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 03-01 , 2009, and ending 02-28 , 20 10

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: CLARENCE H & ANNA E LUTZ FOUNDATION

Number and street (or P.O box number if mail is not delivered to street address): 1373 WEST END RD | Room/suite

City or town, state, and ZIP code: CHESTER, SC 29706

A Employer identification number: 57-0940342

B Telephone number (see page 10 of the instructions): (803) 581-3743

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) ▶ $ 4,773,092

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)
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	12	12		
4	Dividends and interest from securities	256,037	256,037		
5a	Gross rents				
b	Net rental income or (loss)				
6a	Net gain or (loss) from sale of assets not on line 10 STM139	(19,714)			
b	Gross sales price for all assets on line 6a 218,462				
7	Capital gain net income (from Part IV, line 2)				
8	Net short-term capital gain				
9	Income modifications				
10a	Gross sales less returns and allowances				
b	Less: Cost of goods sold				
c	Gross profit or (loss) (attach schedule)				
11	Other income (attach schedule)				
12	**Total.** Add lines 1 through 11	236,335	256,049		
13	Compensation of officers, directors, trustees, etc	27,000	27,000		
14	Other employee salaries and wages				
15	Pension plans, employee benefits				
16a	Legal fees (attach schedule) STM107	16,500	16,500		
b	Accounting fees (attach schedule)				
c	Other professional fees (attach schedule)				
17	Interest				
18	Taxes (attach schedule) (see page 14 of the instructions) STM110	2,655	2,655		
19	Depreciation (attach schedule) and depletion				
20	Occupancy				
21	Travel, conferences, and meetings	146	146		
22	Printing and publications				
23	Other expenses (attach schedule) STM103	2,615	2,615		
24	**Total operating and administrative expenses.** Add lines 13 through 23	48,916	48,916		0
25	Contributions, gifts, grants paid	286,784			286,784
26	**Total expenses and disbursements.** Add lines 24 and 25	335,700	48,916		286,784
27	Subtract line 26 from line 12				
a	**Excess of revenue over expenses and disbursements**	(99,365)			
b	**Net investment income** (if negative, enter -0-)		207,133		
c	**Adjusted net income** (if negative, enter -0-)			0	

Revenue (lines 1–12); Operating and Administrative Expenses (lines 13–26)

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

		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets 1	Cash - non-interest-bearing	220,412	125,248	125,248
2	Savings and temporary cash investments			
3	Accounts receivable ▶			
	Less allowance for doubtful accounts ▶			
4	Pledges receivable ▶			
	Less allowance for doubtful accounts ▶			
5	Grants receivable			
6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see page 16 of the instructions)			
7	Other notes and loans receivable (attach schedule) ▶			
	Less allowance for doubtful accounts ▶			
8	Inventories for sale or use			
9	Prepaid expenses and deferred charges			
10a	Investments - U S and state government obligations (attach schedule) STM136	73,210	40,199	39,803
b	Investments - corporate stock (attach schedule) STM137	3,428,684	3,426,874	3,302,254
c	Investments - corporate bonds (attach schedule) STM138	526,483	613,865	579,461
11	Investments - land, buildings, and equipment basis ▶			
	Less accumulated depreciation (attach schedule) ▶			
12	Investments - mortgage loans			
13	Investments - other (attach schedule) STM118	984,976	993,835	722,396
14	Land, buildings, and equipment basis ▶			
	Less accumulated depreciation (attach schedule) ▶			
15	Other assets (describe ▶ STM120)	3,930	3,930	3,930
16	**Total assets** (to be completed by all filers - see the instructions Also, see page 1, item I)	5,237,695	5,203,951	4,773,092
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)		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			
28	Paid-in or capital surplus, or land, bldg., and equipment fund			
29	Retained earnings, accumulated income, endowment, or other funds	5,237,695	5,203,951	
30	**Total net assets or fund balances** (see page 17 of the instructions)	5,237,695	5,203,951	
31	**Total liabilities and net assets/fund balances** (see page 17 of the instructions)	5,237,695	5,203,951	

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	5,237,695
2	Enter amount from Part I, line 27a	2	(99,365)
3	Other increases not included in line 2 (itemize) ▶	3	
4	Add lines 1, 2, and 3	4	5,138,330
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	5,138,330

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 (yr , mo , day)	(d) Date sold (yr , mo , day)
1a				
b				
c				
d				
e				

	(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a				
b				
c				
d				
e				

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

	(i) 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

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

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	315,000	4,986,116	0.063175
2007	315,931	6,249,690	0.050551
2006	291,621	6,468,675	0.045082
2005	281,649	6,013,646	0.046835
2004	284,646	5,731,554	0.049663

2	**Total** of line 1, column (d)	2	0.255307
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	0.051061
4	Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4	4,402,658
5	Multiply line 4 by line 3	5	224,804
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	2,071
7	Add lines 5 and 6	7	226,875
8	Enter qualifying distributions from Part XII, line 4	8	286,784

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 letter if necessary-see instructions)				
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ▶ [X] and enter 1% of Part I, line 27b			1	2,071
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	2,071
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	2,071
6	Credits/Payments				
a	2009 estimated tax payments and 2008 overpayment credited to 2009	6a	5,078		
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	5,078
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	3,007
11	Enter the amount of line 10 to be **Credited to 2010 estimated tax** ▶ 3,007 **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?	2		X
	If "Yes," attach a detailed description of the activities			
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or 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?	5		X
	If "Yes," attach the statement required by General Instruction T			
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either ● By language in the governing instrument, or ● By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law 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) ▶ SC			
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)

			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 ▶ HTTP://WWW.LUTZFOUNDATION.ORG

14 The books are in care of ▶ DEWEY GUYTON Telephone no ▶ 803-581-3743

Located at ▶ 1373 WEST END RD CHESTER, SC ZIP+4 ▶ 29706

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

and enter the amount of tax-exempt interest received or accrued during the year ▶ 15 | 0

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	[X] No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	[ ] Yes	[X] No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	[ ] Yes	[X] No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	[X] 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	[X] 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	[X] 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		X
	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	[X] 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		X
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	[X] No			
b	If "Yes," did it have excess business holdings in 2009 as a result of **(1)** any purchase by the foundation or disqualified persons after May 26, 1969, **(2)** the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or **(3)** the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2009.)			3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?			4a		X
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2009?			4b		X

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 [X] 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 [X] No			
	(3) Provide a grant to an individual for travel, study, or other similar purposes? [ ] Yes [X] 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 [X] 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 [X] No			
b	If any answer is "Yes" to 5a(1)-(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see page 22 of the instructions)?	5b		
	Organizations relying on a current notice regarding disaster assistance check here ▶ [ ]			
c	If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? [ ] Yes [ ] No If "Yes," attach the statement required by Regulations section 53.4945-5(d)			
6a	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? [ ] Yes [X] No			
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? If "Yes" to 6b, file Form 8870.	6b		X
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? [ ] Yes [X] No			
b	If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?	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 (see page 22 of the instructions).

(a) Name and address See 990_OFOV	(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
DEWEY GUYTON 1373 WEST END RD CHESTER, SC 29706	PRESIDENT AND E 12	0	0	0
JOAN L GUYTON 1373 WEST END RD CHESTER, SC 29706	VP TREASURER 24	12,000	0	0
MARY S JOLLY 1373 WEST END RD CHESTER, SC 29706	VP TECHNOLOGY 10	5,000	0	0
SUSAN STEPHENSON 1373 WEST END RD CHESTER, SC 29706	VP EXTENDED REI 10	5,000	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 ▶

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 ▶		

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	
2	
3	
4	

Part IX-B Summary of Program-Related Investments (see page 24 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	
2	
All other program-related investments See page 24 of the instructions 3	
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	4,381,735
b	Average of monthly cash balances	1b	87,969
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	4,469,704
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	4,469,704
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see page 25 of the instructions)	4	67,046
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3. Enter here and on Part V, line 4	5	4,402,658
6	**Minimum investment return.** Enter 5% of line 5	6	220,133

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	220,133
2a	Tax on investment income for 2009 from Part VI, line 5	2a	2,071		
b	Income tax for 2009 (This does not include the tax from Part VI)	2b			
c	Add lines 2a and 2b			2c	2,071
3	Distributable amount before adjustments Subtract line 2c from line 1			3	218,062
4	Recoveries of amounts treated as qualifying distributions			4	
5	Add lines 3 and 4			5	218,062
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	218,062

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	286,784
b	Program-related investments - total from Part IX-B	1b	
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	286,784
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	2,071
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	284,713

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				218,062
2 Undistributed income, if any, as of the end of 2009				
a Enter amount for 2008 only			241,067	
b Total for prior years ____, ____, ____		884,705		
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				
4 Qualifying distributions for 2009 from Part XII, line 4 ▶ $ 286,784				
a Applied to 2008, but not more than line 2a			241,067	
b Applied to undistributed income of prior years (Election required - see page 26 of the instructions)				
c Treated as distributions out of corpus (Election required - see page 26 of the instructions)				
d Applied to 2009 distributable amount				45,717
e Remaining amount distributed out of corpus				
5 Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a).)				
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5				
b Prior years' undistributed income Subtract line 4b from line 2b		884,705		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed				
d Subtract line 6c from line 6b. Taxable amount - see page 27 of the instructions		884,705		
e Undistributed income for 2008. Subtract line 4a from line 2a Taxable amount - see page 27 of the instructions				
f Undistributed income for 2009 Subtract lines 4d and 5 from line 1. This amount must be distributed in 2010				172,345
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see page 27 of the instructions)				
8 Excess distributions carryover from 2004 not applied on line 5 or line 7 (see page 27 of the instructions)				
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a				
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				

Part XIV Private Operating Foundations (see page 27 of the instructions and Part VII-A, question 9)

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))

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 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

990APP

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				
RICHARD WINN P O BOX 390 WINNSBORO SC 29180		PUBLIC	REPLACE CARPET	16,000
CHESTER LITTLE THEATER 145 SALUDA ST CHESTER SC 29706		PUBLIC	RENOVATION	25,000
FORT LAWN COMMUNITY CTR P O BOX 103 FORT LAWN SC 29714		PUBLIC	WINDOWS AND WALLS	6,000
ST PAULS PRESBYTERIAN CHURCH 768 PINCKNEY RD CHESTER SC 29706		PUBLIC	YOUTH SUPPLIES	1,700
LEEDS FIRE DEPT 2126 WEST END RD CHESTER SC 29706		PUBLIC	TRUCK AND 1ST RESPONDER	5,000
YMCA 323 OAKLAND AVE ROCK HILL SC 29730		PUBLIC	RENOVATION	25,000
CHESTER ARP CUB SCOUT TROOP 61 2003 LANCASTER HWY CHESTER SC 29706		PUBLIC	CAMPING EQUIPMENT	10,000
VINE INSTITUTE 531 SHERWOOD CR CHESTER SC 29706		PUBLIC	SUPPLIES FOR SHUT-INS	6,000
Total ▶ 3a				
b Approved for future payment				
Total ▶ 3b				

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				
RED CROSS 200 PIEDMONT BLVD ROCK HILL SC 29732		PUBLIC	DISASTER RELIEF	10,000
CUMBERLAND COLLEGE 6191 COLLEGE STATION DR WILLIAMSBURG KY 40769		PUBLIC	OUTREACH PROGRAM	18,500
CHESTER HISTORICAL SOCIETY 154 YORK ST CHESTER SC 29706		PUBLIC	REPLACE LIGHTING	3,000
CHILDRENS HOME OF LANCASTER P O BOX 416 LANCASTER SC 29721		PUBLIC	EQUIP AND FOOD	15,000
CATAWBA RIVERKEEPER FOUNDATION 421 MINUET LN NO 205 CHARLOTTE NC 28217-2784		PUBLIC	YOUTH PROGRAM	5,000
SOUTH CHESTER RURAL FIRE ASSOC 720 COLUMBIA RD CHESTER SC 29706		PUBLIC	ER EQUIP UPGRADE	5,000
SENIOR SERVICES INC 1197 ARMORY RD CHESTER SC 29706		PUBLIC	COMPANION PROGRAM	10,000
CLINTON JR COLLEGE 1029 CRAWFORD RD ROCK HILL SC 29730		PUBLIC	RENOVATE HALLS	25,000
Total ▶ 3a				
b Approved for future payment				
Total ▶ 3b				

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				
HAWTHORNE CHRISTIAN ACADEMY P O BOX 1656 CHESTER SC 29706		PUBLIC	COMPUTER EQUIP	8,000
LIONS CLUB CHESTER SC 1817 KNOLL DR EDGEMOOR SC 29712		PUBLIC	GLASSES AND EYE EXAMS	5,000
ARTS COUNCIL OF CHESTER CO P O BOX 804 CHESTER SC 29706		PUBLIC	SECURITY SYSTEM	1,800
CHESTER AREA UNITED FUND INC P O BOX 1742 CHESTER SC 29706		PUBLIC	PARENTING PROGRAM LIBRARY PROGRAM	19,000
BETHEL UNITED METHODIST P O BOX 309 CHESTER SC 29706		PUBLIC	NEW BATHROOM	25,000
SC DEPT OF SOCIAL SERVICES CHESTER SC 29706		PUBLIC	PARENTING PROGRAM	10,000
FORT LAWN COMMUNITY CHESTER SC 29706		PUBLIC	ADULT PROGRAM	30,000
CHESTER COUNTY DSS CHESTER SC 29706		PUBLIC	PROGRAMS	1,784
Total ▶ 3a				286,784
b Approved for future payment				
Total ▶ 3b				

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated	Unrelated business income (a) Business code	Unrelated business income (b) Amount	Excluded by section 512, 513, or 514 (c) Exclusion code	Excluded by section 512, 513, or 514 (d) Amount	(e) Related or exempt function income (See page 28 of the instructions)
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					12
4 Dividends and interest from securities					256,037
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					
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)					256,049

13 **Total.** Add line 12, columns (b), (d), and (e) . . . 13 256,049

(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)
	SEE ATTACHMENT NO. 11

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

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

Dewey Guyton — Signature of officer or trustee | 8-9-10 Date | President Title

Paid Preparer's Use Only

Preparer's signature	Robert H Breakfield	Date 8-4-2010 08-03-2010	Check if self-employed ▶ ☒	Preparer's identifying number (see Signature on page 30 of the instructions) 572-72-3855
Firm's name (or yours if self-employed), address, and ZIP code	Robert H Breakfield ROCK HILL, SC 29732	EIN ▶	
		Phone no	803-329-4920

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

Department of the Treasury
Internal Revenue Service

Schedule of Contributors

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

OMB No 1545-0047

2009

Name of the organization	Employer identification number
CLARENCE H & ANNA E LUTZ FOUNDATION	57-0940342

Organization type (check one)

Filers of:	**Section:**
Form 990 or 990-EZ	☐ 501(c)( ) (enter number) organization
	☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation
	☐ 527 political organization
Form 990-PF	☒ 501(c)(3) exempt private foundation
	☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation
	☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule.**

Note. Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule See instructions.

General Rule

☐ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, $5,000 or more (in money or property) from any one contributor. Complete Parts I and II.

Special Rules

☒ For a section 501(c)(3) organization filing Form 990 or Form 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), and received from any one contributor, during the year, a contribution of the greater of **(1)** $5,000 or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h or (ii) Form 990-EZ, line 1 Complete Parts I and II

☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, aggregate contributions of more than $1,000 for use exclusively for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals. Complete Parts I, II, and III

☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions for use exclusively for religious, charitable, etc., purposes, but these contributions did not aggregate to more than $1,000. If this box is checked, enter here the total contributions that were received during the year for an exclusively religious, charitable, etc , purpose Do not complete any of the parts unless the **General Rule** applies to this organization because it received nonexclusively religious, charitable, etc., contributions of $5,000 or more during the year . . . . ▶ $ ____________

Caution. An organization that is not covered by the General Rule and/or the Special Rules does not file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2 of its Form 990, or check the box on line H of its Form 990-EZ, or on line 2 of its Form 990-PF, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF)

Current Officers, Directors, Trustees, and Key Employees

1 List all officers, directors, trustees, and key employees for the year even if they were not compensated.

(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 deferred compensation	(e) Expense account, other allowances
SHEILA B BISHOP 1373 WEST END RD CHESTER, SC 29706	RECORDING SECRE 20	5,000	0	0

Name(s) as shown on return: CLARENCE H & ANNA E LUTZ FOUNDATION

FEIN: 57-0940342

STATEMENT #118

FORM 990PF, PART II, LINE 13
INVESTMENTS: OTHER SCHEDULE

CATEGORY	BOOK VALUE (BOY)	BOOK VALUE (EOY)	FMV (EOY)
MUTUAL FUNDS	984,976	993,835	722,396
TOTAL	984,976	993,835	722,396

PG 01
STATEMENT #120

FORM 990PF, PART II, LINE 15
OTHER ASSETS SCHEDULE

DESCRIPTION	BOY BOOK	EOY BOOK	FMV
COMPUTERS	3,930	3,930	3,930
TOTAL	3,930	3,930	3,930

PG 01
STATEMENT #136

FORM 990PF, PART II, LINE 10(A)
INVESTMENTS: GOVERNMENT OBLIGATION SCHEDULE

CATEGORY	BOOK VALUE (BOY)	BOOK VALUE (EOY)	FMV (EOY)
US GOVERNMENT OBLIGATIONS	50,839	30,199	29,165
TOTALS	50,839	30,199	29,165

PG 01
STATEMENT #136

FORM 990PF, PART II, LINE 10(A)
INVESTMENTS: GOVERNMENT OBLIGATION SCHEDULE

CATEGORY	BOOK VALUE (BOY)	BOOK VALUE (EOY)	FMV (EOY)
STATE & MUNICIPAL GOVT OBLIGAT	22,371	10,000	10,638
TOTALS	22,371	10,000	10,638

Federal Supporting Statements	2009 PG 01
Name(s) as shown on return: CLARENCE H & ANNA E LUTZ FOUNDATION	FEIN: 57-0940342

STATEMENT #137

FORM 990PF, PART II, LINE 10(B)
INVESTMENTS: CORPORATE STOCK SCHEDULE

CATEGORY	BOY	BOOK VALUE	EOY FMV
1500 AT&T INC COM	37,921	37,921	37,215
3000 RBS CAP (WAS ABN AMRO)	75,763	75,763	38,809
4000 AEGON NV PERP CAP SECS	99,227	99,676	77,800
800 AEGON NV PERP CAP SECS	19,210	18,761	17,352
600 BANK OF AMERICA	29,310	29,310	9,996
2000 BB&T	43,939	43,929	57,060
600 BAC CAP TR III GTD CAP SEC	15,000	15,000	13,596
1000 BRISTOL MYERS SQUIBB CO	26,249	26,249	24,510
500 CHEVY CHASE PFD	25,000		
1000 CHEVY CHASE PFD	25,000		
3000 FRONTIER COMM CORP	39,064	39,226	23,370
500 FAIRPOINT COMMUNICATIONS C	3,587	3,587	13
5000 DUKE ENERGY COM	92,559	92,559	81,750
1000 DU PONT E I DE NEMOURS	42,568	42,568	33,720
1500 FEDERAL RLTY INVT	34,878	34,878	103,440
1500 FEDERAL NATL MTG ASSN PFD	62,153	62,153	2,736
3500 GALLAGHER ARTHUR J & CO	58,970	107,130	83,055
1500 GENERAL ELECTRIC	49,876	52,725	24,090
2500 JP MORGAN CHASE & CO	59,457	76,419	104,925
4000 JP MORGAN CHASE CAP XI	98,751	98,751	91,320
100 SEARS HOLDING CORP	8,466		
800 PNC FINL SVCS GROUP INC	32,489	32,489	43,008
1000 MOTOROLA	25,686	25,868	6,760
2000 OLIN CORP NEW COM PAR $1	44,063	44,063	35,020
1000 CONOCOPHILLIPS	17,266	17,266	48,000
1000 PIEDMONT NATURAL GAS	33,188	33,188	25,830
2600 PFIZER	89,063	96,585	45,630
2500 SPECTRA	66,724	66,724	54,500
4500 PROGRESS ENERGY	171,650	171,650	172,305
4594 REGIONS FINL CORP NEW COM	104,325	150,533	31,010
3500 SAUL CTRS INC COM	67,653	67,653	118,965
3500 SCANA CORP NEW	96,110	95,947	126,175
300 SCE&G PFD 5%	12,630		
5000 SOUTHERN CO	113,269	113,269	158,850
2000 TECO	57,994	57,994	30,660
300 THORNBURG MTGE INC COM	86,172	8,867	3
3242 UDR INC COMM	51,970	51,970	54,466
2500 VERIZON COMMUNICATIONS	84,766	84,766	72,325
550 VIRGINIA ELEC & PWR $4.20	31,200	31,200	41,869
60 VIRGINIA ELEC & PWR $4.80	3,264	3,264	4,716
200 VIRGINIA ELEC & PWR $5	12,894	12,894	19,400
157 VIRGINIA ELEC & PWR $4.14	9,070	9,070	11,706
1000 WGL HOLDINGS INC COM	25,063	25,063	32,850
1449 WASH GAS LT PFD $4.25	87,346	87,346	101,837
1432 WASH GAS LT CO PFD $4.80	94,434	94,434	102,567

Federal Supporting Statements

2009 PG 02

Name(s) as shown on return: CLARENCE H & ANNA E LUTZ FOUNDATION

FEIN: 57-0940342

STATEMENT #137

FORM 990PF, PART II, LINE 10(B)
INVESTMENTS: CORPORATE STOCK SCHEDULE

CATEGORY	BOY	BOOK VALUE	EOY FMV
774 WASH GAS LT 5 PR	51,708	51,708	56,719
12837 WASHINGTON REAL ESTATE I	252,452	252,452	357,639
1500 XCEL ENERGY INC	31,166	31,166	31,215
3000 WELLS FARGO PFD SEC	60,907	71,595	67,440
2500 AMERICAN ELECT POWER	109,290	109,290	84,050
1500 HOSPITALITY PP TRUST	70,483	70,483	32,955
2000 BANK OF AMERICA	13,800	13,800	41,980
2500 SYSCO CORP	45,079	59,110	57,800
1000 COMCAST NOTE	25,111	25,111	26,000
700 COCA COLA	31,891	31,891	36,904
1500 ROYAL BANK OF SCOTLAND	36,475	36,475	19,515
4000 WINDSTREAM CORP	56,628	56,628	40,520
3000 KRAFT FOODS	104,678	104,678	85,290
1800 GENERAL MILLS INC	94,464	94,464	129,618
3000 PACKAGING CORP OF AMERICA	79,315	79,315	71,400
TOTALS	3,428,684	3,426,874	3,302,254

	Federal Supporting Statements	2009 PG 01
Name(s) as shown on return		FEIN
CLARENCE H & ANNA E LUTZ FOUNDATION		57-0940342

FORM 990PF, PART II, LINE 10(C)
INVESTMENTS: CORPORATE BOND SCHEDULE

STATEMENT #138

CATEGORY	BOY	BOOK VALUE	EOY FMV
$50000 BORDEN INC 7.85%	49,950	49,303	35,000
$65000 CBS INC 7.125%	60,537	60,537	67,498
$47000 CBS	35,000		
$40000 FORD MTR RE CO 7.375%	39,616	39,615	40,801
$30000 MARRIOTT INTL	27,956		
$30000 GENERAL ELECT CAP CORP		30,310	28,922
$20000 FORD MTR DEL DEB 6.5%	20,000	19,890	18,400
$20000 FORD MTR DEL GLOBAL LAN	20,000	19,803	17,575
$20000 GENL MTRS ACCEP 6.0%	20,000	20,000	14,995
$15000 GENL MTRS ACCEP 6.875%	15,000	15,005	14,834
$38000 GENL MTRS ACCEP 7.0%	38,000	38,000	31,020
$25000 GENL MTRS ACCEP 5.9%	25,000	25,000	18,690
$30000 PRUDENTIAL FINL INC	30,000	30,000	29,792
$25000 AVON PRODS INC		24,985	28,290
$30000 LEHMAN BROS HLDGS INC	30,000	30,000	6,750
$25000 BELLSOUTH CORP GLOBAL		24,986	26,438
$20000 GENERAL ELEC CAP CORP M	20,000	20,000	20,044
$40000 SBC COMMUNICATIONS INC		41,574	39,798
$20000 PHILIPS ELECTRS 7.25%	20,547	20,003	22,820
$40000 RIGGS NATL CORP 9.65%	31,150		
$30000 WAL MART STORES 7.25%	29,024	28,559	34,946
$15000 WESTINGHOUSE 8.625%	14,703	14,703	16,486
$47000 WESTINGHOUSE 7.875%		46,612	51,679
$15000 GENERAL ELECT CAP CORP		14,980	14,683
TOTALS	526,483	613,865	579,461

	Federal Supporting Statements	2009
Name(s) as shown on return		FEIN

	1000SH CHEVY CHASE BANK
	1998-12
	PURCHASED
	2009-03
	JOHNSTON LEMON AND CO
	$25,000
	$
	$25,000
	$
	$25,000
NAME	500SH CHEVY CHASE BANK
DATE ACQUIRED	1999-09
HOW ACQUIRED	PURCHASED
DATE SOLD	2009-03
PURCHASER	JOHNSTON LEMON AND CO
GROSS SALES	$25,778
SALES EXPENSE	$
TOTAL NET	$25,778
ACCUMULATED DEPRECIATION	$
BASIS	$25,000
NAME	28000SH FEDERAL HOME LN
DATE ACQUIRED	2002-10
HOW ACQUIRED	PURCHASED
DATE SOLD	2009-05
PURCHASER	JOHNSTON LEMON AND CO
GROSS SALES	$28,000
SALES EXPENSE	$
TOTAL NET	$28,000
ACCUMULATED DEPRECIATION	$
BASIS	$28,000
NAME	40000SH RIGGS NATL CORP
DATE ACQUIRED	1991-10
HOW ACQUIRED	PURCHASED
DATE SOLD	2009-06
PURCHASER	JOHNSTON LEMON AND CO
GROSS SALES	$40,000
SALES EXPENSE	$
TOTAL NET	$40,000
ACCUMULATED DEPRECIATION	$
BASIS	$40,000

	Federal Supporting Statements	2009
Name(s) as shown on return		FEIN

	5000SH SPARTANBURG CO SC HOSP
	1993-10
	PURCHASED
	2009-10
	JOHNSTON LEMON AND CO
	$5,000
	$
	$5,000
	$
	$5,000
NAME	30000SH MARRIOTT INTL INC
DATE ACQUIRED	1996-07
HOW ACQUIRED	PURCHASED
DATE SOLD	2009-12
PURCHASER	JOHNSTON LEMON AND CO
GROSS SALES	$30,000
SALES EXPENSE	$
TOTAL NET	$30,000
ACCUMULATED DEPRECIATION	$
BASIS	$30,000
NAME	300SH SC ELECT AND GAS
DATE ACQUIRED	1993-10
HOW ACQUIRED	PURCHASED
DATE SOLD	2009-12
PURCHASER	JOHNSTON LEMON AND CO
GROSS SALES	$15,750
SALES EXPENSE	$
TOTAL NET	$15,750
ACCUMULATED DEPRECIATION	$
BASIS	$12,630
NAME	3082SH JP MORGAN VALUE OPP
DATE ACQUIRED	1998-02
HOW ACQUIRED	PURCHASED
DATE SOLD	2010-01
PURCHASER	JOHNSTON LEMON AND CO
GROSS SALES	$39,995
SALES EXPENSE	$
TOTAL NET	$39,995
ACCUMULATED DEPRECIATION	$
BASIS	$60,526

	Federal Supporting Statements	**2009**
Name(s) as shown on return		FEIN

	100SH SEARS HLDGS CORP
	2005-03
	PURCHASED
	2010-02
	JOHNSTON LEMON AND CO
	$8,865
	$
	$8,865
	$
	$8,466
NAME	MOTOROLA SECURITIES
DATE ACQUIRED	2000-11
HOW ACQUIRED	PURCHASED
DATE SOLD	2009-04
PURCHASER	COMPLETE CLAIM SOLUTIONS
GROSS SALES	$254
SALES EXPENSE	$
TOTAL NET	$254
ACCUMULATED DEPRECIATION	$
BASIS	$3,734

Federal Supporting Statements

2009 PG 01

Name(s) as shown on return: CLARENCE H & ANNA E LUTZ FOUNDATION

Your Social Security Number: 57-0940342

FORM 990PF, PART I, LINE 23 - OTHER EXPENSES SCHEDULE

STATEMENT #103

DESCRIPTION	REVENUE AND EXPENSES	NET INVESTMENT	ADJUSTED NET INCOME	CHARITABLE PURPOSE
SAFETY DEPOSIT BOX RENTAL	30	30	0	0
OFFICE SUPPLY AND EXPENSE	70	70	0	0
DUES AND MEMBERSHIPS	495	495	0	0
DIRECTORS INSURANCE	750	750	0	0
PHONE AND INTERNET EXPENSE	984	984	0	0
STAFF EXPENSE	100	100	0	0
POSTAGE	132	132	0	0
MISCELLANEOUS	54	54	0	0
TOTALS	2,615	2,615	0	0

PG 01

FORM 990PF, PART I, LINE 16(A) - LEGAL FEES SCHEDULE

STATEMENT #107

DESCRIPTION	REVENUE AND EXPENSES	NET INVESTMENT	ADJUSTED NET INCOME	CHARITABLE PURPOSE
ROBERT H BREAKFIELD	16,500	16,500	0	0
TOTALS	16,500	16,500	0	0

Federal Supporting Statements

2009 PG 01

Name(s) as shown on return: CLARENCE H & ANNA E LUTZ FOUNDATION

Your Social Security Number: 57-0940342

FORM 990PF, PART I, LINE 18 - TAXES SCHEDULE

STATEMENT #110

DESCRIPTION	REVENUE AND EXPENSES	NET INVESTMENT	ADJUSTED NET INCOME	CHARITABLE PURPOSE
FEDERAL INCOME TAX	2,655	2,655	0	0
TOTALS	2,655	2,655	0	0

PG 01

SUBSIDIARY STATEMENT

FORM 990PF, PART I, LINE 25 - SUBSIDIARY SCHEDULE

DESCRIPTION	REVENUE AND EXPENSES	NET INVESTMENT	ADJUSTED NET INCOME	CHARITABLE PURPOSE
VARIOUS CHARITIES	0	0	0	0
TOTALS	0	0	0	0

Name(s) as shown on return: CLARENCE H & ANNA E LUTZ FOUNDATION

Your Social Security Number: 57-0940342

FORM 990PF, PART XV, LINE 2
APPLICATION SUBMISSION INFORMATION

990APP

GRANT PROGRAM
CLARENCE E & ANNA LU

APPLICANT NAME
JOAN GUYTON

ADDRESS
1373 WEST END RD CHESTER SC 29706

TELEPHONE
803-581-3743

FORM & CONTENT
SEE ATTACHED GRANT GUIDELINES AND APPLICATIONS

SUBMISSION DEADLINE
NOV 30TH 5 PM

RESTRICTIONS ON AWARD
NO

The Clarence H. and Anna Elizabeth Lutz Foundation

Guidelines for Grant Application

1. The Foundation provides assistance to established non-profit entities, not individuals.

2. The Foundation will consider applications for capital projects, equipment purchases and special projects that advance education, religion, community projects and health & welfare.

3. The Foundation will not consider requests for operating costs or general contributions to organizations.

4. The Foundation prefers to assist local non-profit organizations.

5. All applications must be submitted in DUPLICATE on foundation forms. No photocopies.

6. Return the application and requested supporting materials at your earliest convenience-but no later than December 1st of each year.

Board of Directors

Dewey Guyton	President & Chairman
Joan Guyton	Vice-President and Treasurer
Mary S. Jolley	Secretary
Susan Stephenson	Assistant Secretary

Robert H. Breakfield
Legal Counsel
PO Box 36061
Rock Hill, SC 29732
(803) 329-4920

Eva Marie Staudt,
Investment Advisor
Johnston Lemon and Co. Inc.
1101 Vermont Ave N.W. 8th floor
Washington, DC 2005-3521

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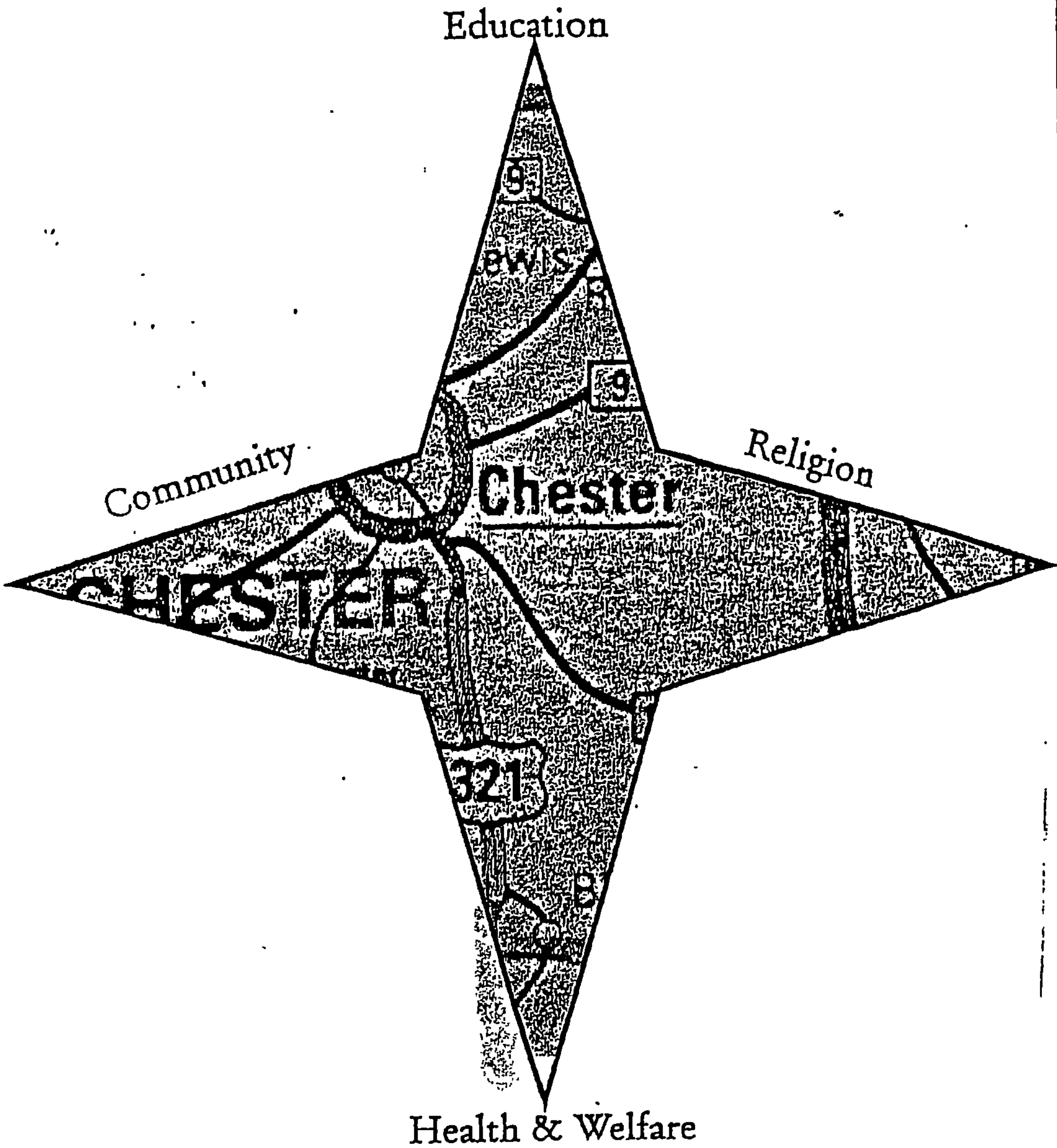
The Clarence H. and Anna Elizabeth Lutz Foundation



Assisting Chester County and the Surrounding Counties with Funding for Education, Community, Health & Welfare and Religion

Application Guidelines

We request that you submit a brief summary of your organization and the program for which you will be applying. Upon receipt and review of this document, we will forward application forms for your use.

A. Duplicate Application: All applications and supporting documents must be submitted in duplicate on our current fiscal year application forms. We will not process non-duplicate applications or non-current fiscal year forms.

B. Supporting documents must be attached to both application forms.

C. US Mail or Courier (Fed-Ex. UPS): a) All Applications must be received (not postmarked) no later than 5:00 pm on November 30th of each fiscal year. b) Applications not received by this date and time will be automatically rejected. c) All applications must be submitted by mail or other courier forms. d). We will not accept hand-delivered applications.

D. Legible: Grant applications forms should be completed (typed or neatly printed) and signed by the Board Chairman or Executive Officer of the organization.

E. Mailing Address: Lutz Foundation 1373 West End Road Chester, SC 29706

F. Apply only one time annually: We strongly advise that each organization submit only one application per organization per fiscal year.

G. Application Availability: Applications for the next year will be available after February 15th.

Supporting Document Guidelines

1. Cover letter of not more than two pages covering the following points:

- Purpose of organization, objectives and background of project.

- Demonstration of need.
- Specific plans and timetable for project.
- Description of both the current and long-term funding plans.
- Qualifications of the organization. (Copy of non-profit corporate charter) and personnel concerned (brief bio information regarding officers and board members).

2. An overall budget for the organization as well as a budget for the specific need o project. This budget should show sources of income as well as expenditure items.
3. List of current Board of Directors.
4. Copy of applicant's official notice of tax-exempt status under the Internal Revenue Code IRS 501c(3) letter.
5. Copy of applicant's most recent audit or compilation signed by an independent accountant.

General Information

A. Chester, York Union and Lancaster counties will have primary consideration; however: grants are not limited to these counties.

B. The Foundation does not award grants to individuals or for profit entities.

C. We strive to support entities that have a broad based community support program.

D. We do not fund general operating expenses or general fund campaigns.

E. We support community, health, educational and religious projects in that order of interest.

Officers

Dewey G. Guyton President

Joan L. Guyton Vice-President &

Treasurer

Mary S. Jolley	Secretary
Susan L. Stephenson	Public Relations
Robert H. Breakfield	Legal Counsel
Eva Marie Staudt	Investment Representative

Contact Information

Clarence H. Anna E. Lutz Foundation

1373 West End Hwy

Chester, SC 29706

Foundation Phone: 803-385-5357

Residence Phone: 803-581-3743

Website: http://www.lutzfoundation.org

Email Address:

Joan Guyton: JGuyton@LutzFoundation.org

Mary Jolley: MJolley@LutzFoundation.org

Name(s) as shown on return: CLARENCE H & ANNA E LUTZ FOUNDATION

FEIN: 57-0940342

FORM 990PF, PART II, LINE 13 — STATEMENT #118

INVESTMENTS: OTHER SCHEDULE

CATEGORY	BOOK VALUE (BOY)	BOOK VALUE (EOY)	FMV (EOY)
MUTUAL FUNDS	984,976	993,835	722,396
TOTAL	984,976	993,835	722,396

PG 01

FORM 990PF, PART II, LINE 15 — STATEMENT #120

OTHER ASSETS SCHEDULE

DESCRIPTION	BOY BOOK	EOY BOOK	FMV
COMPUTERS	3,930	3,930	3,930
TOTAL	3,930	3,930	3,930

PG 01

FORM 990PF, PART II, LINE 10(A) — STATEMENT #136

INVESTMENTS: GOVERNMENT OBLIGATION SCHEDULE

CATEGORY	BOOK VALUE (BOY)	BOOK VALUE (EOY)	FMV (EOY)
US GOVERNMENT OBLIGATIONS	50,839	30,199	29,165
TOTALS	50,839	30,199	29,165

PG 01

FORM 990PF, PART II, LINE 10(A) — STATEMENT #136

INVESTMENTS: GOVERNMENT OBLIGATION SCHEDULE

CATEGORY	BOOK VALUE (BOY)	BOOK VALUE (EOY)	FMV (EOY)
STATE & MUNICIPAL GOVT OBLIGAT	22,371	10,000	10,638
TOTALS	22,371	10,000	10,638

Federal Supporting Statements	2009 PG 01

Name(s) as shown on return: CLARENCE H & ANNA E LUTZ FOUNDATION

FEIN: 57-0940342

FORM 990PF, PART II, LINE 10(B) STATEMENT #137

INVESTMENTS: CORPORATE STOCK SCHEDULE

CATEGORY	BOY	BOOK VALUE	EOY FMV
1500 AT&T INC COM	37,921	37,921	37,215
3000 RBS CAP (WAS ABN AMRO)	75,763	75,763	38,809
4000 AEGON NV PERP CAP SECS	99,227	99,676	77,800
800 AEGON NV PERP CAP SECS	19,210	18,761	17,352
600 BANK OF AMERICA	29,310	29,310	9,996
2000 BB&T	43,939	43,929	57,060
600 BAC CAP TR III GTD CAP SEC	15,000	15,000	13,596
1000 BRISTOL MYERS SQUIBB CO	26,249	26,249	24,510
500 CHEVY CHASE PFD	25,000		
1000 CHEVY CHASE PFD	25,000		
3000 FRONTIER COMM CORP	39,064	39,226	23,370
500 FAIRPOINT COMMUNICATIONS C	3,587	3,587	13
5000 DUKE ENERGY COM	92,559	92,559	81,750
1000 DU PONT E I DE NEMOURS	42,568	42,568	33,720
1500 FEDERAL RLTY INVT	34,878	34,878	103,440
1500 FEDERAL NATL MTG ASSN PFD	62,153	62,153	2,736
3500 GALLAGHER ARTHUR J & CO	58,970	107,130	83,055
1500 GENERAL ELECTRIC	49,876	52,725	24,090
2500 JP MORGAN CHASE & CO	59,457	76,419	104,925
4000 JP MORGAN CHASE CAP XI	98,751	98,751	91,320
100 SEARS HOLDING CORP	8,466		
800 PNC FINL SVCS GROUP INC	32,489	32,489	43,008
1000 MOTOROLA	25,686	25,868	6,760
2000 OLIN CORP NEW COM PAR $1	44,063	44,063	35,020
1000 CONOCOPHILLIPS	17,266	17,266	48,000
1000 PIEDMONT NATURAL GAS	33,188	33,188	25,830
2600 PFIZER	89,063	96,585	45,630
2500 SPECTRA	66,724	66,724	54,500
4500 PROGRESS ENERGY	171,650	171,650	172,305
4594 REGIONS FINL CORP NEW COM	104,325	150,533	31,010
3500 SAUL CTRS INC COM	67,653	67,653	118,965
3500 SCANA CORP NEW	96,110	95,947	126,175
300 SCE&G PFD 5%	12,630		
5000 SOUTHERN CO	113,269	113,269	158,850
2000 TECO	57,994	57,994	30,660
300 THORNBURG MTGE INC COM	86,172	8,867	3
3242 UDR INC COMM	51,970	51,970	54,466
2500 VERIZON COMMUNICATIONS	84,766	84,766	72,325
550 VIRGINIA ELEC & PWR $4.20	31,200	31,200	41,869
60 VIRGINIA ELEC & PWR $4.80	3,264	3,264	4,716
200 VIRGINIA ELEC & PWR $5	12,894	12,894	19,400
157 VIRGINIA ELEC & PWR $4.14	9,070	9,070	11,706
1000 WGL HOLDINGS INC COM	25,063	25,063	32,850
1449 WASH GAS LT PFD $4.25	87,346	87,346	101,837
1432 WASH GAS LT CO PFD $4.80	94,434	94,434	102,567

	Federal Supporting Statements	**2009** PG 02
Name(s) as shown on return		FEIN
CLARENCE H & ANNA E LUTZ FOUNDATION		57-0940342

FORM 990PF, PART II, LINE 10(B)
INVESTMENTS: CORPORATE STOCK SCHEDULE

STATEMENT #137

CATEGORY	BOY	BOOK VALUE	EOY FMV
774 WASH GAS LT 5 PR	51,708	51,708	56,719
12837 WASHINGTON REAL ESTATE I	252,452	252,452	357,639
1500 XCEL ENERGY INC	31,166	31,166	31,215
3000 WELLS FARGO PFD SEC	60,907	71,595	67,440
2500 AMERICAN ELECT POWER	109,290	109,290	84,050
1500 HOSPITALITY PP TRUST	70,483	70,483	32,955
2000 BANK OF AMERICA	13,800	13,800	41,980
2500 SYSCO CORP	45,079	59,110	57,800
1000 COMCAST NOTE	25,111	25,111	26,000
700 COCA COLA	31,891	31,891	36,904
1500 ROYAL BANK OF SCOTLAND	36,475	36,475	19,515
4000 WINDSTREAM CORP	56,628	56,628	40,520
3000 KRAFT FOODS	104,678	104,678	85,290
1800 GENERAL MILLS INC	94,464	94,464	129,618
3000 PACKAGING CORP OF AMERICA	79,315	79,315	71,400
TOTALS	3,428,684	3,426,874	3,302,254

	Federal Supporting Statements	2009 PG 01
Name(s) as shown on return		FEIN
CLARENCE H & ANNA E LUTZ FOUNDATION		57-0940342

FORM 990PF, PART II, LINE 10(C)
INVESTMENTS: CORPORATE BOND SCHEDULE

STATEMENT #138

CATEGORY	BOY	BOOK VALUE	EOY FMV
$50000 BORDEN INC 7.85%	49,950	49,303	35,000
$65000 CBS INC 7.125%	60,537	60,537	67,498
$47000 CBS	35,000		
$40000 FORD MTR RE CO 7.375%	39,616	39,615	40,801
$30000 MARRIOTT INTL	27,956		
$30000 GENERAL ELECT CAP CORP		30,310	28,922
$20000 FORD MTR DEL DEB 6.5%	20,000	19,890	18,400
$20000 FORD MTR DEL GLOBAL LAN	20,000	19,803	17,575
$20000 GENL MTRS ACCEP 6.0%	20,000	20,000	14,995
$15000 GENL MTRS ACCEP 6.875%	15,000	15,005	14,834
$38000 GENL MTRS ACCEP 7.0%	38,000	38,000	31,020
$25000 GENL MTRS ACCEP 5.9%	25,000	25,000	18,690
$30000 PRUDENTIAL FINL INC	30,000	30,000	29,792
$25000 AVON PRODS INC		24,985	28,290
$30000 LEHMAN BROS HLDGS INC	30,000	30,000	6,750
$25000 BELLSOUTH CORP GLOBAL		24,986	26,438
$20000 GENERAL ELEC CAP CORP M	20,000	20,000	20,044
$40000 SBC COMMUNICATIONS INC		41,574	39,798
$20000 PHILIPS ELECTRS 7.25%	20,547	20,003	22,820
$40000 RIGGS NATL CORP 9.65%	31,150		
$30000 WAL MART STORES 7.25%	29,024	28,559	34,946
$15000 WESTINGHOUSE 8.625%	14,703	14,703	16,486
$47000 WESTINGHOUSE 7.875%		46,612	51,679
$15000 GENERAL ELECT CAP CORP		14,980	14,683
TOTALS	526,483	613,865	579,461

Federal Supporting Statements	2009
Name(s) as shown on return: Clarence H & Anna Lutz Foundation	FEIN: 57-0940342

	1000SH CHEVY CHASE BANK
	1998-12
	PURCHASED
	2009-03
	JOHNSTON LEMON AND CO
	$25,000
	$
	$25,000
	$
	$25,000
NAME	500SH CHEVY CHASE BANK
DATE ACQUIRED	1999-09
HOW ACQUIRED	PURCHASED
DATE SOLD	2009-03
PURCHASER	JOHNSTON LEMON AND CO
GROSS SALES	$25,778
SALES EXPENSE	$
TOTAL NET	$25,778
ACCUMULATED DEPRECIATION	$
BASIS	$25,000
NAME	28000SH FEDERAL HOME LN
DATE ACQUIRED	2002-10
HOW ACQUIRED	PURCHASED
DATE SOLD	2009-05
PURCHASER	JOHNSTON LEMON AND CO
GROSS SALES	$28,000
SALES EXPENSE	$
TOTAL NET	$28,000
ACCUMULATED DEPRECIATION	$
BASIS	$28,000
NAME	40000SH RIGGS NATL CORP
DATE ACQUIRED	1991-10
HOW ACQUIRED	PURCHASED
DATE SOLD	2009-06
PURCHASER	JOHNSTON LEMON AND CO
GROSS SALES	$40,000
SALES EXPENSE	$
TOTAL NET	$40,000
ACCUMULATED DEPRECIATION	$
BASIS	$40,000

Federal Supporting Statements	2009
Name(s) as shown on return: Clarence H & Anna Lutz Foundation	FEIN: 57-0940342

	5000SH SPARTANBURG CO SC HOSP
	1993-10
	PURCHASED
	2009-10
	JOHNSTON LEMON AND CO
	$5,000
	$
	$5,000
	$
	$5,000
NAME	30000SH MARRIOTT INTL INC
DATE ACQUIRED	1996-07
HOW ACQUIRED	PURCHASED
DATE SOLD	2009-12
PURCHASER	JOHNSTON LEMON AND CO
GROSS SALES	$30,000
SALES EXPENSE	$
TOTAL NET	$30,000
ACCUMULATED DEPRECIATION	$
BASIS	$30,000
NAME	300SH SC ELECT AND GAS
DATE ACQUIRED	1993-10
HOW ACQUIRED	PURCHASED
DATE SOLD	2009-12
PURCHASER	JOHNSTON LEMON AND CO
GROSS SALES	$15,750
SALES EXPENSE	$
TOTAL NET	$15,750
ACCUMULATED DEPRECIATION	$
BASIS	$12,630
NAME	3082SH JP MORGAN VALUE OPP
DATE ACQUIRED	1998-02
HOW ACQUIRED	PURCHASED
DATE SOLD	2010-01
PURCHASER	JOHNSTON LEMON AND CO
GROSS SALES	$39,995
SALES EXPENSE	$
TOTAL NET	$39,995
ACCUMULATED DEPRECIATION	$
BASIS	$60,526

Federal Supporting Statements

2009

Name(s) as shown on return: Clarence H & Anna Lutz Foundation

FEIN: 57-0940342

	100SH SEARS HLDGS CORP
	2005-03
	PURCHASED
	2010-02
	JOHNSTON LEMON AND CO
	$8,865
	$
	$8,865
	$
	$8,466
NAME	MOTOROLA SECURITIES
DATE ACQUIRED	2000-11
HOW ACQUIRED	PURCHASED
DATE SOLD	2009-04
PURCHASER	COMPLETE CLAIM SOLUTIONS
GROSS SALES	$254
SALES EXPENSE	$
TOTAL NET	$254
ACCUMULATED DEPRECIATION	$
BASIS	$3,734

Federal Supporting Statements

Name(s) as shown on return: CLARENCE H & ANNA E LUTZ FOUNDATION

Your Social Security Number: 57-0940342

FORM 990PF, PART I, LINE 23 - OTHER EXPENSES SCHEDULE

STATEMENT #103

DESCRIPTION	REVENUE AND EXPENSES	NET INVESTMENT	ADJUSTED NET INCOME	CHARITABLE PURPOSE
SAFETY DEPOSIT BOX RENTAL	30	30	0	0
OFFICE SUPPLY AND EXPENSE	70	70	0	0
DUES AND MEMBERSHIPS	495	495	0	0
DIRECTORS INSURANCE	750	750	0	0
PHONE AND INTERNET EXPENSE	984	984	0	0
STAFF EXPENSE	100	100	0	0
POSTAGE	132	132	0	0
MISCELLANEOUS	54	54	0	0
TOTALS	2,615	2,615	0	0

FORM 990PF, PART I, LINE 16(A) - LEGAL FEES SCHEDULE

STATEMENT #107

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ROBERT H BREAKFIELD	16,500	16,500	0	0
TOTALS	16,500	16,500	0	0

Federal Supporting Statements

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FORM 990PF, PART I, LINE 18 - TAXES SCHEDULE

STATEMENT #110

DESCRIPTION	REVENUE AND EXPENSES	NET INVESTMENT	ADJUSTED NET INCOME	CHARITABLE PURPOSE
FEDERAL INCOME TAX	2,655	2,655	0	0
TOTALS	2,655	2,655	0	0

PG 01
SUBSIDIARY STATEMENT

FORM 990PF, PART I, LINE 25 - SUBSIDIARY SCHEDULE

DESCRIPTION	REVENUE AND EXPENSES	NET INVESTMENT	ADJUSTED NET INCOME	CHARITABLE PURPOSE
VARIOUS CHARITIES	0	0	0	0
TOTALS	0	0	0	0

FORM 990PF, PART XV, LINE 2

990APP

APPLICATION SUBMISSION INFORMATION

GRANT PROGRAM

CLARENCE E & ANNA LU

APPLICANT NAME

JOAN GUYTON

ADDRESS

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TELEPHONE

803-581-3743

FORM & CONTENT

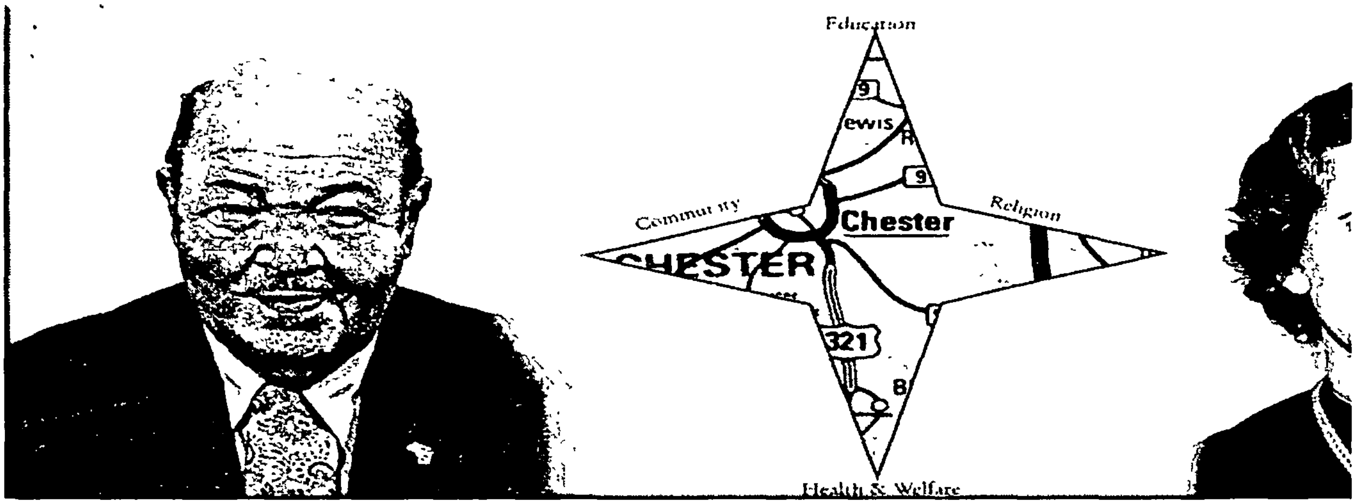
SEE ATTACHED GRANT GUIDELINES AND APPLICATIONS

SUBMISSION DEADLINE

NOV 30TH 5 PM

RESTRICTIONS ON AWARD

NO



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Grants 2007
Grants 2008
Community
Education
Religion
Tax Documents

The Clarence H. and Anna Elizabeth Lutz Foundation

Mission Statement

The Lutz Foundation was established in 1995 after the deaths of Clarence H. and Anna E. Lutz, who spent their last years living in Chester. Their purpose in endowing this foundation was to help fund various religious and community needs, as well as educational, health and welfare programs. In endowing these grants, our mission is to enrich as many lives as possible with the funds available each year. We hope to make our community a better place to live, raise a family, and retire, as a result of these endeavors.

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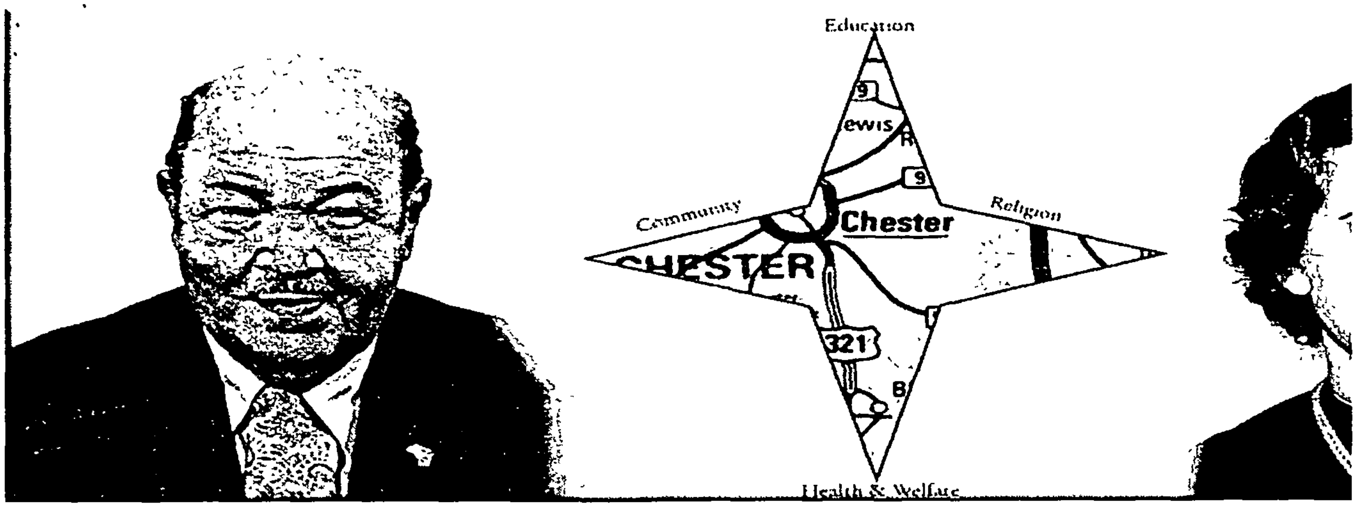

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Joan L. Guyton Vice-President & Treasurer

Mary S. Jolley Secretary

Susan L. Stephenson Public Relations

Robert H. Breakfield Legal Counsel

Eva Marie Staudt Investment Representative

Contact Information

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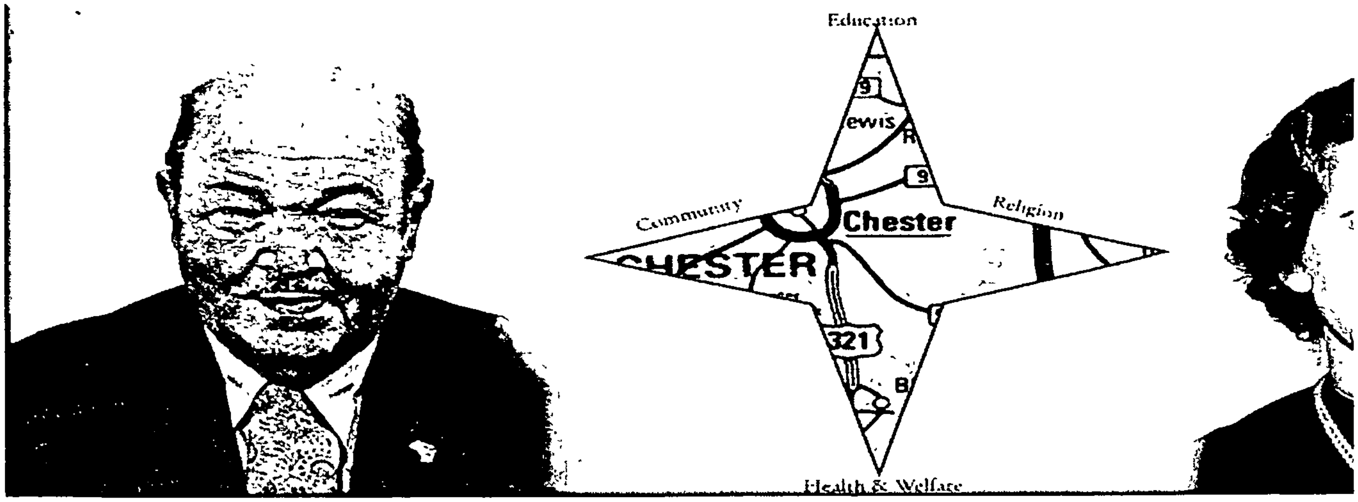

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Legible:
Grant applications forms should be completed (typed or neatly printed) and signed by the Board Chairman or Executive Officer of the organization.

Mailing Address:
Lutz Foundation 1373 West End Road Chester, SC 29706

Apply only one time annually:
We strongly advise that each organization submit only one application per organization per fiscal year.

Application Availability:

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Applications for the next year will be available after February 15th.

Supporting Document Guidelines

Cover letter of not more than two pages covering the following points:

Purpose of organization, objectives and background of project.

Demonstration of need.

Specific plans and timetable for project.

Description of both the current and long-term funding plans.

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An overall budget for the organization as well as a budget for the specific need o project. This budget should show sources of income as well as expenditure items.

List of current Board of Directors.

Copy of applicant's official notice of tax-exempt status under the Internal Revenue Code IRS 501c(3) letter.

Copy of applicant's most recent audit or compilation signed by an independent accountant.

General Information

Chester, York Union and Lancaster counties will have primary consideration; however: grants are not limited to these counties.

The Foundation does not award grants to individuals or for profit entities.

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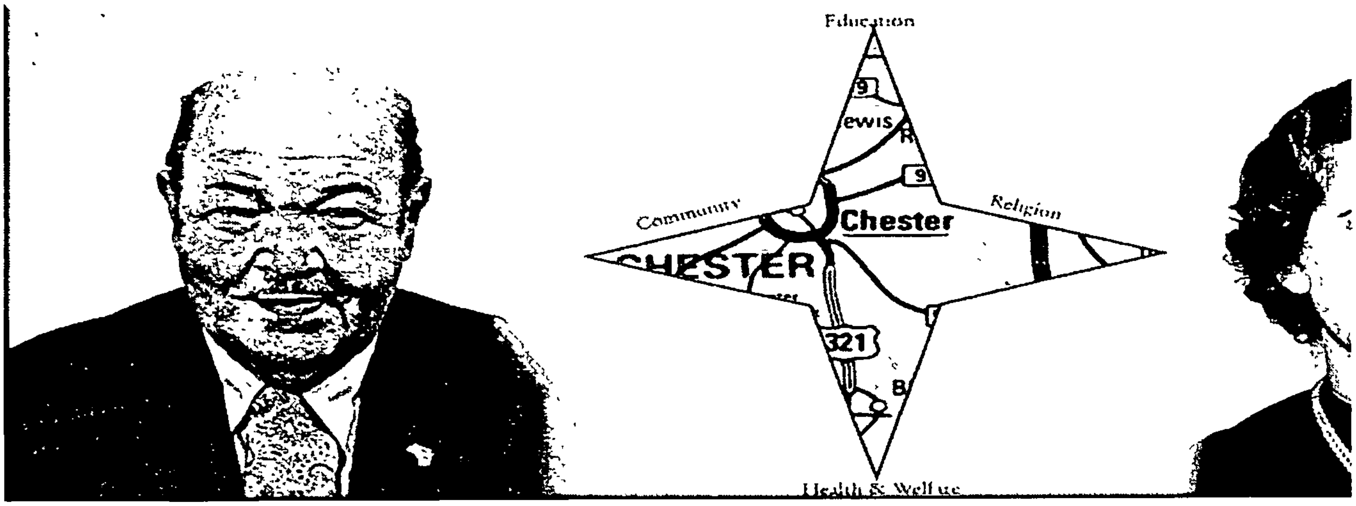
We do not fund general operating expenses or general fund campaigns.

We support community, health, educational and religious projects in



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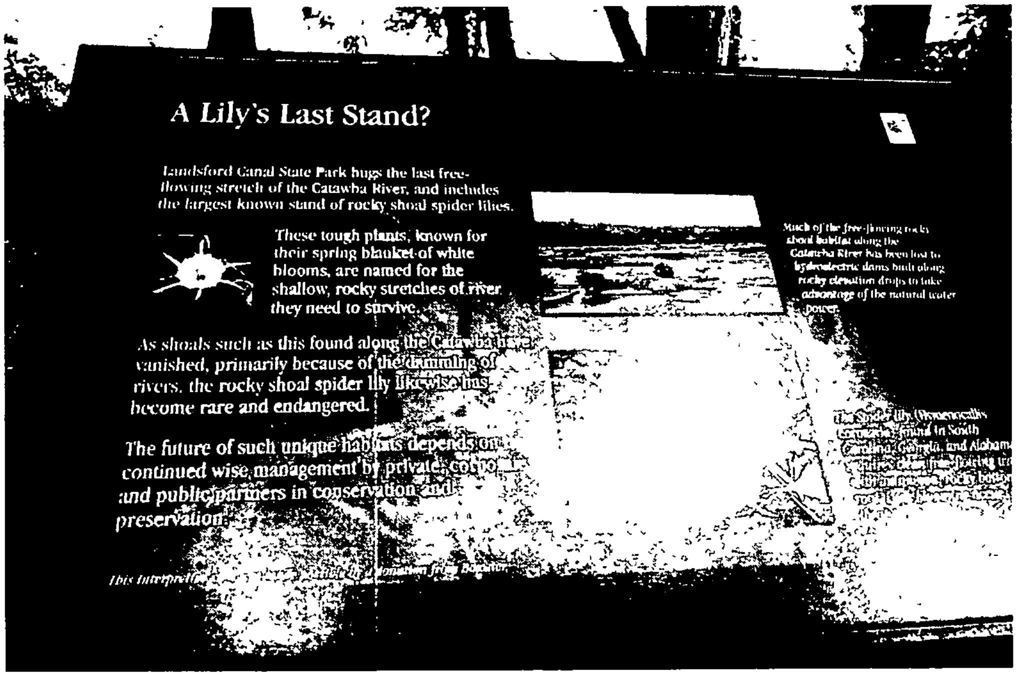
Community Projects that The Lutz Foundation has helped with.

Landsford Canal

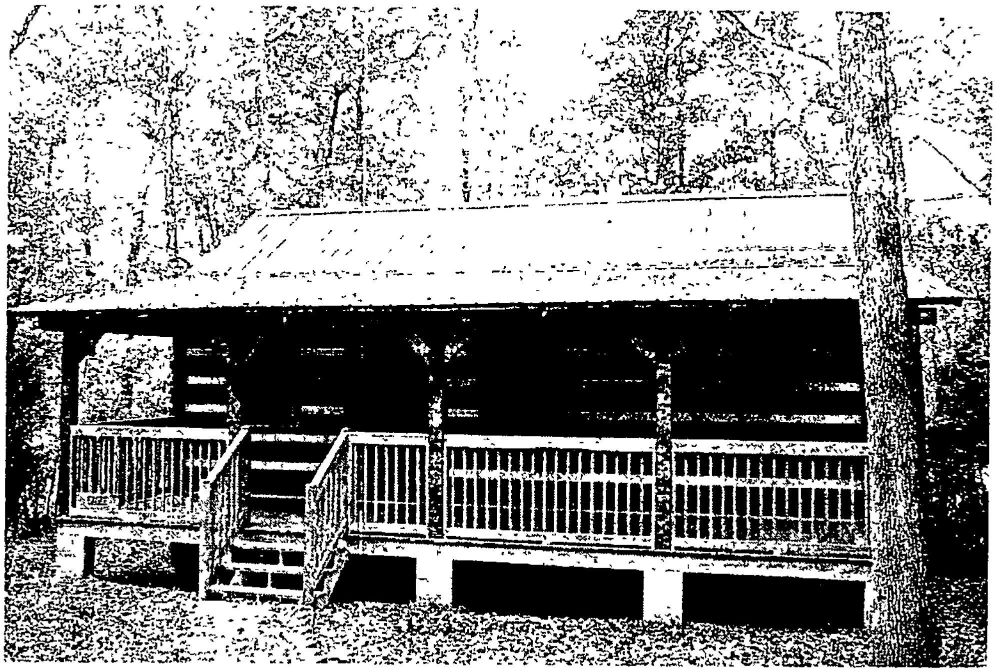


Visited on June 8th 2005.

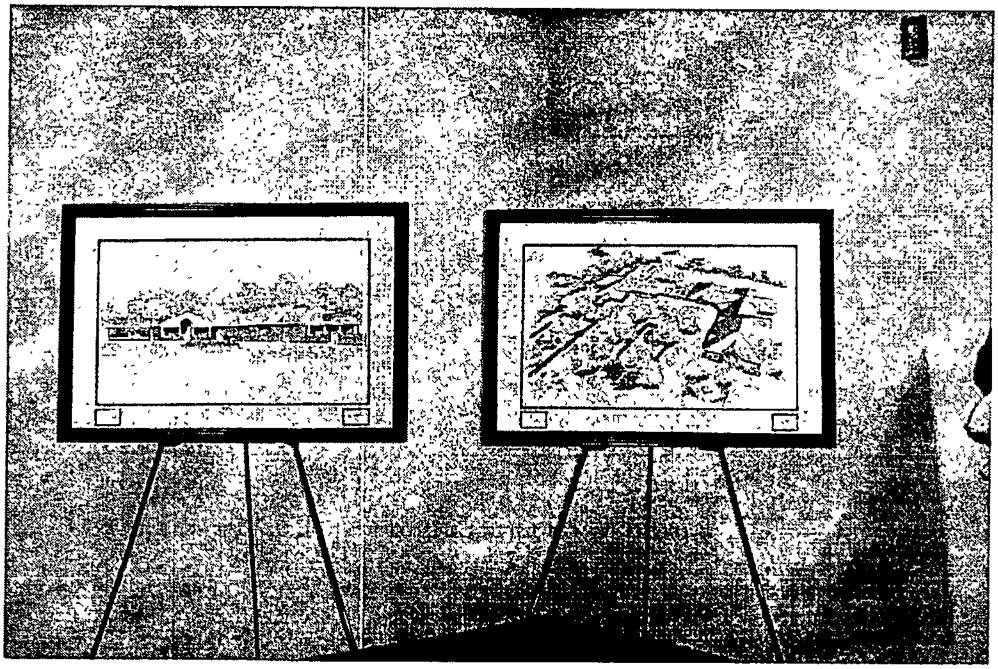
Herbert Lutz House visited July 13th, helped with new siding.

Family Connections in Rock Hill SC, helps families with children with disabilities.

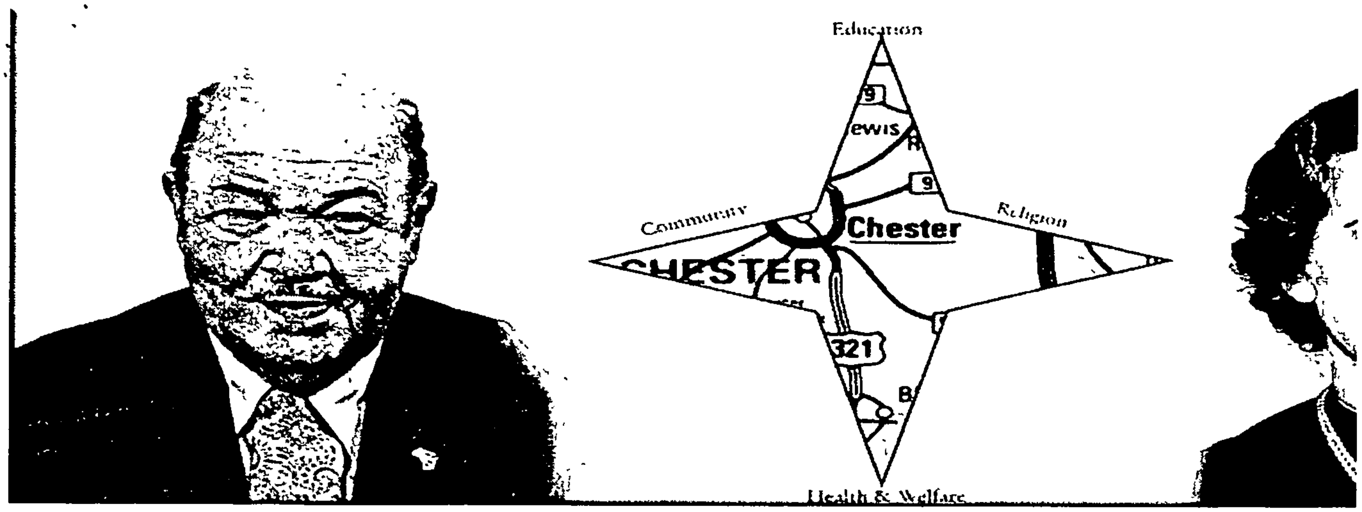
Staff of the Good Samaritan Clinic in Chester SC, visited October 22nd.



Tree Tops program visited October 17th.



Pictures of the new Hospice building to be built in Rock Hill.



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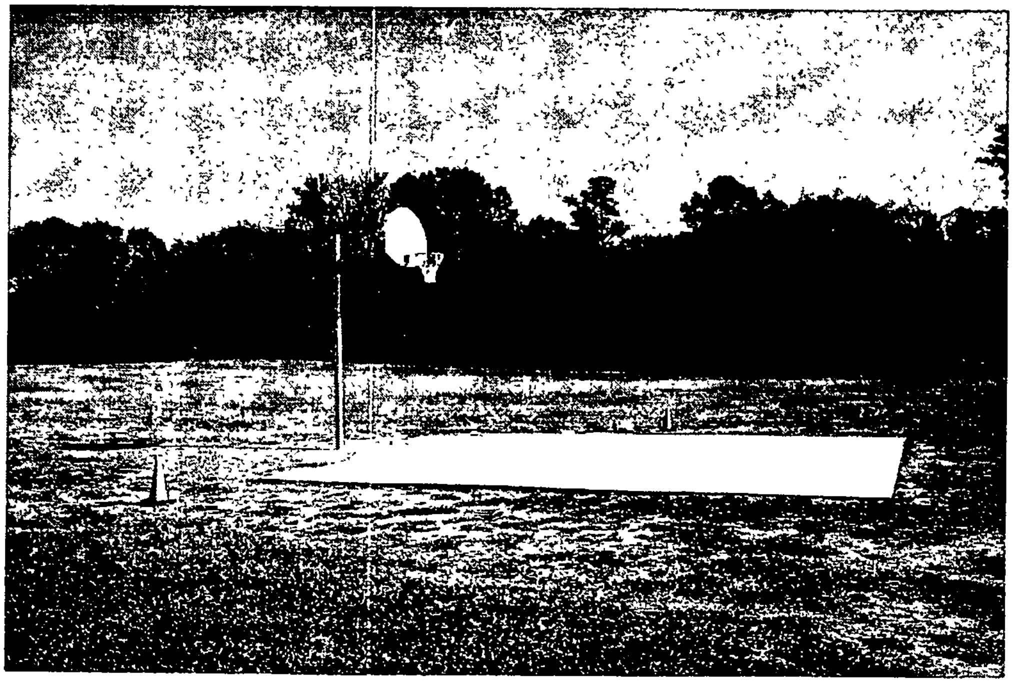
Educational Projects that The Lutz Foundation has helped with.

York Tech Nursing program first year in Chester.

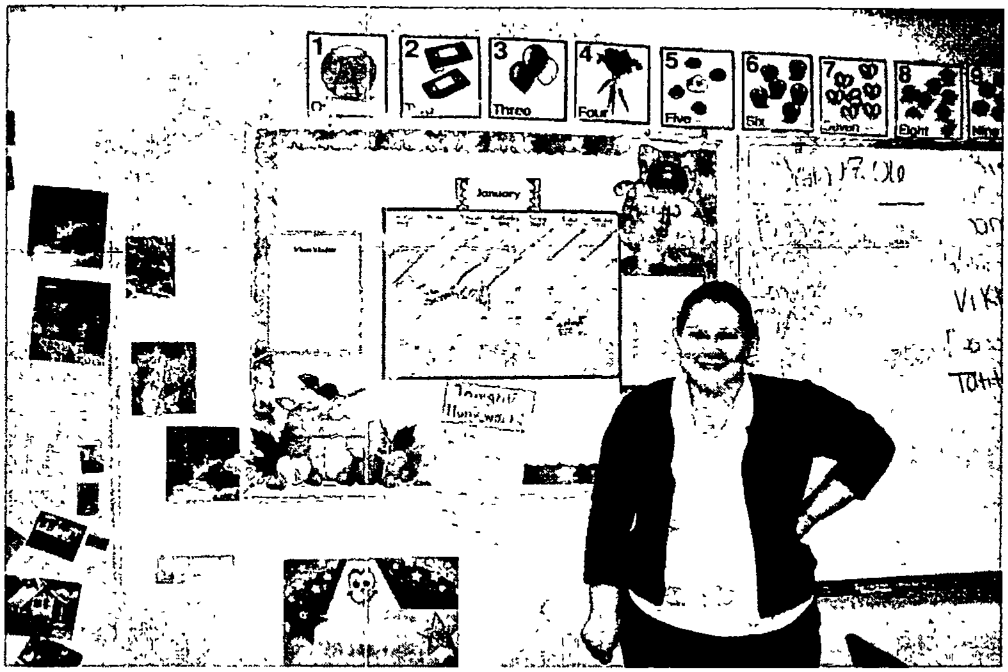
High School Rodeo June 3, 2005 Clemson SC.

High School Rodeo truck June 3, 2005.

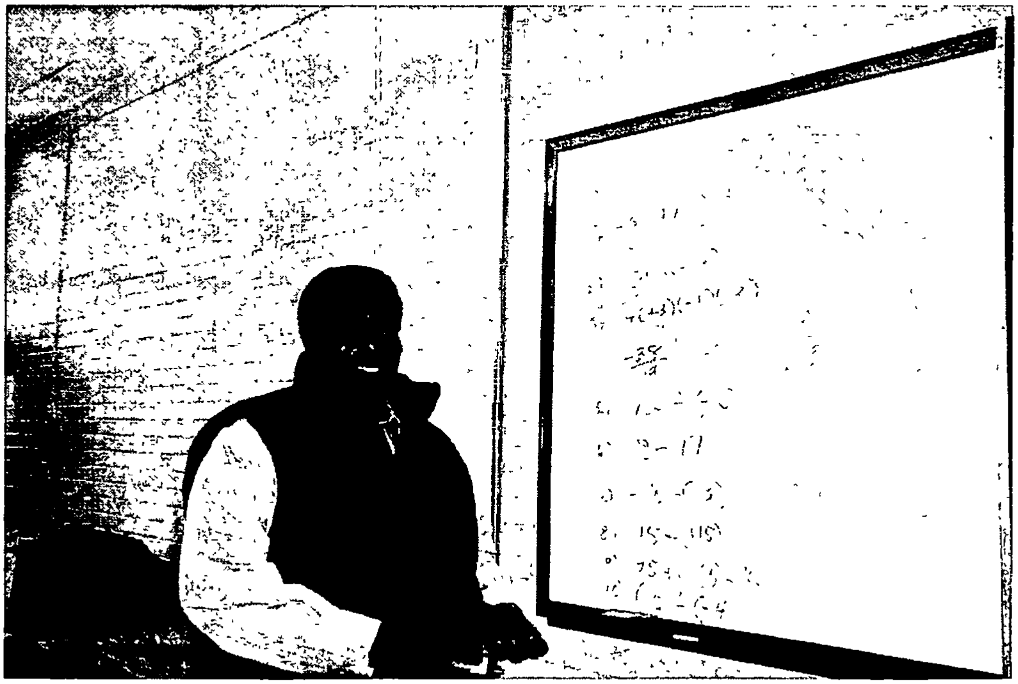
Clemson Extension summer programs for kids, visited July 6th.



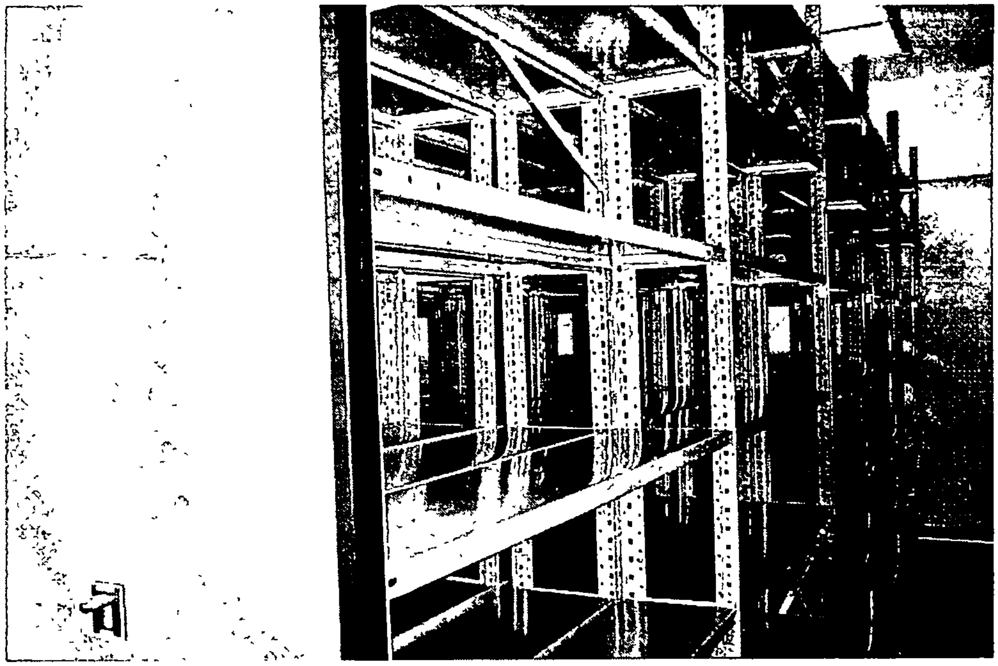
Baseball pad for School of Inquiry in Chester SC.



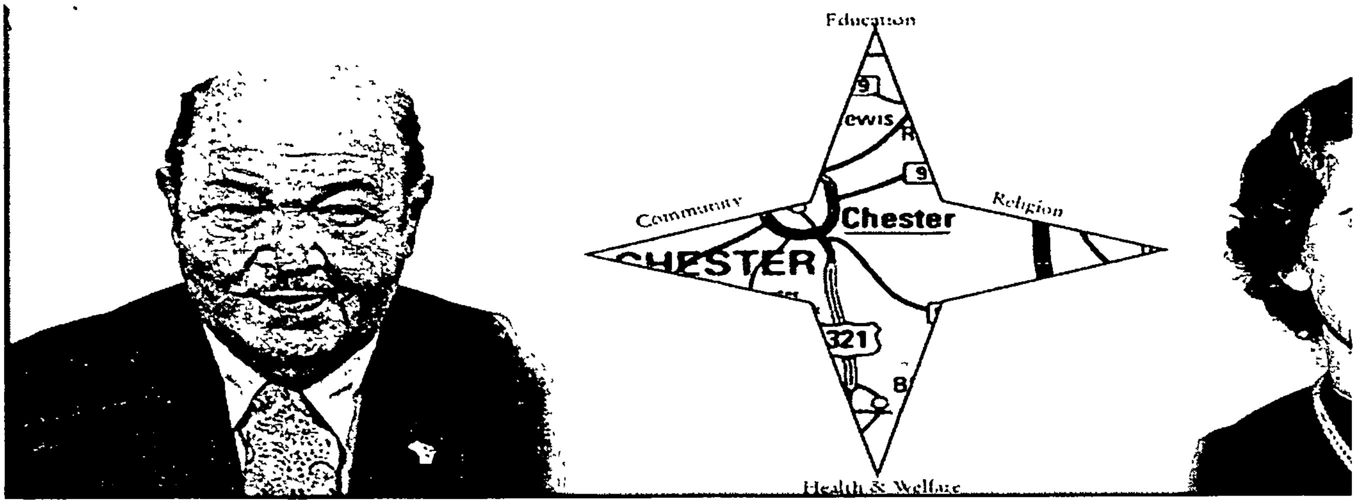
Onsite School for The Girl's Home in Rock Hill SC.



Adult Education school that helps 14 to 18 year olds that have dropped out of high school.



Compact shelving for Winthrop University for the Library.



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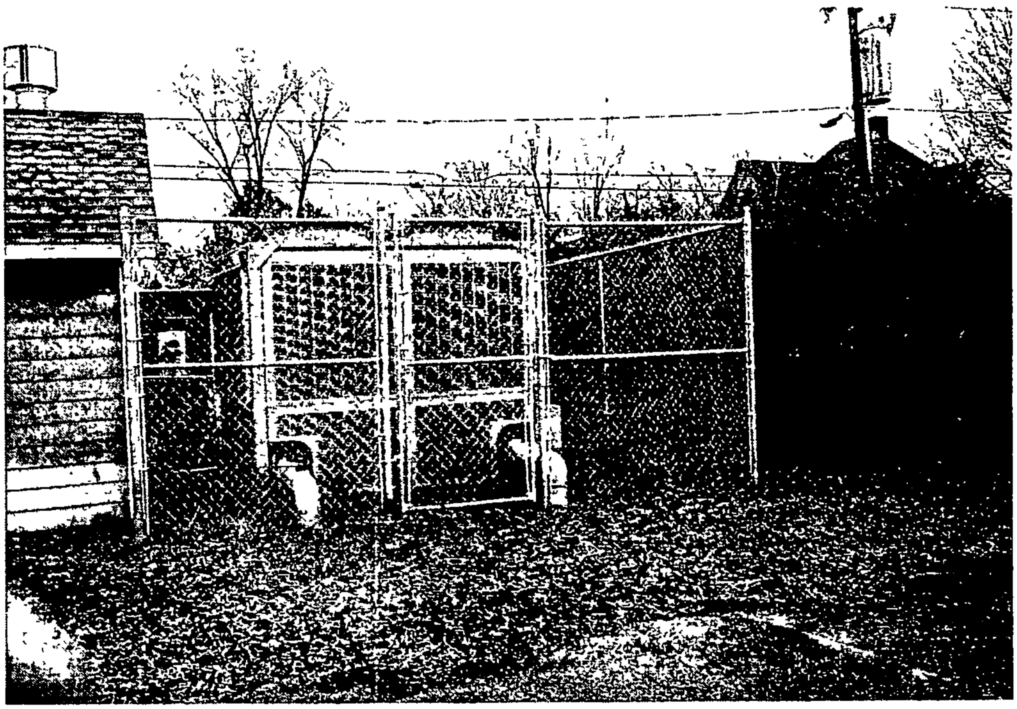
Church Projects that The Lutz Foundation has helped with.

Swing Sets and Playground for Lowrys Baptist Church, visited August 7

Kitchen appliances for Second Baptist Church in Chester SC, visited October 5th.



Air-condition Unit for Bethel Church in Chester SC, visited August 2nd

The Herbert and Anna Lutz Foundation
Internal Control
Policies & Procedures

Adopted April 28, 2010

REIMBURSEMENT OF EXPENSES OF BOARD MEMBERS AND EMPLOYERS

Policy

It is the policy of The Foundation that reimbursement will not be made to a Board of Director or any employee without the Board of Directors approval for any of the following expenditures.

- First class or charter travel
- Travel for companions (including spouses)
- Tax indemnification and gross-up payments
- Discretionary spending account
- Housing allowance or residence for personal use
- Payments for business use of personal residence
- Health or social club dues or initiation fees
- Personal services (e.g. maid, chauffeur, chef)

Dewey Guyton

Dewey Guyton

The Herbert and Anna Lutz Foundation
Internal Control
Policies & Procedures

Adopted April 28, 2010

BOARD OF DIRECTOR REIMBURSEMENT

Policy

It is the policy The Foundation that out of pocket costs incurred by a Board member for a Board approved business activity will be reimbursed.

Procedure

1. The Board member will submit receipts for any out of pocket costs from a Board approved business activity to the Board, along with an explanation of the expenditures.

2. The Board member will submit the approved expenditures for reimbursement to the Treasurer.

3. The Treasurer will process the check and mail to the Board member.

Dewey Guyton

Dewey Guyton

The Herbert and Anna Lutz Foundation
Internal Control
Policies & Procedures

Adopted April 28, 2010

DATA SECURITY BREACH

Policy

(A) It is the policy of The Foundation to disclose a breach of the security of it's computer system following discovery or notification of the breach in the security of the data to any person whose personal identifying information that was not encrypted, redacted or is reasonably believed to have been acquired by an unauthorized person when the illegal use of the information has occurred or is reasonably likely to occur or use the information creates a material risk of harm to the person. (SC Code Ann 39-1-901).

(B) A person conducting business in this State and maintaining computerized data or other data that includes personal identifying information that the person does not own shall notify the owner or licensee of the information of a breach of the security of the data immediately following discovery, if the personal identifying information was, or is reasonably believed to have been, acquired by an unauthorized person.

(C) The notification required by this policy may be delayed if a law enforcement agency determines that the notification impedes a criminal investigation.

Definition
"Breach of the security of the system" means unauthorized access to and acquisition of computerized data that was not rendered unusable through encryption, redaction, or other methods that compromises the security, confidentiality, or integrity of personal identifying information maintained by The Foundation, when illegal use of the information has occurred or is reasonably likely to occur or use of the information creates a material risk of harm to a person. Good faith acquisition of personal identifying information by an employee or agent of The Foundation for the purposes of its business is not a breach of the security of the system if the personal identifying information is not used or subject to further unauthorized disclosure.

Notification Requirements
(1) Written notice;
(2) Electronic notice;
(3) Telephone notice; or
(4) If a business provides notice to more than 500 persons at one time pursuant to this section, the business shall notify, without unreasonable delay, the Consumer Protection Division of the Department of Consumer Affairs.

Dewey Guyton

Dewey Guyton

The Herbert and Anna Lutz Foundation

Lutz Foundation Time Line

September 30th	Grant Programs / Projects must be completed by September 30th of each year.
September 30th	All site visits are to be completed and audit material on grants due by September 30th.
November 30th	New grant applications due and on the premises by Nov. 30th
December and January	Review grants in December. Visit and interview potential grant applicants during December and January.
Third week in January	Contract letters go out allowing two weeks to be signed. -- Write Eva for money to be transferred to Foundation Account.
Second Week in February	Write award letters and checks – Be sure to include our tax Id number on our award letters and enclose a copy of grant contract letter. -- Write letters to those that have been denied.
Fourth week in February	Make sure copies of all Grant letters have been returned, signed, and checks accounted for.

1373 West End Rd. Chester, SC 29706
Phone: 803-385-5357 Website: http://www.lutzfoundation.org

Grants to Consider For 2009/2010 Fiscal Year

1. **Pilgrims Inn Inc.** – (57-0789205)
   CEO: Stephen Cox – Address: 1545 Granville Rd Rock Hill SC, 29732 Phone: 803-325-2910
   Contact Person: Susan Dean – Address: PO Box 11328 Rock Hill, SC 29731 Phone: 803-327-4227
   Project: Emergency Services – help homeless & at risk for homeless women and children, medicine expenses utilities and transportation.
   Amount Requested: $21,826 This is the total budget for the project.
   Begin Date: Feb.15, 2010 ending September 30th, 2010

2. **Richard Winn** – (57-049330)
   CEO: Ken Atkerson- Address: PO Box 390 Winnsboro, SC 29180 Phone: 803-635-5494
   Contact Person: Lana McMeeya Address: Same Phone: Same
   Project: To replace carpeting in 18 classrooms(sent sample of carpet)
   Amount Requested: $16,000 Total Budget $32,125 – have already received $16,125.77
   Begin Date:

3. **Good Samaritan Med. Clinic** – (82-0549226)
   CEO: John Hart- Address: 139 Church St. Chester ,SC 29706 Phone: 803-385-6332
   Contact Person: Same
   Project: Initial cost of changing diabetic Glucometers and Test strips $8.75 rather than $31.
   Amount Requested: $5,300 Total Budget is $10,870 - $5000 being considered from donations.
   Begin Date:

4. **Bethel United Methodist** - (57-0406808)
   CEO: Jack Cabrey – Address: PO Box 309 Chester, SC 29706 Phone: 803-581-0916
   Contact Person: Tony Helms – Address: 1225 Paden Bridge Rd Chester, SC 29706 Phone: 803-581-8569
   Project: New Bathroom in Auditorium.
   Amount Requested: $30,000 Total Budget $56,850
   Begin Date:

5. **SC Govenor School of Science and Math** –(57-0881347)
   CEO: Kim Bowman – Address: 1201 Main St. Suite 2350 Columbia SC, 29201 Phone:803-252-9152
   Contact Person - Same
   Project: Full year meal plan for 5 students from this area.
   Amount Requested: $1200 Total Budget $43,000
   Begin Date: Aug. 2009 End May 2010

6. **Childrens Home of Lancaster** –(57-0549954)
   CEO: Annette Deese – Address: PO Box 416 Lancaster SC 29721 Phone: 803-286-5277
   Contact Person: Same
   Project: To hire person. We don't give money for Salaries.
   Amount Requested: $30,000
   Begin Date:

7. **Chester Little Theater** - (23-7209789)
   CEO: Russ White – Address: 145 Saluda St. Chester SC 29706 Phone: 803-385-7166
   Contact Person: Same
   Project: Renovation of Theater

Amount Requested: Any Amount $50,000 Total Project: $140,000
Begin Date: Dec 2009 to March 2010

8. **Catawba Riverkeeper Foundation Inc.** – (56-2034780)
CEO: Rick Gaskins – Address: 421 Minuet Lane #205 Charlotte NC 28217-2784 Phone:704-679-9494
Contact Person: Regina Stone – same
Project: Youth Kayaking River Program
Amount Requested: $5,000 Total Bud. $21,550 Have Received $10,000
Begin Date: spring 2010 and fall 2010

9. **Fort Lawn Community Center** – (31-1611139)
CEO: Cheryl Quinn Address: PO Box 103 5554 Main St. Fort Lawn SC 29714 Phone: 803-872-4494
Contact Person: Same
Project: For Windows and walls
Amount Requested: $12,204 Total Budget: $12,789 had some fundraising
End Date: August 2010

10. **Chester County Commission on Alcohol and Drug Abuse** –(57-0610928)
CEO: David Seward 130 Hudson St. Chester SC 29706 Phone: 803-377-8111
Contact Person: Same
Project: Salaries
Amount Requested: $10,000 Total Budget $53,500
Begin Date: April 2010 End Date April 2011

11. **Palmetto Volunteers Medical Clinic**– (26-0754886)
CEO: Hartwell Hildebrand 235 South Herlong Avenue , PO Box 3123 Rock Hill SC 29732
Phone: 803-366-6337
Contact Person: Same
Project: Salary assistance
Amount Requested: $20,000 Total Budget $239,040
Begin Date: started in 2008 End Date ongoing

12. **Lewis Fire Dept.** – (57-109-1961)
CEO: Jay Williams 1652 Woods Rd. Chester SC 29706 Phone:80-581-6900
Contact Person: Same
Project: To purchase Jaws of life equipment.
Amount Requested: $35,000 Total Budget: $38,701 already have $830 estimate having $8,000
Begin Date: as soon as money received

13. **South Chester Rural Fire Association - (57-1055799)**
CEO: Blair White 720 Columbia Rd. Chester SC 29706 Phone:803-385-3581
Contact Person: Same
Project: Upgrade the ER Equipment
Amount Requested: $5,000 Total Budget $6,000 Other from yearly equipment funding
Begin Date: Nov 2009 End Jan 2010

14. **St. Pauls Presbyterian Church - (57-0766137)**
CEO: Benny McKay 768 Pinckney Rd. Chester SC 29706 Phone: 803-377-1867
Contact Person: Penny Hollis 191 West Elliot ST. Chester SC 29706 Phone: 803-385-5772
Project: Tents and Lanterns survivor kits for Scouts and Youth Group
Amount Requested: $1,704 Total Budget: 1704

Begin Date: Feb 2010 to August 2010

15. <u>**Palmetto Council (Boy Scouts) - (57-0314450)**</u>
    CEO: Rob Green 420 South Church St. Spartanburg SC 864-585-4391
    Contact Person: Matt Spencer Phone: 864-585-4991 Ext:29
    <u>**Project: Scoutreach – to helped with disadvantaged youth in Chester**</u>
    <u>**Amount Requested: $29,450 Total Budget: $86,000**</u>
    Begin Date: January 2010 to December 2010

16. <u>**Senior Services Inc. - (57-0571243)**</u>
    CEO: Micheal Wissinger 1197 Armory Rd Chester SC 29706 Phone: 803-385-3838
    Contact Person: Frances Stephenson - same
    <u>**Project: Senior Companion**</u>
    <u>**Amount Requested: $20,000 Total Budget: $20,000**</u>
    Begin Date: July 2009 to June 30, 2010

17. <u>**New Millenium Love - (27-0409797)**</u>
    CEO: Clyde Gravely PO Box 13222 Anderson SC 29624 Phone: 800-734-9620 Ext: 622
    Contact Person: same
    <u>**Project: Shelter Plus – Shelter and job training for homeless (For Blue Prints)**</u>
    <u>**Amount Requested: $15,000 First year startup and expenses $415,000 – no supporting Documents**</u>
    Begin Date: 10/15/09 – 12/3/2010

18. <u>**Leeds Fire Department - ()**</u>
    CEO: Dwayne Schell 2126 West End Rd Chester SC 29706 Phone: 803-581-0403
    Contact Person: same
    <u>**Project: First responder program**</u>
    <u>**Amount Requested: $30,000 Total Budget: $60,000 Have already spen $39,000 on truck and equipment. No supporting Documentation**</u>
    Begin Date: July 2007 to ongoing

19. <u>**Boy Scouts of America - (22-1576300)**</u> –Indian Waters Council
    CEO: Doug Stone PO Box 144 Columbia SC 29202-0144 Phone: 803-750-9868
    Contact Person: same
    <u>**Project: Scoutreach**</u>
    <u>**Amount Requested: $5,000 Total Budget: $396,000**</u>
    Begin Date: Oct 2009 to June 2010

20. <u>**Clinton Jr College - (57-0387838)**</u>
    CEO: Elaine Copeland 1029 Crawford Rd. Rock Hill SC 29730 Phone: 803-327-7402
    Contact Person: Mickey Beckham – same Ext: 238
    <u>**Project: Deferred Maintenance Improvement Project – renovate men and women residence halls**</u>
    <u>**Amount Requested: $60,000 over two years Total Budget: $900,000**</u>
    Begin Date: 2010 end 2011

21. <u>**Deliver the Dream Incorporated - (65-0881619)**</u>
    CEO: Paul Winthrow3223 North West Tenth Terace Suite 602 Fort Lauderdale FL 33309 Phone: 954-564-3512
    Contact Person: Rebecca Hahessy -Same
    <u>**Project: Retreat weekend for hearing impairment**</u>

Amount Requested: $10,000
Begin Date: July 2009 to June 30, 2010

22. Conservative Theological Seminary - (-)
CEO: Dr. Gene Youngblood 12021 Old Saint Augustine Rd. Jacksonville, Fl 32258 Phone: 904-262-8275
Contact Person: same
Project: Scholarship Assistance Fund
Amount Requested: $1,000 to $5,000
Begin Date: 2010 to 2015

23. Mount Pleasant Presbyterian Church - (57-0765123)
CEO: Mr. Robert Boland 1544 McGill Rd Smyrna SC 29743 Phone: 803-925-2443
Contact Person: Mrs. Mary Love 150 Wilson St. Chester SC 29706 Phone:803-377-4026
Project: Paving of the driveway and parking lot
Amount Requested: any amount Total Budget: $28,000
Begin Date: When funds are available to when complete

24. YMCA - (57-0335422)
CEO: Frank Bell 323 Oakland Ave. Rock Hill SC 29730 Phone: 803-324-9622
Contact Person: Scott Brown Address:157 Columbia St. Chester SC 29706 Phone:803-581-9622
Project: Phase 5 Renovation Project
Amount Requested: $49,920 Total Budget: $49,920
Begin Date: As soon as funds are received and then will take 6 months

25. Family Promise of York County - (58-2453186)
CEO: Jennifer Coye 404 East Main ST. Rock Hill SC 29730 Phone:803-329-2456
Contact Person: same
Project: To improve restroom and shower facilities for people with disabilities (final stage of project)
Amount Requested: $30,000 Total Budget $32,850
Begin Date: when receive funding and will last 6 to 8 weeks.

26. Hawthorne Christian Academy - ()
CEO: Rev. James Sanders PO Box 1656 Chester SC 29706 Phone: 803-377-8235
Contact Person: Michelle Cassady PO Box 801 Chester SC 29706 Phone: Same
Project: Desk Top Computers for Lab and Laptop Computers for Teachers and Networking equipment.
Amount Requested: $18,000 on hand $500
Begin Date: April 2010 August 2010

27. Chester ARP Cub Scout Troop Pack 61 - (57-0403148)
CEO: Dr. John Sherer 2003 Lancaster Hwy. Chester SC 29706 Phone: 803-789-5096
Contact Person: Bobby Bass 703 Grant lakes Circle Chester SC 29706 Phone:803-385-6124
Project: Camping Equipment
Amount Requested: $6,136.81 on hand $2000
Begin Date: August 2009

28. Lions Club Chester SC - (36-1263962)
CEO: Penn Colvin 1817 Knoll Drive Edgemoor SC 29712 Phone: 803-789-5247
Contact Person: Jim Bennett PO Box 549 Chester SC 29706 Phone:803-385-5102

Project: Financial Assistance for Glasses and Eye Exams
Amount Requested: $6,000
Begin Date: immediately

29. Chester Historical Society - (57-0626537)
CEO: Bob Smith 154 York St. Chester SC 29706 Phone: 803-581-8145
Contact Person: Same
Project: Replace inadequate lighting thru museum.
Amount Requested: $3,000
Begin Date: When they get the money to Dec 2010

30. Second Baptist - (1651)
CEO: Kevin Taylor 729 Village Dr. Chester SC 29706 Phone: 803-377-7149
Contact Person: Steven Bishop- same
Project: Community Shelter
Amount Requested: $33,267.25

31. Vine Institute - (84-1712763)
CEO: Steve Bishop 531 Sherwood Circle Chester SC 29706 Phone: 803-377-7149
Contact Person: same
Project: Recording and duplicating lessons on cd's
Amount Requested: $6,137.50

32. Arts Council of Chester County - (57-0718545)
CEO: Lauren Medlin PO Box 804 Chester SC 29706 Phone: 803-581-2030
Contact Person: same
Project: Install a security system
Amount Requested: $1,850 on hand $1,300
Begin Date: one month to complete

33. Generations - (57-0929065)
CEO: Kathleen Reynolds PO Box 80009 Simpsonville SC 29680 Phone: 864-243-5557 Ext: 268
Contact Person: Roseanne Brown Same Ext:269
Project: 30 Beds for Psychiatric residential treatment for children.
Amount Requested: $25,000 on hand $200,000
Begin Date: Jan 2010 Sept 2010

34. Respite Care Ministeries – (57-0350582)
CEO: Laura Stefanelli 405 King St. Charleston SC 29403 Phone: 803-723-1611
Contact Person: same
Project: Support for dealing with Alzheimers
Amount Requested: $2,500 on hand $3,000
Begin Date: April 2010 ongoing

35. Avian Conservation Center - ()
CEO: James D. Elliott PO Box 1247 Charleston SC 29402 Phone: 843-971-7474
Contact Person: same
Project: Low income children to learn about the bird.
Amount Requested: $5,000 on hand $5,000
Begin Date: Jan 2010 to Dec 2010

36. **Dee Norton Lowcountry Childrens Center - (57-0905724)**
CEO: M. Elizabeth Ralston 1061 king St. Charleston SC 29403 Phone: 843-723-3600
Contact Person: Patty O'Donnell same
Project: Child Abuse Treatment
Amount Requested: $5,000 two million dollar budget
Begin Date: Jan 2010 Ends Dec 2010

37. **Red Cross - (53-0196605)**
CEO: Rebecca M. Melton 200 Piedmont Blvd. Rock Hill SC 29732 Phone: 803-581-4820
Contact Person: James L. Mayhugh PO Box 353 Chester SC 29706 - same
Project: Chester County Disaster Relief Fund
Amount Requested: $10,000

38. **Chester County School District - ()**
CEO: Dr. Phil Mc Daniel 109 Hinton St. Chester SC 29706 Phone: 803-385-6122
Contact Person: Kelly Thomas 1330 JA Cochran Bypass Chester SC 803-385-6122
Project: 16 Laptops and a cart for the students
Amount Requested: $17,020.64
Is there a computer lab at the high school

39. **Chester area united fund incorporated - ()**
CEO: Kristen L. Fairfax 109 Gadsden St , Po Box 1742 Chester SC 29706 Phone: 803-581-7000
Contact Person: same
Project: United Way Success By 6 – to provide parenting classes in Chester county (Parenting with a plan)
Amount Requested: $19,850
Begin Date: Jan 2010

40. **Cumberland College**
CEO: Dr. Jim Taylor President 6191 College Station Drive Williamsburg Kentucky, 40769
Project: Mountain Outreach program
Amount Requested: $10,000

41. **Sandy River Baptist Church Christian Ministries**
CEO: Mr. Willie Graham (Deacon) 1184 Lowrys Hwy Chester SC 29706
Phone 803-377-8093
Project: Building project for community and religious programs.
Amount Requested: $300,000

42. **March of Dimes SC Chapter**
240 Stone Ridge Drive Suite 206
One Greystone Building Columbia SC 29210
--- Rejected not complete

43. **Friends of Juvenile Justice**
CEO: Jerry Grimes (Director) PO Box 3307 Irmo SC 29063
No duplicate Application --- See letter December 7th 2009

44. **Billy Murphy Foundation**
CEO: Flora Murphy 114 Martin Luther King Drive Chester SC 29706
Rejected Because it was received Late; --- See Letter for December 7th 2009

45. **<u>Saluda Street Church of God</u>**
CEO: Pastor Jimmie L Cox Jr. Po Box 633 Chester SC 29706
Rejected because it was late --- See letter of December 7th

46. **<u>Ms. Trisha P. Southergill – Grants Coordinator II</u>**
Grant support services Clemson University PO Box 340140 Clemson SC 29634-0140
Rejected because no duplicate application. See letter January 8th 2010.