Form **990-PF**

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

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

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

OMB No 1545-0052

2010

For calendar year 2010, or tax year beginning , 2010, and ending , 20

G Check all that apply: [ ] Initial return [ ] Initial return of a former public charity [ ] Final return
[ ] Amended return [X] Address change [ ] Name change

Name of foundation: LOUIS M PLANSOEN CHAR TR U/10TH PAR

A Employer identification number: 22-6322826

Number and street (or P O box number if mail is not delivered to street address): 1525 W W.T. HARRIS BLVD. D1114-044

Room/suite

B Telephone number (see page 10 of the instructions): (336) 747-8203

City or town, state, and ZIP code: CHARLOTTE, NC 28288

C If exemption application is pending, check here ▶ [ ]

D 1 Foreign organizations, check here ▶ [ ]

2 Foreign organizations meeting the 85% test, check here and attach computation ▶ [ ]

E If private foundation status was terminated under section 507(b)(1)(A), check here ▶ [ ]

F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ▶ [ ]

H Check type of organization: [X] Section 501(c)(3) exempt private foundation
[ ] Section 4947(a)(1) nonexempt charitable trust [ ] Other taxable private foundation

I Fair market value of all assets at end of year *(from Part II, col. (c), line 16)* ▶ $ 11,199,795.

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

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

	Line	Description	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1	Contributions, gifts, grants, etc, received (attach schedule)				
	2	Check ▶ [X] if the foundation is **not** required to attach Sch B				
	3	Interest on savings and temporary cash investments				
	4	Dividends and interest from securities	331,032.	328,580.		STMT 1
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10	177,799.			
	b	Gross sales price for all assets on line 6a 895,742.				
	7	Capital gain net income (from Part IV, line 2)		177,799.		
	8	Net short-term capital gain				
	9	Income modifications				
	10a	Gross sales less returns and allowances				
	b	Less Cost of goods sold				
	c	Gross profit or (loss) (attach schedule)				
	11	Other income (attach schedule)				
	12	**Total.** Add lines 1 through 11	508,831.	506,379.		
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc	81,413.	43,508.		37,905.
	14	Other employee salaries and wages		NONE	NONE	
	15	Pension plans, employee benefits		NONE	NONE	
	16a	Legal fees (attach schedule) STMT 3	3,235.	NONE	NONE	3,235.
	b	Accounting fees (attach schedule) STMT 4	750.	NONE	NONE	750.
	c	Other professional fees (attach schedule) STMT 5	14,198.	10,649.		3,550.
	17	Interest				
	18	Taxes (attach schedule) (see page 14 of the instructions) STMT 6	7,179.			
	19	Depreciation (attach schedule) and depletion				
	20	Occupancy				
	21	Travel, conferences, and meetings		NONE	NONE	
	22	Printing and publications		NONE	NONE	
	23	Other expenses (attach schedule)				
	24	**Total operating and administrative expenses.** Add lines 13 through 23	106,775.	54,157.	NONE	45,440.
	25	Contributions, gifts, grants paid	513,119.			513,119.
	26	**Total expenses and disbursements** Add lines 24 and 25	619,894.	54,157.	NONE	558,559.
	27	Subtract line 26 from line 12.				
	a	**Excess of revenue over expenses and disbursements**	-111,063.			
	b	**Net investment income** (if negative, enter -0-)		452,222.		
	c	**Adjusted net income** (if negative, enter -0-)				

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POSTMARK DATE JUL 13 2011

SCANNED JUL 22 2011

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

		Beginning of year (a) Book Value	End of year (b) Book Value	(c) Fair Market Value
Assets				
1	Cash - non-interest-bearing			
2	Savings and temporary cash investments	1,806,305.	591,208.	591,208.
3	Accounts receivable ▶ Less allowance for doubtful accounts ▶			
4	Pledges receivable ▶ Less allowance for doubtful accounts ▶			
5	Grants receivable			
6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see page 15 of the instructions)			
7	Other notes and loans receivable (attach schedule) ▶ Less allowance for doubtful accounts ▶ NONE			
8	Inventories for sale or use			
9	Prepaid expenses and deferred charges			
10 a	Investments - U S and state government obligations (attach schedule) STMT 7		2,214,615.	2,406,866.
b	Investments - corporate stock (attach schedule) STMT 8		3,072,748.	6,917,916.
c	Investments - corporate bonds (attach schedule) STMT 10		1,281,270.	1,283,805.
11	Investments - land, buildings, and equipment basis ▶ Less accumulated depreciation (attach schedule) ▶			
12	Investments - mortgage loans			
13	Investments - other (attach schedule)	5,529,511.		
14	Land, buildings, and equipment basis ▶ Less accumulated depreciation (attach schedule) ▶			
15	Other assets (describe ▶)			
16	**Total assets** (to be completed by all filers - see the instructions Also, see page 1, item I)	7,335,816.	7,159,841.	11,199,795.
Liabilities				
17	Accounts payable and accrued expenses			
18	Grants payable			
19	Deferred revenue			
20	Loans from officers, directors, trustees, and other disqualified persons			
21	Mortgages and other notes payable (attach schedule)			
22	Other liabilities (describe ▶)			
23	**Total liabilities** (add lines 17 through 22)			
Net Assets or Fund Balances	**Foundations that follow SFAS 117, check here ▶ ☐ and complete lines 24 through 26 and lines 30 and 31.**			
24	Unrestricted			
25	Temporarily restricted			
26	Permanently restricted			
	Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. ▶ X			
27	Capital stock, trust principal, or current funds	6,222,876.	7,159,841.	
28	Paid-in or capital surplus, or land, bldg , and equipment fund			
29	Retained earnings, accumulated income, endowment, or other funds	1,112,940.		
30	**Total net assets or fund balances** (see page 17 of the instructions)	7,335,816.	7,159,841.	
31	**Total liabilities and net assets/fund balances** (see page 17 of the instructions)	7,335,816.	7,159,841.	

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	7,335,816.
2	Enter amount from Part I, line 27a	2	-111,063.
3	Other increases not included in line 2 (itemize) ▶	3	
4	Add lines 1, 2, and 3	4	7,224,753.
5	Decreases not included in line 2 (itemize) ▶ SEE STATEMENT 11	5	64,912.
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	7,159,841.

Part IV Capital Gains and Losses for Tax on Investment Income

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

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

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

	(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col (j), if any	(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
a				
b				
c				
d				
e				

2 Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 / If (loss), enter -0- in Part I, line 7 }	2	177,799.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c) (see pages 13 and 17 of the instructions). If (loss), enter -0- in Part I, line 8		3	

Part V Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income)

If section 4940(d)(2) applies, leave this part blank.

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☒ No

If "Yes," the foundation does not qualify under section 4940(e). Do not complete this part

1 Enter the appropriate amount in each column for each year; see page 18 of the instructions before making any entries.

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2009	228,867.	10,336,362.	0.02214192963
2008	209,338.	11,243,765.	0.01861814081
2007	200,750.	12,245,150.	0.01639424589
2006	202,031.	11,055,164.	0.01827480804
2005	203,750.	10,532,362.	0.01934513835

2	**Total** of line 1, column (d)	2	0.09477426272
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	0.01895485254
4	Enter the net value of noncharitable-use assets for 2010 from Part X, line 5	4	10,812,151.
5	Multiply line 4 by line 3	5	204,943.
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	4,522.
7	Add lines 5 and 6	7	209,465.
8	Enter qualifying distributions from Part XII, line 4	8	558,559.

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

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

1a	Exempt operating foundations described in section 4940(d)(2), check here ▶ [ ] and enter "N/A" on line 1. Date of ruling or determination letter ______ (attach copy of ruling letter if necessary - see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ▶ [X] and enter 1% of Part I, line 27b	1	4,522.
c	All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col. (b).		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	2	
3	Add lines 1 and 2	3	4,522.
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	4	NONE
5	**Tax based on investment income.** Subtract line 4 from line 3 If zero or less, enter -0-	5	4,522.
6	Credits/Payments		
a	2010 estimated tax payments and 2009 overpayment credited to 2010 — 6a: 6,700.		
b	Exempt foreign organizations-tax withheld at source — 6b: NONE		
c	Tax paid with application for extension of time to file (Form 8868) — 6c: 2,234.		
d	Backup withholding erroneously withheld — 6d:		
7	Total credits and payments Add lines 6a through 6d	7	8,934.
8	Enter any **penalty** for underpayment of estimated tax Check here [ ] if Form 2220 is attached	8	
9	**Tax due.** If the total of lines 5 and 8 is more than line 7, enter **amount owed** ▶	9	
10	**Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶	10	4,412.
11	Enter the amount of line 10 to be **Credited to 2011 estimated tax** ▶ 4,412. **Refunded** ▶	11	

Part VII-A Statements Regarding Activities

			Yes	No
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a		X
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)?	1b		X
	*If the answer is "Yes" to **1a** or **1b**, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.*			
c	Did the foundation file **Form 1120-POL** for this year?	1c		X
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation ▶ $ ______ (2) On foundation managers ▶ $ ______			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ▶ $ ______			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? *If "Yes," attach a detailed description of the activities*	2		X
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? *If "Yes," attach a conformed copy of the changes*	3		X
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		X
b	If "Yes," has it filed a tax return on **Form 990-T** for this year?	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? *If "Yes," attach the statement required by General Instruction T*	5		X
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	X	
7	Did the foundation have at least $5,000 in assets at any time during the year? *If "Yes," complete Part II, col (c), and Part XV*	7	X	
8a	Enter the states to which the foundation reports or with which it is registered (see page 19 of the instructions) ▶ STMT 12			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by *General Instruction G? If "No," attach explanation*	8b	X	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2010 or the taxable year beginning in 2010 (see instructions for Part XIV on page 27)? *If "Yes," complete Part XIV*	9		X
10	Did any persons become substantial contributors during the tax year? *If "Yes," attach a schedule listing their names and addresses*	10		X

Part VII-A Statements Regarding Activities *(continued)*

		Line	Yes	No
11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see page 20 of the instructions)	11		X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	

Website address ▶ N/A

14 The books are in care of ▶ WELLS FARGO BANK NA Telephone no ▶ (336)747-8203

Located at ▶ 1 W 4TH ST 2ND FLOOR, WINSTON-SALEM, NC ZIP + 4 ▶ 27101-3818

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

		Line	Yes	No
16	At any time during calendar year 2010, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?	16		X
	See page 20 of the instructions for exceptions and filing requirements for Form TD F 90-22 1 If "Yes," enter the name of the foreign country ▶			

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.

			Line	Yes	No
1a	During the year did the foundation (either directly or indirectly)				
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	☐ Yes ☒ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	☐ Yes ☒ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	☒ Yes ☐ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	☒ Yes ☐ No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	☐ Yes ☒ No			
	(6) Agree to pay money or property to a government official? (**Exception.** Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days)	☐ Yes ☒ No			
b	If any answer is "Yes" to 1a(1)-(6), did **any** of the acts fail to qualify under the exceptions described in Regulations section 53 4941(d)-3 or in a current notice regarding disaster assistance (see page 22 of the instructions)?		1b		X
	Organizations relying on a current notice regarding disaster assistance check here ▶ ☐				
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2010?		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 2010, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2010? If "Yes," list the years ▶ ______, ______, ______, ______	☐ Yes ☒ No			
b	Are there any years listed in 2a for which the foundation is **not** applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to **all** years listed, answer "No" and attach statement - see page 22 of the instructions)		2b		X
c	If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here ▶ ______, ______, ______, ______				
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	☐ Yes ☒ No			
b	If "Yes," did it have excess business holdings in 2010 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 2010.)*		3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		4a		X
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2010?		4b		X

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

5a During the year did the foundation pay or incur any amount to				
(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	[ ] Yes	[X] No		
(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?	[ ] Yes	[X] No		
(3) Provide a grant to an individual for travel, study, or other similar purposes?	[ ] Yes	[X] No		
(4) Provide a grant to an organization other than a charitable, etc, organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see page 22 of the instructions)	[ ] Yes	[X] No		
(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?	[ ] Yes	[X] No		
b If any answer is "Yes" to 5a(1)-(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53 4945 or in a current notice regarding disaster assistance (see page 22 of the instructions)?			**5b**	
Organizations relying on a current notice regarding disaster assistance check here ▶ [ ]				
c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?	[ ] Yes	[ ] No		
If "Yes," attach the statement required by Regulations section 53.4945-5(d).				
6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	[ ] Yes	[X] No		
b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?			**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	[X] No		
b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?			**7b**	

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

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

(a) Name and address	(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 13		81,413.	-0-	-0-

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

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

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

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

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

(a) Name and address of each person paid more than $50,000	(b) Type of service	(c) Compensation
NONE		NONE
Total number of others receiving over $50,000 for professional services ▶		NONE

Part IX-A Summary of Direct Charitable Activities

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

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

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

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	9,445,942.
b	Average of monthly cash balances	1b	1,530,861.
c	Fair market value of all other assets (see page 25 of the instructions)	1c	NONE
d	**Total** (add lines 1a, b, and c)	1d	10,976,803.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation) 1e		
2	Acquisition indebtedness applicable to line 1 assets	2	NONE
3	Subtract line 2 from line 1d	3	10,976,803.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see page 25 of the instructions)	4	164,652.
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3. Enter here and on Part V, line 4	5	10,812,151.
6	**Minimum investment return.** Enter 5% of line 5	6	540,608.

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	540,608.
2a	Tax on investment income for 2010 from Part VI, line 5	2a	4,522.		
b	Income tax for 2010. (This does not include the tax from Part VI.)	2b			
c	Add lines 2a and 2b			2c	4,522.
3	Distributable amount before adjustments. Subtract line 2c from line 1			3	536,086.
4	Recoveries of amounts treated as qualifying distributions			4	NONE
5	Add lines 3 and 4			5	536,086.
6	Deduction from distributable amount (see page 25 of the instructions)			6	NONE
7	**Distributable amount** as adjusted Subtract line 6 from line 5. Enter here and on Part XIII, line 1			7	536,086.

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	558,559.
b	Program-related investments - total from Part IX-B	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	NONE
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	NONE
b	Cash distribution test (attach the required schedule)	3b	NONE
4	**Qualifying distributions.** Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	558,559.
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	4,522.
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	554,037.

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 2009	(c) 2009	(d) 2010
1 Distributable amount for 2010 from Part XI, line 7				536,086.
2 Undistributed income, if any, as of the end of 2010				
a Enter amount for 2009 only			NONE	
b Total for prior years: 20 08 ,20____,20____		NONE		
3 Excess distributions carryover, if any, to 2010:				
a From 2005 ...... NONE				
b From 2006 ...... NONE				
c From 2007 ...... NONE				
d From 2008 ...... NONE				
e From 2009 ...... NONE				
f **Total** of lines 3a through e	NONE			
4 Qualifying distributions for 2010 from Part XII, line 4 ▶ $ 558,559.				
a Applied to 2009, but not more than line 2a			NONE	
b Applied to undistributed income of prior years (Election required - see page 26 of the instructions)		NONE		
c Treated as distributions out of corpus (Election required - see page 26 of the instructions)	NONE			
d Applied to 2010 distributable amount				536,086.
e Remaining amount distributed out of corpus	22,473.			
5 Excess distributions carryover applied to 2010 *(If an amount appears in column (d), the same amount must be shown in column (a).)*	NONE			NONE
6 **Enter the net total of each column as indicated below:**				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	22,473.			
b Prior years' undistributed income Subtract line 4b from line 2b		NONE		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		NONE		
d Subtract line 6c from line 6b Taxable amount - see page 27 of the instructions		NONE		
e Undistributed income for 2009 Subtract line 4a from line 2a. Taxable amount - see page 27 of the instructions			NONE	
f Undistributed income for 2010 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2011				NONE
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see page 27 of the instructions)	NONE			
8 Excess distributions carryover from 2005 not applied on line 5 or line 7 (see page 27 of the instructions)	NONE			
9 **Excess distributions carryover to 2011.** Subtract lines 7 and 8 from line 6a	22,473.			
10 Analysis of line 9.				
a Excess from 2006 ... NONE				
b Excess from 2007 ... NONE				
c Excess from 2008 ... NONE				
d Excess from 2009 ... NONE				
e Excess from 2010 ... 22,473.				

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

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2010, enter the date of the ruling . . . . ▶

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

	Tax year	Prior 3 years			(e) Total
	(a) 2010	(b) 2009	(c) 2008	(d) 2007	
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed .					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon a "Assets" alternative test - enter (1) Value of all assets . . .					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i).					
b "Endowment" alternative test-enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed . .					
c "Support" alternative test - enter (1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942 (j)(3)(B)(iii)					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income .					

Part XV Supplementary Information (Complete this part only if the foundation had $5,000 or more in assets at any time during the year - see page 28 of the instructions.)

1 Information Regarding Foundation Managers:

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

N/A

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.

N/A

2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:

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

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

b The form in which applications should be submitted and information and materials they should include:

c Any submission deadlines:

d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors:

Part XV Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
SEE STATEMENT 22				
Total . . . . . . ▶ **3a**				513,119.
b *Approved for future payment*				
Total . . . . . . ▶ **3b**				

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated	Unrelated business income (a) Business code	(b) Amount	Excluded by section 512, 513, or 514 (c) Exclusion code	(d) Amount	(e) Related or exempt function income (See page 28 of the instructions.)
1 Program service revenue:					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities			14	331,032.	
5 Net rental income or (loss) from real estate					
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal property					
7 Other investment income					
8 Gain or (loss) from sales of assets other than inventory			18	177,799.	
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)				508,831.	

13 Total. Add line 12, columns (b), (d), and (e) . . . 13 508,831.

(See worksheet in line 13 instructions on page 29 to verify calculations.)

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

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

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

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

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

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

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

b If "Yes," complete the following schedule

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

Sign Here

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

Signature of officer or trustee WELLS FARGO BANK, N.A. | Date 06/01/2011 | Title CO-TRUSTEE

Paid Preparer Use Only	Print/Type preparer's name	Preparer's signature	Date	Check ☐ if self-employed	PTIN
	Firm's name ▶			Firm's EIN ▶	
	Firm's address ▶			Phone no	

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

Kind of Property		Description				P or D	Date acquired	Date sold
Gross sale price less expenses of sale	Depreciation allowed/ allowable	Cost or other basis	FMV as of 12/31/69	Adj basis as of 12/31/69	Excess of FMV over adj basis		Gain or (loss)	
		99.04 GNMA POOL #607809 5.000% 3/15/ PROPERTY TYPE: SECURITIES					03/25/2003	01/15/2010
99.00		99.00						
		200000. UNITED STATES TREAS NT DTD 02/15 PROPERTY TYPE: SECURITIES					05/06/2005	02/15/2010
200,000.00		200,000.00						
		12782.63 GNMA POOL #607809 5.000% 3/ PROPERTY TYPE: SECURITIES					03/25/2003	02/16/2010
12,783.00		12,733.00					50.00	
		66.51 GNMA POOL #607809 5.000% 3/15/ PROPERTY TYPE: SECURITIES					03/25/2003	03/15/2010
67.00		66.00					1.00	
		71.12 GNMA POOL #607809 5.000% 3/15/ PROPERTY TYPE: SECURITIES					03/25/2003	04/15/2010
71.00		71.00						
		6000. BP PLC SPONSORED ADR PROPERTY TYPE: SECURITIES					02/01/1989	05/05/2010
304,897.00		80,307.00					224,590.00	
		69.1 GNMA POOL #607809 5.000% 3/15/3 PROPERTY TYPE: SECURITIES					03/25/2003	05/17/2010
69.00		69.00						
		67.46 GNMA POOL #607809 5.000% 3/15/ PROPERTY TYPE: SECURITIES					03/25/2003	06/15/2010
67.00		67.00						
		5221.22 GNMA POOL #607809 5.000% 3/1 PROPERTY TYPE: SECURITIES					03/25/2003	07/15/2010
5,221.00		5,201.00					20.00	
		.9433 FRONTIER COMMUNICATIONS CORPORATIO PROPERTY TYPE: SECURITIES					04/28/1989	07/21/2010
7.00		6.00					1.00	
		5910. PFIZER INC COM W/RTS ATTACHED EXP PROPERTY TYPE: SECURITIES					10/16/2009	07/28/2010
88,235.00		104,371.00					-16,136.00	

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

Kind of Property		Description				P or D	Date acquired	Date sold
Gross sale price less expenses of sale	Depreciation allowed/ allowable	Cost or other basis	FMV as of 12/31/69	Adj. basis as of 12/31/69	Excess of FMV over adj basis		Gain or (loss)	
		1420. TIDEWATER INC COM W/RTS ATTACHED E					12/26/2007	07/28/2010
		PROPERTY TYPE: SECURITIES						
57,416.00		79,819.00					-22,403.00	
		1555. VALERO ENERGY CORP NEW COM					05/04/2009	07/28/2010
		PROPERTY TYPE: SECURITIES						
26,435.00		33,401.00					-6,966.00	
		60.47 GNMA POOL #607809 5.000% 3/15/					03/25/2003	08/15/2010
		PROPERTY TYPE: SECURITIES						
60.00		60.00						
		58.79 GNMA POOL #607809 5.000% 3/15/					03/25/2003	09/15/2010
		PROPERTY TYPE: SECURITIES						
59.00		59.00						
		63.36 GNMA POOL #607809 5.000% 3/15/					03/25/2003	10/15/2010
		PROPERTY TYPE: SECURITIES						
63.00		63.00						
		67.2 GNMA POOL #607809 5.000% 3/15/3					03/25/2003	11/15/2010
		PROPERTY TYPE: SECURITIES						
67.00		67.00						
		200000. UNITED STATES TREAS BD DTD 11/15					11/25/2005	11/15/2010
		PROPERTY TYPE: SECURITIES						
200,000.00		201,359.00					-1,359.00	
		63.55 GNMA POOL #607809 5.000% 3/15/					03/25/2003	12/15/2010
		PROPERTY TYPE: SECURITIES						
64.00		63.00					1.00	
		61.91 GNMA POOL #607809 5.000% 3/15/					03/25/2003	12/31/2010
		PROPERTY TYPE: SECURITIES						
62.00		62.00						

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

Kind of Property		Description				P or D	Date acquired	Date sold
Gross sale price less expenses of sale	Depreciation allowed/ allowable	Cost or other basis	FMV as of 12/31/69	Adj basis as of 12/31/69	Excess of FMV over adj basis		Gain or (loss)	
TOTAL GAIN(LOSS)							177,799.	

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

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
AFLAC INC COM	1,508.	1,508.
AT&T INC	26,796.	26,796.
AMERICAN EXPRESS CO COM	540.	540.
AON CORP COM	1,827.	1,827.
BP PLC SPONSORED ADR	5,040.	5,040.
BRISTOL-MYERS SQUIBB CO COM	16,640.	16,640.
CHUBB CORP COM	4,314.	4,314.
COCA-COLA CO COM	10,560.	10,560.
EXXON MOBIL CORP COM	12,180.	12,180.
FPL GRP INC COM W/RTS ATTACHED EXP 6/30/	3,000.	3,000.
FRONTIER COMMUNICATIONS CORPORATION	777.	229.
GNMA POOL #607809 5.000% 3/15/33	1,934.	1,934.
GTE CORP DEB 6.84% 4/15/18	6,840.	6,840.
GAP INC COM	2,888.	2,888.
GENERAL ELEC CO COM	4,200.	4,200.
GENERAL ELEC CAP COR 3.750% 11/14/14	1,031.	1,031.
HEWLETT-PACKARD CO COM	1,388.	1,388.
HOME DEPOT INC COM	2,032.	2,032.
INTEL CORP COM	4,410.	4,410.
INTL BUSINESS MACHINES CORP COM	2,250.	2,250.
IBM CORP 2.100% 5/06/13	420.	420.
JP MORGAN CHASE & CO COM	800.	800.
JPMORGAN CHASE & CO 3.400% 6/24/15	1,256.	1,256.
MCDONALDS CORP COM	3,390.	3,390.
MEDTRONIC INC 3.000% 3/15/15	342.	342.
MERCK & CO INC NEW	13,680.	13,680.
MICROSOFT CORP COM	3,520.	3,520.
MICROSOFT CORP 2.950% 6/01/14	508.	508.
FEDERATED INVESTORS PRIME OBLIGS FD #10	696.	696.
NEXTERA ENERGY INC	9,000.	9,000.
NIKE INC CL B COM	2,780.	2,780.
ORACLE CORP COM	1,361.	1,361.

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

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
PNC FINL SVCS GROUP INC COM W/RIGHTS ATT	200.	200.
PFIZER INC COM W/RTS ATTACHED EXP 10/15/	12,208.	12,208.
PRAXAIR INC COM	1,881.	1,881.
PRAXAIR INC 2.125% 6/14/13	761.	761.
PRECISION CASTPARTS CORP COM W/RIGHTS AT	68.	68.
PROCTER & GAMBLE CO COM	4,534.	4,534.
QWEST COMMUNICATIONS INTL INC COM	1,904.	
RAYTHEON CO COM	12,054.	12,054.
ROSS STORES INC COM	1,110.	1,110.
STATE STR CORP COM	86.	86.
TEXAS INSTRS INC COM	715.	715.
TIDEWATER INC COM W/RTS ATTACHED EXP 11/	710.	710.
UNITED STATES TREAS BDS DTD 2/16/93 7.12	44,175.	44,175.
UNITED STATES TREAS DTD 2/15/2001 5% 02/	10,000.	10,000.
US TREASURY NOTES 4.000% 11/15/12	8,021.	8,021.
U S TREASURY NOTE 4.000% 2/15/14	11,200.	11,200.
UNITED STATES TREAS NT DTD 02/15/2005 3.	3,608.	3,608.
UNITED STATES TREAS BD DTD 11/15/2005 4.	9,000.	9,000.
UNITED STATES TREAS BD DTD 11/15/2005 4.	12,600.	12,600.
U S TREASURY NOTE 4.250% 1/15/11	8,655.	8,655.
US TREASURY NOTE 4.250% 11/15/17	11,900.	11,900.
VALERO ENERGY CORP NEW COM	156.	156.
VERIZON COMMUNICATIONS COM	16,524.	16,524.
VERIZON VIRGINIA INC 4.625% 3/15/13	6,938.	6,938.
ACE LIMITED	2,246.	2,246.
FEDERATED PRIME OBLIGATION #10	1,870.	1,870.
TOTAL	331,032.	328,580.

FORM 990PF, PART I - LEGAL FEES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME	ADJUSTED NET INCOME	CHARITABLE PURPOSES
LEGAL FEES	3,235.			3,235.
TOTALS	3,235.	NONE	NONE	3,235.

FORM 990PF, PART I - ACCOUNTING FEES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME	ADJUSTED NET INCOME	CHARITABLE PURPOSES
TAX PREPARATION FEE (NON-ALLOC	750.			750.
TOTALS	750.	NONE	NONE	750.

FORM 990PF, PART I - OTHER PROFESSIONAL FEES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME	CHARITABLE PURPOSES
AGENT FOR INDIVIDUAL TRUSTEE F	14,198.	10,649.	3,550.
TOTALS	14,198.	10,649.	3,550.

FORM 990PF, PART I - TAXES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS
FEDERAL TAX PAYMENT - PRIOR YE	479.
FEDERAL ESTIMATES - PRINCIPAL	6,700.
TOTALS	7,179.

FORM 990PF, PART II - U.S. AND STATE OBLIGATIONS

DESCRIPTION	ENDING BOOK VALUE	ENDING FMV
36202SGS1 GNMA POOL 3/15/2033	30,455.	32,632.
912828ES5 US T NOTE 1/15/2011	199,759.	200,250.
912828CA6 US T NOTE 2/15/2014	284,692.	305,026.
912828EN6 US T NOTE 11/15/2015	290,227.	313,491.
912810EP9 US T BOND 2/15/2023	716,584.	832,741.
9128276T4 US T NOTE 2/15/2011	210,273.	201,126.
912828HH6 US T NOTE 11/15/2017	282,756.	308,678.
912828AP5 US T NOTE 11/15/2012	199,869.	212,922.
TOTALS	2,214,615.	2,406,866.

FORM 990PF, PART II - CORPORATE STOCK

DESCRIPTION	ENDING BOOK VALUE	ENDING FMV
364760108 GAP INC	86,993.	166,050.
437076102 HOME DEPOT INC	120,869.	150,758.
580135101 MCDONALDS CORP	79,155.	115,140.
654106103 NIKE INC CL B	82,551.	170,840.
778296103 ROSS STORES INC	67,501.	109,739.
191216100 COCA COLA CO	16,640.	394,620.
742718109 PROCTER & GAMBLE CO	118,951.	154,714.
30231G102 EXXON MOBIL CORP	23,053.	511,840.
001055102 AFLAC INC	128,848.	146,718.
025816109 AMERICAN EXPRESS CO	133,977.	128,760.
037389103 AON CORP	115,522.	140,100.
171232101 CHUBB CORP	116,957.	176,236.
46625H100 JPMORGAN CHASE & CO	94,467.	169,680.
693475105 PNC FINANCIAL SVCS	119,228.	121,440.
857477103 STATE STREET CORP	74,714.	99,399.
110122108 BRISTOL MYERS SQUIBB	72,624.	344,240.
58933Y105 MERCK & CO INC	91,359.	324,360.
717081103 PFIZER INC	24,252.	245,140.
98956P102 ZIMMER HOLDINGS INC	678.	32,208.
369604103 GENERAL ELECTRIC CO	10,352.	182,900.
740189105 PRECISION CASTPARTS	58,154.	105,104.
755111507 RAYTHEON CO	75,641.	389,256.
055921100 BMC SOFTWARE INC	78,205.	100,644.
17275R102 CISCO SYSTEMS INC	143,044.	123,403.
428236103 HEWLETT PACKARD CO	105,891.	146,087.
458140100 INTEL CORP	92,223.	147,210.
459200101 IBM CORP	80,662.	132,084.
594918104 MICROSOFT CORP	165,556.	178,624.
68389X105 ORACLE CORP	154,610.	212,997.

FORM 990PF, PART II - CORPORATE STOCK

DESCRIPTION	ENDING BOOK VALUE	ENDING FMV
882508104 TEXAS INSTRUMENTS	138,874.	178,750.
74005P104 PRAXAIR INC	63,056.	99,766.
00206R102 AT&T INC	82,957.	468,611.
35906A108 FRONTIER COMMUN CORP	8,089.	20,170.
92343V104 VERIZON COMMUNICAT	123,518.	309,139.
65339F101 NEXTERA ENERGY INC	42,208.	311,940.
H0023R105 ACE LIMITED	81,369.	109,249.
TOTALS	3,072,748.	6,917,916.

FORM 990PF, PART II - CORPORATE BONDS

DESCRIPTION	ENDING BOOK VALUE	ENDING FMV
263901AC4 DUKE ENERGY INDIANA	103,802.	97,624.
36962G4G6 GENERAL ELEC CAP	104,230.	103,372.
362320AZ6 GTE CORP 4/15/2018	99,899.	113,362.
459200GR6 IBM CORP 5/6/2013	103,172.	102,428.
46625HHR4 JPMORGAN CHASE & CO	102,951.	101,975.
585055AR7 MEDTRONIC 3/15/2015	105,289.	102,618.
594918AB0 MICROSOFT 6/1/2014	106,082.	104,098.
693476BL6 PNC FUND 8/11/2020	101,628.	98,830.
74005PAX2 PRAXAIR 6/14/2013	102,767.	102,150.
87612EAV8 TARGET 7/15/2020	102,613.	99,566.
92345NAA8 VERIZON 3/15/2013	146,204.	158,426.
931142CT8 WALMART 7/8/2015	102,633.	99,356.
TOTALS	1,281,270.	1,283,805.

FORM 990PF, PART III - OTHER DECREASES IN NET WORTH OR FUND BALANCES

DESCRIPTION	AMOUNT
CHANGE OF RECORD KEEPING FROM BOOK TO COST	64,912.
TOTAL	64,912.

STATE(S) WHERE THE FOUNDATION IS REGISTERED

NJ

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

OFFICER NAME:
WELLS FARGO
ADDRESS:
1525 WEST WT HARRIS BLVD
CHARLOTTE, NC 28288-1114
TITLE:
Co-Trustee
AVERAGE HOURS PER WEEK DEVOTED TO POSITION: 40
COMPENSATION .... 58,011.

OFFICER NAME:
John L. Plansoen
ADDRESS:
342 Sunset Road
Pompton Plains, NJ 07444
TITLE:
Co-Trustee
COMPENSATION .... 10,768.

OFFICER NAME:
Helen Post
ADDRESS:
15 Cache Cay Drive
Vero Beach, FL 32963
TITLE:
Co-Trustee
COMPENSATION .... 12,634.

TOTAL COMPENSATION: 81,413.

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

RECIPIENT NAME:
FIRST REFORMED CHURCH
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
GENERAL
FOUNDATION STATUS OF RECIPIENT:
PUBLIC CHARITY

RECIPIENT NAME:
FIRST CHURCH IN SWAMPSCOTT
CONGREGATIONAL
ADDRESS:
40 MONUMENT AVENUE
SWAMPSCOTT, MA 01907
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
CONTRIBUTION
FOUNDATION STATUS OF RECIPIENT:
PUBLIC CHARITY
AMOUNT OF GRANT PAID .... 15,000.

RECIPIENT NAME:
SALVATION ARMY
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
GENERAL
FOUNDATION STATUS OF RECIPIENT:
PUBLIC CHARITY

RECIPIENT NAME:
MEMORIAL HOSPITAL AT EASTON
ADDRESS:
219 S. WASHINGTON STREET
EASTON, MD 21601
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
GENERAL
FOUNDATION STATUS OF RECIPIENT:
PUBLIC CHARITY

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

RECIPIENT NAME:
CYSTIC FIBROSIS FOUNDATION
ADDRESS:
6931 ARLINGTON ROAD
BETHESDA, MD 20814
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
CONTRIBUTION
FOUNDATION STATUS OF RECIPIENT:
PUBLIC CHARITY
AMOUNT OF GRANT PAID .... 20,000.

RECIPIENT NAME:
YOUTH FOR CHRIST - INDIAN
RIVER COUNTY, INC.
ADDRESS:
PO BOX 651455
VERO BEACH, FL 32965
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
CONTRIBUTION
FOUNDATION STATUS OF RECIPIENT:
PUBLIC CHARITY
AMOUNT OF GRANT PAID .... 25,000.

RECIPIENT NAME:
CHAPEL OF GOOD SHEPHERD FDN
ADDRESS:
376 HALE STREET
BEVERLY, MA 01915-2096
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
GENERAL
FOUNDATION STATUS OF RECIPIENT:
PUBLIC CHARITY
AMOUNT OF GRANT PAID .... 60,000.

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

RECIPIENT NAME:
FIRST PRESBYTERIAN CHURCH OF
CALDWELL
ADDRESS:
326 BLOOMFIELD AVENUE
CALDWELL, NJ 07006
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
CONTRIBUTION
FOUNDATION STATUS OF RECIPIENT:
PUBLIC CHARITY
AMOUNT OF GRANT PAID .... 15,000.

RECIPIENT NAME:
FIRST PRESBYTERIAN CHURCH
OF VERONA
ADDRESS:
10 FAIRVIEW AVENUE
VERONA, NJ 07044
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
CONTRIBUTION
FOUNDATION STATUS OF RECIPIENT:
PUBLIC CHARITY
AMOUNT OF GRANT PAID .... 10,000.

RECIPIENT NAME:
ST. MARY'S HOSPITAL
ADDRESS:
ATTN: BRUCE P. BYRNE EXEC DIR
PASSAIC, NJ 07055
AMOUNT OF GRANT PAID .... 500.

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

RECIPIENT NAME:
CLARA MAASS MEDICAL CENTER
ADDRESS:
ATTN: JANE NEWMAN KESSLER, VP
BELLEVILLE, NJ 07109
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
GENERAL
FOUNDATION STATUS OF RECIPIENT:
PUBLIC CHARITY
AMOUNT OF GRANT PAID .... 1,000.

RECIPIENT NAME:
FIRST REFORMED CHURCH OF
POMPTON PLAINS
ADDRESS:
529 NEWARK-POMPTON TURNPIKE
POMPTON PLAINS, NJ 07444
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
CONTRIBUTION
FOUNDATION STATUS OF RECIPIENT:
PUBLIC CHARITY
AMOUNT OF GRANT PAID .... 8,095.

RECIPIENT NAME:
CHILTON MEMORIAL HOSPITAL
ADDRESS:
97 WEST PARKWAY
POMPTON PLAINS, NJ 07444
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
CONTRIBUTION
FOUNDATION STATUS OF RECIPIENT:
PUBLIC CHARITY
AMOUNT OF GRANT PAID .... 30,000.

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

RECIPIENT NAME:
MOUNTAINSIDE HOSPITAL
ADDRESS:
1 BAY AVENUE
MONTCLAIR, NJ 07042
AMOUNT OF GRANT PAID .... 500.

RECIPIENT NAME:
MOUNTAINSIDE HOSPITAL
ADDRESS:
1 BAY AVENUE
MONTCLAIR, NJ 07042
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
GENERAL
FOUNDATION STATUS OF RECIPIENT:
PUBLIC CHARITY

RECIPIENT NAME:
FIRST UNITED PRESBYTERIAN CHURCH
ADDRESS:
115 EXETER AVENUE
WEST PITTSTON, PA 1864-2439
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
GENERAL USE
FOUNDATION STATUS OF RECIPIENT:
PUBLIC CHARITY
AMOUNT OF GRANT PAID .... 35,000.

RECIPIENT NAME:
ST. MARY'S HOSPITAL
ATTN: BRUCE P. BYRNE, EXE
ADDRESS:
350 BOULEVARD
PASSAIC, NJ 07055
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
GENERAL
FOUNDATION STATUS OF RECIPIENT:
PUBLIC CHARITY

RECIPIENT NAME:
CROYA FOUNDATION INC.
ADDRESS:
PO BOX 582
LAKE FOREST, IL 60045-0582
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
CONTRIBUTION
FOUNDATION STATUS OF RECIPIENT:
PUBLIC CHARITY
AMOUNT OF GRANT PAID .... 6,024.

RECIPIENT NAME:
CHRIST CHURCH OF LAKE FOREST
ADDRESS:
100 N. WAUKEGAN ROAD
LAKE FOREST, IL 60045
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
GENERAL USE
FOUNDATION STATUS OF RECIPIENT:
PUBLIC CHARITY
AMOUNT OF GRANT PAID .... 15,000.

RECIPIENT NAME:
FIRST CHRISTIAN CHURCH
ADDRESS:
1000 KENTUCKY STREET
LAWRENCE, KS 66044-2916
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
CONTRIBUTION
FOUNDATION STATUS OF RECIPIENT:
PUBLIC CHARITY
AMOUNT OF GRANT PAID .... 20,000.

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

RECIPIENT NAME:
MEMORIAL HOSPITAL AT EASTON
ADDRESS:
219 S. WASHINGTON STREET
EASTON, MD 21601
AMOUNT OF GRANT PAID .... 1,000.

RECIPIENT NAME:
EPISCOPAL PRESCHOOL OF THE
CHURCH OF THE HOLY SPIRIT
ADDRESS:
400 EAST WESTMINSTER ROAD
LAKE FOREST, IL 60045
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
CONTRIBUTION
FOUNDATION STATUS OF RECIPIENT:
PUBLIC CHARITY
AMOUNT OF GRANT PAID .... 15,000.

RECIPIENT NAME:
FIRST CHURCH IN SWAMPSCOTT
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
GENERAL
FOUNDATION STATUS OF RECIPIENT:
PUBLIC CHARITY

RECIPIENT NAME:
HUMANE SOCIETY OF VERO BEACH
AND INDIAN RIVER COUNTY
ADDRESS:
PO BOX 644 6230 77TH STREET
VERO BEACH, FL 32961-0644
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
CONTRIBUTION
FOUNDATION STATUS OF RECIPIENT:
PUBLIC CHARITY
AMOUNT OF GRANT PAID .... 5,000.

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

RECIPIENT NAME:
GLENDALE BAPTIST CHURCH
ADDRESS:
790 27TH AVENUE
VERO BEACH, FL 32968-1314
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
CONTRIBUTION
FOUNDATION STATUS OF RECIPIENT:
PUBLIC CHARITY
AMOUNT OF GRANT PAID .... 50,000.

RECIPIENT NAME:
RIVERSIDE THEATRE FOUNDATION, INC
ADDRESS:
3250 RIVERSIDE PARK DRIVE
VERO BEACH, FL 32963
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
CONTRIBUTION
FOUNDATION STATUS OF RECIPIENT:
PUBLIC CHARITY
AMOUNT OF GRANT PAID .... 10,000.

RECIPIENT NAME:
VERO BEACH MUSEUM OF ART
ADDRESS:
3001 RIVERSIDE PARK DRIVE
VERO BEACH, FL 32963
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
CONTRIBUTION
FOUNDATION STATUS OF RECIPIENT:
PUBLIC CHARITY
AMOUNT OF GRANT PAID .... 10,000.

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

RECIPIENT NAME:
INDIAN RIVER MEMORIAL HOSPITAL, INC
ADDRESS:
1000 36TH STREET
VERO BEACH, FL 32960
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
CONTRIBUTION
FOUNDATION STATUS OF RECIPIENT:
PUBLIC CHARITY
AMOUNT OF GRANT PAID .... 21,000.

RECIPIENT NAME:
COMMUNITY CHURCH OF VERO BEACH
ADDRESS:
1901 23RD STREET
VERO BEACH, FL 32960
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
GENERAL
FOUNDATION STATUS OF RECIPIENT:
PUBLIC CHARITY
AMOUNT OF GRANT PAID .... 140,000.

TOTAL GRANTS PAID: 513,119.

SCHEDULE D (Form 1041)

Department of the Treasury
Internal Revenue Service

Capital Gains and Losses

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

OMB No 1545-0092

2010

Name of estate or trust: LOUIS M PLANSOEN CHAR TR U/10TH PAR

Employer identification number: 22-6322826

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

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

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

b	Enter the short-term gain or (loss), if any, from Schedule D-1, line 1b	1b	-16,136.
2	Short-term capital gain or (loss) from Forms 4684, 6252, 6781, and 8824	2	
3	Net short-term gain or (loss) from partnerships, S corporations, and other estates or trusts	3	
4	Short-term capital loss carryover. Enter the amount, if any, from line 9 of the 2009 Capital Loss Carryover Worksheet	4	( )
5	**Net short-term gain or (loss).** Combine lines 1a through 4 in column (f) Enter here and on line 13, column (3) on the back ▶	5	-16,136.

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

(a) Description of property (Example 100 shares 7% preferred of "Z" Co)	(b) Date acquired (mo, day, yr)	(c) Date sold (mo, day, yr)	(d) Sales price	(e) Cost or other basis (see instructions)	(f) Gain or (loss) for the entire year Subtract (e) from (d)
6a					

b	Enter the long-term gain or (loss), if any, from Schedule D-1, line 6b	6b	193,935.
7	Long-term capital gain or (loss) from Forms 2439, 4684, 6252, 6781, and 8824	7	
8	Net long-term gain or (loss) from partnerships, S corporations, and other estates or trusts	8	
9	Capital gain distributions	9	
10	Gain from Form 4797, Part I	10	
11	Long-term capital loss carryover. Enter the amount, if any, from line 14 of the 2009 Capital Loss Carryover Worksheet	11	( )
12	**Net long-term gain or (loss).** Combine lines 6a through 11 in column (f). Enter here and on line 14a, column (3) on the back ▶	12	193,935.

For Paperwork Reduction Act Notice, see the Instructions for Form 1041.

Part III Summary of Parts I and II **Caution:** *Read the instructions **before** completing this part.*		(1) Beneficiaries' (see instr.)	(2) Estate's or trust's	(3) Total
13 **Net short-term gain or (loss)**	13			-16,136.
14 **Net long-term gain or (loss):**				
a Total for year	14a			193,935.
b Unrecaptured section 1250 gain (see line 18 of the wrksht)	14b			
c 28% rate gain	14c			
15 **Total net gain or (loss).** Combine lines 13 and 14a ▶	15			177,799.

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

Part IV **Capital Loss Limitation**

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

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

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

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

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

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

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

17 Enter taxable income from Form 1041, line 22 (or Form 990-T, line 34)			17	
18 Enter the **smaller** of line 14a or 15 in column (2) but not less than zero	18			
19 Enter the estate's or trust's qualified dividends from Form 1041, line 2b(2) (or enter the qualified dividends included in income in Part I of Form 990-T)	19			
20 Add lines 18 and 19	20			
21 If the estate or trust is filing Form 4952, enter the amount from line 4g; otherwise, enter -0- ▶	21			
22 Subtract line 21 from line 20. If zero or less, enter -0-			22	
23 Subtract line 22 from line 17. If zero or less, enter -0-			23	
24 Enter the **smaller** of the amount on line 17 or $2,300			24	
25 Is the amount on line 23 equal to or more than the amount on line 24? ☐ **Yes.** Skip lines 25 and 26; go to line 27 and check the "No" box. ☐ **No.** Enter the amount from line 23			25	
26 Subtract line 25 from line 24			26	
27 Are the amounts on lines 22 and 26 the same? ☐ **Yes.** Skip lines 27 thru 30, go to line 31 ☐ **No.** Enter the **smaller** of line 17 or line 22			27	
28 Enter the amount from line 26 (If line 26 is blank, enter -0-)			28	
29 Subtract line 28 from line 27			29	
30 Multiply line 29 by 15% (15)			30	
31 Figure the tax on the amount on line 23. Use the 2010 Tax Rate Schedule for Estates and Trusts (see the Schedule G instructions in the instructions for Form 1041)			31	
32 Add lines 30 and 31			32	
33 Figure the tax on the amount on line 17 Use the 2010 Tax Rate Schedule for Estates and Trusts (see the Schedule G instructions in the instructions for Form 1041)			33	
34 **Tax on all taxable income.** Enter the **smaller** of line 32 or line 33 here and on Form 1041, Schedule G, line 1a (or Form 990-T, line 36)			34	

SCHEDULE D-1
(Form 1041)

Department of the Treasury
Internal Revenue Service

Continuation Sheet for Schedule D (Form 1041)

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

OMB No 1545-0092

2010

Name of estate or trust: LOUIS M PLANSOEN CHAR TR U/10TH PAR

Employer identification number: 22-6322826

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

(a) Description of property (Example 100 sh 7% preferred of "Z" Co)	(b) Date acquired (mo , day, yr)	(c) Date sold (mo , day, yr)	(d) Sales price	(e) Cost or other basis (see instructions)	(f) Gain or (loss) Subtract (e) from (d)
1a 5910. PFIZER INC COM W/RTS ATTACHED EXP 10/15/2007	10/16/2009	07/28/2010	88,235.00	104,371.00	-16,136.00

1b Total. Combine the amounts in column (f) Enter here and on Schedule D, line 1b . . . . -16,136.00

For Paperwork Reduction Act Notice, see the Instructions for Form 1041. **Schedule D-1 (Form 1041) 2010**

JSA
0F1221 3 000

DM0348 5892 06/01/2011 12:06:09

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

LOUIS M PLANSOEN CHAR TR U/10TH PAR

Employer identification number

22-6322826

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

(a) Description of property (Example 100 sh 7% preferred of "Z" Co)	(b) Date acquired (mo , day, yr)	(c) Date sold (mo , day, yr)	(d) Sales price	(e) Cost or other basis (see instructions)	(f) Gain or (loss) Subtract (e) from (d)
6a 99.04 GNMA POOL #607809 5.000% 3/15/33	03/25/2003	01/15/2010	99.00	99.00	
200000. UNITED STATES TREAS NT DTD 02/15/2005 3.	05/06/2005	02/15/2010	200,000.00	200,000.00	
12782.63 GNMA POOL #607809 5.000% 3/15/33	03/25/2003	02/16/2010	12,783.00	12,733.00	50.00
66.51 GNMA POOL #607809 5.000% 3/15/33	03/25/2003	03/15/2010	67.00	66.00	1.00
71.12 GNMA POOL #607809 5.000% 3/15/33	03/25/2003	04/15/2010	71.00	71.00	
6000. BP PLC SPONSORED ADR	02/01/1989	05/05/2010	304,897.00	80,307.00	224,590.00
69.1 GNMA POOL #607809 5.000% 3/15/33	03/25/2003	05/17/2010	69.00	69.00	
67.46 GNMA POOL #607809 5.000% 3/15/33	03/25/2003	06/15/2010	67.00	67.00	
5221.22 GNMA POOL #607809 5.000% 3/15/33	03/25/2003	07/15/2010	5,221.00	5,201.00	20.00
.9433 FRONTIER COMMUNICATIONS CORPORATION	04/28/1989	07/21/2010	7.00	6.00	1.00
1420. TIDEWATER INC COM W/RTS ATTACHED EXP 11/01/20	12/26/2007	07/28/2010	57,416.00	79,819.00	-22,403.00
1555. VALERO ENERGY CORP NEW COM	05/04/2009	07/28/2010	26,435.00	33,401.00	-6,966.00
60.47 GNMA POOL #607809 5.000% 3/15/33	03/25/2003	08/15/2010	60.00	60.00	
58.79 GNMA POOL #607809 5.000% 3/15/33	03/25/2003	09/15/2010	59.00	59.00	
63.36 GNMA POOL #607809 5.000% 3/15/33	03/25/2003	10/15/2010	63.00	63.00	
67.2 GNMA POOL #607809 5.000% 3/15/33	03/25/2003	11/15/2010	67.00	67.00	
200000. UNITED STATES TREAS BD DTD 11/15/2005 4.	11/25/2005	11/15/2010	200,000.00	201,359.00	-1,359.00
63.55 GNMA POOL #607809 5.000% 3/15/33	03/25/2003	12/15/2010	64.00	63.00	1.00
61.91 GNMA POOL #607809 5.000% 3/15/33	03/25/2003	12/31/2010	62.00	62.00	

6b Total. Combine the amounts in column (f). Enter here and on Schedule D, line 6b 193,935.00

Form **8868** (Rev January 2011)

Department of the Treasury Internal Revenue Service

Application for Extension of Time To File an Exempt Organization Return

▶ File a separate application for each return.

OMB No. 1545-1709

- If you are filing for an **Automatic 3-Month Extension, complete only Part I** and check this box . . . ▶ [X]
- If you are filing for an **Additional (Not Automatic) 3-Month Extension, complete only Part II** (on page 2 of this form).

Do not complete Part II unless you have already been granted an automatic 3-month extension on a previously filed Form 8868.

Electronic filing *(e-file)*. You can electronically file Form 8868 if you need a 3-month automatic extension of time to file (6 months for a corporation required to file Form 990-T), or an additional (not automatic) 3-month extension of time You can electronically file Form 8868 to request an extension of time to file any of the forms listed in Part I or Part II with the exception of Form 8870, Information Return for Transfers Associated With Certain Personal Benefit Contracts, which must be sent to the IRS in paper format (see instructions). For more details on the electronic filing of this form, visit *www.irs.gov/efile* and click on *e-file for Charities & Nonprofits*.

Part I **Automatic 3-Month Extension of Time.** Only submit original (no copies needed).

A corporation required to file Form 990-T and requesting an automatic 6-month extension - check this box and complete Part I only . . . ▶ [ ]

All other corporations (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns.

Type or print	Name of exempt organization	**Employer identification number**
File by the due date for filing your return See instructions	LOUIS M PLANSOEN CHAR TR U/10TH PAR	22-6322826
	Number, street, and room or suite no If a P O box, see instructions 1525 WEST WT HARRIS BLVD	
	City, town or post office, state, and ZIP code For a foreign address, see instructions CHARLOTTE, NC 28288-5709	

Enter the Return code for the return that this application is for (file a separate application for each return) . . . [0 4]

Application Is For	**Return Code**	**Application Is For**	**Return Code**
Form 990	01	Form 990-T (corporation)	07
Form 990-BL	02	Form 1041-A	08
Form 990-EZ	03	Form 4720	09
Form 990-PF	04	Form 5227	10
Form 990-T (sec. 401(a) or 408(a) trust)	05	Form 6069	11
Form 990-T (trust other than above)	06	Form 8870	12

- The books are in the care of ▶ WELLS FARGO

Telephone No. ▶ (336)747-8203 FAX No. ▶

- If the organization does not have an office or place of business in the United States, check this box . . . ▶ [ ]
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) ______ . If this is for the whole group, check this box . . . ▶ [ ] . If it is for part of the group, check this box . . . ▶ [ ] and attach a list with the names and EINs of all members the extension is for.

1 I request an automatic 3-month (6 months for a corporation required to file Form 990-T) extension of time until 08/15 , 20 11 , to file the exempt organization return for the organization named above. The extension is for the organization's return for:

▶ [X] calendar year 2010 or

▶ [ ] tax year beginning ______, 20 ___, and ending ______, 20 ___

2 If the tax year entered in line 1 is for less than 12 months, check reason: [ ] Initial return [ ] Final return [ ] Change in accounting period

3a	If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	**3a**	$ 8,499.
b	If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit.	**3b**	$ 6,700.
c	**Balance Due.** Subtract line 3b from line 3a Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	**3c**	$ 1,799.

Caution. If you are going to make an electronic fund withdrawal with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions.