175.17	($1,792.65)
HOYA CORP SPONSORED ADR	01/20/2006	01/22/2009	850	$15,070 41	$33,987 85	($18,917 44)
ENCANA CORP ISIN#CA2925051047 SEDOL#279319	02/14/2006	01/22/2009	40	$1,663 13	$1,652.40	$10.73
SASOL LTDSPONSORED ADR	02/14/2006	01/22/2009	80	$2,036 07	$3,011 20	($975.13)
SWISS REINSURANCE	02/14/2006	01/22/2009	80	$2,299.97	$5,842 40	($3,542 43)
HSBC HLDGS PLCSPONSORED ADR	02/14/2006	01/22/2009	100	$3,643 23	$8,324 00	($4,680 77)
DASSAULT SYS SA	02/14/2006	01/22/2009	130	$4,873.53	$7,088 90	($2,215.37)
SAP AKTIENGESELLSCHAFT SPONSORED ADR	02/14/2006	01/22/2009	140	$4,869 02	$6,993 00	($2,123 98)
HOYA CORP SPONSORED ADR	02/14/2006	01/22/2009	150	$2,659 49	$5,839 50	($3,180 01)
HUTCHISON WHAMPOA LTDADR	02/14/2006	01/22/2009	150	$3,504 52	$7,189 50	($3,684 98)
WPP PLC	02/14/2006	01/22/2009	160	$4,471 77	$8,692 18	($4,220.41)
BUNGE LTD	02/14/2006	01/22/2009	200	$8,790 01	$11,358 00	($2,567 99)
UNILEVER PLC SPONSORED NEW	02/14/2006	01/22/2009	234	$5,273.37	$5,477 73	($204 36)
NESTLE S ASPONSORED ADR REPSTG REG SHS	02/14/2006	01/22/2009	250	$8,772 45	$7,208 00	$1,564 45
ADR ROCHE HLDG LTD SPONSORED ADR	02/14/2006	01/22/2009	260	$9,484 75	$9,630 40	($145 65)
ERSTE GROUP BANK AG	02/14/2006	01/22/2009	260	$1,749.79	$7,612 80	($5,863 01)
PANASONIC CORPORATION	02/14/2006	01/22/2009	300	$3,599 47	$6,495 00	($2,895 53)
WAL MART DE MEX S A DE C V SPONSOREDADR RE	02/14/2006	01/22/2009	300	$6,713 45	$8,442 00	($1,728.55)
QIAGEN NV	02/14/2006	01/22/2009	340	$5,929 12	$4,523 12	$1,406 00
L OREAL CO ADR	02/14/2006	01/22/2009	350	$4,717 97	$5,715 50	($997 53)
TESCO PLCSPONSORED ADR	02/14/2006	01/22/2009	390	$5,647.17	$6,739.20	($1,092.03)

ATTACHMENT L

The Thomas H. & Jarman F. Lowder Foundation
EIN: 63-1139498
State Street MY1579
Long Term Capital Gain/(Loss)

Security	Date Acquired	Date Sold	Quantity	Sales Prices	Cost Basis	Long Term G/L
SKF AB	02/14/2006	01/22/2009	500	$4,085 78	$7,265 00	($3,179 22)
AIR LIQUIDE ADR	02/14/2006	01/22/2009	605	$9,093 10	$10,007 50	($914 40)
TAIWAN SEMICONDUCTOR MFG CO LTDSPONSORED A	02/14/2006	01/22/2009	861 7296	$6,314 72	$8,324.42	($2,009 70)
ATLAS COPCO SP ADR A NEW	02/14/2006	01/22/2009	880	$6,056 92	$10,771 20	($4,714 28)
SWISS REINSURANCE	02/24/2006	01/22/2009	70	$2,012 47	$5,038 60	($3,026 13)
HSBC HLDGS PLCSPONSORED ADR	02/24/2006	01/22/2009	100	$3,643 23	$8,557 00	($4,913 77)
DASSAULT SYS SA	02/24/2006	01/22/2009	120	$4,498 64	$6,933 60	($2,434.96)
SAP AKTIENGESELLSCHAFT SPONSORED ADR	02/24/2006	01/22/2009	130	$4,521 23	$6,749 60	($2,228 37)
HOYA CORP SPONSORED ADR	02/24/2006	01/22/2009	140	$2,482.19	$5,422 20	($2,940 01)
HUTCHISON WHAMPOA LTDADR	02/24/2006	01/22/2009	150	$3,504 52	$7,144 50	($3,639 98)
WPP PLC	02/24/2006	01/22/2009	160	$4,471 77	$9,284 80	($4,813 03)
BUNGE LTD	02/24/2006	01/22/2009	190	$8,350.51	$10,839 50	($2,488 99)
UNILEVER PLC SPONSORED NEW	02/24/2006	01/22/2009	216	$4,867 73	$5,012 40	($144 67)
SASOL LTDSPONSORED ADR	02/24/2006	01/22/2009	230	$5,853 70	$8,257 00	($2,403 30)
ERSTE GROUP BANK AG	02/24/2006	01/22/2009	240	$1,615.19	$7,255 20	($5,640 01)
NESTLE S ASPONSORED ADR REPSTG REG SHS	02/24/2006	01/22/2009	250	$8,772 45	$7,248 00	$1,524 45
ADR ROCHE HLDG LTD SPONSORED ADR	02/24/2006	01/22/2009	260	$9,484.75	$9,532 90	($48 15)
PANASONIC CORPORATION	02/24/2006	01/22/2009	280	$3,359 51	$5,989 20	($2,629 69)
WAL MART DE MEX S A DE C V SPONSOREDADR RE	02/24/2006	01/22/2009	280	$6,265 89	$8,142.40	($1,876 51)
QIAGEN NV	02/24/2006	01/22/2009	320	$5,580 35	$4,608 19	$972 16
L OREAL CO ADR	02/24/2006	01/22/2009	370	$4,987.57	$6,634 10	($1,646 53)
TESCO PLCSPONSORED ADR	02/24/2006	01/22/2009	370	$5,357.57	$6,615 60	($1,258 03)
SKF AB	02/24/2006	01/22/2009	470	$3,840 63	$6,923 10	($3,082.47)
AIR LIQUIDE ADR	02/24/2006	01/22/2009	580.6	$8,726.37	$9,867 80	($1,141 43)
TAIWAN SEMICONDUCTOR MFG CO LTDSPONSORED A	02/24/2006	01/22/2009	801.0758	$5,870 25	$7,623 00	($1,752 75)
ATLAS COPCO SP ADR A NEW	02/24/2006	01/22/2009	820	$5,643 95	$10,446 80	($4,802.85)
FRESENI MED CARE AKTIENGESELLSCHAFT	05/09/2006	01/22/2009	820	$35,603 38	$32,807 87	$2,795 51

The Thomas H. & Jarman F. Lowder Foundation
EIN: 63-1139498
State Street MY1579
Long Term Capital Gain/(Loss)

Security	Date Acquired	Date Sold	Quantity	Sales Prices	Cost Basis	Long Term G/L
AMERICA MOVIL S A DE C V CL LSPONSORED AD	06/20/2006	01/22/2009	1430	$38,690 15	$43,499 74	($4,809 59)
HOYA CORP SPONSORED ADR	06/29/2006	01/22/2009	930	$16,488 80	$32,212.04	($15,723 24)
ALCON INC COMSHS ISIN#CH0013826497 SEDOL#2	08/16/2006	01/22/2009	530	$43,805 79	$61,000 14	($17,194 35)
NOMURA HLDGS INC SPONSORED ADR	08/16/2006	01/22/2009	1260	$8,707 81	$24,195 65	($15,487.84)
NOMURA HLDGS INC SPONSORED ADR	11/15/2006	01/22/2009	2080	$14,374.80	$35,349 81	($20,975 01)
NOVA NORDISK AS	11/16/2006	01/22/2009	1680	$85,411.22	$64,449 32	$20,961.90
MITSUBISHI ESTATE LTD ADR	11/17/2006	01/22/2009	270	$37,527 08	$62,257 88	($24,730 80)
NESTLE S ASPONSORED ADR REPSTG REG SHS	01/04/2007	01/22/2009	240	$8,421 55	$8,485 98	($64 43)
FRESENI MED CARE AKTIENGESELLSCHAFT	01/09/2007	01/22/2009	830	$36,037 56	$37,315 90	($1,278 34)
QIAGEN NV	01/09/2007	01/22/2009	1188	$20,717 06	$18,545 87	$2,171.19
QIAGEN NV	01/10/2007	01/22/2009	1102	$19,217 34	$17,013 56	$2,203 78
UNILEVER PLC SPONSORED NEW	01/10/2007	01/22/2009	1330	$29,972 58	$35,996.29	($6,023 71)
KUBOTA CORP ADR	02/01/2007	01/22/2009	1290	$35,663 14	$68,439 00	($32,775 86)
PT TELEKOMUNIKASI INDONESIA SPONSORED	03/29/2007	01/22/2009	830	$18,481.34	$35,814 17	($17,332 83)
DASSAULT SYS SA	03/30/2007	01/22/2009	700	$26,242 08	$37,682 95	($11,440 87)
PT TELEKOMUNIKASI INDONESIA SPONSORED	04/23/2007	01/22/2009	740	$16,477 34	$34,425 54	($17,948 20)
UNILEVER PLC SPONSORED NEW	07/13/2007	01/22/2009	588	$13,251 03	$20,050 09	($6,799 06)
KUBOTA CORP ADR	07/19/2007	01/22/2009	1090	$30,133 97	$48,443 09	($18,309 12)
DBS GROUP HLDGS LTDSPONSORED ADR	12/11/2007	01/22/2009	670	$18,730 41	$40,136 42	($21,406.01)
Total				$1,638,125 40	$2,017,052 59	($378,927 19)

ATTACHMENT L

The Thomas H. & Jarman F. Lowder Foundation
EIN: 63-1139498
State Street MY2290
Long Term Capital Gain/(Loss)

Security	Date Acquired	Date Sold	Quantity	Sales Prices	Cost Basis	Long Term G/L
COLONIAL BANCGROUP INC COM	01/01/1997	07/31/2009	88000	$51,751.45	$9,680.00	$42,071 45
Total				$51,751.45	$9,680.00	$42,071.45

ATTACHMENT M

The Thomas H. & Jarman F. Lowder Foundation
EIN: 63-1139498
State Street MY2291
Long Term Capital Gain/(Loss)

Security	Date Acquired	Date Sold	Quantity	Sales Prices	Cost Basis	Long Term G/L
FIDELITY FINL TR CONV SECS FD	10/28/2003	03/18/2009	39876 97	$544,320.68	$772,416 97	($228,096.29)
FIDELITY FINL TR CONV SECS FD	11/17/2003	03/18/2009	7987.552	$109,030 09	$154,000 00	($44,969.91)
Total				$653,350.77	$926,416.97	($273,066 20)

ATTACHMENT N

The Thomas H. & Jarman F. Lowder Foundation
EIN: 63-1139498
State Street MY2295
Long Term Capital Gain/(Loss)

Security	Date Acquired	Date Sold	Quantity	Sales Prices	Cost Basis	Long Term G/L
VIRTUS OPPORTUNITIES T VIRTUS	02/12/2008	08/24/2009	19379 85	$356,782.94	$500,000.00	($143,217.06)
Total				$356,782.94	$500,000.00	($143,217 06)

ATTACHMENT O

The Thomas H. & Jarman F. Lowder Foundation
EIN: 63-1139498
State Street MY2298
Long Term Capital Gain/(Loss)

Security	Date Acquired	Date Sold	Quantity	Sales Prices	Cost Basis	Long Term G/L
PIMCO FDS PAC INVT MGM EMRG MKTBD INS	02/12/2008	03/18/2009	26241 8	$217,806.92	$280,000.00	($62,193.08)
PIMCO FDS PAC INVT MGM EMRG MKTBD INS	03/04/2008	03/18/2009	80 844	$671 01	$870 69	($199.68)
Total				$218,477.93	$280,870.69	($62,392.76)

ATTACHMENT P

The Thomas H. & Jarman F. Lowder Foundation
EIN: 63-1139498
Pershing 4333
Long Term Capital Gain/(Loss)

Security	Date Acquired	Date Sold	Quantity	Sales Prices	Cost Basis	Long Term G/L
VANGUARD INDEX FDS 500 IDX FD SHS	08/01/2003	12/02/2009	7608.7	$645,193 00	$569,804.03	$75,388.97
Total				$645,193.00	$569,804.03	$75,388.97

ATTACHMENT Q

The Thomas H. & Jarman F. Lowder Foundation
EIN: 63-1139498
Pershing 5389
Long Term Capital Gain/(Loss)

Security	Date Acquired	Date Sold	Quantity	Sales Prices	Cost Basis	Long Term G/L
EATON VANCE SER TR II TAX MG EMRMK I	02/12/2008	12/02/2009	5979.118	$253,380.00	$291,362 41	($37,982 41)
Total				$253,380 00	$291,362.41	($37,982.41)

Form **8868**
(Rev April 2009)
Department of the Treasury
Internal Revenue Service

Application for Extension of Time To File an Exempt Organization Return

OMB No. 1545-1709

▶ File a separate application for each return.

- If you are filing for an **Automatic 3-Month Extension, complete only Part I** and check this box ▶ [X]
- If you are filing for an **Additional (Not Automatic) 3-Month Extension, complete only Part II** (on page 2 of this form).

Do not complete Part II unless you have already been granted an automatic 3-month extension on a previously filed Form 8868.

Part I **Automatic 3-Month Extension of Time.** Only submit original (no copies needed).

A corporation required to file Form 990-T and requesting an automatic 6-month extension - check this box and complete Part I only ▶ [ ]

All other corporations (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns.

Electronic Filing (e-file). Generally, you can electronically file Form 8868 if you want a 3-month automatic extension of time to file one of the returns noted below (6 months for a corporation required to file Form 990-T). However, you cannot file Form 8868 electronically if (1) you want the additional (not automatic) 3-month extension or (2) you file Forms 990-BL, 6069, or 8870, group returns, or a composite or consolidated From 990-T. Instead, you must submit the fully completed and signed page 2 (Part II) of Form 8868 For more details on the electronic filing of this form, visit *www.irs.gov/efile* and click on *e-file for Charities & Nonprofits*.

Type or print	Name of Exempt Organization	Employer identification number
	THE THOMAS H. AND JARMAN F. LOWDER FOUNDATION	63-1139498
File by the due date for filing your return. See instructions.	Number, street, and room or suite no. If a P.O. box, see instructions. C/O HARRIS MYCFO, 3344 PEACHTREE RD, S 3344 PEACHTREE ROAD NE	
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. ATLANTA, GA 30326	

Check type of return to be filed (file a separate application for each return):

[ ] Form 990	[ ] Form 990-T (corporation)	[ ] Form 4720
[ ] Form 990-BL	[ ] Form 990-T (sec. 401(a) or 408(a) trust)	[ ] Form 5227
[ ] Form 990-EZ	[ ] Form 990-T (trust other than above)	[ ] Form 6069
[X] Form 990-PF	[ ] Form 1041-A	[ ] Form 8870

- The books are in the care of ▶ HARRIS MYCFO, INC.

Telephone No. ▶ 404 806-2842 FAX No. ▶ 404 806-2850

- If the organization does not have an office or place of business in the United States, check this box ▶ [ ]
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) ______ . If this is for the whole group, check this box ▶ [ ] . If it is for part of the group, check this box ▶ [ ] and attach a list with the names and EINs of all members the extension will cover.

1 I request an automatic 3-month (6 months for a corporation required to file Form 990-T) extension of time until 08/15 , 2010 , to file the exempt organization return for the organization named above. The extension is for the organization's return for:

▶ [X] calendar year 2009 or
▶ [ ] tax year beginning ______ , ______, and ending ______ , ______ .

2 If this tax year is for less than 12 months, check reason: [ ] Initial return [ ] Final return [ ] Change in accounting period

3a	If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	3a $	4,134.
b	If this application is for Form 990-PF or 990-T, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit.	3b $	9,227.
c	**Balance Due.** Subtract line 3b from line 3a. Include your payment with this form, or, if required, deposit with FTD coupon or, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	3c $	0.

Caution. If you are going to make an electronic fund withdrawal with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions.

For Privacy Act and Paperwork Reduction Act Notice, see Instructions. Form **8868** (Rev. 4-2009)

● If you are filing for an **Additional (Not Automatic) 3-Month Extension, complete only Part II** and check this box . . . . ▶ [X]

Note. Only complete Part II if you have already been granted an automatic 3-month extension on a previously filed Form 8868

● If you are filing for an **Automatic 3-Month Extension, complete only Part I** (on page 1)

Part II Additional (Not Automatic) 3-Month Extension of Time. Only file the original (no copies needed).

Type or print	Name of Exempt Organization THE THOMAS H. AND JARMAN F. LOWDER FOUNDATION	**Employer identification number** 63-1139498
File by the extended due date for filing the return See instructions	Number, street, and room or suite no If a P O box, see instructions C/O PATHSTONE FAMILY OFFICE	For IRS use only
	City, town or post office, state, and ZIP code For a foreign address, see instructions ATLANTA, GA 30355	

Check type of return to be filed (File a separate application for each return)

- [ ] Form 990
- [ ] Form 990-BL
- [ ] Form 990-EZ
- [X] Form 990-PF
- [ ] Form 990-T (sec. 401(a) or 408(a) trust)
- [ ] Form 990-T (trust other than above)
- [ ] Form 1041-A
- [ ] Form 4720
- [ ] Form 5227
- [ ] Form 6069
- [ ] Form 8870

STOP! Do not complete Part II if you were not already granted an automatic 3-month extension on a previously filed Form 8868.

● The books are in the care of ▶ PATHSTONE FAMILY OFFICE

Telephone No ▶ 404 592-0180 FAX No ▶ 877 543-7284

● If the organization does not have an office or place of business in the United States, check this box . . . . ▶ [ ]

● If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) ______ If this is for the whole group, check this box . . . ▶ [ ] . If it is for part of the group, check this box . . . ▶ [ ] and attach a list with the names and EINs of all members the extension is for

4 I request an additional 3-month extension of time until 11/15/2010

5 For calendar year 2009 , or other tax year beginning ______, and ending ______

6 If this tax year is for less than 12 months, check reason [ ] Initial return [ ] Final return [ ] Change in accounting period

7 State in detail why you need the extension ADDITIONAL TIME IS NEEDED TO OBTAIN THE INFORMATION NECESSARY TO PREPARE THE RETURN.

8a If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits See instructions	8a	$	4,081.
b If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made Include any prior year overpayment allowed as a credit and any amount paid previously with Form 8868	8b	$	9,227.
c **Balance Due.** Subtract line 8b from line 8a Include your payment with this form, or, if required, deposit with FTD coupon or, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	8c	$	0.

Signature and Verification

Under penalties of perjury, I declare that I have examined this form, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete, and that I am authorized to prepare this form

Signature ▶ Title ▶ Date ▶

PATHSTONE FAMILY OFFICE
P.O. BOX 52047
ATLANTA, GA 30355