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 04/01 , 2009, and ending 03/31, 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: POTTER, CLYDE R., MD CHARITABLE 49-7903672

A Employer identification number: 56-6267552

Number and street (or P O box number if mail is not delivered to street address): P.O. BOX 1908 — Room/suite:

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

City or town, state, and ZIP code: ORLANDO, FL 32802-1908

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)* ▶ $ 680,728.

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

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

		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)				
	2 Check ▶ [X] if the foundation is **not** required to attach Sch B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities	14,110.	13,399.		STMT 1
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	34,269.			
	b Gross sales price for all assets on line 6a 413,306.				
	7 Capital gain net income (from Part IV, line 2)		34,268.		
	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	48,379.	47,667.		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	7,952.	3,976.		3,976.
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)				
	c Other professional fees (attach schedule)				
	17 Interest				
	18 Taxes (attach schedule) (see page 14 of the instructions) STMT 2		120.		
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)				
	24 **Total operating and administrative expenses.** Add lines 13 through 23	7,952.	4,096.		3,976.
	25 Contributions, gifts, grants paid	28,782.			28,782.
	26 Total expenses and disbursements Add lines 24 and 25	36,734.	4,096.		32,758.
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	11,645.			
	b **Net investment income** (if negative, enter -0-)		43,571.		
	c **Adjusted net income** (if negative, enter -0-)				

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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 (a) Book Value	End of year (b) Book Value	End of year (c) Fair Market Value
Assets			
1 Cash - non-interest-bearing			
2 Savings and temporary cash investments	141,138.	39,874.	39,874.
3 Accounts receivable ▶			
Less allowance for doubtful accounts ▶			
4 Pledges receivable ▶			
Less allowance for doubtful accounts ▶			
5 Grants receivable			
6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see page 16 of the instructions)			
7 Other notes and loans receivable (attach schedule) ▶			
Less allowance for doubtful accounts ▶			
8 Inventories for sale or use			
9 Prepaid expenses and deferred charges			
10 a Investments - U S and state government obligations (attach schedule)			
b Investments - corporate stock (attach schedule)			
c Investments - corporate bonds (attach schedule)			
11 Investments - land, buildings, and equipment basis ▶			
Less accumulated depreciation (attach schedule) ▶			
12 Investments - mortgage loans			
13 Investments - other (attach schedule) STMT 3	459,801.	572,710.	640,854.
14 Land, buildings, and equipment basis ▶			
Less accumulated depreciation (attach schedule) ▶			
15 Other assets (describe ▶)			
16 **Total assets** (to be completed by all filers - see the instructions Also, see page 1, item I)	600,939.	612,584.	680,728.
Liabilities			
17 Accounts payable and accrued expenses			
18 Grants payable			
19 Deferred revenue			
20 Loans from officers, directors, trustees, and other disqualified persons			
21 Mortgages and other notes payable (attach schedule)			
22 Other liabilities (describe ▶)			
23 **Total liabilities** (add lines 17 through 22)			
Net Assets or Fund Balances			
Foundations that follow SFAS 117, check here ▶ ☐ and complete lines 24 through 26 and lines 30 and 31.			
24 Unrestricted			
25 Temporarily restricted			
26 Permanently restricted			
Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. ▶ X			
27 Capital stock, trust principal, or current funds	585,609.	612,584.	
28 Paid-in or capital surplus, or land, bldg, and equipment fund			
29 Retained earnings, accumulated income, endowment, or other funds	15,330.		
30 **Total net assets or fund balances** (see page 17 of the instructions)	600,939.	612,584.	
31 **Total liabilities and net assets/fund balances** (see page 17 of the instructions)	600,939.	612,584.	

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	600,939.
2	Enter amount from Part I, line 27a	2	11,645.
3	Other increases not included in line 2 (itemize) ▶	3	
4	Add lines 1, 2, and 3	4	612,584.
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	612,584.

Part IV Capital Gains and Losses for Tax on Investment Income

	(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse; or common stock, 200 shs MLC Co)	(b) How acquired P-Purchase D-Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
1a	SEE PART IV DETAIL			
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** 34,268.

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	33,674.	635,190.	0.05301405879
2007	34,756.	791,238.	0.04392610062
2006	40,454.	756,809.	0.05345338124
2005	4,136.	721,665.	0.00573119107
2004	69,027.	729,885.	0.09457243264

2	**Total** of line 1, column (d)	2	0.25069716436
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	0.05013943287
4	Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4	621,016.
5	Multiply line 4 by line 3	5	31,137.
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	436.
7	Add lines 5 and 6	7	31,573.
8	Enter qualifying distributions from Part XII, line 4	8	32,758.

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

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

1a	Exempt operating foundations described in section 4940(d)(2), check here ▶ ☐ and enter "N/A" on line 1 . . . Date of ruling or determination letter ______________ (attach copy of ruling letter if necessary - see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ▶ [X] and enter 1% of Part I, line 27b	1	436.
c	All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	2	
3	Add lines 1 and 2	3	436.
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	4	NONE
5	**Tax based on investment income.** Subtract line 4 from line 3 If zero or less, enter -0-	5	436.
6	Credits/Payments:		
a	2009 estimated tax payments and 2008 overpayment credited to 2009 — 6a: 200.		
b	Exempt foreign organizations-tax withheld at source — 6b: NONE		
c	Tax paid with application for extension of time to file (Form 8868) — 6c: NONE		
d	Backup withholding erroneously withheld — 6d:		
7	Total credits and payments Add lines 6a through 6d	7	200.
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** PAID By. EFTPS ▶	9	236.
10	**Overpayment** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶	10	
11	Enter the amount of line 10 to be **Credited to 2010 estimated tax** ▶ Refunded ▶	11	

Part VII-A Statements Regarding Activities

			Yes	No
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a		X
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)?	1b		X
	If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.			
c	Did the foundation file **Form 1120-POL** for this year?	1c		X
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation ▶ $ ________ (2) On foundation managers ▶ $ ________			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ▶ $ ________			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? *If "Yes," attach a detailed description of the activities*	2		X
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? *If "Yes," attach a conformed copy of the changes*	3		X
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		X
b	If "Yes," has it filed a tax return on **Form 990-T** for this year?	4b	N/A	
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? *If "Yes," attach the statement required by General Instruction T*	5		X
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	X	
7	Did the foundation have at least $5,000 in assets at any time during the year? *If "Yes," complete Part II, col (c), and Part XV*	7	X	
8a	Enter the states to which the foundation reports or with which it is registered (see page 19 of the instructions) ▶ STMT 4			
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 ▶ N/A

14 The books are in care of ▶ SUNTRUST BANK Telephone no ▶ (919)918-2450

Located at ▶ ZIP + 4 ▶ 27517

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here ▶ ☐
and enter the amount of tax-exempt interest received or accrued during the year ▶ 15

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

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

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

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	N/A
Organizations relying on a current notice regarding disaster assistance check here ▶ [ ]				
c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? N/A	[ ] Yes	[ ] No		
If "Yes," attach the statement required by Regulations section 53 4945-5(d)				
6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	[ ] Yes	[X] No		
b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?			6b	X (No)
If "Yes" to 6b, file Form 8870				
7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	[ ] Yes	[X] No		
b If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?			7b	N/A

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

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

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
SEE STATEMENT 5		7,952.	-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		NONE	NONE	NONE

Total number of other employees paid over $50,000 ▶ NONE

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

3 Five highest-paid independent contractors for professional services (see page 23 of the instructions). If none, enter "NONE"

(a) Name and address of each person paid more than $50,000	(b) Type of service	(c) Compensation
NONE		NONE

Total number of others receiving over $50,000 for professional services . . . . ▶ NONE

Part IX-A Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc	Expenses
1 NONE	
2	
3	
4	

Part IX-B Summary of Program-Related Investments (see page 23 of the instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1 NONE	
2	
All other program-related investments See page 24 of the instructions 3 NONE	
Total. Add lines 1 through 3 . . . . ▶	

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes.		
a	Average monthly fair market value of securities	1a	573,383.
b	Average of monthly cash balances	1b	57,090.
c	Fair market value of all other assets (see page 24 of the instructions)	1c	NONE
d	**Total** (add lines 1a, b, and c)	1d	630,473.
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	NONE
3	Subtract line 2 from line 1d	3	630,473.
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see page 25 of the instructions)	4	9,457.
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3 Enter here and on Part V, line 4	5	621,016.
6	**Minimum investment return.** Enter 5% of line 5	6	31,051.

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	31,051.
2a	Tax on investment income for 2009 from Part VI, line 5	2a	436.		
b	Income tax for 2009. (This does not include the tax from Part VI.)	2b			
c	Add lines 2a and 2b			2c	436.
3	Distributable amount before adjustments Subtract line 2c from line 1			3	30,615.
4	Recoveries of amounts treated as qualifying distributions			4	NONE
5	Add lines 3 and 4			5	30,615.
6	Deduction from distributable amount (see page 25 of the instructions)			6	NONE
7	**Distributable amount** as adjusted. Subtract line 6 from line 5 Enter here and on Part XIII, line 1			7	30,615.

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	32,758.
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	NONE
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	NONE
b	Cash distribution test (attach the required schedule)	3b	NONE
4	**Qualifying distributions** Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	32,758.
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	436.
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	32,322.

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				30,615.
2	Undistributed income, if any, as of the end of 2009				
a	Enter amount for 2008 only			13,453.	
b	Total for prior years 20 07 ,20 ___, 20 ___		NONE		
3	Excess distributions carryover, if any, to 2009				
a	From 2004 ...... NONE				
b	From 2005 ...... NONE				
c	From 2006 ...... NONE				
d	From 2007 ...... NONE				
e	From 2008 ...... NONE				
f	**Total** of lines 3a through e	NONE			
4	Qualifying distributions for 2009 from Part XII, line 4 ► $ 32,758.				
a	Applied to 2008, but not more than line 2a			13,453.	
b	Applied to undistributed income of prior years (Election required - see page 26 of the instructions)		NONE		
c	Treated as distributions out of corpus (Election required - see page 26 of the instructions)	NONE			
d	Applied to 2009 distributable amount				19,305.
e	Remaining amount distributed out of corpus	NONE			
5	Excess distributions carryover applied to 2009 *(If an amount appears in column (d), the same amount must be shown in column (a).)*	NONE			NONE
6	**Enter the net total of each column as indicated below:**				
a	Corpus Add lines 3f, 4c, and 4e. Subtract line 5	NONE			
b	Prior years' undistributed income. Subtract line 4b from line 2b		NONE		
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		NONE		
d	Subtract line 6c from line 6b. Taxable amount - see page 27 of the instructions		NONE		
e	Undistributed income for 2008 Subtract line 4a from line 2a Taxable amount - see page 27 of the instructions			NONE	
f	Undistributed income for 2009 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2010				11,310.
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)	NONE			
8	Excess distributions carryover from 2004 not applied on line 5 or line 7 (see page 27 of the instructions)	NONE			
9	**Excess distributions carryover to 2010.** Subtract lines 7 and 8 from line 6a	NONE			
10	Analysis of line 9:				
a	Excess from 2005 ... NONE				
b	Excess from 2006 ... NONE				
c	Excess from 2007 ... NONE				
d	Excess from 2008 ... NONE				
e	Excess from 2009 ... NONE				

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

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

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

	Tax year (a) 2009	Prior 3 years (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 ▶ [X] if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc (see page 28 of the instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d.

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

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*				
SEE STATEMENT 7				
Total . . . . ▶ 3a				28,782.
b *Approved for future payment*				
Total . . . . ▶ 3b				

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See page 28 of the instructions)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities			14	14,110.	
5 Net rental income or (loss) from real estate					
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal property					
7 Other investment income					
8 Gain or (loss) from sales of assets other than inventory			18	34,269.	
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)				48,379.	

13 **Total.** Add line 12, columns (b), (d), and (e) . . . . 13 48,379.

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

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

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

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

			Yes	No
1	Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?			
a	Transfers from the reporting foundation to a noncharitable exempt organization of			
	(1) Cash	1a(1)		X
	(2) Other assets	1a(2)		X
b	Other transactions			
	(1) Sales of assets to a noncharitable exempt organization	1b(1)		X
	(2) Purchases of assets from a noncharitable exempt organization	1b(2)		X
	(3) Rental of facilities, equipment, or other assets	1b(3)		X
	(4) Reimbursement arrangements	1b(4)		X
	(5) Loans or loan guarantees	1b(5)		X
	(6) Performance of services or membership or fundraising solicitations	1b(6)		X
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c		X

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

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

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

b If "Yes," complete the following schedule

(a) Name of organization	(b) Type of organization	(c) Description of relationship
N/A		

Sign Here

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

Signature of officer or trustee | Date 04/15/2010 | Title TRUSTEE

Paid Preparer's Use Only

Preparer's signature	Date 04/15/2010	Check if self-employed ☐	Preparer's identifying number (See Signature on page 30 of the instructions) P00353001
Firm's name (or yours if self-employed), address, and ZIP code	KPMG LLP PO BOX 6768 PROVIDENCE, RI 02940-6768	EIN ▶ 13-5565207	Phone no 888-942-3272

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

Kind of Property		Description				P or D	Date acquired	Date sold
Gross sale price less expenses of sale	Depreciation allowed/ allowable	Cost or other basis	FMV as of 12/31/69	Adj basis as of 12/31/69	Excess of FMV over adj basis		Gain or (loss)	
		TOTAL LONG-TERM CAPITAL GAIN DIVIDENDS					421.	
		3. BERKSHIRE HATHAWAY INC DEL CLASS B					03/26/2003	06/11/2009
		PROPERTY TYPE: SECURITIES						
8,751.00		6,630.00					2,121.00	
		3273.213 RIDGEWORTH FD-LARGECAP CORE EQT					06/02/2008	06/11/2009
		PROPERTY TYPE: SECURITIES						
34,827.00		49,000.00					-14,173.00	
		405. AT&T INC					09/17/1997	06/17/2009
		PROPERTY TYPE: SECURITIES						
9,829.00		8,778.00					1,051.00	
		150. ABBOTT LABS COM					01/18/2006	06/17/2009
		PROPERTY TYPE: SECURITIES						
6,898.00		6,243.00					655.00	
		300. CISCO SYSTEMS COM STK					06/21/1996	06/17/2009
		PROPERTY TYPE: SECURITIES						
5,817.00		1,763.00					4,054.00	
		300. WALT DISNEY CO					10/17/2005	06/17/2009
		PROPERTY TYPE: SECURITIES						
7,155.00		7,298.00					-143.00	
		100. EXXON MOBIL CORP					01/04/1996	06/17/2009
		PROPERTY TYPE: SECURITIES						
7,149.00		2,049.00					5,100.00	
		400. GENERAL ELEC CO COM					03/04/1996	06/17/2009
		PROPERTY TYPE: SECURITIES						
4,936.00		5,222.00					-286.00	
		400. INTEL CORP COM					04/01/1998	06/17/2009
		PROPERTY TYPE: SECURITIES						
6,472.00		7,668.00					-1,196.00	
		100. INTERNATIONAL BUSINESS MACHS COR					11/13/1997	06/17/2009
		PROPERTY TYPE: SECURITIES						
10,767.00		4,910.00					5,857.00	

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

Kind of Property		Description				P or D	Date acquired	Date sold
Gross sale price less expenses of sale	Depreciation allowed/ allowable	Cost or other basis	FMV as of 12/31/69	Adj basis as of 12/31/69	Excess of FMV over adj basis		Gain or (loss)	
		300. J P MORGAN CHASE & CO PROPERTY TYPE: SECURITIES					02/22/2002	06/17/2009
9,921.00		10,569.00					-648.00	
		300. MICROSOFT CORP COM PROPERTY TYPE: SECURITIES					06/15/2005	06/17/2009
7,116.00		3,600.00					3,516.00	
		300. ORACLE CORPORATION COM PROPERTY TYPE: SECURITIES					01/04/1996	06/17/2009
6,024.00		914.00					5,110.00	
		100. SCHLUMBERGER LTD COM PROPERTY TYPE: SECURITIES					03/27/2001	06/17/2009
5,610.00		3,122.00					2,488.00	
		4515.148 RIDGEWORTH FD-US GOVT SECS #532 PROPERTY TYPE: SECURITIES					06/22/2007	06/25/2009
48,357.00		46,321.00					2,036.00	
		200. CISCO SYSTEMS COM STK PROPERTY TYPE: SECURITIES					06/21/1996	06/30/2009
3,702.00		1,175.00					2,527.00	
		100. EXXON MOBIL CORP PROPERTY TYPE: SECURITIES					01/04/1996	06/30/2009
6,940.00		2,049.00					4,891.00	
		50. INTERNATIONAL BUSINESS MACHS COR C PROPERTY TYPE: SECURITIES					11/13/1997	06/30/2009
5,207.00		2,455.00					2,752.00	
		200. MICROSOFT CORP COM PROPERTY TYPE: SECURITIES					12/05/1995	06/30/2009
4,732.00		1,070.00					3,662.00	
		200. ORACLE CORPORATION COM PROPERTY TYPE: SECURITIES					01/04/1996	06/30/2009
4,272.00		609.00					3,663.00	
		802.591 RIDGEWORTH FD-SHORT TERM BD #516 PROPERTY TYPE: SECURITIES					01/08/2008	06/30/2009
7,745.00		7,832.00					-87.00	

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

Kind of Property		Description				P or D	Date acquired	Date sold
Gross sale price less expenses of sale	Depreciation allowed/ allowable	Cost or other basis	FMV as of 12/31/69	Adj basis as of 12/31/69	Excess of FMV over adj basis		Gain or (loss)	
		2072.806 RIDGEWORTH FD-INTERMEDIATE BD # PROPERTY TYPE: SECURITIES					01/08/2008	06/30/2009
21,495.00		21,267.00					228.00	
		216.358 DREYFUS BOSTON CO SMALLCAP EQTY PROPERTY TYPE: SECURITIES					06/25/2009	07/06/2009
5,273.00		5,410.00					-137.00	
		22.925 PIMCO FOREIGN BOND FUND PROPERTY TYPE: SECURITIES					02/22/2007	07/06/2009
221.00		232.00					-11.00	
		46.323 PIMCO FDS INVT GRADE CORP BD-I PROPERTY TYPE: SECURITIES					06/30/2009	07/06/2009
485.00		481.00					4.00	
		47.673 RIDGEWORTH FD-SHORT TERM BD #516 PROPERTY TYPE: SECURITIES					02/22/2007	07/06/2009
461.00		465.00					-4.00	
		71.516 RIDGEWORTH FD-SEIX FLT HIGH INCM# PROPERTY TYPE: SECURITIES					02/22/2007	07/06/2009
585.00		715.00					-130.00	
		174.64 RIDGEWORTH FD-INTERMEDIATE BD #85 PROPERTY TYPE: SECURITIES					01/08/2008	07/06/2009
1,818.00		1,792.00					26.00	
		10.506 ALLIANZ FDS NFJ SMALLCAP VALUE FD PROPERTY TYPE: SECURITIES					09/16/2008	07/20/2009
220.00		315.00					-95.00	
		94.811 EATON VANCE TAX-MGD VAL-I-IBT #35 PROPERTY TYPE: SECURITIES					06/11/2009	07/20/2009
1,279.00		1,277.00					2.00	
		77.721 T ROWE PRICE INSTL EQTY LARGECAP PROPERTY TYPE: SECURITIES					06/02/2008	07/20/2009
907.00		1,174.00					-267.00	
		88.025 RIDGEWORTH FD-MIDCAP VAL EQTY #41 PROPERTY TYPE: SECURITIES					06/02/2008	07/20/2009
713.00		913.00					-200.00	

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

Kind of Property		Description				P or D	Date acquired	Date sold
Gross sale price less expenses of sale	Depreciation allowed/ allowable	Cost or other basis	FMV as of 12/31/69	Adj basis as of 12/31/69	Excess of FMV over adj basis		Gain or (loss)	
		208.765 RIDGEWORTH FD-LARGECAP VAL EQTY# PROPERTY TYPE: SECURITIES					06/02/2008	07/20/2009
1,977.00		2,685.00					-708.00	
		206.194 RIDGEWORTH FD-LARGECAP GRTH STK# PROPERTY TYPE: SECURITIES					06/11/2009	07/20/2009
1,598.00		1,577.00					21.00	
		6.355 RIDGEWORTH FD-INTL EQ INDEX #530 PROPERTY TYPE: SECURITIES					06/11/2009	07/20/2009
72.00		72.00						
		17.279 SENTINEL FDS SMALL CO-I PROPERTY TYPE: SECURITIES					07/06/2009	07/20/2009
94.00		89.00					5.00	
		454.062 ALLIANZ FDS NFJ SMALLCAP VALUE F PROPERTY TYPE: SECURITIES					07/06/2009	10/26/2009
10,766.00		8,995.00					1,771.00	
		441.318 ALLIANZ FDS NFJ SMALLCAP VALUE F PROPERTY TYPE: SECURITIES					09/24/2008	10/26/2009
10,464.00		13,205.00					-2,741.00	
		1546.553 EATON VANCE TAX-MGD VAL-I-IBT # PROPERTY TYPE: SECURITIES					06/11/2009	10/26/2009
23,554.00		20,832.00					2,722.00	
		133.619 PIMCO COMMODITY REALRTN STRATEGY PROPERTY TYPE: SECURITIES					06/02/2008	10/26/2009
1,093.00		2,583.00					-1,490.00	
		790.332 RIDGEWORTH FD-LARGECAP VAL EQTY# PROPERTY TYPE: SECURITIES					06/11/2009	10/26/2009
8,409.00		7,500.00					909.00	
		2746.134 RIDGEWORTH FD-LARGECAP VAL EQTY PROPERTY TYPE: SECURITIES					06/02/2008	10/26/2009
29,219.00		35,315.00					-6,096.00	
		591.742 RIDGEWORTH FD-EMERGING GROWTH #5 PROPERTY TYPE: SECURITIES					07/06/2009	10/26/2009
5,929.00		4,888.00					1,041.00	

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

Kind of Property		Description				P or D	Date acquired	Date sold
Gross sale price less expenses of sale	Depreciation allowed/ allowable	Cost or other basis	FMV as of 12/31/69	Adj basis as of 12/31/69	Excess of FMV over adj basis		Gain or (loss)	
		3604.833 RIDGEWORTH FD-LARGECAP GRTH STK PROPERTY TYPE: SECURITIES					06/25/2009	10/26/2009
31,326.00		27,550.00					3,776.00	
		867.344 RIDGEWORTH FD-INTL EQ INDEX #530 PROPERTY TYPE: SECURITIES					06/11/2009	10/26/2009
11,527.00		9,853.00					1,674.00	
		302.774 RIDGEWORTH FD-INTL 130/30 #242 PROPERTY TYPE: SECURITIES					06/11/2009	10/26/2009
2,074.00		1,747.00					327.00	
		5.98 EATON VANCE TAX-MGD VAL-I-IBT #3557 PROPERTY TYPE: SECURITIES					06/11/2009	01/19/2010
97.00		81.00					16.00	
		114.784 T ROWE PRICE INSTL EQTY LARGECAP PROPERTY TYPE: SECURITIES					06/02/2008	01/19/2010
1,646.00		1,733.00					-87.00	
		40.363 JANUS PERKINS SMALL CAP VALUE-I PROPERTY TYPE: SECURITIES					10/26/2009	01/19/2010
867.00		808.00					59.00	
		63.723 MANNING & NAPIER FD WORLD OPPTYS- PROPERTY TYPE: SECURITIES					10/26/2009	01/19/2010
534.00		512.00					22.00	
		17.388 OPPENHEIMER DEVELOPING MKTS INSTL PROPERTY TYPE: SECURITIES					10/26/2009	01/19/2010
510.00		473.00					37.00	
		286.897 PIMCO FOREIGN BOND FUND PROPERTY TYPE: SECURITIES					10/26/2009	01/19/2010
2,915.00		2,781.00					134.00	
		901.662 PIMCO FOREIGN BOND FUND PROPERTY TYPE: SECURITIES					02/22/2007	01/19/2010
9,161.00		9,143.00					18.00	
		34.892 PIMCO FDS INVT GRADE CORP BD-I PROPERTY TYPE: SECURITIES					10/26/2009	01/19/2010
388.00		389.00					-1.00	

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

Kind of Property		Description				P or D	Date acquired	Date sold
Gross sale price less expenses of sale	Depreciation allowed/ allowable	Cost or other basis	FMV as of 12/31/69	Adj basis as of 12/31/69	Excess of FMV over adj basis		Gain or (loss)	
		147.822 RIDGEWORTH FD-MIDCAP VAL EQTY #4 PROPERTY TYPE: SECURITIES					06/02/2008	01/19/2010
1,561.00		1,533.00					28.00	
		77.476 RIDGEWORTH FD-LARGECAP VAL EQTY#5 PROPERTY TYPE: SECURITIES					06/11/2009	01/19/2010
884.00		735.00					149.00	
		31.398 RIDGEWORTH FD-LARGECAP GRTH STK#5 PROPERTY TYPE: SECURITIES					06/25/2009	01/19/2010
292.00		233.00					59.00	
		843.536 RIDGEWORTH FD-INTERMEDIATE BD #8 PROPERTY TYPE: SECURITIES					10/26/2009	01/19/2010
8,874.00		8,840.00					34.00	
		65.791 ROWE T PRICE REAL ESTATE FD COM PROPERTY TYPE: SECURITIES					06/02/2008	01/19/2010
927.00		1,328.00					-401.00	
		39.077 SENTINEL FDS SMALL CO-I PROPERTY TYPE: SECURITIES					10/26/2009	01/19/2010
254.00		240.00					14.00	
TOTAL GAIN(LOSS)							34,268.	

POTTER, CLYDE R., MD CHARITABLE 49-7903672 56-6267552

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

DESCRIPTION		REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
DIVIDENDS & INTEREST		14,110.	13,399.
	TOTAL	14,110.	13,399.

FORM 990PF, PART I - TAXES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
FOREIGN TAXES		120.
TOTALS		120.

FORM 990PF, PART II - OTHER INVESTMENTS

DESCRIPTION	COST/ FMV C OR F	BEGINNING BOOK VALUE	ENDING BOOK VALUE	ENDING FMV
SEE ATTACHED STATEMENT	C	459,801.	572,710.	640,854.
TOTALS		459,801.	572,710.	640,854.

STATE(S) WHERE THE FOUNDATION IS REGISTERED
NC

STATEMENT 4

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

OFFICER NAME:
SUNTRUST BANK
ADDRESS:
1414 Raleigh Rd, Ste 150
Chapel Hill, NC 27517
TITLE:
TRUSTEE, AS REQ'D
COMPENSATION .... 7,952.

TOTAL COMPENSATION: 7,952.

FORM 990PF, PART XV, LINE 3 - CONTRIBUTIONS, GIFTS, GRANTS PAID

RECIPIENT NAME:
DUCKS UNLIMITED INC
ATTN: JON RICH
ADDRESS:
ONE WATERFOWL WAY
MEMPHIS, TN 38120
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
GENERAL CHARITABLE PURPOSE
FOUNDATION STATUS OF RECIPIENT:
N/A
AMOUNT OF GRANT PAID .... 20,148.

RECIPIENT NAME:
ENDOWMENT/INVESTMENT ACCOUNTING
DUKE UNIVERSITY
ADDRESS:
324 BLACKWELL ST, SUITE 1000
DURHAM, NC 27701
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
GENERAL CHARITABLE PURPOSE
FOUNDATION STATUS OF RECIPIENT:
N/A
AMOUNT OF GRANT PAID .... 2,878.

RECIPIENT NAME:
WAKE FOREST UNIV GEN ENDOWMENT FND
OFFICE OF DEVELOPMENT
ADDRESS:
7227 REYNOLDA STATION
WINSTON-SALEM, NC 27109
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
GENERAL CHARITABLE PURPOSE
FOUNDATION STATUS OF RECIPIENT:
N/A
AMOUNT OF GRANT PAID .... 2,878.

RECIPIENT NAME:
NATHAN A WOMACK SURGICAL SOCIETY
C/O MED FOUNDATION OF NC
ADDRESS:
880 MLK JR BLVD
CHAPEL HILL, NC 27514
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
GENERAL CHARITABLE PURPOSE
FOUNDATION STATUS OF RECIPIENT:
N/A
AMOUNT OF GRANT PAID .... 2,878.

TOTAL GRANTS PAID: 28,782.

SCHEDULE D
(Form 1041)

Department of the Treasury
Internal Revenue Service

Capital Gains and Losses

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

OMB No 1545-0092

2009

Name of estate or trust	Employer identification number
POTTER, CLYDE R., MD CHARITABLE 49-7903672	56-6267552

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

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

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

b	Enter the short-term gain or (loss), if any, from Schedule D-1, line 1b	1b	12,543.
2	Short-term capital gain or (loss) from Forms 4684, 6252, 6781, and 8824	2	
3	Net short-term gain or (loss) from partnerships, S corporations, and other estates or trusts	3	
4	Short-term capital loss carryover. Enter the amount, if any, from line 9 of the 2008 Capital Loss Carryover Worksheet	4	( )
5	**Net short-term gain or (loss).** Combine lines 1a through 4 in column (f) Enter here and on line 13, column (3) on the back ▶	5	12,543.

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

	(a) Description of property (Example 100 shares 7% preferred of "Z" Co)	(b) Date acquired (mo , day, yr)	(c) Date sold (mo , day, yr)	(d) Sales price	(e) Cost or other basis (see page 4 of the instructions)	(f) Gain or (loss) for the entire year Subtract (e) from (d)
6a	LONG-TERM CAPITAL GAIN DIVIDENDS		STMT 1			421.

b	Enter the long-term gain or (loss), if any, from Schedule D-1, line 6b	6b	21,115.
7	Long-term capital gain or (loss) from Forms 2439, 4684, 6252, 6781, and 8824	7	
8	Net long-term gain or (loss) from partnerships, S corporations, and other estates or trusts	8	
9	Capital gain distributions	9	189.
10	Gain from Form 4797, Part I	10	
11	Long-term capital loss carryover. Enter the amount, if any, from line 14 of the 2008 Capital Loss Carryover Worksheet	11	( )
12	**Net long-term gain or (loss).** Combine lines 6a through 11 in column (f) Enter here and on line 14a, column (3) on the back ▶	12	21,725.

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

			(1) Beneficiaries' (see page 5)	(2) Estate's or trust's	(3) Total
13	**Net short-term gain or (loss)**	13			12,543.
14	**Net long-term gain or (loss):**				
a	Total for year	14a			21,725.
b	Unrecaptured section 1250 gain (see line 18 of the wrksht)	14b			
c	28% rate gain	14c			
15	**Total net gain or (loss).** Combine lines 13 and 14a ▶	15			34,268.

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

Part IV **Capital Loss Limitation**

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

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

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

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

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

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

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

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

SCHEDULE D-1
(Form 1041)

Department of the Treasury
Internal Revenue Service

Continuation Sheet for Schedule D (Form 1041)

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

OMB No 1545-0092

2009

Name of estate or trust: POTTER, CLYDE R., MD CHARITABLE 49-7903672

Employer identification number: 56-6267552

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

(a) Description of property (Example 100 sh 7% preferred of "Z" Co)	(b) Date acquired (mo , day, yr)	(c) Date sold (mo , day, yr)	(d) Sales price (see page 4 of the instructions)	(e) Cost or other basis (see page 4 of the instructions)	(f) Gain or (loss) Subtract (e) from (d)
1a 216.358 DREYFUS BOSTON CO SMALLCAP EQTY TE	06/25/2009	07/06/2009	5,273.00	5,410.00	-137.00
46.323 PIMCO FDS INVT GRADE CORP BD-I	06/30/2009	07/06/2009	485.00	481.00	4.00
10.506 ALLIANZ FDS NFJ SMALLCAP VALUE FD	09/16/2008	07/20/2009	220.00	315.00	-95.00
94.811 EATON VANCE TAX-MGD VAL-I-IBT #35572	06/11/2009	07/20/2009	1,279.00	1,277.00	2.00
206.194 RIDGEWORTH FD-LARGECAP GRTH STK#510	06/11/2009	07/20/2009	1,598.00	1,577.00	21.00
6.355 RIDGEWORTH FD-INTL EQ INDEX #530	06/11/2009	07/20/2009	72.00	72.00	
17.279 SENTINEL FDS SMALL CO-I	07/06/2009	07/20/2009	94.00	89.00	5.00
454.062 ALLIANZ FDS NFJ SMALLCAP VALUE FD	07/06/2009	10/26/2009	10,766.00	8,995.00	1,771.00
1546.553 EATON VANCE TAX-MGD VAL-I-IBT #35572	06/11/2009	10/26/2009	23,554.00	20,832.00	2,722.00
790.332 RIDGEWORTH FD-LARGECAP VAL EQTY#512	06/11/2009	10/26/2009	8,409.00	7,500.00	909.00
591.742 RIDGEWORTH FD-EMERGING GROWTH #593	07/06/2009	10/26/2009	5,929.00	4,888.00	1,041.00
3604.833 RIDGEWORTH FD-LARGECAP GRTH STK#510	06/25/2009	10/26/2009	31,326.00	27,550.00	3,776.00
867.344 RIDGEWORTH FD-INTL EQ INDEX #530	06/11/2009	10/26/2009	11,527.00	9,853.00	1,674.00
302.774 RIDGEWORTH FD-INTL 130/30 #242	06/11/2009	10/26/2009	2,074.00	1,747.00	327.00
5.98 EATON VANCE TAX-MGD VAL-I-IBT #35572	06/11/2009	01/19/2010	97.00	81.00	16.00
40.363 JANUS PERKINS SMALL CAP VALUE-I	10/26/2009	01/19/2010	867.00	808.00	59.00
63.723 MANNING & NAPIER FD WORLD OPPTYS-A	10/26/2009	01/19/2010	534.00	512.00	22.00
17.388 OPPENHEIMER DEVELOPING MKTS INSTL-Y	10/26/2009	01/19/2010	510.00	473.00	37.00
286.897 PIMCO FOREIGN BOND FUND	10/26/2009	01/19/2010	2,915.00	2,781.00	134.00
34.892 PIMCO FDS INVT GRADE CORP BD-I	10/26/2009	01/19/2010	388.00	389.00	-1.00
77.476 RIDGEWORTH FD-LARGECAP VAL EQTY#512	06/11/2009	01/19/2010	884.00	735.00	149.00
31.398 RIDGEWORTH FD-LARGECAP GRTH STK#510	06/25/2009	01/19/2010	292.00	233.00	59.00
843.536 RIDGEWORTH FD-INTERMEDIATE BD #850	10/26/2009	01/19/2010	8,874.00	8,840.00	34.00
39.077 SENTINEL FDS SMALL CO-I	10/26/2009	01/19/2010	254.00	240.00	14.00

1b Total. Combine the amounts in column (f) Enter here and on Schedule D, line 1b 12,543.00

Name of estate or trust as shown on Form 1041 Do not enter name and employer identification number if shown on the other side	Employer identification number
POTTER, CLYDE R., MD CHARITABLE 49-7903672	56-6267552

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

(a) Description of property (Example 100 sh 7% preferred of "Z" Co)	(b) Date acquired (mo , day, yr)	(c) Date sold (mo , day, yr)	(d) Sales price (see page 4 of the instructions)	(e) Cost or other basis (see page 4 of the instructions)	(f) Gain or (loss) Subtract (e) from (d)
6a 3. BERKSHIRE HATHAWAY INC DEL CLASS B	03/26/2003	06/11/2009	8,751.00	6,630.00	2,121.00
3273.213 RIDGEWORTH FD-LARGECAP CORE EQTY#983	06/02/2008	06/11/2009	34,827.00	49,000.00	-14,173.00
405. AT&T INC	09/17/1997	06/17/2009	9,829.00	8,778.00	1,051.00
150. ABBOTT LABS COM	01/18/2006	06/17/2009	6,898.00	6,243.00	655.00
300. CISCO SYSTEMS COM STK	06/21/1996	06/17/2009	5,817.00	1,763.00	4,054.00
300. WALT DISNEY CO	10/17/2005	06/17/2009	7,155.00	7,298.00	-143.00
100. EXXON MOBIL CORP	01/04/1996	06/17/2009	7,149.00	2,049.00	5,100.00
400. GENERAL ELEC CO COM	03/04/1996	06/17/2009	4,936.00	5,222.00	-286.00
400. INTEL CORP COM	04/01/1998	06/17/2009	6,472.00	7,668.00	-1,196.00
100. INTERNATIONAL BUSINESS MACHS COR COM	11/13/1997	06/17/2009	10,767.00	4,910.00	5,857.00
300. J P MORGAN CHASE & CO	02/22/2002	06/17/2009	9,921.00	10,569.00	-648.00
300. MICROSOFT CORP COM	06/15/2005	06/17/2009	7,116.00	3,600.00	3,516.00
300. ORACLE CORPORATION COM	01/04/1996	06/17/2009	6,024.00	914.00	5,110.00
100. SCHLUMBERGER LTD COM	03/27/2001	06/17/2009	5,610.00	3,122.00	2,488.00
4515.148 RIDGEWORTH FD-US GOVT SECS #532	06/22/2007	06/25/2009	48,357.00	46,321.00	2,036.00
200. CISCO SYSTEMS COM STK	06/21/1996	06/30/2009	3,702.00	1,175.00	2,527.00
100. EXXON MOBIL CORP	01/04/1996	06/30/2009	6,940.00	2,049.00	4,891.00
50. INTERNATIONAL BUSINESS MACHS COR COM	11/13/1997	06/30/2009	5,207.00	2,455.00	2,752.00
200. MICROSOFT CORP COM	12/05/1995	06/30/2009	4,732.00	1,070.00	3,662.00
200. ORACLE CORPORATION COM	01/04/1996	06/30/2009	4,272.00	609.00	3,663.00
802.591 RIDGEWORTH FD-SHORT TERM BD #516	01/08/2008	06/30/2009	7,745.00	7,832.00	-87.00
2072.806 RIDGEWORTH FD-INTERMEDIATE BD #850	01/08/2008	06/30/2009	21,495.00	21,267.00	228.00
22.925 PIMCO FOREIGN BOND FUND	02/22/2007	07/06/2009	221.00	232.00	-11.00
47.673 RIDGEWORTH FD-SHORT TERM BD #516	02/22/2007	07/06/2009	461.00	465.00	-4.00
71.516 RIDGEWORTH FD-SEIX FLT HIGH INCM#203	02/22/2007	07/06/2009	585.00	715.00	-130.00

6b Total. Combine the amounts in column (f) Enter here and on Schedule D, line 6b . . . .

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

POTTER, CLYDE R., MD CHARITABLE 49-7903672

Employer identification number

56-6267552

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

(a) Description of property (Example 100 sh 7% preferred of "Z" Co)	(b) Date acquired (mo , day, yr)	(c) Date sold (mo , day, yr)	(d) Sales price (see page 4 of the instructions)	(e) Cost or other basis (see page 4 of the instructions)	(f) Gain or (loss) Subtract (e) from (d)
6a 174.64 RIDGEWORTH FD-INTERMEDIATE BD #850	01/08/2008	07/06/2009	1,818.00	1,792.00	26.00
77.721 T ROWE PRICE INSTL EQTY LARGECAP GRW	06/02/2008	07/20/2009	907.00	1,174.00	-267.00
88.025 RIDGEWORTH FD-MIDCAP VAL EQTY #412	06/02/2008	07/20/2009	713.00	913.00	-200.00
208.765 RIDGEWORTH FD-LARGECAP VAL EQTY#512	06/02/2008	07/20/2009	1,977.00	2,685.00	-708.00
441.318 ALLIANZ FDS NFJ SMALLCAP VALUE FD	09/24/2008	10/26/2009	10,464.00	13,205.00	-2,741.00
133.619 PIMCO COMMODITY REALRTN STRATEGY USA	06/02/2008	10/26/2009	1,093.00	2,583.00	-1,490.00
2746.134 RIDGEWORTH FD-LARGECAP VAL EQTY#512	06/02/2008	10/26/2009	29,219.00	35,315.00	-6,096.00
114.784 T ROWE PRICE INSTL EQTY LARGECAP GRW	06/02/2008	01/19/2010	1,646.00	1,733.00	-87.00
901.662 PIMCO FOREIGN BOND FUND	02/22/2007	01/19/2010	9,161.00	9,143.00	18.00
147.822 RIDGEWORTH FD-MIDCAP VAL EQTY #412	06/02/2008	01/19/2010	1,561.00	1,533.00	28.00
65.791 ROWE T PRICE REAL ESTATE FD COM	06/02/2008	01/19/2010	927.00	1,328.00	-401.00

6b Total. Combine the amounts in column (f) Enter here and on Schedule D, line 6b 21,115.00

FEDERAL CAPITAL GAIN DIVIDENDS

LONG-TERM CAPITAL GAIN DIVIDENDS

15% RATE CAPITAL GAIN DIVIDENDS

PIMCO FOREIGN BOND FUND	78.00	
PIMCO COMMODITY REALRTN STRATEGY USA	153.00	
PIMCO FDS INVT GRADE CORP BD-I	121.00	
RIDGEWORTH FD-INTERMEDIATE BD #850	69.00	
TOTAL 15% RATE CAPITAL GAIN DIVIDENDS		421.00
TOTAL LONG-TERM CAPITAL GAIN DIVIDENDS		421.00

STATEMENT 1

990PF, PART VII-B LINE 2B – SECTION 4942a2 EXPLANATION STATEMENT

This question does not apply. The foundation does not have any undistributed income from prior years

SunTrust

PORTFOLIO DETAIL

ϽTTER, CLYDE R., MD CHARITABLE FDN
ϽCOUNT NO. 7903672

AS OF 03/31/10

ΑR VALUE Ɽ SHARES	ASSET DESCRIPTION	MARKET VALUE MARKET PRICE % OF MARKET	FED TAX COST COST PER UNIT	UNREALIZED GAIN/LOSS (FED TO MKT)	ESTIMATED ANNUAL INCOME	INCOME YIELD AT MARKET/ YIELD TO MATURITY
ƦINCIPAL PORTFOLIO						
ΓIF & MONEY MARKET FUNDS						
32,066.7	RIDGEWORTH FD-US GOVT SECS MM I SHS #502 CUSIP: 76628T330	32,066.70 1.000 4.71 %	32,066.70 1.00	0.00	15	0.05 % 0.00 %
ЈTUAL FUNDS						
1,179.029	ABERDEEN FDS EQUITY LONG SHORT FD INSTL CL CUSIP: 003020336	13,264.08 11.250 1.95 %	12,875.00 10.92	389.08	0	0.00 % 0.00 %
3,302.356	EATON VANCE TR TAX-MANAGED VALUE CL I-IBT #35572 CUSIP: 277923629	54,389.80 16.470 7.99 %	42,957.33 13.01	11,432.47	697	1.28 % 0.00 %
1,253.799	FORUM FDS ABSOLUTE STRATEGIES FD INSTL SHS CUSIP: 34984T600	13,365.50 10.660 1.96 %	13,099.98 10.45	265.52	171	1.28 % 0.00 %
1,245.209	JANUS FDS PERKINS SMALL CAP VALUE FD CL I CUSIP: 47103C183	27,867.78 22.380 4.09 %	24,941.53 20.03	2,926.25	73	0.26 % 0.00 %
4,740.506	MANNING & NAPIER FD INC WORLD OPPORTUNITIES SER CL A CUSIP: 563821545	39,441.01 8.320 5.79 %	38,113.67 8.04	1,327.34	280	0.71 % 0.00 %
455.958	OPPENHEIMER FDS DEVELOPING MKTS INSTL FD CL Y CUSIP: 683974505	13,345.89 29.270 1.96 %	12,402.05 27.20	943.84	80	0.60 % 0.00 %

SunTrust

PORTFOLIO DETAIL

OTTER, CLYDE R., MD CHARITABLE FDN
CCOUNT NO. 7903672

AS OF 03/31/10

AR VALUE R SHARES	ASSET DESCRIPTION	MARKET VALUE MARKET PRICE % OF MARKET	FED TAX COST COST PER UNIT	UNREALIZED GAIN/LOSS (FED TO MKT)	ESTIMATED ANNUAL INCOME	INCOME YIELD AT MARKET/ YIELD TO MATURITY
1,585.544	PIMCO COMMODITY REALRETURN STRATEGY FD USA-INS CUSIP: 722005667	12,398.95 7.820 1.82 %	16,265.73 10.26	3,866.78-	975	7.86 % 0.00 %
1,780.782	PIMCO FDS INVT GRADE CORP BD INSTL INVT GRADE CORP BD FD INSTL CL CUSIP: 722005816	19,909.14 11.180 2.92 %	18,545.01 10.41	1,364.13	1,152	5.79 % 0.00 %
2,054.145	SENTINEL FDS SMALL CO FD-I CUSIP: 81728B825	13,824.40 6.730 2.03 %	11,515.82 5.61	2,308.58	0	0.00 % 0.00 %
3,732.088	T ROWE PRICE INSTL EQUITY FDS INC LARGE-CAP GROWTH FD CUSIP: 45775L408	54,712.41 14.660 8.04 %	49,206.85 13.18	5,505.56	86	0.16 % 0.00 %
959.819	T ROWE PRICE REAL ESTATE FD SHS CUSIP: 779919109	14,579.65 15.190 2.14 %	13,742.34 14.32	837.31	422	2.89 % 0.00 %
1,529.53	TEMPLETON INCOME TR GLOBAL BD FD ADVISOR CL CUSIP: 880208400	20,434.52 13.360 3.00 %	19,838.00 12.97	596.52	873	4.27 % 0.00 %
TOTAL MUTUAL FUNDS		297,533.13	273,503.31	24,029.82	4,810	1.62 %

SUNTRUST

PORTFOLIO DETAIL

)TTER, CLYDE R., MD CHARITABLE FDN
:COUNT NO. 7903672

AS OF 03/31/10

AR VALUE R SHARES	ASSET DESCRIPTION	MARKET VALUE MARKET PRICE % OF MARKET	FED TAX COST COST PER UNIT	UNREALIZED GAIN/LOSS (FED TO MKT)	ESTIMATED ANNUAL INCOME	INCOME YIELD AT MARKET/ YIELD TO MATURITY
ROPRIETARY FUNDS						
9,419.14	RIDGEWORTH FD-INTERMEDIATE BD I SHS #850 CUSIP: 76628T702	99,183.54 10.530 14.57 %	94,278.50 10.01	4,905.04	2,958	2.98 % 0.00 %
2,004.727	RIDGEWORTH FD-INTL EQUITY INDEX I SHS #530 CUSIP: 76628R813	25,500.13 12.720 3.75 %	22,048.08 11.00	3,452.05	1,315	5.16 % 0.00 %
976.101	RIDGEWORTH FD-INTL 130/30 I SHS #242 CUSIP: 76628R870	6,588.68 6.750 0.97 %	5,478.65 5.61	1,110.03	238	3.61 % 0.00 %
3,606.149	RIDGEWORTH FD-LARGECAP GROWTH STK I SHS #510 CUSIP: 76628R748	34,582.97 9.590 5.08 %	26,257.88 7.28	8,325.09	47	0.14 % 0.00 %
7,023.242	RIDGEWORTH FD-LARGECAP VALUE EQUITY I SHS #512 CUSIP: 76628R672	82,242.16 11.710 12.08 %	64,051.10 9.12	18,191.06	1,215	1.48 % 0.00 %
3,168.807	RIDGEWORTH FD-MIDCAP VAL EQUITY I SHS #412 CUSIP: 76628R615	35,395.57 11.170 5.20 %	27,274.06 8.61	8,121.51	364	1.03 % 0.00 %
3,033.855	RIDGEWORTH FD-SEIX FLTG RT HIGH INCM I SHS #203 CUSIP: 76628T678	26,697.92 8.800 3.92 %	27,264.37 8.99	566.45-	1,487	5.57 % 0.00 %
3,332.964	RIDGEWORTH FD-SHORT TERM BD I SHS #516 CUSIP: 76628T611	33,129.66 9.940 4.87 %	32,554.53 9.77	575.13	990	2.99 % 0.00 %

SUNTRUST

PORTFOLIO DETAIL

)TTER, CLYDE R., MD CHARITABLE FDN
:COUNT NO. 7903672

AS OF 03/31/10

AR VALUE R SHARES	ASSET DESCRIPTION	MARKET VALUE MARKET PRICE % OF MARKET	FED TAX COST COST PER UNIT	UNREALIZED GAIN/LOSS (FED TO MKT)	ESTIMATED ANNUAL INCOME	INCOME YIELD AT MARKET/ YIELD TO MATURITY
TOTAL PROPRIETARY FUNDS		343,320.63	299,207.17	44,113.46	8,614	2.51 %
(SCELLANEOUS ASSETS						
1	CLASS ACTION PENDING AMERICAN INTL GROUP ON RCPT OF FINAL PMT CUSIP: 997001FA5	0.00 0.000 0.00 %	0.00 0.00	0.00	0	0.00 % 0.00 %
1	CLASS ACTION PENDING MOTOROLA ON RCPT OF FINAL PMT CUSIP: 997001FD9	0.00 0.000 0.00 %	0.00 0.00	0.00	0	0.00 % 0.00 %
1	CLASS ACTION PENDING TYCO INTL ON RCPT OF FINAL PMT CUSIP: 997000VX9	0.00 0.000 0.00 %	0.00 0.00	0.00	0	0.00 % 0.00 %
TOTAL MISCELLANEOUS ASSETS		0.00	0.00	0.00	0	0.00 %
?INCIPAL PORTFOLIO TOTAL		672,920.46	604,777.18	68,143.28	13,438	2.00 %

ICOME PORTFOLIO

SUNTRUST

PORTFOLIO DETAIL

OTTER, CLYDE R., MD CHARITABLE FDN
CCOUNT NO. 7903672

AS OF 03/31/10

AR VALUE R SHARES	ASSET DESCRIPTION	MARKET VALUE MARKET PRICE % OF MARKET	FED TAX COST COST PER UNIT	UNREALIZED GAIN/LOSS (FED TO MKT)	ESTIMATED ANNUAL INCOME	INCOME YIELD AT MARKET/ YIELD TO MATURITY
TIF & MONEY MARKET FUNDS						
7,807.26	RIDGEWORTH FD-US GOVT SECS MM I SHS #502 CUSIP: 76628T330	7,807.26 1.000 1.15 %	7,807.26 1.00	0.00	4	0.05 % 0.00 %
NCOME PORTFOLIO TOTAL		7,807.26	7,807.26	0.00	4	0.05 %
OTAL ASSETS		680,727.72	612,584.44	68,143.28	13,442	1.97 %

SUNTRUST

TRANSACTION SUMMARY

OTTER, CLYDE R., MD CHARITABLE FDN
CCOUNT NO. 7903672

03/01/10 THROUGH 03/31/10

	PRINCIPAL CASH	INCOME CASH	FED TAX COST
BEGINNING BALANCES	0.00	0.00	612,394.62
RECEIPTS			
DIVIDENDS	0.00	1,073.52	0.00
OTHER RECEIPTS	0.00	145.80	0.00
TOTAL RECEIPTS	0.00	1,219.32	0.00
DISBURSEMENTS			
ADMINISTRATIVE EXPENSES	514.75-	514.75-	0.00
TOTAL DISBURSEMENTS	514.75-	514.75-	0.00
CASH SWEEP TRANSACTIONS			
SWEEP PURCHASES	0.00	1,219.32-	1,219.32
SWEEP SALES	514.75	514.75	1,029.50-
TOTAL CASH SWEEP TRANSACTIONS	514.75	704.57-	189.82
ENDING BALANCES	0.00	0.00	612,584.44

SUNTRUST

MARKET VALUE SUMMARY

BEGINNING MARKET VALUE		654,500.92
RECEIPTS		
DIVIDENDS	1,073.52	
OTHER RECEIPTS	145.80	
TOTAL RECEIPTS		1,219.32
DISBURSEMENTS		
ADMINISTRATIVE EXPENSES	1,029.50-	
TOTAL DISBURSEMENTS		1,029.50-
NET CHANGE IN MARKET VALUE		26,036.98
ENDING MARKET VALUE		680,727.72