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

OMB No 1545-0052

2009

Department of the Treasury  
Internal Revenue Service

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

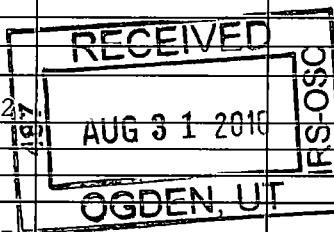
For calendar year 2009, or tax year beginning 6/01, 2009, and ending 5/31, 2010

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	JOHN T. STEVENS FOUNDATION POST OFFICE BOX 158 KERSHAW, SC 29067	A Employer identification number 57-6005554
		B Telephone number (see the instructions) (803) 475-3655
H Check type of organization <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		C If exemption application is pending, check here <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, column (c), line 16) \$		D 1 Foreign organizations, check here <input type="checkbox"/> 2 Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
J Accounting method <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ (Part I, column (d) must be on cash basis)		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/> F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>

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 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 (att sch)				
	2 CK <input checked="" type="checkbox"/> if the foundn is not req to att Sch B				
	3 Interest on savings and temporary cash investments	73,323.	73,323.	73,323.	
	4 Dividends and interest from securities	204,583.	204,583.	204,583.	
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain/(loss) from sale of assets not on line 10				
	b Gross sales price for all assets on line 6a				
	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/(loss) (att sch)					
11 Other income (attach schedule) SEE STATEMENT 1	3,099.				
12 Total. Add lines 1 through 11	281,005.	277,906.	277,906.		
ADMINISTRATIVE AND OPERATING EXPENSES	13 Compensation of officers, directors, trustees, etc	46,200.		46,200.	
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach sch) SEE ST 2	5,190.		5,190.	
	c Other prof fees (attach sch)				
	17 Interest				
	18 Taxes (attach schedule)(see instr)				
	19 Depreciation (attach sch) and depletion	1,712.		1,712.	
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
23 Other expenses (attach schedule) SEE STATEMENT 3	10,377.		10,377.		
24 Total operating and administrative expenses. Add lines 13 through 23	63,479.		63,479.		
25 Contributions, gifts, grants paid PART XV	245,743.			245,743.	
26 Total expenses and disbursements. Add lines 24 and 25	309,222.	0.	63,479.	245,743.	
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements	-28,217.				
b Net investment income (if negative, enter -0-)		277,906.			
c Adjusted net income (if negative, enter -0-)			214,427.		

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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		16,731.	34,323.	
	2	Savings and temporary cash investments		1,191,120.	1,219,982.	
	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 the instructions)				
	7	Other notes and loans receivable (attach sch)				
		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)		1,022,684.	1,304,677.	
	b	Investments — corporate stock (attach schedule)		3,766,614.	3,536,301.	
	c	Investments — corporate bonds (attach schedule)		58,737.	79,959.	
	11	Investments — land, buildings, and equipment basis	47,824.			
	Less accumulated depreciation (attach schedule) SEE STMT 4	23,790.	25,746.	24,034.		
12	Investments — mortgage loans					
13	Investments — other (attach schedule)					
14	Land, buildings, and equipment basis					
	Less accumulated depreciation (attach schedule)					
15	Other assets (describe)		39.			
16	<b>Total assets</b> (to be completed by all filers — see instructions. Also, see page 1, item I)		6,081,671.	6,199,276.	0.	
LIABILITIES	17	Accounts payable and accrued expenses				
	18	Grants payable				
	19	Deferred revenue				
	20	Loans from officers, directors, trustees, & other disqualified persons				
	21	Mortgages and other notes payable (attach schedule)				
	22	Other liabilities (describe SEE STATEMENT 5)			2,358.	
	23	<b>Total liabilities</b> (add lines 17 through 22)		0.	2,358.	
FUND ASSETS	Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31.		<input checked="" type="checkbox"/>			
	24	Unrestricted		6,081,671.	6,196,918.	
	25	Temporarily restricted				
	26	Permanently restricted				
	Foundations that do not follow SFAS 117, check here and complete lines 27 through 31.		<input type="checkbox"/>			
	27	Capital stock, trust principal, or current funds				
	28	Paid-in or capital surplus, or land, building, and equipment fund				
	29	Retained earnings, accumulated income, endowment, or other funds				
30	<b>Total net assets or fund balances</b> (see the instructions)		6,081,671.	6,196,918.		
31	<b>Total liabilities and net assets/fund balances</b> (see the instructions)		6,081,671.	6,199,276.		

## 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	6,081,671.
2	Enter amount from Part I, line 27a	2	-28,217.
3	Other increases not included in line 2 (itemize) SEE STATEMENT 6	3	149,022.
4	Add lines 1, 2, and 3	4	6,202,476.
5	Decreases not included in line 2 (itemize) SEE STATEMENT 7	5	5,558.
6	Total net assets or fund balances at end of year (line 4 minus line 5) — Part II, column (b), line 30	6	6,196,918.

**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 shares MLC Company)		(b) How acquired P — Purchase D — Donation	(c) Date acquired (month, day, year)	(d) Date sold (month, day, year)
1 a N/A				
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) Gains (Column (h) gain minus column (k), but not less than -0-) or Losses (from column (h))
(i) Fair Market Value as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of column (i) over column (j), if any	
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 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 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 (column (b) divided by column (c))
2008	292,486.	6,300,419.	0.046423
2007	426,624.	7,669,299.	0.055628
2006	388,600.	7,815,739.	0.049720
2005	268,604.	7,383,019.	0.036381
2004	238,810.	7,168,053.	0.033316

2 Total of line 1, column (d)

2

0.221468

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

0.044294

4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5

4

6,051,123.

5 Multiply line 4 by line 3

5

268,028.

6 Enter 1% of net investment income (1% of Part I, line 27b)

6

2,779.

7 Add lines 5 and 6

7

270,807.

8 Enter qualifying distributions from Part XII, line 4

8

245,743.

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

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

1 a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter 'N/A' on line 1 Date of ruling or determination letter _____ (attach copy of letter if necessary - see instr.)		1	5,558.
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b			
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, column (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	5,558.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		4	0.
5 <b>Tax based on investment income.</b> Subtract line 4 from line 3. If zero or less, enter -0-		5	5,558.
6 Credits/Payments			
a 2009 estimated tax pmts and 2008 overpayment credited to 2009	6a	3,200.	
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	3,200.	
8 Enter any <b>penalty</b> for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8		
9 <b>Tax due.</b> If the total of lines 5 and 8 is more than line 7, enter <b>amount owed</b>	9	2,358.	
10 <b>Overpayment.</b> If line 7 is more than the total of lines 5 and 8, enter the <b>amount overpaid</b>	10		
11 Enter the amount of line 10 to be <b>Credited to 2010 estimated tax</b> <input type="checkbox"/> <b>Refunded</b> <input type="checkbox"/>	11		

**Part VII-A Statements Regarding Activities**

	Yes	No
1 a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see the instructions for definition)? <i>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</i>		X
c Did the foundation file <b>Form 1120-POL</b> for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation <input type="checkbox"/> \$ 0. (2) On foundation managers <input type="checkbox"/> \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input type="checkbox"/> \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If 'Yes,' attach a detailed description of the activities</i>		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? <i>If 'Yes,' attach a conformed copy of the changes</i>		X
4 a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If 'Yes,' has it filed a tax return on <b>Form 990-T</b> for this year?	N/A	
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If 'Yes,' attach the statement required by General Instruction T</i>		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?		X
7 Did the foundation have at least \$5,000 in assets at any time during the year? <i>If 'Yes,' complete Part II, column (c), and Part XV</i>	X	
8 a Enter the states to which the foundation reports or with which it is registered (see 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? <i>If 'No,' attach explanation</i>	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)? <i>If 'Yes,' complete Part XIV</i>		X
10 Did any persons become substantial contributors during the tax year? <i>If 'Yes,' attach a schedule listing their names and addresses</i>		X

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**Part VII-A** Statements Regarding Activities *Continued*

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If 'Yes', attach schedule (see instructions)	11		X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address <u>N/A</u>	13	X	
14	The books are in care of <u>STEVE WILLIAMS, SR.</u> Telephone no <u>(803) 475-3655</u> Located at <u>POST OFFICE BOX 158, KERSHAW, SC</u> ZIP + 4 <u>29067</u>			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 – Check here <u>N/A</u> and enter the amount of tax-exempt interest received or accrued during the year <u>15</u>	N/A		

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

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

	Yes	No
<b>1a</b> 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?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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)?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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)	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
<b>b</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 the instructions)? Organizations relying on a current notice regarding disaster assistance check here <input type="checkbox"/>	1b	N/A
<b>c</b> 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
<b>2</b> 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))		
<b>a</b> At the end of tax year 2009, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2009? If 'Yes,' list the years <u>20__ , 20__ , 20__ , 20__</u>	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
<b>b</b> Are there any years listed in 2a for which the foundation is <b>not</b> 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 <b>all</b> years listed, answer 'No' and attach statement – see the instructions)	2b	N/A
<b>c</b> If the provisions of section 4942(a)(2) are being applied to <b>any</b> of the years listed in 2a, list the years here <u>20__ , 20__ , 20__ , 20__</u>		
<b>3a</b> Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
<b>b</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
<b>4a</b> Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	X
<b>b</b> Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2009?	4b	X

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**Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required** (continued)**5a** During the year did the foundation pay or incur any amount to

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?

☐ Yes ☒ No

(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?

☐ Yes ☒ No

(3) Provide a grant to an individual for travel, study, or other similar purposes?

☐ Yes ☒ No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see instructions)

☐ Yes ☒ No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?

☐ Yes ☒ No**b** If any answer is 'Yes' to 5a(1)-(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?

5b N/A

Organizations relying on a current notice regarding disaster assistance check here

☐**c** If the answer is 'Yes' to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?N/A ☐ Yes ☐ No

If 'Yes,' attach the statement required by Regulations section 53.4945-5(d)

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

6b X

If 'Yes' to 6b, file Form 8870

**7a** At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?☐ Yes ☒ No**b** If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?

7b N/A

**Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors****1** List all officers, directors, trustees, foundation managers and their compensation (see 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 8		46,200.	0.	0.

**2** Compensation of five highest-paid employees (other than those included on line 1— see 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

0

**Part VIII** Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)**3** Five highest-paid independent contractors for professional services – (see 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		0

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

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.

	Expenses
1 N/A	
2	
3	
4	

**Part IX-B** Summary of Program-Related Investments (see instructions)

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

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

<b>1</b> Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
<b>a</b> Average monthly fair market value of securities	<b>1a</b>	6,078,252.
<b>b</b> Average of monthly cash balances	<b>1b</b>	40,129.
<b>c</b> Fair market value of all other assets (see instructions)	<b>1c</b>	24,891.
<b>d Total</b> (add lines 1a, b, and c)	<b>1d</b>	6,143,272.
<b>e</b> Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	<b>1e</b>	0.
<b>2</b> Acquisition indebtedness applicable to line 1 assets	<b>2</b>	0.
<b>3</b> Subtract line 2 from line 1d	<b>3</b>	6,143,272.
<b>4</b> Cash deemed held for charitable activities Enter 1-1/2% of line 3 (for greater amount, see instructions)	<b>4</b>	92,149.
<b>5 Net value of noncharitable-use assets.</b> Subtract line 4 from line 3 Enter here and on Part V, line 4	<b>5</b>	6,051,123.
<b>6 Minimum investment return.</b> Enter 5% of line 5	<b>6</b>	302,556.

**Part XI Distributable Amount** (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ☐ and do not complete this part.)

<b>1</b> Minimum investment return from Part X, line 6	<b>1</b>	302,556.
<b>2a</b> Tax on investment income for 2009 from Part VI, line 5	<b>2a</b>	5,558.
<b>b</b> Income tax for 2009 (This does not include the tax from Part VI.)	<b>2b</b>	
<b>c</b> Add lines 2a and 2b	<b>2c</b>	5,558.
<b>3</b> Distributable amount before adjustments Subtract line 2c from line 1	<b>3</b>	296,998.
<b>4</b> Recoveries of amounts treated as qualifying distributions	<b>4</b>	
<b>5</b> Add lines 3 and 4	<b>5</b>	296,998.
<b>6</b> Deduction from distributable amount (see instructions)	<b>6</b>	
<b>7 Distributable amount</b> as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1	<b>7</b>	296,998.

**Part XII Qualifying Distributions** (see instructions)

<b>1</b> Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes		
<b>a</b> Expenses, contributions, gifts, etc. — total from Part I, column (d), line 26	<b>1a</b>	245,743.
<b>b</b> Program-related investments — total from Part IX-B	<b>1b</b>	
<b>2</b> Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	<b>2</b>	
<b>3</b> Amounts set aside for specific charitable projects that satisfy the		
<b>a</b> Suitability test (prior IRS approval required)	<b>3a</b>	
<b>b</b> Cash distribution test (attach the required schedule)	<b>3b</b>	
<b>4 Qualifying distributions</b> Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	<b>4</b>	245,743.
<b>5</b> 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 instructions)	<b>5</b>	
<b>6 Adjusted qualifying distributions.</b> Subtract line 5 from line 4	<b>6</b>	245,743.

**Note:** The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years

**Part XIII** Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
<b>1</b> Distributable amount for 2009 from Part XI, line 7				296,998.
<b>2</b> Undistributed income, if any, as of the end of 2009				
<b>a</b> Enter amount for 2008 only			186,083.	
<b>b</b> Total for prior years 20____, 20____, 20____		0.		
<b>3</b> Excess distributions carryover, if any, to 2009				
<b>a</b> From 2004				
<b>b</b> From 2005				
<b>c</b> From 2006				
<b>d</b> From 2007				
<b>e</b> From 2008				
<b>f</b> Total of lines 3a through e	0.			
<b>4</b> Qualifying distributions for 2009 from Part XII, line 4 ▶ \$ 245,743.				
<b>a</b> Applied to 2008, but not more than line 2a			186,083.	
<b>b</b> Applied to undistributed income of prior years (Election required – see instructions)		0.		
<b>c</b> Treated as distributions out of corpus (Election required – see instructions)	0.			
<b>d</b> Applied to 2009 distributable amount				59,660.
<b>e</b> Remaining amount distributed out of corpus	0.			
<b>5</b> Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a) )	0.			0.
<b>6</b> Enter the net total of each column as indicated below:				
<b>a</b> Corpus Add lines 3f, 4c, and 4e Subtract line 5	0.			
<b>b</b> Prior years' undistributed income Subtract line 4b from line 2b		0.		
<b>c</b> Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
<b>d</b> Subtract line 6c from line 6b Taxable amount – see instructions		0.		
<b>e</b> Undistributed income for 2008 Subtract line 4a from line 2a Taxable amount – see instructions			0.	
<b>f</b> Undistributed income for 2009 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2010				237,338.
<b>7</b> Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions)	0.			
<b>8</b> Excess distributions carryover from 2004 not applied on line 5 or line 7 (see instructions)	0.			
<b>9</b> Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a	0.			
<b>10</b> Analysis of line 9				
<b>a</b> Excess from 2005				
<b>b</b> Excess from 2006				
<b>c</b> Excess from 2007				
<b>d</b> Excess from 2008				
<b>e</b> Excess from 2009				

BAA

Form 990-PF (2009)



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

Recipient	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
Name and address (home or business)				
<b>a</b> Paid during the year SEE STATEMENT 10				
<b>Total</b>			<b>3a</b>	245,743.
<b>b</b> Approved for future payment				
<b>Total</b>			<b>3b</b>	

**Part XVI-A Analysis of Income-Producing Activities**

Enter gross amounts unless otherwise indicated

Enter gross amounts unless otherwise indicated	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (see the instructions)
	(a) Business code	(b) Amount	(c) Exclu- sion code	(d) Amount	
1 Program service revenue					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments			14	73,323.	
4 Dividends and interest from securities			14	204,583.	
5 Net rental income or (loss) from real estate					
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal property					
7 Other investment income			14	3,099.	
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)				281,005.	
13 Total. Add line 12, columns (b), (d), and (e)				13	281,005.

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

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

[illegible]



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## FEDERAL STATEMENTS

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**STATEMENT 1**  
**FORM 990-PF, PART I, LINE 11**  
**OTHER INCOME**

	(A) REVENUE PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME
OTHER INVESTMENT INCOME	\$ 3,099.		
TOTAL	\$ 3,099.	\$ 0.	\$ 0.

**STATEMENT 2**  
**FORM 990-PF, PART I, LINE 16B**  
**ACCOUNTING FEES**

	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING FEES	\$ 5,190.		\$ 5,190.	
TOTAL	\$ 5,190.	\$ 0.	\$ 5,190.	\$ 0.

**STATEMENT 3**  
**FORM 990-PF, PART I, LINE 23**  
**OTHER EXPENSES**

	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
INSURANCE	\$ 848.		\$ 848.	
MISCELLANEOUS	9,529.		9,529.	
TOTAL	\$ 10,377.	\$ 0.	\$ 10,377.	\$ 0.

**STATEMENT 4**  
**FORM 990-PF, PART II, LINE 11**  
**INVESTMENTS - LAND, BUILDINGS, AND EQUIPMENT**

CATEGORY	BASIS	ACCUM. DEPREC.	BOOK VALUE	FAIR MARKET VALUE
FURNITURE AND FIXTURES	\$ 3,057.	\$ 3,057.	\$ 0.	\$ 0.
BUILDINGS	44,767.	20,733.	24,034.	0.
TOTAL	\$ 47,824.	\$ 23,790.	\$ 24,034.	\$ 0.

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**STATEMENT 5**  
**FORM 990-PF, PART II, LINE 22**  
**OTHER LIABILITIES**

TOTAL \$ 2,358.

**STATEMENT 6**  
**FORM 990-PF, PART III, LINE 3**  
**OTHER INCREASES**

GAIN IN UNREALIZED INVESTMENTS

TOTAL \$ 149,022.  
TOTAL \$ 149,022.

**STATEMENT 7**  
**FORM 990-PF, PART III, LINE 5**  
**OTHER DECREASES**

EXCISE TAXES / PENALTIES

TOTAL \$ 5,558.  
TOTAL \$ 5,558.

**STATEMENT 8**  
**FORM 990-PF, PART VIII, LINE 1**  
**LIST OF OFFICERS, DIRECTORS, TRUSTEES, AND KEY EMPLOYEES**

NAME AND ADDRESS	TITLE AND AVERAGE HOURS PER WEEK DEVOTED	COMPEN- SATION	CONTRI- BUTION TO EBP & DC	EXPENSE ACCOUNT/ OTHER
STEVE WILLIAMS, SR. KERSHAW, SC	PRESIDENT 1.00	\$ 1,050.	\$ 0.	\$ 0.
DOUGLAS WILLIAMS KERSHAW, SC	VICE PRESIDENT 1.00	8,400.	0.	0.
STEVE WILLIAMS, JR. KERSHAW, SC	TREASURER 1.00	8,400.	0.	0.
JASON MUNN KERSHAW, SC	0	7,700.	0.	0.
LANNY M. WILLIAMS KERSHAW, SC	1.00	8,400.	0.	0.



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**STATEMENT 8 (CONTINUED)**  
**FORM 990-PF, PART VIII, LINE 1**  
**LIST OF OFFICERS, DIRECTORS, TRUSTEES, AND KEY EMPLOYEES**

NAME AND ADDRESS	TITLE AND AVERAGE HOURS PER WEEK DEVOTED	COMPEN- SATION	CONTRI- BUTION TO EBP & DC	EXPENSE ACCOUNT/ OTHER
JOEY MUNN KERSHAW, SC	TREASURER 1.00	\$ 12,250.	\$ 0.	\$ 0.
TOTAL		\$ 46,200.	\$ 0.	\$ 0.

**STATEMENT 9**  
**FORM 990-PF, PART XV, LINE 2A-D**  
**APPLICATION SUBMISSION INFORMATION**

NAME OF GRANT PROGRAM:  
NAME: JOHN T. STEVENS FOUNDATION  
CARE OF: STEVE WILLIAMS SR.  
STREET ADDRESS: P. O. BOX 158  
CITY, STATE, ZIP CODE: KERSHAW, SC 29067  
TELEPHONE: 803-475-3655  
FORM AND CONTENT: THE REQUEST MUST BE IN WRITING  
SUBMISSION DEADLINES: NONE  
RESTRICTIONS ON AWARDS: KERSHAW AND LANCASTER COUNTY AREAS AND MUST QUALIFY AS A  
501 (C) 3 ORGANIZATION

**STATEMENT 10**  
**FORM 990-PF, PART XV, LINE 3A**  
**RECIPIENT PAID DURING THE YEAR**

NAME AND ADDRESS	DONEE RELATIONSHIP	FOUND- ATION STATUS	PURPOSE OF GRANT	AMOUNT
ANDREW JACKSON HIGH SCHOOL 6925 KERSHAW-CAMDEN HWY KERSHAW, SC 29067	NONE	PUBLIC	MISCELLANEOUS BAND ACTIVITIES	\$ 6,500.
ANDREW JACKSON MIDDLE SCHOOL 6865 KERSHAW-CAMDEN HWY KERSHAW, SC 29067	NONE	PUBLIC	EDUCATIONAL MATERIALS	2,300.
CAMDEN ELEMENTARY SCHOOL 1304 LYTTLETON STREET CAMDEN, SC 29020	NONE	PUBLIC	EDUCATIONAL MATERIALS	3,700.
CAMDEN HIGH SCHOOL 1022 EHRENCLOU DRIVE CAMDEN, SC 29020	NONE	PUBLIC	CLASSROOM MATERIALS	3,000.

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**STATEMENT 10 (CONTINUED)**  
**FORM 990-PF, PART XV, LINE 3A**  
**RECIPIENT PAID DURING THE YEAR**

NAME AND ADDRESS	DONEE RELATIONSHIP	FOUND- ATION STATUS	PURPOSE OF GRANT	AMOUNT
CLINTON CHAPEL AME CHURCH PO BOX 124 KERSHAW, SC 29067	NONE	PUBLIC	BUILDING RESTORATION	\$ 5,000.
COLUMBUS PARKER TRACK CLUB PO BOX 145 LANCASTER, SC 29721	NONE	PUBLIC	SUPPORT	1,000.
COMMUNITY MEDICAL CLINIC CITY OF KERSHAW 110C EAST DEKALB STREET CAMDEN, SC 29020	NONE	PUBLIC	SUPPORT	5,000.
DOBY'S MILL ELEMENTARY SCHOOL 1964 FT. JACKSON RD LUGOFF, SC 29078	NONE	PUBLIC	CLASSROOM MATERIALS	2,500.
FIRST BAPTIST CHURCH 210 NORTH MATSON STREET KERSHAW, SC 29067	NONE	PUBLIC	SUPPORT/ASSISTIN G THE NEEDY	13,100.
FLATCREEK VOLUNTEER FIRE DEPARTMENT 7563 FLOAT CREEK ROAD KERSHAW, SC 29067	NONE	PUBLIC	EQUIPMENT PURCHASES	4,800.
KERSHAW CHAMBER OF COMMERCE POST OFFICE BOX 441 KERSHAW, SC 29067	NONE	PUBLIC	EVENT SUPPORT	4,000.
KERSHAW CONSERVATION DISTRICT 1126 LITTLE ST CAMDEN, SC 29020	NONE	PUBLIC	BUDGET SUPPORT	100.
LANCASTER COUNTY COUNCIL OF ARTS 201 W GAY STREET LANCASTER, SC 29721	NONE	PUBLIC	SUPPORT/SUMMER PROGRAMS	8,750.
LANCASTER COUNTY LITERACY COUNCIL 610 EAST MEETING STREET LANCASTER, SC 29720	NONE	PUBLIC	SUPPORT	2,000.
OPERATION RUDOLPH 7048 HILTON DRIVE KERSHAW, SC 29067	NONE	PUBLIC	ASSISTING THE NEEDY	10,000.

JOHN T. STEVENS FOUNDATION

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**STATEMENT 10 (CONTINUED)**  
**FORM 990-PF, PART XV, LINE 3A**  
**RECIPIENT PAID DURING THE YEAR**

NAME AND ADDRESS	DONEE RELATIONSHIP	FOUND- ATION STATUS	PURPOSE OF GRANT	AMOUNT
PALMETTO COUNCIL BSA 420 SOUTH CHURCH STREET SPARTANBURG, SC 29306	NONE	PUBLIC	SUPPORT	\$ 1,000.
SANDHILL MISSIONARY BAPTIST CHURCH PO BOX 296 KERSHAW, SC 29067	NONE	PUBLIC	LITERACY & TECHNOLOGY PROJECT	2,500.
SISTERCARE OF KERSHAW CITY PO BOX 1029 COLUMBIA, SC 29202	NONE	PUBLIC	BUDGET SUPPORT	2,500.
TOWN OF KERSHAW 113 SOUTH HAMPTON ST KERSHAW, SC 29067	NONE	PUBLIC	SUPPORT	15,500.
UNITED WAY OF KERSHAW 110 DEKALB ST, SUITE 1A CAMDEN, SC 29021	NONE	PUBLIC	SUPPORT	4,500.
UPTON TRIO 2233 FOREST DRIVE CAMDEN, SC 29020	NONE	PUBLIC	SUPPORT	2,500.
USC SCHOOL OF MEDICINE 1600 HAMPTON STREET STE 736 COLUMBIA, SC 29208	NONE	PUBLIC	SCHOLARSHIPS	41,000.
WATEREE ELEMENTARY SCHOOL 424 WILDWOOD LANE LUGOFF, SC 29078	NONE	PUBLIC	INSTRUCATIONAL TOOLS	3,393.
AMERICAN RED CROSS 106 C WOODLAND DRIVE LANCASTER, SC 29720	NONE	PUBLIC	SUPPORT	2,000.
CAMDEN MIDDLE SCHOOL 416 LAURENS STREET CAMDEN, SC 29020	NONE	PUBLIC	CLASSROOM SUPPLIES	1,000.
CAMDEN MILITARY ACADEMY 520 HIGHWAY 1 NORTH CAMDEN, SC 29020	NONE	PUBLIC	SUPPORT	2,500.
KIWANIS CLUB OF CAMDEN P.O. BOX 494 CAMDEN, SC 29021	NONE	PUBLIC	SCHOLARSHIP SUPPORT	1,500.
MT CALVARY OUTREACH CENTER P.O. BOX 158 KERSHAW, SC 29067	NONE	PUBLIC	SUMMER PROGRAM	5,000.

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**STATEMENT 10 (CONTINUED)**  
**FORM 990-PF, PART XV, LINE 3A**  
**RECIPIENT PAID DURING THE YEAR**

NAME AND ADDRESS	DONEE RELATIONSHIP	FOUND- ATION STATUS	PURPOSE OF GRANT	AMOUNT
NEWHAVEN BAPTIST CHURCH 9244 TAXAHAW ROAD JEFFERSON, SC 29718	NONE	PUBLIC	BUILDING REPAIR ASSISTANCE	\$ 2,000.
LANCASTER COUNTY SHERIFF 1941 PAGELAND HWY LANVASTER, SC 29721	NONE	PUBLIC	EQUIPMENT PURCHASES	13,000.
KERSHAW HOG JAM 108 NORTH HAMPTON ST. KERSHAW, SC 29067	NONE	PUBLIC	EVENT FUNDING	1,000.
BELMONT BAPTIST CHURCH 65 PAYNE POND RD CAMDEN, SC 29020	NONE	PUBLIC	SUPPORT	2,500.
INDIAN WATERS COUNCIL - BSA P.O. BOX 144 COLUMBIA, SC 29202	NONE	PUBLIC	SUPPORT	1,000.
BUFFALO-MT. PISGAH VOLUNTEER FIRE DEPT 5203 MT. PISGAH RD KERSHAW, SC 29067	NONE	PUBLIC	EQUIPMENT PURCHASES	2,000.
CAMDEN-KERSHAW COUNTY RESCUE SQUAD 1000 LYTTLETON STREET CAMDEN, SC 29020	NONE	PUBLIC	SUPPORT	5,000.
EDUCATIONAL FOUNDATION OF USC LANCASTER 476 HUBBARD DR LANCASTER, SC 29720	NONE	PUBLIC	BUDGET SUPPORT	10,000.
EL ROI MINISTRIES 10900 TRADEWINDS LAND CHARLOTTE, NC 28226	NONE	PUBLIC	PRISON MINISTRY	1,000.
FLINT RIDGE BAPTIST CHURCH 1850 FLINT RIDGE RD HEATH SPRINGS, SC 29058	NONE	PUBLIC	BUILDING IMPROVEMENTS	8,000.
GREATER FRAZIER AME ZION CHURCH 101 SOUTH WILLOW LAKE RD LANCASTER, SC 29720	NONE	PUBLIC	BUILDING IMPROVEMENTS	2,000.
HIGHLAND HEIGHTS CEMETERY 263 LITTLE DUDE AVE KERSHAW, SC 29067	NONE	PUBLIC	SUPPORT	3,000.

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**STATEMENT 10 (CONTINUED)**  
**FORM 990-PF, PART XV, LINE 3A**  
**RECIPIENT PAID DURING THE YEAR**

NAME AND ADDRESS	DONEE RELATIONSHIP	FOUND- ATION STATUS	PURPOSE OF GRANT	AMOUNT
HISTORIC CAMDEN 811 FAIR STREET CAMDEN, SC 29020	NONE	PUBLIC	BUILDING RESTORATION	\$ 5,300.
KERSHAW ELEMENTARY SCHOOL 108 NORTH ROLLINS DRIVE KERSHAW, SC 29067	NONE	PUBLIC	EDUCATION TRIP	6,800.
LANCASTER CHILDREN'S HOME 1287 CHILDRENS AVE LANCASTER, SC 29720	NONE	PUBLIC	SUPPORT	2,500.
PALMETTO CONSERVATION FOUNDATION 722 KING STREET COLUMBIA, SC 29205	NONE	PUBLIC	SUPPORT	6,000.
PERFORMING ARTS CENTER - USC LANCASTER 476 HUBBARD DR LANCASTER, SC 29720	NONE	PUBLIC	SUPPORT	1,000.
SC EQUINE PROMOTION FOUNDATION 443 CLEVELAND SCHOOL RD CAMDEN, SC 29020	NONE	PUBLIC	SUPPORT	1,000.
SAINT MATTHEWS BAPTIST CHURCH 759 LONGTOWN RD LUGOFF, SC 29078	NONE	PUBLIC	BUILDING IMPROVEMENTS	1,000.
THE CHILDREN'S COUNCIL 1240 CHILDRENS AVE LANCASTER, SC 29720	NONE	PUBLIC	EDUCATIONAL PROGRAMS	1,000.
TOWN OF HEATH SPRINGS P.O. BOX 100 HEATH SPRINGS, SC 29058	NONE	PUBLIC	EVENT FUNDING	1,000.
YORK TECHNICAL COLLEGE 452 SOUTH ANDERSON RD ROCK HILL, SC 29730	NONE	PUBLIC	TRAINING FACILITIES	10,000.
BOY SCOUT TROOP 74 1066 SUNSET BLVD WEST COLUMBIA, SC 29169	NONE	PUBLIC	SUPPORT	3,000.
TOTAL				\$ 245,743.