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Form 990-PF

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

OMB No 1545-0052

Department of the Treasury  
Internal Revenue Service (77)

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

2009

For calendar year 2009, or tax year beginning

7/1/2009, and ending

6/30/2010

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.Name of foundation  
**PAUL & ELIZABETH YOUNTS CHAR TUW**A Employer identification number  
**56-6169362**See Specific  
Instructions.Number and street (or P O box number if mail is not delivered to street address)  
**WELLS FARGO BANK N.A - 1525 West WT Harris Blvd**B Telephone number (see page 10 of the instructions)  
**(888) 730-4933**

Room/suite

City or town, state, and ZIP code  
**Charlotte NC 28288-5709**C If exemption application is pending, check here ►   
D 1. Foreign organizations, check here ► 2. Foreign organizations meeting the 85% test,  
check here and attach computation ► E If private foundation status was terminated  
under section 507(b)(1)(A), check here ► F If the foundation is in a 60-month termination  
under section 507(b)(1)(B), check here ► H Check type of organization    Section 501(c)(3) exempt private foundation  
 Section 4947(a)(1) nonexempt charitable trust    Other taxable private foundationI Fair market value of all assets at end  
of year (from Part II, col (c),  
line 16) ► \$ **1,561,835** (Part I, column (d) must be on cash basis)J Accounting method.    Cash    Accrual  
 Other (specify)**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)
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1 Contributions, gifts, grants, etc., received (attach schedule)				
2 Check ► <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B				
3 Interest on savings and temporary cash investments	0	0		
4 Dividends and interest from securities	52,948	52,441		
5 a Gross rents		0		
b Net rental income or (loss)	0			
6 a Net gain or (loss) from sale of assets not on line 10	-27,384			
b Gross sales price for all assets on line 6a	157,953			
7 Capital gain net income (from Part IV, line 2)		0		
8 Net short-term capital gain			0	
9 Income modifications				
10 a Gross sales less returns and allowances	0			
b Less Cost of goods sold	0			
c Gross profit or (loss) (attach schedule)	0			
11 Other income (attach schedule)	0	0	0	
12 Total. Add lines 1 through 11	25,564	52,441	0	

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13 Compensation of officers, directors, trustees, etc	0			
14 Other employee salaries and wages	396	0	0	396
15 Pension plans, employee benefits	2,333	0	0	2,333
16 a Legal fees (attach schedule)	0	0	0	0
b Accounting fees (attach schedule)	1,406	448	0	0
c Other professional fees (attach schedule)	0	0	0	0
17 Interest				
18 Taxes (attach schedule) (see page 14 of the instructions)				
19 Depreciation (attach schedule) and depletion	0	0	0	0
20 Occupancy				
21 Travel, conferences, and meetings				
22 Printing and publications				
23 Other expenses (attach schedule)	19,503	14,627	0	4,876
24 Total operating and administrative expenses.	23,638	15,075	0	7,605
Add lines 13 through 23	69,260			69,260
25 Contributions, gifts, grants paid	92,898	15,075	0	76,865
26 Total expenses and disbursements. Add lines 24 and 25	-67,334			
27 Subtract line 26 from line 12				
a Excess of revenue over expenses and disbursements				
b Net investment income (if negative, enter -0-)		37,366		
c Adjusted net income (if negative, enter -0-)			0	

21 NC

<b>Part II</b> <b>Balance Sheets</b>		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions )	<b>Beginning of year</b>	<b>End of year</b>	
			<b>(a) Book Value</b>	<b>(b) Book Value</b>	<b>(c) Fair Market Value</b>
<b>Assets</b>	1	Cash—non-interest-bearing		0	
	2	Savings and temporary cash investments	5,080	11,385	11,385
	3	Accounts receivable ►	0	0	0
		Less allowance for doubtful accounts ►	0	0	0
	4	Pledges receivable ►	0	0	0
		Less allowance for doubtful accounts ►	0	0	0
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see page 15 of the instructions)		0	0
	7	Other notes and loans receivable (attach schedule) ►	0	0	0
		Less allowance for doubtful accounts ►	0	0	0
	8	Inventories for sale or use		0	
	9	Prepaid expenses and deferred charges		0	
	10	a Investments—U S and state government obligations (attach schedule)	0	0	0
	b	Investments—corporate stock (attach schedule)	0	0	0
	c	Investments—corporate bonds (attach schedule)	0	0	0
<b>Liabilities</b>	11	Investments—land, buildings, and equipment basis ►	0	0	0
		Less accumulated depreciation (attach schedule) ►	0	0	0
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)	1,701,174	1,571,964	1,550,450
	14	Land, buildings, and equipment basis ►	0	0	0
		Less accumulated depreciation (attach schedule) ►	0	0	0
	15	Other assets (descnbe ► )	0	0	0
	16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	1,706,254	1,583,349	1,561,835
	17	Accounts payable and accrued expenses		0	
	18	Grants payable			
<b>Net Assets or Fund Balances</b>	19	Deferred revenue		0	
	20	Loans from officers, directors, trustees, and other disqualified persons	0	0	
	21	Mortgages and other notes payable (attach schedule)	0	0	
	22	Other liabilities (descnbe ► )	0	0	
	23	Total liabilities (add lines 17 through 22)	0	0	
		Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31.	► <input type="checkbox"/>		
	24	Unrestrcted			
	25	Temporarly restricted			
	26	Permanently restricted			
		Foundations that do not follow SFAS 117, check here and complete lines 27 through 31.	► <input checked="" type="checkbox"/>		
<b>Part III</b> <b>Analysis of Changes in Net Assets or Fund Balances</b>	27	Capital stock, trust principal, or current funds	1,706,254	1,583,349	
	28	Paid-in or capital surplus, or land, bldg , and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds			
	30	Total net assets or fund balances (see page 17 of the instructions).	1,706,254	1,583,349	
	31	Total liabilities and net assets/fund balances (see page 17 of the instructions).	1,706,254	1,583,349	

**Part III** **Analysis of Changes in Net Assets or Fund Balances**

1	Total net assets or fund balances at beginning of year—Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	1,706,254
2	Enter amount from Part I, line 27a	2	-67,334
3	Other increases not included in line 2 (itemize) ►	3	0
4	Add lines 1, 2, and 3	4	1,638,920
5	Decreases not included in line 2 (itemize) ► See Attached Statement	5	55,571
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	1,583,349

**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.)
<b>1a See Attached Statement</b>					
<b>b</b>					
<b>c</b>					
<b>d</b>					
<b>e</b>					
<b>(e) Gross sales price</b>	<b>(f) Depreciation allowed (or allowable)</b>	<b>(g) Cost or other basis plus expense of sale</b>	<b>(h) Gain or (loss) (e) plus (f) minus (g)</b>		
a 0	0	0	0		
b 0	0	0	0		
c 0	0	0	0		
d 0	0	0	0		
e 0	0	0	0		
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			<b>(i) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))</b>		
<b>(i) FMV as of 12/31/69</b>	<b>(j) Adjusted basis as of 12/31/69</b>	<b>(k) Excess of col (i) over col (j), if any</b>			
a 0	0	0	0		
b 0	0	0	0		
c 0	0	0	0		
d 0	0	0	0		
e 0	0	0	0		
<b>2 Capital gain net income or (net capital loss)</b>	<b>{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }</b>		<b>2</b>	<b>-27,384</b>	
<b>3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6)</b> 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			<b>3</b>	<b>0</b>	

**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	70,805	1,444,911	0.049003
2007			0.000000
2006			0.000000
2005			0.000000
2004			0.000000

2 Total of line 1, column (d) 2 0.049003

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 0.049003

4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5 4 1,601,272

5 Multiply line 4 by line 3 5 78,467

6 Enter 1% of net investment income (1% of Part I, line 27b) 6 374

7 Add lines 5 and 6 7 78,841

8 Enter qualifying distributions from Part XII, line 4 8 76,865  
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)**1 a Exempt operating foundations described in section 4940(d)(2), check here ►  and enter "N/A" on line 1

Date of ruling or determination letter \_\_\_\_\_ (attach copy of letter if necessary—see instructions)

b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ►  and enter 1% of Part I, line 27b

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-)

3 Add lines 1 and 2

4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)

5 **Tax based on investment income.** Subtract line 4 from line 3 If zero or less, enter -0-

6 Credits/Payments

a 2009 estimated tax payments and 2008 overpayment credited to 2009

6a 820

b Exempt foreign organizations—tax withheld at source

6b

c Tax paid with application for extension of time to file (Form 8868)

6c 0

d Backup withholding erroneously withheld

6d

7 Total credits and payments Add lines 6a through 6d

7 820

8 Enter any penalty for underpayment of estimated tax Check here  if Form 2220 is attached

8 0

9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed

9 0

10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid

10 73

11 Enter the amount of line 10 to be Credited to 2010 estimated tax ►

73 Refunded ► 11 0

**Part VII-A Statements Regarding Activities**

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?

Yes No

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*

1c X

c Did the foundation file Form 1120-POL for this year?

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 ► \$ \_\_\_\_\_

2 X

e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ► \$ \_\_\_\_\_

3 X

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*

4a 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*

4b N/A

4 a Did the foundation have unrelated business gross income of \$1,000 or more during the year?

5 X

b If "Yes," has it filed a tax return on Form 990-T for this year?

6 X

5 Was there a liquidation, termination, dissolution, or substantial contraction during the year?

*If "Yes," attach the statement required by General Instruction T*

7 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?

8b 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*

9 X

8 a Enter the states to which the foundation reports or with which it is registered (see page 19 of the instructions) ► NC

10 X

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*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*10 Did any persons become substantial contributors during the tax year? *If "Yes," attach a schedule listing their names and addresses*

**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 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 ► WELLS FARGO BANK N.A. Telephone no ► (888) 730-4933  
Located at ► 1525 West WT Harris Blvd Charlotte NC ZIP+4 ► 28288-5709

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.

1a During the year did the foundation (either directly or indirectly)

Yes No

(1) Engage in the sale or exchange, or leasing of property with a disqualified person?  Yes  No(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?  Yes  No(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?  Yes  No(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?  Yes  No(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?  Yes  No(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days)  Yes  No

b If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here ► □

1b X

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 ► 20\_\_\_\_\_ 20\_\_\_\_\_ 20\_\_\_\_\_ 20\_\_\_\_\_

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 N/A

c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ► 20\_\_\_\_\_ 20\_\_\_\_\_ 20\_\_\_\_\_ 20\_\_\_\_\_

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))?  
 (2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?  
 (3) Provide a grant to an individual for travel, study, or other similar purposes?  
 (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)  
 (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  
 Yes  No  
 Yes  No  
 Yes  No  
 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 page 22 of the instructions)?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**

If "Yes," attach the statement required by Regulations section 53.4945–5(d)

**5b** N/A**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? If "Yes" to 6b, file Form 8870.**6b** X**7a** At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?

Yes  No

**b** If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?**7b****Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors****1 List all officers, directors, trustees, foundation managers and their compensation (see page 22 of the instructions).**

(a) Name and address	(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
WELLS FARGO BANK N.A. 1525 West WT Harris Blvd Charlotte NC 28288-	TRUSTEE	4.00	19,504	0
		.00	0	0
		00	0	0
		00	0	0

**2 Compensation of five highest-paid employees (other than those included on line 1—see page 23 of the instructions). If none, enter "NONE."**

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
None				

**Total number of other employees paid over \$50,000**

► 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 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		0
		0
		0
		0
		0
		0
<b>Total number of others receiving over \$50,000 for professional services</b>		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
<b>1</b>	NONE	
<b>2</b>		
<b>3</b>		
<b>4</b>		

**Part IX-B Summary of Program-Related Investments (see page 24 of the instructions)**

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2		Amount
<b>1</b>	NONE	
<b>2</b>		
All other program-related investments. See page 24 of the instructions		
<b>3</b>	NONE	
<b>Total. Add lines 1 through 3</b>		0

**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	1,587,241
b	Average of monthly cash balances	1b	38,416
c	Fair market value of all other assets (see page 24 of the instructions)	1c	
d	Total (add lines 1a, b, and c)	1d	1,625,657
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	
3	Subtract line 2 from line 1d	3	1,625,657
4	Cash deemed held for charitable activities Enter 1 1/2 % of line 3 (for greater amount, see page 25 of the instructions)	4	24,385
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	1,601,272
6	Minimum investment return. Enter 5% of line 5	6	80,064

**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	80,064
2a	Tax on investment income for 2009 from Part VI, line 5	2a	747
b	Income tax for 2009 (This does not include the tax from Part VI)	2b	
c	Add lines 2a and 2b	2c	747
3	Distributable amount before adjustments Subtract line 2c from line 1	3	79,317
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	79,317
6	Deduction from distributable amount (see page 25 of the instructions)	6	
7	Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1	7	79,317

**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	76,865
b	Program-related investments—total from Part IX-B	1b	0
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the	3a	
a	Suitability test (prior IRS approval required)	3b	0
b	Cash distribution test (attach the required schedule)	4	76,865
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4		
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	0
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	76,865

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				79,317
2 Undistributed income, if any, as of the end of 2009				
a Enter amount for 2008 only			787	
b Total for prior years. 20 20 20		0		
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	0			
4 Qualifying distributions for 2009 from Part XII, line 4 ► \$ 76,865				
a Applied to 2008, but not more than line 2a			787	
b Applied to undistributed income of prior years (Election required—see page 26 of the instructions)			0	
c Treated as distributions out of corpus (Election required—see page 26 of the instructions)		0		
d Applied to 2009 distributable amount				76,078
e Remaining amount distributed out of corpus	0			
5 Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a) )	0			0
6 Enter the net total of each column as indicated below:	0			
a Corpus Add lines 3f, 4c, and 4e Subtract line 5				
b Prior years' undistributed income Subtract line 4b from line 2b		0		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed				
d Subtract line 6c from line 6b Taxable amount—see page 27 of the instructions		0		
e Undistributed income for 2008 Subtract line 4a from line 2a Taxable amount—see page 27 of the instructions				0
f Undistributed income for 2009 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2010				3,239
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see page 27 of the instructions)				
8 Excess distributions carryover from 2004 not applied on line 5 or line 7 (see page 27 of the instructions)	0			
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a	0			
10 Analysis of line 9				
a Excess from 2005	0			
b Excess from 2006	0			
c Excess from 2007	0			
d Excess from 2008	0			
e Excess from 2009	0			

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

1 a	If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2009, enter the date of the ruling				►																																																									
b	Check box to indicate whether the foundation is a private operating foundation described in section				<input type="checkbox"/> 4942(j)(3) or		<input type="checkbox"/> 4942(j)(5)																																																							
2 a	Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed				<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: center;">Tax year</th> <th colspan="3" style="text-align: center;">Prior 3 years</th> <th style="text-align: center;">(e) Total</th> </tr> <tr> <th style="text-align: center;">(a) 2009</th> <th style="text-align: center;">(b) 2008</th> <th style="text-align: center;">(c) 2007</th> <th style="text-align: center;">(d) 2006</th> <th></th> </tr> </thead> <tbody> <tr><td style="text-align: center;">0</td><td style="text-align: center;">0</td><td style="text-align: center;">0</td><td style="text-align: center;">0</td><td style="text-align: center;">0</td></tr> <tr><td style="text-align: center;">0</td><td style="text-align: center;">0</td><td style="text-align: center;">0</td><td style="text-align: center;">0</td><td style="text-align: center;">0</td></tr> <tr><td style="text-align: center;">0</td><td style="text-align: center;">0</td><td style="text-align: center;">0</td><td style="text-align: center;">0</td><td style="text-align: center;">0</td></tr> <tr><td style="text-align: center;">0</td><td style="text-align: center;">0</td><td style="text-align: center;">0</td><td style="text-align: center;">0</td><td style="text-align: center;">0</td></tr> <tr><td style="text-align: center;">0</td><td style="text-align: center;">0</td><td style="text-align: center;">0</td><td style="text-align: center;">0</td><td style="text-align: center;">0</td></tr> <tr><td style="text-align: center;">0</td><td style="text-align: center;">0</td><td style="text-align: center;">0</td><td style="text-align: center;">0</td><td style="text-align: center;">0</td></tr> <tr><td style="text-align: center;">0</td><td style="text-align: center;">0</td><td style="text-align: center;">0</td><td style="text-align: center;">0</td><td style="text-align: center;">0</td></tr> <tr><td style="text-align: center;">0</td><td style="text-align: center;">0</td><td style="text-align: center;">0</td><td style="text-align: center;">0</td><td style="text-align: center;">0</td></tr> <tr><td style="text-align: center;">0</td><td style="text-align: center;">0</td><td style="text-align: center;">0</td><td style="text-align: center;">0</td><td style="text-align: center;">0</td></tr> </tbody> </table>			Tax year	Prior 3 years			(e) Total	(a) 2009	(b) 2008	(c) 2007	(d) 2006		0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Tax year	Prior 3 years			(e) Total																																																										
(a) 2009	(b) 2008	(c) 2007	(d) 2006																																																											
0	0	0	0	0																																																										
0	0	0	0	0																																																										
0	0	0	0	0																																																										
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0	0	0	0	0																																																										
0	0	0	0	0																																																										
0	0	0	0	0																																																										
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)(ii)																																																													
(3)	Largest amount of support from an exempt organization																																																													
(4)	Gross investment income																																																													

**Part XV Supplementary Information (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year—see page 28 of the instructions.)****1 Information Regarding Foundation Managers:**

a List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000) (See section 507(d)(2))

NONE

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

NONE**2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:**

Check here ►  if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc (see page 28 of the instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d

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

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	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
<b>Name and address (home or business)</b>				
<b>a Paid during the year</b> See Attached Statement				
<b>Total</b>			► 3a	69,260
<b>b Approved for future payment</b> NONE				
<b>Total</b>			► 3b	0

## 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 page 28 of the instructions)
		(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount
<b>1</b>	<b>Program service revenue</b>				
a			0		0
b			0		0
c			0		0
d			0		0
e			0		0
f			0		0
<b>g</b>	<b>Fees and contracts from government agencies</b>				
<b>2</b>	<b>Membership dues and assessments</b>				
<b>3</b>	<b>Interest on savings and temporary cash investments</b>				
<b>4</b>	<b>Dividends and interest from securities</b>				
<b>5</b>	<b>Net rental income or (loss) from real estate.</b>				
a	Debt-financed property				
b	Not debt-financed property				
<b>6</b>	<b>Net rental income or (loss) from personal property</b>				
<b>7</b>	<b>Other investment income</b>				
<b>8</b>	<b>Gain or (loss) from sales of assets other than inventory</b>				
<b>9</b>	<b>Net income or (loss) from special events</b>				
<b>10</b>	<b>Gross profit or (loss) from sales of inventory</b>				
<b>11</b>	<b>Other revenue</b>	<b>a</b>			
a			0		0
b			0		0
c			0		0
d			0		0
e			0		0
<b>12</b>	<b>Subtotal Add columns (b), (d), and (e)</b>				<b>25,564</b>
<b>13</b>	<b>Total. Add line 12, columns (b), (d), and (e)</b>				<b>13</b> <b>25,564</b>
(See worksheet in line 13 instructions on page 28 to verify calculations.)					

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

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

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?	Yes	No
a	Transfers from the reporting foundation to a noncharitable exempt organization of (1) Cash (2) Other assets	1a(1)	X
b	Other transactions. (1) Sales of assets to a noncharitable exempt organization (2) Purchases of assets from a noncharitable exempt organization (3) Rental of facilities, equipment, or other assets (4) Reimbursement arrangements (5) Loans or loan guarantees (6) Performance of services or membership or fundraising solicitations	1b(1) 1b(2) 1b(3) 1b(4) 1b(5) 1b(6)	X X X X X 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.		

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

**b** If "Yes," complete the following schedule.

(a) Name of organization	(b) Type of organization	(c) Description of relationship

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

Sign Here

John T Sulentic

**Signature of officer or trustee**

10/29/2019

Dat

► VP AND TAX DIRECTOR

Title

<b>Sign Here</b>	Preparer's signature	Date	Check if self-employed <input checked="" type="checkbox"/>	Preparer's identifying number (see Signature on page 30 of the instructions)
				P00364310
<b>Paid Preparer's Use Only</b>	Firm's name (or yours if self-employed), address, and ZIP code	► PRICEWATERHOUSECOOPERS, LLP 600 GRANT STREET, PITTSBURGH, PA 15219-2777	EIN ► 13-4008324	Phone no. 412-355-6000

**Line 6 (990-PF) - Gain/Loss from Sale of Assets Other Than Inventory**

Index	Check "X" if Sale of Index	Description	CUSIP #	Purchaser	Check "X" if Purchaser is a Business	Date Acquired	Acquisition Method	Date Sold	Gross Sales Price	Cost or Other Basis	Valuation Method	Net Gain or Loss	
												0	.27,384
1	X	ARTIO TOTAL RETURN BD FD	04315J209			10/21/2009		6/1/2010	6,917	6,887			
2	X	ARTIO TOTAL RETURN BD FD	04315J209			10/21/2009		6/30/2010	2,348	2,306			
3	X	ARTIO TOTAL RETURN BD FD	04315J209			7/21/2009		8,350		7,914			
4	X	ARTIO TOTAL RETURN BD FD	04315J209			10/31/2008		1,028		910			
5	X	ARTIO INTERNATIONAL EQUI	04315J837			3/21/2007		7/21/2009	3,798	5,619			
6	X	ARTIO INTERNATIONAL EQUI	04315J837			3/21/2007		10/21/2009	5,288	6,576			
7	X	DODGE & COX INTERNAT	256206103			3/21/2007		10/21/2009	11,225	15,689			
8	X	DODGE & COX INCOME FD C	256210105			10/21/2009		6/1/2010	7,729	7,577			
9	X	DODGE & COX INCOME FD C	256210105			10/21/2009		6/30/2010	6,251	6,127			
10	X	DODGE & COX INCOME FD C	256210105			3/21/2007		6/30/2010	5,726	5,548			
11	X	EVERGREEN EQUITY TR INT	30023D671			10/31/2008		7/21/2009	4,465	4,327			
12	X	GOLDEN LARGE CORE VALU	34984T881			3/21/2007		7/21/2009	4,511	6,265			
13	X	GOLDMAN SACHS GROWTH C	38142Y401			10/31/2008		10/21/2009	6,847	5,490			
14	X	ING INTERNATIONAL REAL ES	44980Q518			11/1/2007		7/21/2009	5,204	9,740			
15	X	PERKINS MID CAP VALUE FD	47103C241			10/31/2008		7/21/2009	5,099	4,773			
16	X	JPMORGAN HIGH YIELD FUN	4812C0803			8/1/2007		6/30/2010	2,872	3,040			
17	X	PIMCO TOTAL RETURN FD IN	693390700			10/21/2009		4/21/2010	9,355	9,203			
18	X	PIMCO TOTAL RET FD-INST #	693390700			10/21/2009		6/1/2010	1,856	1,826			
19	X	PIMCO TOTAL RET FD-INST #	693390700			6/24/2009		6/1/2010	1,629	1,527			
20	X	PIMCO TOTAL RET FD-INST #	693390700			6/24/2009		6/30/2010	6,499	6,003			
21	X	PIMCO TOTAL RET FD-INST #	693390700			10/31/2008		6/30/2010	1,552	1,398			
22	X	PIMCO FOREIGN BD FD INST	693390882			3/21/2007		6/1/2010	727	705			
23	X	PIMCO FOREIGN BD FD USD	693390882			3/21/2007		6/30/2010	2,041	1,962			
24	X	PIMCO EMERG MKTS BD-INS	693391559			3/21/2007		6/30/2010	1,286	1,335			
25	X	T ROWE PRICE REAL ESTATE	779919109			5/5/2008		10/21/2009	10,618	17,907			
26	X	T ROWE PRICE REAL ESTATE	779919109			5/5/2008		4/21/2010	10,809	14,094			
27	X	ROYCE VALUE PLUS FUND-IN	780905212			10/31/2008		10/21/2009	467	375			
28	X	SSGA EMERGING MARKETS	784924425			3/21/2007		7/21/2009	6,758	10,036			
29	X	SSGA EMERGING MARKETS	784924425			3/21/2007		10/21/2009	5,555	6,852			
30	X	VANGUARD INFLAT PROTEC	922031869			10/21/2009		6/2/2010	154	152			
31	X	VANGUARD INFLAT PROTEC	922031869			10/21/2009		6/30/2010	2,814	2,749			
32	X	WELLS FARGO ADVANTAGE	949915565			3/21/2007		7/21/2009	5,599	8,332			
33	X	WELLS FARGO ADVANTAGE	949915565			8/1/2008		7/21/2009	1,373	2,093			

**Line 16a (990-PF) - Legal Fees**

	Name of Organization or Person Providing Service	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes (Cash Basis Only)
1	LEGAL FEES	396			396
2					
3					
4					
5					
6					
7					
8					
9					
10					

**Line 16b (990-PF) - Accounting Fees**

	Name of Organization or Person Providing Service	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	0	0
1	TAX PREP FEES	2,333				2,333
2						
3						
4						
5						
6						
7						
8						
9						
10						

**Line 18 (990-PF) - Taxes**

	Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
1	FOREIGN TAX WITHHELD	448		448	
2	PY EXCISE TAX DUE		138		
3	ESTIMATED EXCISE PAYMENTS		820		
4					
5					
6					
7					
8					
9					
10					

Line 23 (990-PF) - Other Expenses

	Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	0	4,876
1	Amortization See attached statement	0	0	0	0	0
2	TRUSTEE FEES	19,503	14,627			4,876
3						
4						
5						
6						
7						
8						
9						
10						

**Part II, Line 13 (990-PF) - Investments - Other**

	Item or Category	Basis of Valuation	Book Value Beg. of Year	Book Value End of Year	FMV
1	PRIOR YEAR		1,701,174	1,571,964	1,550,450
2	SEE ATTACHMENT		1,701,174	0	1,550,450
3				1,571,964	1,550,450
4					
5					
6					
7					
8					
9					
10					

**Part III (990-PF) - Changes in Net Assets or Fund Balances**

**Line 5 - Decreases not included in Part III, Line 2**

1 COST BASIS ADJUSTMENT	1	54,097
2 GAIN ON CY SALES NOT SETTLED AT YEAR END	2	1,474
3 Total	3	55,571

## Part IV (990-PF) - Capital Gains and Losses for Tax on Investment Income

	Amount	Long Term CG Distributions	Short Term CG Distributions	Totals	Gross Sales	Depreciation Allowed	Cost or Other Basis Plus	F M V as of 12/31/09	Adjusted Basis as of 12/31/09	Excess of FMV Over Adj Basis	Gains Minus Excess of FMV Over Adjusted Basis or Losses
1	ARTIO TOTAL RETURN BD FD CL #152/04315J209	CUSIP #	How Acquired	Date Acquired	Date Sold	6,917	0	6,887	30	0	-28,590
2	ARTIO TOTAL RETURN BD FD CL #152/04315J209			10/21/2009	6/30/2010	2,348	0	2,306	42	0	42
3	ARTIO TOTAL RETURN BD FD CL #152/04315J209			7/21/2009	6/30/2010	8,350	0	7,914	436	0	436
4	ARTIO TOTAL RETURN BD FD CL #152/04315J209			10/31/2008	6/30/2010	1,028	0	910	118	0	118
5	ARTIO INTERNATIONAL EQUITY II-I			3/21/2007	7/21/2009	3,796	0	5,619	-1,823	0	-1,823
6	ARTIO INTERNATIONAL EQUITY II-I			3/21/2007	10/21/2009	5,288	0	6,576	-1,288	0	-1,288
7	DODGE & COX INTERNATIONAL STOCK			3/21/2007	10/21/2009	11,225	0	15,689	-4,464	0	-4,464
8	DODGE & COX INCOME FD COM #147			6/1/2010	7/21/2009	7,729	0	7,577	152	0	152
9	DODGE & COX INCOME FD COM #147			10/21/2009	6/30/2010	6,251	0	6,127	124	0	124
10	DODGE & COX INCOME FD COM #147			3/21/2007	6/30/2010	5,726	0	5,548	178	0	178
11	EVERGREEN EQUITY TR INTRINSIC VALUE			10/31/2008	7/21/2009	4,465	0	4,327	138	0	138
12	GOLDEN LARGE CORE VALUE FD INS			3/21/2007	7/21/2009	4,511	0	6,265	-1,754	0	-1,754
13	GOLDMAN SACHS GROWTH OPPORTUNITY			10/31/2008	10/21/2009	6,847	0	5,490	1,357	0	1,357
14	ING INTERNATIONAL REAL ESTATE			11/1/2007	7/21/2009	5,204	0	9,740	-4,536	0	-4,536
15	PERKINS MID CAP VALUE FD CL I			10/31/2008	7/21/2009	5,099	0	4,773	326	0	326
16	JPMORGAN HIGH YIELD FUND SS #358481208083			8/1/2007	6/30/2010	2,872	0	3,040	-168	0	-168
17	PIMCO TOTAL RETURN FD INST CL			10/21/2009	4/21/2010	9,355	0	9,203	152	0	152
18	PIMCO TOTAL RET FD INST #45			10/21/2009	6/1/2010	1,856	0	1,826	30	0	30
19	PIMCO TOTAL RET FD-INST #35			6/24/2009	6/1/2010	1,629	0	1,527	102	0	102
20	PIMCO TOTAL RET FD-INST #45			6/24/2009	6/30/2010	6,499	0	6,003	496	0	496
21	PIMCO TOTAL RET FD-INST #35			10/31/2008	6/30/2010	1,552	0	1,398	154	0	154
22	PIMCO FOREIGN BD FD INST CL #103			6/31/2007	6/1/2010	727	0	705	22	0	22
23	PIMCO FOREIGN BD FD USD H-INST #16			3/21/2007	6/30/2010	2,041	0	1,962	79	0	79
24	PIMCO EMERG MKTS BD-INST #137			3/21/2007	6/30/2010	1,285	0	1,335	-50	0	-50
25	T ROWE PRICE REAL ESTATE FD			5/5/2008	10/21/2009	10,618	0	17,907	-7,289	0	-7,289
26	T ROWE PRICE REAL ESTATE FD			5/5/2008	4/21/2010	10,809	0	14,094	-3,285	0	-3,285
27	ROYCE VALUE PLUS FUND-INV			10/31/2008	10/21/2009	467	0	375	92	0	92
28	SSGA EMERGING MARKETS FUND CL S			3/21/2007	7/21/2009	6,758	0	10,036	-3,278	0	-3,278
29	SSGA EMERGING MARKETS FUND CL S			3/21/2007	10/21/2009	5,555	0	6,852	-1,297	0	-1,297
30	VANGUARD INFLAT PROTECT SEC FD #			10/21/2009	6/2/2010	154	0	152	2	0	2
31	VANGUARD INFLAT PROTECT SEC FD #			10/21/2009	6/30/2010	2,814	0	2,749	65	0	65
32	WELLS FARGO ADVANTAGE ENDEAVO			3/21/2007	7/21/2009	5,599	0	8,332	-2,733	0	-2,733
33	WELLS FARGO ADVANTAGE ENDEAVO			8/1/2008	7/21/2009	1,373	0	2,093	-720	0	-720

**Part VIII, Line 1 (990-PF) - Compensation of Officers, Directors, Trustees and Foundation Managers**



**Part VI, Line 6a (990-PF) - Estimated Tax Payments**

	Date	Amount
1 Credit from prior year return		1
2 First quarter estimated tax payment	11/12/2009	656
3 Second quarter estimated tax payment	2	0
4 Third quarter estimated tax payment	3	
5 Fourth quarter estimated tax payment	3/11/2010	164
6 Other payments	4	0
7 Total	5	
	6	820
	7	820

**Part XIII, Line 2a, Column C (990-PF) - Prior Year Undistributed Income**

1 Distributable amounts for 2008 that remained undistributed at the beginning of the 2009 tax year	1
2	2 787
3	3
4	4
5	5
6	6
7	7
8	8
9	9
<b>10 Total</b>	<b>10 787</b>

• **Part XV, Lines 1a-1b (990-PF) - Information Regarding Foundation Managers**

---

List Managers who contributed more than 2%  
of the total contributions received by the foundation

1 NONE  
2 \_\_\_\_\_  
3 \_\_\_\_\_  
4 \_\_\_\_\_  
5 \_\_\_\_\_  
6 \_\_\_\_\_  
7 \_\_\_\_\_  
8 \_\_\_\_\_  
9 \_\_\_\_\_  
10 \_\_\_\_\_

List Managers who own 10% or more of the stock  
of a corporation of which the foundation has a 10%  
or greater interest

NONE  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

PAUL &amp; ELIZABETH YOUNTS CHAR TUW

56-6169362

Page 1 of 1

**Continuation of Part XV, Line 3a (990-PF) - Grants and Contributions Paid During the Year****Recipient(s) paid during the year**

Name

PRESBYTERIAN HOSPITAL FOUNDATION

 Person Business

Street

P.O. BOX 33549

City

CHARLOTTE

State

NC

Zip code

28233

Foreign Country

Relationship

NONE

Foundation Status

501(C)(3) PUBLIC CHARITY

Purpose of grant/contribution

GENERAL SUPPORT GRANT

Amount

17,315

Name

CAROLINA'S HEALTHCARE FOUNDATION

 Person Business

Street

1221 EAST MOREHEAD STREET

City

CHARLOTTE

State

NC

Zip code

28204

Foreign Country

Relationship

NONE

Foundation Status

501(C)(3) PUBLIC CHARITY

Purpose of grant/contribution

GENERAL SUPPORT GRANT

Amount

17,315

Name

WESTMINSTER PRESBYTERIAN CHURCH

 Person Business

Street

PO BOX 220654

City

CHARLOTTE

State

NC

Zip code

28222

Foreign Country

Relationship

NONE

Foundation Status

501(C)(3) PUBLIC CHARITY

Purpose of grant/contribution

GENERAL SUPPORT GRANT

Amount

17,315

Name

HEINEMAN MEDICAL RESEARCH, INC

 Person Business

Street

1001 BLYTHE BLVD

City

CHARLOTTE

State

NC

Zip code

28203

Foreign Country

Relationship

NONE

Foundation Status

501(C)(3) PUBLIC CHARITY

Purpose of grant/contribution

GENERAL SUPPORT GRANT

Amount

17,315

Name

 Person Business

Street

City

State

Zip code

Foreign Country

Relationship

NONE

Foundation Status

Purpose of grant/contribution

GENERAL SUPPORT GRANT

Amount

0

Name

 Person Business

Street

City

State

Zip code

Foreign Country

Relationship

NONE

Foundation Status

Purpose of grant/contribution

GENERAL SUPPORT GRANT

Amount

0

PAUL & ELIZABETH YOUNTS CHAR TUW  
 ACCT# 1013032353  
 FYE: 6/30/2010

Account Category	Account #	CUSIP	Asset Name	Units	FMV	Tax Cost
Cash	1013032353	04315J209	ARTIO TOTAL RETURN BD FD CL I #1524	7858.8220	108,294.57	96,625.42
Invest - Other	1013032353	04315J837	ARTIO INTERNATIONAL EQ FD II #1529	6228.5660	64,341.09	88,872.23
Invest - Other	1013032353	256206103	DODGE & COX INTL STOCK FD #1048	2206.3970	62,639.61	76,575.91
Invest - Other	1013032353	256210105	DODGE & COX INCOME FD COM #147	9420.7470	124,259.65	118,712.92
Invest - Other	1013032353	299908830	EVERGREEN INTL BOND FUND-IN #4705	2632.5870	28,616.22	28,394.98
Invest - Other	1013032353	30023D671	EVERGREEN INTRINSIC VALUE I FD #517	5280.6590	48,476.45	40,860.88
Invest - Other	1013032353	34984T857	GOLDEN SMALL CAP CORE FUND	7002.0800	55,316.43	72,040.44
Invest - Other	1013032353	34984T881	GOLDEN LARGE CAP CORE FUND-I	13692.9480	119,402.51	136,220.53
Invest - Other	1013032353	38142Y401	GOLDMAN SACHS GRTH OPP FD-I #1132	3725.3030	73,015.94	56,099.54
Invest - Other	1013032353	38142Y773	GOLDMAN SACHS UC VALUE-I #1216	4863.1590	47,999.38	44,805.71
Invest - Other	1013032353	44980Q518	ING INTERNATIONAL REAL EST CL I	3787.9130	26,894.18	41,989.19
Invest - Other	1013032353	47103C241	PERKINS MID CAP VALUE F/C I #1167	3798.9370	72,445.73	59,867.57
Invest - Other	1013032353	4812C0803	JPMORGAN HIGH YIELD FUND SS #3580	12554.2240	96,667.52	99,357.34
Invest - Other	1013032353	693390700	PIMCO TOTAL RET FD-INST #35	9216.5790	103,778.68	93,606.18
Invest - Other	1013032353	693390882	PIMCO FOREIGN BD FD USD H-INST #103	3182.5400	33,830.40	32,466.61
Invest - Other	1013032353	693391559	PIMCO EMERG MKTS BD-INST #137	5995.0510	64,207.00	66,590.55
Invest - Other	1013032353	722005667	PIMCO COMMODITY REAL RET STRAT-#45	8608.1950	63,528.48	68,474.66
Invest - Other	1013032353	779919109	T ROWE PRICE REAL ESTATE FD #122	4468.3910	64,344.83	56,040.12
Invest - Other	1013032353	780905212	ROYCE VALUE PLUS FUND-INV#271	5416.5590	59,419.65	46,645.78
Invest - Other	1013032353	784924425	SSGA EMERGING MKTS - SELECT #1510	4172.0870	75,055.85	70,938.58
Invest - Other	1013032353	922031869	VANGUARD INFLAT PROTECT SEC FD #119	5087.7610	65,988.26	62,103.97
Invest - Other	1013032353	949915565	WF ADV ENDEAVOR SELECT-I #3124	12032.3820	91,927.40	114,675.00
Savings & Temp Inv	1013032353	99999Y944	SECURED MARKET DEPOSIT ACCOUNT	9877.8600	9,877.86	9,877.86
Savings & Temp Inv	1013032353	99999Y944	SECURED MARKET DEPOSIT ACCOUNT	1507.3200	1,507.32	1,507.32

Total

1,561,835.01 1,563,349.29