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 , **and ending**

G Check all that apply: ☐ Initial return ☐ Initial return of a former public charity ☐ Final return
☐ Amended return ☒ Address change ☐ Name change

Use the IRS label. Otherwise, print or type. See Specific Instructions.

Name of foundation
MOBILE INFIRMARY TRUST U/W J. L. BEDSOLE

Number and street (or P O box number if mail is not delivered to street address) | Room/suite
REGIONS BANK, P.O. DRAWER 1628

City or town, state, and ZIP code
MOBILE, AL 36633-1628

A Employer identification number
63-6107955

B Telephone number
(251) 438-8260

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: ☒ 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)* ▶$ 548,238.

J Accounting method: ☒ 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).)

		(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			N/A	
	2 Check ▶ ☒ if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities	15,900.	15,900.		STATEMENT 1
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	<100,352.>			
	b Gross sales price for all assets on line 6a 267,463.				
	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)				
	11 Other income	1,296.	0.		STATEMENT 2
	12 **Total** Add lines 1 through 11	<83,156.>	15,900.		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	4,133.	4,133.		0.
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees				
	b Accounting fees STMT 3	950.	0.		950.
	c Other professional fees				
	17 Interest				
	18 Taxes STMT 4	86.	86.		0.
	19 Depreciation and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses				
	24 **Total operating and administrative expenses.** Add lines 13 through 23	5,169.	4,219.		950.
	25 Contributions, gifts, grants paid	50,000.			50,000.
	26 **Total expenses and disbursements.** Add lines 24 and 25	55,169.	4,219.		50,950.
	27 Subtract line 26 from line 12:				
	a Excess of revenue over expenses and disbursements	<138,325.>			
	b **Net investment income** (if negative, enter -0-)		11,681.		
	c **Adjusted net income** (if negative enter -0-)			N/A	

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Part II Balance Sheets (Attached schedules and amounts in the description column should be for end-of-year amounts only)		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	<29,267.>	20,109.	20,109.
	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			
	7 Other notes and loans receivable ▶			
	Less: allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments - U.S. and state government obligations			
	b Investments - corporate stock			
	c Investments - corporate bonds			
	11 Investments - land, buildings, and equipment basis ▶			
	Less accumulated depreciation ▶			
	12 Investments - mortgage loans			
	13 Investments - other STMT 7	729,912.	539,419.	528,129.
	14 Land, buildings, and equipment: basis ▶			
	Less accumulated depreciation ▶			
	15 Other assets (describe ▶)			
	16 **Total assets** (to be completed by all filers)	700,645.	559,528.	548,238.
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			
	22 Other liabilities (describe ▶)			
	23 **Total liabilities** (add lines 17 through 22)	0.	0.	
Net Assets or Fund Balances	**Foundations that follow SFAS 117, check here ▶ ☐ and complete lines 24 through 26 and lines 30 and 31.**			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ [X] and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds	700,645.	559,528.	
	28 Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
	29 Retained earnings, accumulated income, endowment, or other funds	0.	0.	
	30 **Total net assets or fund balances**	700,645.	559,528.	
	31 **Total liabilities and net assets/fund balances**	700,645.	559,528.	

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	700,645.
2 Enter amount from Part I, line 27a	2	<138,325.>
3 Other increases not included in line 2 (itemize) ▶ SEE STATEMENT 5	3	1,673.
4 Add lines 1, 2, and 3	4	563,993.
5 Decreases not included in line 2 (itemize) ▶ SEE STATEMENT 6	5	4,465.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	559,528.

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	REGIONS BANK SCHEDULE ATTACHED	P	VARIOUS	/ /09
b	CAPITAL GAINS DIVIDENDS			
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	267,417.		367,815.	<100,398.>
b	46.			46.
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				<100,398.>
b				46.
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 <100,352.>

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).
If (loss), enter -0- in Part I, line 8 } 3 N/A

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 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	51,006.	654,335.	.077951
2007	50,950.	776,931.	.065579
2006	50,087.	746,881.	.067062
2005	50,301.	759,942.	.066191
2004	50,831.	762,537.	.066660

2	**Total** of line 1, column (d)	2	.343443
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	.068689
4	Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4	516,041.
5	Multiply line 4 by line 3	5	35,446.
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	117.
7	Add lines 5 and 6	7	35,563.
8	Enter qualifying distributions from Part XII, line 4	8	50,950.

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.

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

1a	Exempt operating foundations described in section 4940(d)(2), check here ▶ ☐ and enter "N/A" on line 1. Date of ruling or determination letter: ______ (attach copy of letter if necessary-see instructions)			
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ▶ ☒ and enter 1% of Part I, line 27b		1	117.
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)			
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		2	0.
3	Add lines 1 and 2		3	117.
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	117.
6	Credits/Payments:			
a	2009 estimated tax payments and 2008 overpayment credited to 2009	6a 160.		
b	Exempt foreign organizations - tax withheld at source	6b		
c	Tax paid with application for extension of time to file (Form 8868)	6c		
d	Backup withholding erroneously withheld	6d		
7	Total credits and payments. Add lines 6a through 6d		7	160.
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	43.
11	Enter the amount of line 10 to be: **Credited to 2010 estimated tax** ▶ 43. **Refunded** ▶		11	0.

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 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. ▶ $ 0. (2) On foundation managers. ▶ $ 0.			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ $ 0.			
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? N/A	4b		
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 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)? *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

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Part VII-A Statements Regarding Activities *(continued)*

			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 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 ▶ KEN NIEMEYER, REGIONS BANK TR DEPT Telephone no. ▶ (251) 438-8260

Located at ▶ 11 NORTH WATER STREET, 28TH FLOOR, MOBILE, AL ZIP+4 ▶ 36602

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here ▶ ☐

and enter the amount of tax-exempt interest received or accrued during the year ▶ 15 N/A

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

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

			Yes	No
1a	During the year did the foundation (either directly or indirectly):			
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☒ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☒ No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☒ No			
	(6) Agree to pay money or property to a government official? (**Exception.** Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) ☐ Yes ☒ No			
b	If any answer is "Yes" to 1a(1)-(6), did **any** of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)? N/A	1b		
	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 instructions.) N/A	2b		
c	If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here. ▶ ______, ______, ______, ______			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☒ No			
b	If "Yes," did it have excess business holdings in 2009 as a result of **(1)** any purchase by the foundation or disqualified persons after May 26, 1969; **(2)** the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or **(3)** the lapse of the 10-, 15-, or 20-year first phase holding period? *(Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2009.)* N/A	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		X
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2009?	4b		X

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

5a During the year did the foundation pay or incur any amount to:

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☒ No

(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☒ No

(3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☒ No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? ☐ 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 instructions)? N/A | 5b |

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

c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? 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 | | 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? N/A | 7b |

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

1 List all officers, directors, trustees, foundation managers and their compensation.

(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
REGIONS BANK TRUST DEPARTMENT P.O. DRAWER 1628 MOBILE, AL 36633-1628	TRUSTEE 0.25	4,133.	0.	0.

2 Compensation of five highest-paid employees (other than those included on line 1). 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 ▶ 0

Part VIII **Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors** *(continued)*

3 Five highest-paid independent contractors for professional services. 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 ▶ 0

Part IX-A **Summary of Direct Charitable Activities**

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical 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**

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.	Amount
1 N/A	
2	
All other program-related investments. See instructions. 3	
Total. Add lines 1 through 3 ▶	0.

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Part X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see 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	507,615.
b	Average of monthly cash balances		1b	16,284.
c	Fair market value of all other assets		1c	
d	**Total** (add lines 1a, b, and c)		1d	523,899.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e 0.		
2	Acquisition indebtedness applicable to line 1 assets		2	0.
3	Subtract line 2 from line 1d		3	523,899.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)		4	7,858.
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3. Enter here and on Part V, line 4		5	516,041.
6	**Minimum investment return.** Enter 5% of line 5		6	25,802.

Part XI Distributable Amount (see 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	25,802.
2a	Tax on investment income for 2009 from Part VI, line 5	2a 117.		
b	Income tax for 2009. (This does not include the tax from Part VI.)	2b		
c	Add lines 2a and 2b		2c	117.
3	Distributable amount before adjustments. Subtract line 2c from line 1		3	25,685.
4	Recoveries of amounts treated as qualifying distributions		4	0.
5	Add lines 3 and 4		5	25,685.
6	Deduction from distributable amount (see instructions)		6	0.
7	**Distributable amount** as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1		7	25,685.

Part XII Qualifying Distributions (see 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	50,950.
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	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	**Qualifying distributions.** Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	50,950.
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	5	117.
6	**Adjusted qualifying distributions** Subtract line 5 from line 4	6	50,833.

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 instructions)

		(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
1 Distributable amount for 2009 from Part XI, line 7					25,685.
2 Undistributed income, if any, as of the end of 2009					
a Enter amount for 2008 only				0.	
b Total for prior years: ____, ____, ____			0.		
3 Excess distributions carryover, if any, to 2009:					
a From 2004	13,042.				
b From 2005	13,652.				
c From 2006	14,469.				
d From 2007	13,684.				
e From 2008	18,577.				
f Total of lines 3a through e		73,424.			
4 Qualifying distributions for 2009 from Part XII, line 4: ▶ $	50,950.				
a Applied to 2008, but not more than line 2a				0.	
b Applied to undistributed income of prior years (Election required - see instructions)			0.		
c Treated as distributions out of corpus (Election required - see instructions)		0.			
d Applied to 2009 distributable amount					25,685.
e Remaining amount distributed out of corpus		25,265.			
5 Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a).)		0.			0.
6 Enter the net total of each column as indicated below:					
a Corpus Add lines 3f, 4c, and 4e Subtract line 5		98,689.			
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 instructions			0.		
e Undistributed income for 2008. Subtract line 4a from line 2a. Taxable amount - see instr.				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)		0.			
8 Excess distributions carryover from 2004 not applied on line 5 or line 7		13,042.			
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a		85,647.			
10 Analysis of line 9:					
a Excess from 2005	13,652.				
b Excess from 2006	14,469.				
c Excess from 2007	13,684.				
d Excess from 2008	18,577.				
e Excess from 2009	25,265.				

Part XIV Private Operating Foundations (see instructions and Part VII-A, question 9) N/A

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

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

	Tax year	Prior 3 years			
	(a) 2009	(b) 2008	(c) 2007	(d) 2006	(e) Total
2 a 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 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).)

NONE

b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest.

NONE

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 instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d.

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

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

c Any submission deadlines:

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

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*				
MOBILE INFIRMARY P.O. BOX 2144 MOBILE, AL 36652		PUBLIC HOSPITAL	NOT RESTRICTED	50,000.
Total			▶ 3a	50,000.
b *Approved for future payment*				
NONE				
Total			▶ 3b	0.

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.	Unrelated business income (a) Business code	(b) Amount	Excluded by section 512, 513, or 514 (c) Exclusion code	(d) Amount	(e) Related or exempt function income
1 Program service revenue:					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities			14	15,900.	
5 Net rental income or (loss) from real estate:					
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal property					
7 Other investment income					
8 Gain or (loss) from sales of assets other than inventory			18	<100,352.>	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue:					
a EXCISE TAX REFUND					1,296.
b					
c					
d					
e					
12 Subtotal. Add columns (b), (d), and (e)		0.		<84,452.>	1,296.

13 Total. Add line 12, columns (b), (d), and (e) 13 <83,156.>

(See worksheet in line 13 instructions 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).
11A	FEDERAL EXCISE TAX REFUND

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

			Yes	No
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?			
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	

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
N/A		

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

REGIONS BANK AS TRUSTEE
~~KENNETH E. NIEMEYER~~ | 5/5/10 | VICE PRESIDENT

Signature of officer or trustee | Date | Title

Paid Preparer's Use Only

Preparer's signature	Date 4/30/10	Check if self-employed ☐	Preparer's identifying number
Firm's name (or yours if self-employed), address, and ZIP code	SMITH DUKES & BUCKALEW LLP 3800 AIRPORT BLVD MOBILE, AL 36608-1667	EIN ▶	
		Phone no. (251)343-1200	

Form 990-PF (2009)

923622
02-02-10

FROM 01/01/2009 STATEMENT OF CAPITAL GAINS AND LOSSES
TO 12/31/2009 MOBILE INFIRMARY TUW J L BEDSOLE RUN 02/09/2010 05.54 19 PM

TRUST YEAR ENDING 12/31/2009

TAX PREPARER 6000
TRUST ADMINISTRATOR· 258
INVESTMENT OFFICER· 91

LEGEND· F - FEDERAL S - STATE I - INHERITED
E - EXEMPT FROM STATE U - ACQ COST UNKNOWN

PROPERTY DESCRIPTION	SHARES	DATE	SALES PRICE	COST BASIS	GAIN/LOSS	TERM
378.8610 AMERICAN CENTURY LARGE CO VALUE-IS - 025076779 - MINOR = 62						
SOLD		07/20/2009	1640 47			
ACQ	378.8610	04/20/2009	1640.47	1443 46	197.01	ST
507.3150 AMERICAN CENTURY LARGE CO VALUE-IS - 025076779 - MINOR = 62						
SOLD		10/20/2009	2561 94			
ACQ	507 3150	04/20/2009	2561 94	1932 87	629 07	ST
67 1300 AMERICAN EUROPACIFIC GRTH-F2 - 29875E100 - MINOR = 64						
SOLD		07/20/2009	2217 30			
ACQ	67 1300	04/20/2009	2217 30	1809.83	407 47	ST
53 7700 AMERICAN EUROPACIFIC GRTH-F2 - 29875E100 - MINOR = 64						
SOLD		10/20/2009	2107 23			
ACQ	53 7700	04/20/2009	2107 23	1449.64	657 59	ST
2252 1530 FIDELITY ADVISOR DIVERSIFIED INTL FUND # - 315920686 - MINOR = 64						
SOLD		04/20/2009	23805 26			
ACQ	2252 1530	08/14/2007	23805 26	53939.06	-30133 80	LT15
203.8380 MFS RESH INTL FD CL I - 552983470 - MINOR = 64						
SOLD		07/20/2009	2517.40			
ACQ	203 8380	04/20/2009	2517 40	2022 07	495 33	ST
150 3240 MFS RESH INTL FD CL I - 552983470 - MINOR = 64						
SOLD		10/20/2009	2215 77			
ACQ	150 3240	04/20/2009	2215 77	1491.21	724.56	ST
161 6970 PIMCO FOREIGN BOND FUND-INST - 693390882 - MINOR = 61						
SOLD		04/20/2009	1474 68			
ACQ	161 6970	08/14/2007	1474 68	1623.44	-148 76	LT15
2140 7670 PIMCO FOREIGN BOND FUND-INST - 693390882 - MINOR = 61						
SOLD		07/20/2009	20636 99			
ACQ	2140 7670	08/14/2007	20636 99	21493 30	-856 31	LT15
4169 5790 PIONEER BOND FUND CLASS Y FD #0703 - 723622403 - MINOR = 61						
SOLD		04/20/2009	34357 33			
ACQ	4169.5790	04/16/2001	34357 33	38445 02	-4087 69	LT15
1435.5920 PIONEER BOND FUND CLASS Y FD #0703 - 723622403 - MINOR = 61						
SOLD		07/20/2009	12374.80			
ACQ	1435 5920	04/16/2001	12374 80	13236 67	-861.87	LT15
4415.0110 PIONEER BOND FUND CLASS Y FD #0703 - 723622403 - MINOR = 61						
SOLD		12/04/2009	40000 00			
ACQ	2906 8410	04/16/2001	26335 98	26802.12	-466.14	LT15
	194 2740	09/21/2005	1760 12	1788.00	-27 88	LT15
	1313 8960	12/20/2005	11903.90	11943.31	-39 41	LT15
14.6420 PIONEER MID CAP VALUE FUND CLASS Y FD #0 - 72375Q405 - MINOR = 62						
SOLD		07/20/2009	237 79			
ACQ	14 6420	08/14/2007	237 79	355 53	-117 74	LT15
52 2050 PIONEER MID CAP VALUE FUND CLASS Y FD #0 - 72375Q405 - MINOR = 62						
SOLD		10/20/2009	984.59			
ACQ	52.2050	08/14/2007	984.59	1267 63	-283 04	LT15
61 1380 PIONEER SMALL CAP VALUE FUND CLASS Y FD - 72387Q500 - MINOR = 62						
SOLD		04/20/2009	865 71			
ACQ	61 1380	12/20/2006	865 71	1990 04	-1124 33	LT15
26 9480 PIONEER SMALL CAP VALUE FUND CLASS Y FD - 72387Q500 - MINOR = 62						
SOLD		07/20/2009	457 58			
ACQ	26 9480	12/20/2006	457.58	877 16	-419 58	LT15
50 8200 PIONEER SMALL CAP GROWTH FUND CLASS A FD - 72387T108 - MINOR = 62						
SOLD		07/20/2009	1003 18			
ACQ	50 8200	04/20/2009	1003 18	855 81	147 37	ST
21 5130 PIONEER SMALL CAP GROWTH FUND CLASS A FD - 72387T108 - MINOR = 62						
SOLD		10/20/2009	479.96			
ACQ	21 5130	04/20/2009	479 96	362 28	117 68	ST
41 3210 PIONEER SELECT MID CAP GROWTH Y - 72387T793 - MINOR = 62						
SOLD		07/20/2009	510 31			
ACQ	41.3210	08/14/2007	510 31	714 85	-204 54	LT15
81 0940 PIONEER SELECT MID CAP GROWTH Y - 72387T793 - MINOR = 62						
SOLD		10/20/2009	1178 29			
ACQ	81 0940	08/14/2007	1178 29	1402.93	-224 64	LT15
4337 8300 PIONEER LARGE CAP GROWTH FUND CLASS Y FD - 72387T801 - MINOR = 62						
SOLD		04/20/2009	37305 34			
ACQ	185 9760	09/26/2001	1599 39	2099 80	-500 41	LT15
	692 0790	06/26/2002	5951 88	7832 44	-1880 56	LT15
	2056.8990	12/23/2002	17689 33	24443 62	-6754 29	LT15
	176.3440	08/03/2006	1516 56	2228 99	-712 43	LT15
	73.0630	11/28/2006	628 34	1002 42	-374 08	LT15
	1149 0530	12/20/2006	9881 86	16063 76	-6181 90	LT15
	4 4160	12/26/2006	37 98	61 16	-23 18	LT15
72 6680 PIONEER LARGE CAP GROWTH FUND CLASS Y FD - 72387T801 - MINOR = 62						
SOLD		10/20/2009	797 89			
ACQ	72.6680	09/26/2001	797 89	820 47	-22 58	LT15
32 1640 PIONEER GROWTH FUND Y - 72387T868 - MINOR = 62						
SOLD		07/20/2009	491 46			
ACQ	32 1640	08/14/2007	491 46	612 40	-120 94	LT15
42 7960 PIONEER GROWTH FUND Y - 72387T868 - MINOR = 62						
SOLD		10/20/2009	732 66			
ACQ	42 7960	08/14/2007	732 66	814 84	-82.18	LT15
43 1590 PIONEER SER TR II GROWTH OPPORTUNITIES F - 72387W762 - MINOR = 62						
SOLD		10/20/2009	998 71			
ACQ	43.1590	12/20/2006	998 71	1646 88	-648 17	LT15

REGIONS BANK, TRUST DEPARTMENT
STATEMENT OF CAPITAL GAINS AND LOSSES
MOBILE INFIRMARY TUW J L BEDSOLE

TRUST YEAR ENDING 12/31/2009

TAX PREPARER 6000
TRUST ADMINISTRATOR 258
INVESTMENT OFFICER 91

LEGEND. F - FEDERAL S - STATE I - INHERITED
E - EXEMPT FROM STATE U - ACQ COST UNKNOWN

PROPERTY DESCRIPTION	SHARES	DATE	SALES PRICE	COST BASIS	GAIN/LOSS	TERM
59 1040 PIONEER CULLEN VALUE FUND CLASS Y FD #07 - 72387X406 - MINOR = 62						
SOLD		10/20/2009	976 40			
ACQ	59 1040	08/14/2007	976.40	1275.09	-298 69	LT15
981.1260 PIONEER VALUE FUND CLASS Y FD #0702 - 724010509 - MINOR = 62						
SOLD		04/20/2009	8015 80			
ACQ	227.1920	09/20/2006	1856.16	4168 98	-2312 82	LT15
	737 3970	12/20/2006	6024 53	12579.99	-6555 46	LT15
	16 5370	03/20/2007	135 11	280.47	-145.36	LT15
1884 3410 PIONEER VALUE FUND CLASS Y FD #0702 - 724010509 - MINOR = 62						
SOLD		07/20/2009	17335.94			
ACQ	161 2890	07/30/2002	1483.86	2213 71	-729 85	LT15
	90 3300	11/29/2006	831 04	1513 02	-681 98	LT15
	1500 8220	11/29/2006	13807 56	25138 77	-11331 21	LT15
	131.9000	03/20/2007	1213.48	2237 02	-1023.54	LT15
123 0350 PIONEER VALUE FUND CLASS Y FD #0702 - 724010509 - MINOR = 62						
SOLD		10/20/2009	1304.17			
ACQ	123 0350	07/30/2002	1304 17	1688.67	-384 50	LT15
3117.9440 RMK GROWTH FD CL I - 75913Q464 - MINOR = 62						
SOLD		04/20/2009	40377 37			
ACQ	3117 9440	08/14/2007	40377 37	59365 66	-18988 29	LT15
682.0160 RMK VALUE FD CL I - 759130472 - MINOR = 62						
SOLD		04/20/2009	7454.43			
ACQ	682 0160	08/14/2007	7454 43	12480.89	-5026 46	LT15
		TOTALS	267416 75	367815 28		

SUMMARY OF CAPITAL GAINS/LOSSES

FEDERAL	SHORT TERM	LONG TERM 28%	LONG TERM 15%	ST WASH SALE	LT WASH SALE	1250 GAIN
SUBTOTAL FROM ABOVE	3376 08	0 00	-103774 61	0.00	0 00	0 00*
COMMON TRUST FUND	0 00	0 00	0 00			0 00
CAPITAL GAIN DIVIDENDS	0.00	0 00	46.26			0 00
	3376 08	0.00	-103728 35	0 00	0.00	0.00

STATE	SHORT TERM	LONG TERM 28%	LONG TERM 15%	ST WASH SALE	LT WASH SALE	1250 GAIN
SUBTOTAL FROM ABOVE	3376 08	0 00	-103774 61	0.00	0.00	0 00*
COMMON TRUST FUND	0 00	0 00	0 00			0 00
CAPITAL GAIN DIVIDENDS	0 00	0 00	46 26			0.00
	3376.08	0.00	-103728 35	0 00	0 00	0 00

* - 1250 GAIN DETAILED ON TRANS PAGES, NOT ABOVE

CAPITAL LOSS CARRYOVER

FEDERAL	0 00	0 00
ALABAMA	N/A	N/A

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 1

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
DIVIDENDS	15,921.	46.	15,875.
INTEREST -- CORPORATE	25.	0.	25.
TOTAL TO FM 990-PF, PART I, LN 4	15,946.	46.	15,900.

FORM 990-PF OTHER INCOME STATEMENT 2

DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME
EXCISE TAX REFUND	1,296.	0.	
TOTAL TO FORM 990-PF, PART I, LINE 11	1,296.	0.	

FORM 990-PF ACCOUNTING FEES STATEMENT 3

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
TAX RETURN PREPARATION	950.	0.		950.
TO FORM 990-PF, PG 1, LN 16B	950.	0.		950.

FORM 990-PF TAXES STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FOREIGN TAX PAID	86.	86.		0.
TO FORM 990-PF, PG 1, LN 18	86.	86.		0.

FORM 990-PF	OTHER INCREASES IN NET ASSETS OR FUND BALANCES	STATEMENT 5

DESCRIPTION	AMOUNT
TIMING DIFFERENCE - YEAR END ADJUSTMENT	1,673.
TOTAL TO FORM 990-PF, PART III, LINE 3	1,673.

FORM 990-PF	OTHER DECREASES IN NET ASSETS OR FUND BALANCES	STATEMENT 6

DESCRIPTION	AMOUNT
MUTUAL FUND SALE MADE 01/02009 REPORTED ON 2008 TAX RETURN	4,465.
TOTAL TO FORM 990-PF, PART III, LINE 5	4,465.

FORM 990-PF	OTHER INVESTMENTS	STATEMENT 7

DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
PIONEER BOND FUNDS	COST	143,501.	148,182.
PIONEER VALUE FUND	COST	24,092.	19,684.
AM. CENTURY LARGE CO VALUE FD-IS	COST	29,761.	39,525.
PIMCO FOREIGN BOND FD	COST	20,905.	22,613.
AM. CENTURY LARGE CO VALUE FD-INV	COST	77,056.	52,336.
AMERICAN EUROPACIFIC GROWTH FD	COST	14,485.	20,583.
MFS RESH INTL FUND	COST	14,231.	20,543.
PIONEER MID CAP VALUE FD	COST	15,472.	13,992.
PIONEER SMALL CAP GROWTH FD	COST	10,626.	14,185.
PIONEER SELECT MID CAP GROWTH FD	COST	14,622.	14,438.
PIONEER LARGE CAP GROWTH FD	COST	41,470.	43,660.
PIONEER GROWTH FUND	COST	47,085.	43,648.
PIONEER SER TR II GROWTH OPPUN FD	COST	23,030.	14,139.
PIONEER CULLEN VALUE FUND	COST	42,874.	39,930.
PIMCO TOTAL RETURN INSTL FD	COST	20,209.	20,671.
TOTAL TO FORM 990-PF, PART II, LINE 13		539,419.	528,129.