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

2009

Department of the Treasury
Internal Revenue Service

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

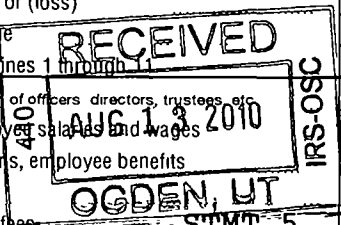
For calendar year 2009, or tax year beginning , and ending

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 JULIAN T. TURNER CHARITABLE TRUST		A Employer identification number 63-6202699
	C/O P-ROBERTS-REGIONS BANK		B Telephone number (251) 438-8577
	Number and street (or P.O. box number if mail is not delivered to street address) Room/suite P O BOX 1628		
	City or town, state, and ZIP code MOBILE, AL 36633-1628		
H Check type of organization: ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation			C If exemption application is pending, check here ☐
I Fair market value of all assets at end of year (from Part II, col (c), line 16) \$ 1,864,509. (Part I, column (d) must be on cash basis)			D 1. Foreign organizations, check here ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ☐
J Accounting method: ☒ Cash ☐ Accrual ☐ Other (specify) _____			E If private foundation status was terminated under section 507(b)(1)(A), check here ☐
			F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received				N/A	
2 Check ☒ if the foundation is not required to attach Sch. B					
3 Interest on savings and temporary cash investments		18,206.	18,206.		STATEMENT 1
4 Dividends and interest from securities		4,970.	4,970.		STATEMENT 2
5a Gross rents		2,485.	2,485.		STATEMENT 3
b Net rental income or (loss) 2,485.					
6a Net gain or (loss) from sale of assets not on line 10		9,651.			
b Gross sales price for all assets on line 6a 719,119.					
7 Capital gain net income (from Part IV, line 2)			9,651.		
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		36,909.	36,909.		STATEMENT 4
12 Total. Add lines 1 through 11		72,221.	72,221.		
13 Compensation of officers, directors, trustees, etc.		32,181.	11,841.		20,340.
14 Other employee salaries and wages					
15 Pension plans, employee benefits					
16a Legal fees					
b Accounting fees		2,214.	2,214.		0.
c Other professional fees					
17 Interest					
18 Taxes		2,963.	2,963.		0.
19 Depreciation and depletion					
20 Occupancy					
21 Travel, conferences, and meetings					
22 Printing and publications					
23 Other expenses		11,671.	11,671.		0.
24 Total operating and administrative expenses. Add lines 13 through 23		49,029.	28,689.		20,340.
25 Contributions, gifts, grants paid		205,660.			205,660.
26 Total expenses and disbursements. Add lines 24 and 25		254,689.	28,689.		226,000.
27 Subtract line 26 from line 12		-182,468.			
a Excess of revenue over expenses and disbursements			43,532.		
b Net investment income (if negative, enter -0-)					
c Adjusted net income (if negative, enter -0-)				N/A	

SCANNED AUG 13 2010



JULIAN T. TURNER CHARITABLE TRUST
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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	End of year	
				(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash - non-interest-bearing		2.	1.	1.
	2	Savings and temporary cash investments		212,197.	56,028.	56,028.
	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 STMT 8		372,235.	218,238.	220,855.
	b	Investments - corporate stock STMT 9		321,187.	297,298.	320,527.
	c	Investments - corporate bonds STMT 10		20,000.	175,533.	180,622.
11	Investments - land, buildings, and equipment basis ▶					
	Less: accumulated depreciation ▶					
12	Investments - mortgage loans					
13	Investments - other STMT 11		731,335.	727,390.	1,086,476.	
14	Land, buildings, and equipment, basis ▶					
	Less: accumulated depreciation ▶					
15	Other assets (describe ▶)					
16	Total assets (to be completed by all filers)		1,656,956.	1,474,488.	1,864,509.	
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 ▶ ☒					
	and complete lines 27 through 31					
	27	Capital stock, trust principal, or current funds		0.	0.	
	28	Paid-in or capital surplus, or land, bldg., and equipment fund		0.	0.	
	29	Retained earnings, accumulated income, endowment, or other funds		1,656,956.	1,474,488.	
30	Total net assets or fund balances		1,656,956.	1,474,488.		
31	Total liabilities and net assets/fund balances		1,656,956.	1,474,488.		

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	1,656,956.
2	Enter amount from Part I, line 27a	2	-182,468.
3	Other increases not included in line 2 (itemize) ▶	3	0.
4	Add lines 1, 2, and 3	4	1,474,488.
5	Decreases not included in line 2 (itemize) ▶	5	0.
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	1,474,488.

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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 ST GAIN	P	VARIOUS	VARIOUS
b REGIONS LT GAIN	P	VARIOUS	VARIOUS
c REGIONS LT GAIN	P	VARIOUS	VARIOUS
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 221,354.		222,909.	-1,555.
b 497,597.		486,559.	11,038.
c 168.			168.
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a			-1,555.
b			11,038.
c			168.
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	9,651.
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	76,779.	2,204,345.	.034831
2007	100,750.	2,213,860.	.045509
2006	56,250.	2,218,247.	.025358
2005	100,000.	2,852,583.	.035056
2004	1,000.	2,278,349.	.000439

2 Total of line 1, column (d)	2	.141193
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	.028239
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4	1,868,727.
5 Multiply line 4 by line 3	5	52,771.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	435.
7 Add lines 5 and 6	7	53,206.
8 Enter qualifying distributions from Part XII, line 4	8	226,000.

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	435.
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	435.
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	435.
6 Credits/Payments:			
a 2009 estimated tax payments and 2008 overpayment credited to 2009	6a	2,842.	
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	2,842.	
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	2,407.	
11 Enter the amount of line 10 to be: Credited to 2010 estimated tax ☒ 436. Refunded ☐	11	1,971.	

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities		X
1c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. ☒ \$ 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?	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

N/A

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Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see 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? Website address ► N/A	13	X	
14	The books are in care of ► REGIONS BANK Telephone no. ► 251-438-8577 Located at ► P.O. BOX 1628, MOBILE, AL ZIP+4 ► 36633			
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)? Organizations relying on a current notice regarding disaster assistance check here	N/A	1b
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2009?		1c
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? If "Yes," list the years ►	☐ Yes ☒ No	
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
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

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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)?

☐ 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
SEE STATEMENT 12		32,181.	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

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

3 Five highest-paid independent contractors for professional services. 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	691,061.
b	Average of monthly cash balances	1b	119,648.
c	Fair market value of all other assets	1c	1,086,476.
d	Total (add lines 1a, b, and c)	1d	1,897,185.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	SEE STATEMENT 13 465,633.
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	1,897,185.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	28,458.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	1,868,727.
6	Minimum investment return. Enter 5% of line 5	6	93,436.

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	93,436.
2a	Tax on investment income for 2009 from Part VI, line 5	2a	435.
b	Income tax for 2009 (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	435.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	93,001.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	93,001.
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	93,001.

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	226,000.
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	226,000.
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	435.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	225,565.

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.

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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				93,001.
2 Undistributed income, if any, as of the end of 2009				
a Enter amount for 2008 only			30,196.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2009:				
a From 2004				
b From 2005				
c From 2006				
d From 2007				
e From 2008				
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2009 from Part XII, line 4: ► \$ 226,000.				
a Applied to 2008, but not more than line 2a			30,196.	
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				93,001.
e Remaining amount distributed out of corpus	102,803.			
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	102,803.			
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	0.			
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a	102,803.			
10 Analysis of line 9:				
a Excess from 2005				
b Excess from 2006				
c Excess from 2007				
d Excess from 2008				
e Excess from 2009	102,803.			

N/A

- ☐ 4942(j)(3) or ☐ 4942(j)(5)

- ~~b-85%-of-line-2a.~~

- (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(i)(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.)
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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 ☐ 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:**

SEE STATEMENT 14

- 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:**

JULIAN T. TURNER CHARITABLE TRUST
C/O P ROBERTS REGIONS BANK

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year				
SEE STATEMENT 15				
Total			▶ 3a	205,660.
b Approved for future payment				
NONE				
Total			▶ 3b	0.

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

2009.04010 JULIAN T. TURNER CHARITABLE 83004 1

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.				
Sign Here	 Signature of officer or trustee		Date 8/9/10	Title Vice-President
	Preparer's signature  Firm's name (or yours if self-employed), address, and ZIP code MCDANIEL & ASSOCIATES, P. C. P. O. BOX 6356 DOTHAN, ALABAMA 36302-6356	Date 8-4-10	Check if self-employed ☐	Preparer's identifying number EIN Phone no. (334) 792-2153

FORM 990-PF INTEREST ON SAVINGS AND TEMPORARY CASH INVESTMENTS STATEMENT 1

SOURCE	AMOUNT
REGIONS BANK(07)	454.
REGIONS BANK(09)	12,550.
REGIONS BANK(13)	4,811.
REGIONS BANK(192)	26.
REGIONS BANK(991)	-52.
TURNER LAND & TIMBER CO P'SHIP K-1 LN 5A	417.
TOTAL TO FORM 990-PF, PART I, LINE 3, COLUMN A	18,206.

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
REGIONS BANK(01)	5.	0.	5.
REGIONS BANK(03)	537.	0.	537.
REGIONS BANK(05)	4,335.	0.	4,335.
REGIONS BANK(500)	1.	0.	1.
REGIONS BANK(502)	92.	0.	92.
TOTAL TO FM 990-PF, PART I, LN 4	4,970.	0.	4,970.

FORM 990-PF RENTAL INCOME STATEMENT 3

KIND AND LOCATION OF PROPERTY	ACTIVITY NUMBER	GROSS RENTAL INCOME
TURNER LAND & TIMBER P'SHIP K-1 LN 2	1	2,485.
TOTAL TO FORM 990-PF, PART I, LINE 5A		2,485.

FORM 990-PF	OTHER INCOME	STATEMENT	4
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DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
TURNER LAND & TIMBER CO GEN'L P'SHIP K-1 LN 7	36,909.	36,909.	
TOTAL TO FORM 990-PF, PART I, LINE 11	36,909.	36,909.	

FORM 990-PF	ACCOUNTING FEES	STATEMENT	5
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
REGIONS	150.	150.		0.
MCDANIEL & ASSOC	2,064.	2,064.		0.
TO FORM 990-PF, PG 1, LN 16B	2,214.	2,214.		0.

FORM 990-PF	TAXES	STATEMENT	6
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FOREIGN TAX	64.	64.		0.
FEDERAL TAX PAID IN 2007	2,899.	2,899.		0.
TO FORM 990-PF, PG 1, LN 18	2,963.	2,963.		0.

FORM 990-PF	OTHER EXPENSES			STATEMENT	7
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
TURNER LAND & TIMBER CO					
GEN'L PSHIP K-1 LN 13I	11,595.	11,595.			0.
TURNER LAND & TIMBER CO					
GEN'L PSHIP K-1 LN 13L	65.	65.			0.
TURNER LAND & TIMBER CO					
GEN'L PSHIP K-1 LN 18	11.	11.			0.
TO FORM 990-PF, PG 1, LN 23	11,671.	11,671.			0.

FORM 990-PF	U.S. AND STATE/CITY GOVERNMENT OBLIGATIONS			STATEMENT	8
DESCRIPTION	U.S. GOV'T	OTHER GOV'T	BOOK VALUE	FAIR MARKET VALUE	
US GOVT OBL	X		218,238.	220,855.	
TOTAL U.S. GOVERNMENT OBLIGATIONS			218,238.	220,855.	
TOTAL STATE AND MUNICIPAL GOVERNMENT OBLIGATIONS					
TOTAL TO FORM 990-PF, PART II, LINE 10A			218,238.	220,855.	

FORM 990-PF	CORPORATE STOCK		STATEMENT	9
DESCRIPTION	BOOK VALUE		FAIR MARKET VALUE	
MUTUAL FUNDS & STOCKS	297,161.		320,390.	
MUTUAL FUNDS DISTR & INT IN TRANSIT	137.		137.	
TOTAL TO FORM 990-PF, PART II, LINE 10B	297,298.		320,527.	

FORM 990-PF	CORPORATE BONDS	STATEMENT	10
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
OTHER BONDS	175,533.	180,622.
TOTAL TO FORM 990-PF, PART II, LINE 10C	175,533.	180,622.

FORM 990-PF	OTHER INVESTMENTS	STATEMENT	11
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DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
12.834% TURNER LAND & TIMBER CO	COST	727,390.	1,086,476.
TOTAL TO FORM 990-PF, PART II, LINE 13		727,390.	1,086,476.

FORM 990-PF	PART VIII - LIST OF OFFICERS, DIRECTORS TRUSTEES AND FOUNDATION MANAGERS	STATEMENT	12
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NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN CONTRIB	EXPENSE ACCOUNT
S.E. JONES 103 WILLOWBROOK TERRACE DOTHAN, AL 36301	DISTRIBUTION 1.00	COMM. MEMBER 4,520.	0.	0.
EDWARD C. STUTTS P. O. BOX 6266 DOTHAN, AL 36302	DISTRIBUTION 1.00	COMM. MEMBER 4,520.	0.	0.
EDMON H. MCKINLEY 117 WILSON AVE THOMASVILLE, AL 36784	DISTRIBUTION 2.00	COMM. CHAIR 6,780.	0.	0.
S.E. JONES III 1 WESTWOOD ROAD DOTHAN, AL 36303	DISTRIBUTION 1.00	COMM. MEMBER 4,520.	0.	0.
REGIONS BANK P O BOX 1628 MOBILE, AL 36633	TRUSTEE 1.00	11,841.	0.	0.
TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII		32,181.	0.	0.

FORM 990-PF

REDUCTION EXPLANATION
PART X, LINE 1E

STATEMENT 13

EXPLANATION FOR REDUCTION CLAIMED FOR BLOCKAGE OR OTHER FACTORS

THE CHARITABLE TRUST OWNS A 20% INTEREST IN A CLOSELY HELD
PARTNERSHIP, ~~TURNER LAND & TIMBER COMPANY.~~ AS THE OWNER OF A MINORITY
INTEREST, THE CHARITABLE TRUST HAS APPLIED A 30% DISCOUNT TO THE
ENTITY FAIR MARKET VALUE FOR LACK OF MARKETABILITY/MINORITY INTEREST.

FORM 990-PF

GRANT APPLICATION SUBMISSION INFORMATION
PART XV, LINES 2A THROUGH 2D

STATEMENT 14

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

~~E. H. MCKINLEY~~
117 WILSON AVENUE
THOMASVILLE, AL 36784

TELEPHONE NUMBER

334-636-4882

FORM AND CONTENT OF APPLICATIONS

ALL APPLICATIONS MUST BE WRITTEN AND INCLUDE THE APPLICANT'S LEGAL NAME, ADDRESS, AND A COPY OF THE APPLICANT'S EXEMPT DETERMINATION LETTER (IF APPLICABLE)

ANY SUBMISSION DEADLINES

NONE

RESTRICTIONS AND LIMITATIONS ON AWARDS

GRANTS ARE MADE TO SUCH PUBLIC CHARITABLE, SCIENTIFIC OR EDUCATIONAL USES AND PURPOSES AS MAY BE SELECTED FROM TIME TO TIME BY THE TRUST DISTRIBUTION COMMITTEE IN ITS ABSOLUTE DISCRETION, AS WILL, IN THE COMMITTEE'S OPINION, ASSIST AND PROMOTE THE WELL BEING OF INHABITANTS OF THE STATE OF ALABAMA.

FORM 990-PF

GRANTS AND CONTRIBUTIONS
PAID DURING THE YEAR

STATEMENT 15

RECIPIENT NAME AND ADDRESS	RECIPIENT RELATIONSHIP AND PURPOSE OF GRANT	RECIPIENT STATUS	AMOUNT
ALFRED SALIBA FAMILY SERVICES CENTER 301 WEST LAFAYETTE ST DOTHAN, AL 36301	NONE SUPPORT THE ORGANIZATIONS CHARITABLE PURPOSES	PUBLIC CHARITY	10,000.
K LIFE MINISTRIES P O BOX 9931 DOTHAN, AL 36304	NONE SUPPORT THE ORGANIZATIONS CHARITABLE PURPOSES	PUBLIC CHARITY	2,500.
WALLACE COMMUNITY COLLEGE 1141 WALLACE DR DOTHAN, AL 36303	NONE CAPITAL CAMPAIGN	SCHOOL	10,000.
WIREGRASS HUMANE SOCIETY 255 JERRY DR DOTHAN, AL 36303	NONE SUPPORT THE ORGANIZATIONS CHARITABLE PURPOSES	PUBLIC CHARITY	2,000.
WIREGRASS UNITED WAY FOOD BANK 382 TWITCHELL RD DOTHAN, AL 36303	NONE SUPPORT THE ORGANIZATIONS CHARITABLE PURPOSES	PUBLIC CHARITY	2,000.
TROY UNIVERSITY FOUNDATION ADAMS ADMINISTRATION BUILDING TROY, AL 36082	NONE CAPITAL IMPROVEMENTS ACADEMIC COMPUTER LAB	SCHOOL	31,000.
TROY UNIVERSITY FOUNDATION ADAMS ADMINISTRATION BUILDING TROY, AL 36082	NONE SUPPORT THE ORGANIZATIONS CHARITABLE PURPOSES	SCHOOL	35,000.
WALLACE COMMUNITY COLLEGE 1141 WALLACE DR DOTHAN, AL 36303	NONE SUPPORT THE ORGANIZATIONS CHARITABLE PURPOSES	SCHOOL	10,000.

JULIAN T. TURNER CHARITABLE TRUST C/O P

63-6202699

ALFRED SALIBA FAMILY SERVICES CENTER 301 WEST LAFAYETTE ST DOTHAN, AL 36301	NONE SUPPORT THE ORGANIZATIONS CHARITABLE PURPOSES	PUBLIC CHARITY	10,000.
K LIFE MINISTRIES P O BOX 9931 DOTHAN, AL 36304	NONE SUPPORT THE ORGANIZATIONS CHARITABLE PURPOSES	PUBLIC CHARITY	5,000.
WIREGRASS HUMANE SOCIETY 255 JERRY DR DOTHAN, AL 36303	NONE SUPPORT THE ORGANIZATIONS CHARITABLE PURPOSES	PUBLIC CHARITY	1,000.
TIGERS UNLIMITED AUBURN UNIVERSITY P O BOX 351 AUBURN, AL 36831-0351	NONE SUPPORT THE ORGANIZATIONS CHARITABLE PURPOSES	SCHOOL	10,000.
EVERGREEN PRESBYTERIAN CHURCH 1103 NORTH PONTIAC DOTHAN, AL 36303	NONE FOODBANK PROGRAM	CHURCH	11,000.
WIREGRASS MUSEUM OF ART 126 MUSEUM AVENUE DOTHAN, AL 36303	NONE SUPPORT THE ORGANIZATIONS CHARITABLE PURPOSES	PUBLIC CHARITY	2,500.
CLARKE COUNTY MUSEUM P O BOX 131 JACKSON, AL 36545	NONE FLOOR AND ROOF REPAIR	PUBLIC CHARITY	5,000.
THOMASVILLE PUBLIC LIBRARY 1401 MOSELEY DE THOMASVILLE, AL 36784	NONE COMPUTERS AND BOOKS	PUBLIC CHARITY	5,000.
TIGERS UNLIMITED AUBURN UNIVERSITY P O BOX 351 AUBURN, AL 36831-0351	NONE SUPPORT THE ORGANIZATIONS CHARITABLE PURPOSES	SCHOOL	12,000.
EVERGREEN PRESBYTERIAN CHURCH 1103 NORTH PONTIAC DOTHAN, AL 36303	NONE SUPPORT THE ORGANIZATIONS CHARITABLE PURPOSES	CHURCH	11,660.

JULIAN T. TURNER CHARITABLE TRUST C/O P

63-6202699

HERRING HOUSES OF DOTHAN 101 NORTH HERRING STREET DOTHAN, AL 36303	NONE SUPPORT THE ORGANIZATIONS CHARITABLE PURPOSES	PUBLIC CHARITY	12,000.
DOTHAN RESCUE MISSION 216 EAST CRAWFORD DOTHAN, AL 36301	NONE SUPPORT THE ORGANIZATIONS CHARITABLE PURPOSES	PUBLIC CHARITY	5,000.
PROVIDENCE SCHOOL 4847 MURPHY MILL RD DOTHAN, AL 36303	NONE SUPPORT THE ORGANIZATIONS CHARITABLE PURPOSES	SCHOOL	1,000.
MISSION TO THE WORLD (PCA) INC P O BOX 116284 ATLANTA, GA 30368-6284	NONE SUPPORT THE ORGANIZATIONS CHARITABLE PURPOSES	CHURCH	12,000.

TOTAL TO FORM 990-PF, PART XV, LINE 3A

205,660.

**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 Form 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 File by the due date for filing your return. See instructions	Name of Exempt Organization JULIAN T. TURNER CHARITABLE TRUST C/O P ROBERTS REGIONS BANK	Employer identification number 63-6202699
	Number, street, and room or suite no. If a P.O. box, see instructions P O BOX 1628	
	City, town or post office, state, and ZIP code. For a foreign address, see instructions MOBILE, AL 36633-1628	

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 |
| ☒ Form 990-PF | ☐ Form 1041-A | ☐ Form 8870 |

REGIONS BANK

- The books are in the care of ▶
- P.O. BOX 1628 - MOBILE, AL 36633**

Telephone No ▶ **251-438-8577**

FAX No ▶

- 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 **AUGUST 15, 2010**, to file the exempt organization return for the organization named above. The extension is for the organization's return for:
- ▶ ☒ 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	\$ 602.
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	\$ 2,842.
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

LHA For Privacy Act and Paperwork Reduction Act Notice, see Instructions.

Form **8868** (Rev. 4-2009)