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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 01-01-2010 , and ending 12-31-2010

G Check all that apply ☐ Initial return ☐ Initial return of a former public charity ☐ Final return
☐ Amended return ☐ Address change ☐ Name change

Name of foundation
EVAN G ROBERTS CHARITABLE TRUST

A Employer identification number
55-6016455

Number and street (or P O box number if mail is not delivered to street address) | Room/suite
PO BOX 1793

B Telephone number (see page 10 of the instructions)
(304) 285-2356

City or town, state, and ZIP code
CHARLESTON, WV 25326

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 foundation

I Fair market value of all assets at end of year *(from Part II, col. (c), line 16)* ▶$ 2,956,711

J Accounting method ☑ 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 ▶ ☑ if the foundation is **not** required to attach Sch B				
	3	Interest on savings and temporary cash investments	52	52		
	4	Dividends and interest from securities	56,886	56,886		
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10	50,880			
	b	Gross sales price for all assets on line 6a 1,223,830				
	7	Capital gain net income (from Part IV, line 2)		50,880		
	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	107,818	107,818		
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc	39,444	15,768		23,676
	14	Other employee salaries and wages				
	15	Pension plans, employee benefits				
	16a	Legal fees (attach schedule)	2,160	0		2,160
	b	Accounting fees (attach schedule)				
	c	Other professional fees (attach schedule)				
	17	Interest				
	18	Taxes (attach schedule) (see page 14 of the instructions)	646	0		0
	19	Depreciation (attach schedule) and depletion				
	20	Occupancy				
	21	Travel, conferences, and meetings				
	22	Printing and publications				
	23	Other expenses (attach schedule)	11	11		0
	24	**Total operating and administrative expenses.** Add lines 13 through 23	42,261	15,779		25,836
	25	Contributions, gifts, grants paid	141,134			141,134
	26	**Total expenses and disbursements.** Add lines 24 and 25	183,395	15,779		166,970
	27	Subtract line 26 from line 12				
	a	**Excess of revenue over expenses and disbursements**	-75,577			
	b	**Net investment income** (if negative, enter -0-)		92,039		
	c	**Adjusted net income** (if negative, enter -0-)				

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

		Beginning of year (a) Book Value	End of year (b) Book Value	End of year (c) Fair Market Value
Assets				
1	Cash—non-interest-bearing	8	20	20
2	Savings and temporary cash investments	148,745	341,516	341,516
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 ▶			
8	Inventories for sale or use			
9	Prepaid expenses and deferred charges			
10a	Investments—U S and state government obligations (attach schedule)	522,410	299,060	309,527
b	Investments—corporate stock (attach schedule)	1,647,889	1,703,606	2,198,478
c	Investments—corporate bonds (attach schedule)	201,068	100,341	107,170
11	Investments—land, buildings, and equipment basis ▶ Less accumulated depreciation (attach schedule) ▶			
12	Investments—mortgage loans			
13	Investments—other (attach schedule)			
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)	2,520,120	2,444,543	2,956,711
Liabilities				
17	Accounts payable and accrued expenses			
18	Grants payable			
19	Deferred revenue			
20	Loans from officers, directors, trustees, and other disqualified persons			
21	Mortgages and other notes payable (attach schedule)			
22	Other liabilities (describe ▶)			
23	**Total liabilities** (add lines 17 through 22)	0	0	
Net Assets or Fund Balances				
	Foundations that follow SFAS 117, check here ▶ ☐ **and complete lines 24 through 26 and lines 30 and 31.**			
24	Unrestricted			
25	Temporarily restricted			
26	Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ ☑ **and complete lines 27 through 31.**			
27	Capital stock, trust principal, or current funds	0	0	
28	Paid-in or capital surplus, or land, bldg , and equipment fund	0	0	
29	Retained earnings, accumulated income, endowment, or other funds	2,520,120	2,444,543	
30	**Total net assets or fund balances** (see page 17 of the instructions)	2,520,120	2,444,543	
31	**Total liabilities and net assets/fund balances** (see page 17 of the instructions)	2,520,120	2,444,543	

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	2,520,120
2	Enter amount from Part I, line 27a	2	-75,577
3	Other increases not included in line 2 (itemize) ▶	3	0
4	Add lines 1, 2, and 3	4	2,444,543
5	Decreases not included in line 2 (itemize) ▶	5	0
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	2,444,543

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 Additional Data Table			
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	See Additional Data Table			
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	See Additional Data Table			
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	50,880
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	74,932	2,540,162	0 029499
2008	129,725	2,957,476	0 043863
2007	136,061	3,394,902	0 040078
2006	176,876	3,196,646	0 055332
2005	122,909	3,149,496	0 039025

2	**Total** of line 1, column (d)	2	0 207797
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 041559
4	Enter the net value of noncharitable-use assets for 2010 from Part X, line 5	4	2,756,053
5	Multiply line 4 by line 3	5	114,539
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	920
7	Add lines 5 and 6	7	115,459
8	Enter qualifying distributions from Part XII, line 4	8	166,970

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

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

1a	Exempt operating foundations described in section 4940(d)(2), check here ▶ ☐ and enter "N/A" on line 1 Date of ruling or determination letter ____________ **(attach copy of letter if necessary–see instructions)**			
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ▶ ☑ and enter 1% of Part I, line 27b		1	920
c	All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)			
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		2	0
3	Add lines 1 and 2		3	920
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		4	0
5	**Tax based on investment income.** Subtract line 4 from line 3 If zero or less, enter -0-		5	920
6	Credits/Payments			
a	2010 estimated tax payments and 2009 overpayment credited to 2010	6a 971		
b	Exempt foreign organizations—tax withheld at source	6b		
c	Tax paid with application for extension of time to file (Form 8868)	6c		
d	Backup withholding erroneously withheld	6d		
7	Total credits and payments Add lines 6a through 6d		7	971
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	51
11	Enter the amount of line 10 to be **Credited to 2011 estimated tax** ▶ 51	**Refunded** ▶	11	0

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		No
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		No
	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		No
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year **(1)** On the foundation ▶ $ 0 **(2)** On foundation managers ▶ $ 0			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ▶ $ 0			
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		No
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		No
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		No
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		No
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	Yes	
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	Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see page 19 of the instructions) ▶ WV			
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	Yes	
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		No
10	Did any persons become substantial contributors during the tax year? *If "Yes," attach a schedule listing their names and addresses*	10		No

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

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

Website address ▶N/A

14 The books are in care of ▶PATRICIA L WATSON VICE PRESIDENT Telephone no ▶(304) 285-2361

Located at ▶496 HIGH STREET MORGANTOWN WV ZIP+4 ▶26505

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 |

			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		No

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.

			Yes	No
1a	During the year did the foundation (either directly or indirectly)			
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☑ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☑ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☑ Yes ☐ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☑ Yes ☐ No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☑ No			
	(6) Agree to pay money or property to a government official? (**Exception.** Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days) ☐ Yes ☑ No			
b	If any answer is "Yes" to 1a(1)–(6), did **any** of the acts fail to qualify under the exceptions described in Regulations section 53 4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)?	1b		No
	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		No
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? ☐ 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		
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 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		No
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		No

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

5a	During the year did the foundation pay or incur any amount to			
	(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☑ No			
	(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☑ No			
	(3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☑ No			
	(4) Provide a grant to an organization other than a charitable, etc , organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see page 22 of the instructions) ☐ Yes ☑ No			
	(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☑ No			
b	If any answer is "Yes" to 5a(1)–(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53 4945 or in a current notice regarding disaster assistance (see 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 ☑ No			
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?	**6b**		No
	If "Yes" to 6b, file Form 8870.			
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☑ 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
BRANCH BANKING TRUST CO PO BOX 1793 CHARLESTON, WV 25326	CO-TRUSTEE 3 00	29,558	0	0
DAVID C ROGERSON 2204 VETERANS AVE COPPERAS COVE, TX 765223321	CO-TRUSTEE 0 20	9,886	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		
Total number of others receiving over $50,000 for professional services. . . . . ▶		0

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

List the foundation's four largest direct charitable activities during the tax year Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc	Expenses
1	
2	
3	
4	

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

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1	
2	
All other program-related investments See page 24 of the instructions 3	
Total. Add lines 1 through 3. . . . . ▶	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	2,660,915
b	Average of monthly cash balances	1b	137,108
c	Fair market value of all other assets (see page 24 of the instructions)	1c	0
d	**Total** (add lines 1a, b, and c)	1d	2,798,023
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation) — 1e: 0		
2	Acquisition indebtedness applicable to line 1 assets	2	0
3	Subtract line 2 from line 1d	3	2,798,023
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see page 25 of the instructions)	4	41,970
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3 Enter here and on Part V, line 4	5	2,756,053
6	**Minimum investment return.** Enter 5% of line 5	6	137,803

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	137,803
2a	Tax on investment income for 2010 from Part VI, line 5 — 2a: 920		
b	Income tax for 2010 (This does not include the tax from Part VI) — 2b:		
c	Add lines 2a and 2b	2c	920
3	Distributable amount before adjustments Subtract line 2c from line 1	3	136,883
4	Recoveries of amounts treated as qualifying distributions	4	0
5	Add lines 3 and 4	5	136,883
6	Deduction from distributable amount (see page 25 of the instructions)	6	0
7	**Distributable amount** as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1	7	136,883

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	166,970
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		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	**Qualifying distributions.** Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	166,970
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	920
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	166,050

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				136,883
2 Undistributed income, if any, as of the end of 2010				
a Enter amount for 2009 only.			20,260	
b Total for prior years 20___, 20___, 20___		0		
3 Excess distributions carryover, if any, to 2010				
a From 2005.				
b From 2006.				
c From 2007.				
d From 2008.				
e From 2009.				
f **Total** of lines 3a through e.	0			
4 Qualifying distributions for 2010 from Part XII, line 4 ▶ $ 166,970				
a Applied to 2009, but not more than line 2a			20,260	
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 2010 distributable amount.				136,883
e Remaining amount distributed out of corpus	9,827			
5 Excess distributions carryover applied to 2010 *(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:**				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	9,827			
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.		0		
d Subtract line 6c from line 6b Taxable amount—see page 27 of the instructions . . .		0		
e Undistributed income for 2009 Subtract line 4a from line 2a Taxable amount—see page 27 of the instructions			0	
f Undistributed income for 2010 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2011				0
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)	0			
8 Excess distributions carryover from 2005 not applied on line 5 or line 7 (see page 27 of the instructions)	0			
9 **Excess distributions carryover to 2011.** Subtract lines 7 and 8 from line 6a	9,827			
10 Analysis of line 9				
a Excess from 2006. . . .				
b Excess from 2007. . . .				
c Excess from 2008. . . .				
d Excess from 2009. . . .				
e Excess from 2010. . . . 9,827				

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

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

b Check box to indicate whether the organization 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 organization had $5,000 or more in assets at any time during the year—see page 27 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))

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

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

PATRICIA L WATSON VICE PRESIDENT
BBT WEALTH MANAGEMENT 496 HIGH
STREET
MORGANTOWN,WV 26505
(304) 285-2361

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

CONTACT PATRICIA L WATSON FOR APPLICATION FORM

c Any submission deadlines

NONE

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

ALL DISTRIBUTIONS FROM THE EVAN G ROBERTS CHARITABLE TRUST MUST BE TO WELL ESTABLISHED CHARITABLE, RELIGIOUS OR EDUCATIONAL INSTITUTIONS, LOCATED WITHIN MARSHALL COUNTY, WEST VIRGINIA, WHICH ARE EXEMPT FROM TAXATION UNDER SECTION 501(C), AND DESCRIBED IN SECTION 170(C) OF THE INTERNAL REVENUE CODE

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 Additional Data Table				
Total . . . . ▶ **3a**				141,134
b *Approved for future payment*				
Total . . . . ▶ **3b**				0

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See page 28 of the instructions)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments			14	52	
4 Dividends and interest from securities			14	56,886	
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	50,880	
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)		0		107,818	0

13 **Total.** Add line 12, columns (b), (d), and (e) 13 107,818

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

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

Line No.	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the organization's exempt purposes (other than by providing funds for such purposes) (See page 28 of the instructions)

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)		No
(2) Other assets	1a(2)		No
b Other transactions			
(1) Sales of assets to a noncharitable exempt organization	1b(1)		No
(2) Purchases of assets from a noncharitable exempt organization	1b(2)		No
(3) Rental of facilities, equipment, or other assets	1b(3)		No
(4) Reimbursement arrangements	1b(4)		No
(5) Loans or loan guarantees	1b(5)		No
(6) Performance of services or membership or fundraising solicitations	1b(6)		No
c Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c		No

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

******	2011-05-13	******
Signature of officer or trustee	Date	Title

Paid Preparer's Use Only

		Date	Check if self-employed ▶ ☑	PTIN
Preparer's Signature ▶	ROBERT J KRALL			
Firm's name ▶	HERNDON MORTON HERNDON & YAEGER		Firm's EIN ▶	
Firm's address ▶	83 EDGINGTON LANE WHEELING, WV 260031541		Phone no (304) 242-2300	

Additional Data

Software ID:
Software Version:
EIN: 55-6016455
Name: EVAN G ROBERTS CHARITABLE TRUST

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

	(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)
A	230 SHS AMGEN	P	2009-07-10	2010-02-10
B	100 SHS ANADARKP PETE CORP	P	2008-07-28	2010-02-10
C	110 SHS APACHE CORP	P	2009-07-10	2010-02-10
D	490 SHS APPLIED MATERIALS	P	2008-07-29	2010-02-10
E	280 SHS ARCHER DANIELS	P	2009-07-10	2010-02-10
F	180 SHS AVERY DENNISON CORP	P	2008-07-29	2010-02-10
G	200 SHS CVS CAREMARK	P	2005-07-01	2010-02-10
H	500 SHS CORNING CORP	P	2005-07-01	2010-02-10
I	250 SHS DISNEY	P	2008-07-29	2010-02-10
J	390 SHS EL DUPONT	P	2009-07-10	2010-02-10
K	340 SHS EMERSON ELECTRIC	P	2009-07-10	2010-02-10
L	110 SHS EXELON CORP	P	2009-07-10	2010-02-10
M	120 SHS HEWLETT PACKARD	P	2009-07-10	2010-02-10
N	430 SHS INTEL	P	2005-07-01	2010-02-10
O	200 SHS MERCK & CO	P	2008-07-29	2010-02-10
P	230 SHS MERCK & CO	P	2009-07-10	2010-02-10
Q	520 SHS MICROSOFT CORP	P	2005-07-01	2010-02-10
R	280 SHS ORACLE SYS CORP	P	2005-07-01	2010-02-10
S	150 SHS QUALCOMM INC	P	2008-07-29	2010-02-10
T	156 SHS SCHLUMBERGER LTD	P	2008-07-29	2010-02-10
U	1140 SHS FINANCIAL SELECT SECTOR	P	2009-07-10	2010-02-10
V	400 SHS SMITH INTL INC	P	2009-07-10	2010-02-10
W	400 SHS STAPLES INC	P	2005-07-01	2010-02-10
X	260 SHS STAPLES INC	P	2009-07-16	2010-02-10
Y	250 SHS SYSCO CORP	P	2005-07-01	2010-02-10
Z	255 SHS US BANCORP	P	2008-07-29	2010-02-10
AA	460 SHS US BANCORP	P	2009-07-16	2010-02-10
AB	410 SHS UNILEVER	P	2009-07-10	2010-02-10
AC	420 SHS UNITED HEALTH GROUP IN	P	2009-07-10	2010-02-10
AD	190 SHS WELLPOINT INC	P	2009-07-10	2010-02-10

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

	(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)
AE	170 SHS PROCTOR & GAMBLE	P	2005-07-01	2010-02-10
AF	50K FED NATL MTG ASSN DTD	P	2009-09-18	2010-06-01
AG	100 502 SHS HARBOR INTL FUND	P	2009-07-14	2010-06-21
AH	3553 289 SHS PIMPCO TOTAL	P	2005-07-01	2010-06-21
AI	8618 99 SHS PIMPCO FOREIGN	P	2008-07-29	2010-06-21
AJ	162 SHS ANADARKO PETE CORP	P	2008-07-29	2010-06-23
AK	430 SHS APPLIED MATERIALS	P	2008-07-29	2010-06-23
AL	174 SHS AVERY DENNISON	P	2008-07-29	2010-06-23
AM	320 SHS BAXTER INTL	P	2009-07-10	2010-06-23
AN	190 SHS CAMPBELL SOUP CO	P	2010-02-10	2010-06-23
AO	490 SHS CISCO SYS	P	2005-07-01	2010-06-23
AP	277 SHS CORNING INC	P	2005-07-01	2010-06-23
AQ	130 SHS EXELON CORP	P	2009-07-10	2010-06-23
AR	90 SHS EXXON MOBILE	P	2010-02-10	2010-06-23
AS	1000 SHS GENERAL ELECTRIC	P	2005-07-01	2010-06-23
AT	230 SHS GENUNINE PARTS	P	2010-02-10	2010-06-23
AU	270 SHS INTEL	P	2005-07-01	2010-06-23
AV	360 SHS ISHARES SILVER	P	2010-02-10	2010-06-23
AW	260 SHS LOWES	P	2010-02-10	2010-06-23
AX	200 SHS MEDTRONIC INC	P	2008-07-29	2010-06-23
AY	180 SHS MICROSOFT CORP	P	2005-07-01	2010-06-23
AZ	150 SHS MONSANTO	P	2009-07-10	2010-06-23
BA	150 SHS NUCOR	P	2010-02-10	2010-06-23
BB	220 SHS ORACLE	P	2005-07-01	2010-06-23
BC	146 SHS QUALCOMM INC	P	2008-07-29	2010-06-23
BD	80 SHS TEVA PHARMACEUTICAL	P	2010-02-10	2010-06-23
BE	187 SHS TRANSOCEAN LTD	P	2008-07-29	2010-06-23
BF	50K FEDERAL HOME LOAN	P	2003-07-24	2010-08-13
BG	50K GENERAL DYNAMICS CORP	P	2003-01-13	2010-08-16
BH	3583 625 SHS AIM INVESCO INTL GROWTH	P	2009-07-14	2010-08-20

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(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)
BI	948 443 SHS LAZARD EMERGING MARKETS	P	2009-07-14	2010-08-20
BJ	460 SHS APPLIED MATERIALS	P	2009-07-16	2010-08-24
BK	230 SHS BERKSHIRE HATHAWAY	P	2009-07-10	2010-08-24
BL	170 SHS CVS CAREMARK	P	2009-07-10	2010-08-24
BM	670 SHS EBAY INC	P	2009-07-10	2010-08-24
BN	330 SHS EDISON INTL	P	2009-07-10	2010-08-24
BO	200 SHS EMERSON ELECTRIC	P	2009-07-16	2010-08-24
BP	40 SHS GOLD TRUST	P	2009-07-10	2010-08-24
BQ	510 SHS FINANCIAL SELECT	P	2009-07-10	2010-08-24
BR	340 SHS SYSCO CORP	P	2009-07-10	2010-08-24
BS	240 SHS WELLPOINT	P	2009-07-16	2010-08-24
BT	340 SHS WEATHERFORD INTL	P	2010-06-23	2010-08-24
BU	1104 636 SHS ARTISAN MID CAP VALUE	P	2009-07-14	2010-10-29
BV	1425 717 SHS VANGUARD MID CAP GROUP	P	2009-07-14	2010-10-29
BW	75K FED HOME LOAN BANK	P	2005-05-16	2010-11-02
BX	180 SHS PALL CORP	P	2009-07-10	2010-11-02
BY	320 SHS ABB LTD	P	2009-07-10	2010-11-02
BZ	50 SHS GOLD TRUST	P	2009-07-10	2010-11-02
CA	120 SHS TEVA PHARMACEUTICAL	P	2010-08-24	2010-11-02
CB	920 SHS VODAFONE GROUP PLC	P	2009-07-10	2010-11-02
CC	50K JP MORGAN CHASE 4 5%	P	2009-11-07	2010-11-15
CD	CARDINAL HEALTH SETTLEMENT	P	2005-07-01	2010-11-17
CE	50K FED NATL MTG 4 75%	P	2005-11-20	2010-12-15
CF	PIMCO TOTAL RET FD (LT CAP GAINS)	P	2009-01-01	2010-12-09
CG	PIMCO TOTAL RET FD (ST CAP GAINS)	P	2010-01-01	2010-12-09
CH	GOLDMAN SACHS GROWTH (LT CAP GAINS)	P	2009-01-01	2010-12-10
CI	BB&T SPECIAL OPPORTUNITIES (LT CAP GAINS)	P	2009-01-01	2010-12-10
CJ	AMERICAN CENTURY DIVERSIFIED (LT CAP GAINS)	P	2009-01-01	2010-12-13
CK	AMERICAN CENTURY DIVERSIFIED (ST CAP GAINS)	P	2010-01-01	2010-12-13
CL	FIDELITY ADVISOR SM CAP FUND (LT CAP GAINS)	P	2009-01-01	2010-12-13

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(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)
CM	ARTISAN MID CAP VALUE (ST CAP GAINS)	P	2010-01-01	2010-12-17
CN	ARTISAN MID CAP VALUE (LT CAP GAINS)	P	2009-01-01	2010-12-17
CO	FEDERATED TOTAL RETURN GOVT (ST CAP GAINS)	P	2010-01-01	2010-12-20
CP	FEDERATED TOTAL RETURN GOVT (LT CAP GAINS)	P	2009-01-01	2010-12-20

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

	(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	13,270		12,075	1,195
B	6,250		5,992	258
C	10,771		7,305	3,466
D	5,958		8,310	-2,352
E	8,543		7,641	902
F	5,901		7,918	-2,017
G	6,236		7,694	-1,458
H	9,000		10,040	-1,040
I	7,375		7,855	-480
J	12,719		9,391	3,328
K	15,342		10,452	4,890
L	4,857		5,421	-564
M	5,686		4,430	1,256
N	8,369		10,660	-2,291
O	7,316		6,550	766
P	8,414		6,364	2,050
Q	14,586		14,664	-78
R	6,608		5,936	672
S	5,685		7,937	-2,252
T	9,644		15,680	-6,036
U	15,715		12,939	2,776
V	12,063		9,080	2,983
W	9,400		9,148	252
X	6,110		5,177	933
Y	6,818		7,390	-572
Z	6,073		7,627	-1,554
AA	10,956		8,012	2,944
AB	11,759		9,619	2,140
AC	13,664		10,605	3,059
AD	11,730		9,745	1,985

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
AE	10,414		8,206	2,208
AF	50,000		50,159	-159
AG	5,187		5,000	187
AH	39,655		38,980	675
AI	85,328		92,137	-6,809
AJ	6,825		9,707	-2,882
AK	5,706		7,293	-1,587
AL	6,099		7,654	-1,555
AM	13,515		16,896	-3,381
AN	7,053		6,156	897
AO	11,534		10,726	808
AP	5,008		5,562	-554
AQ	5,346		6,217	-871
AR	5,692		5,802	-110
AS	15,900		28,820	-12,920
AT	9,570		8,647	923
AU	5,762		6,693	-931
AV	6,782		5,328	1,454
AW	5,954		5,592	362
AX	7,744		10,720	-2,976
AY	4,729		5,076	-347
AZ	7,525		10,884	-3,359
BA	6,267		6,003	264
BB	5,075		4,664	411
BC	5,240		7,725	-2,485
BD	4,282		4,542	-260
BE	9,952		20,741	-10,789
BF	50,000		49,045	955
BG	50,000		50,699	-699
BH	87,046		73,751	13,295

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

	(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)
BI	18,144		13,250	4,894
BJ	5,314		5,220	94
BK	18,056		12,947	5,109
BL	4,913		5,234	-321
BM	15,220		10,686	4,534
BN	11,077		10,111	966
BO	9,645		6,261	3,384
BP	4,824		3,630	1,194
BQ	7,202		5,788	1,414
BR	9,754		7,395	2,359
BS	12,341		12,197	144
BT	5,332		5,148	184
BU	21,386		15,553	5,833
BV	24,893		17,180	7,713
BW	75,000		74,869	131
BX	7,691		4,646	3,045
BY	6,739		4,765	1,974
BZ	6,512		4,537	1,975
CA	6,256		6,052	204
CB	25,030		17,094	7,936
CC	50,000		50,028	-28
CD	110			110
CE	50,000		49,277	723
CF	1,464			1,464
CG	3,201			3,201
CH	1,233			1,233
CI	675			675
CJ	225			225
CK	533			533
CL	2,654			2,654

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

	(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)
CM	547			547
CN	1,159			1,159
CO	60			60
CP	632			632

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69				(l) Gains (Col (h) gain minus col (k), but not less than -0-) **or** Losses (from col (h))
	(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	
A				1,195
B				258
C				3,466
D				-2,352
E				902
F				-2,017
G				-1,458
H				-1,040
I				-480
J				3,328
K				4,890
L				-564
M				1,256
N				-2,291
O				766
P				2,050
Q				-78
R				672
S				-2,252
T				-6,036
U				2,776
V				2,983
W				252
X				933
Y				-572
Z				-1,554
AA				2,944
AB				2,140
AC				3,059
AD				1,985

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69				(l) Gains (Col (h) gain minus col (k), but not less than -0-) **or** Losses (from col (h))
	(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	
AE				2,208
AF				-159
AG				187
AH				675
AI				-6,809
AJ				-2,882
AK				-1,587
AL				-1,555
AM				-3,381
AN				897
AO				808
AP				-554
AQ				-871
AR				-110
AS				-12,920
AT				923
AU				-931
AV				1,454
AW				362
AX				-2,976
AY				-347
AZ				-3,359
BA				264
BB				411
BC				-2,485
BD				-260
BE				-10,789
BF				955
BG				-699
BH				13,295

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69				(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
	(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	
BI				4,894
BJ				94
BK				5,109
BL				-321
BM				4,534
BN				966
BO				3,384
BP				1,194
BQ				1,414
BR				2,359
BS				144
BT				184
BU				5,833
BV				7,713
BW				131
BX				3,045
BY				1,974
BZ				1,975
CA				204
CB				7,936
CC				-28
CD				110
CE				723
CF				1,464
CG				3,201
CH				1,233
CI				675
CJ				225
CK				533
CL				2,654

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69				(l) Gains (Col (h) gain minus col (k), but not less than -0-) **or** Losses (from col (h))
	(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	
CM				547
CN				1,159
CO				60
CP				632

Form 990PF Part XV Line 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*				
CITY OF GLENDALE WV 402 WHEELING AVENUE GLEN DALE, WV 26038	N/A	MUNICIPALITY	REPLACE FENCING AND PLAYGROUND EQUIPMENT	15,200
FIRST PRESBYTERIAN CHURCH 1000 3RD ST MOUNDSVILLE, WV 26041	N/A	CHURCH	BUILDING RENOVATION	10,471
MARSHALL COUNTY BOARD OF EDUCATION 2700 FOURTH STREET MOUNDSVILLE, WV 26041	N/A	COUNTY BOARD OF EDUC	CAMERON BAND UNIFORMS	9,600
MARSHALL COUNTY BOARD OF EDUCATION 2700 FOURTH STREET MOUNDSVILLE, WV 26041	N/A	COUNTY BOARD OF EDUC	JMHS RESURFACE TENNIS COURTS	15,000
MOUNDSVILLE-MARSHALL CO PUBLIC LIBRARY 700 FIFTH ST MOUNDSVILLE, WV 26041	N/A	PUBLIC LIBRARY	SUMMER READING PROGRAM	4,800
OUR LADY OF PEACE SCHOOL 640 OLD FAIRMONT PIKE WHEELING, WV 26003	N/A	SCHOOL	"PUMP IT UP" PROGRAM	6,063
MARSHALL COUNTY RESCUE LEAGUE RD5 BOX 210 MOUNDSVILLE, WV 26041	N/A	MUNICIPALITY	BUILDING PROJECT	72,000
MARSHALL COUNTY COMMISSION PO BOX DRAWER B MOUNDSVILLE, WV 26041	N/A	MUNICIPALITY	GRAND VUE PARK SUMMER EVENT SERIES	8,000
Total . . . . ▶ **3a**				141,134

TY 2010 Investments Corporate Bonds Schedule

Name: EVAN G ROBERTS CHARITABLE TRUST

EIN: 55-6016455

Name of Bond	End of Year Book Value	End of Year Fair Market Value
50M GENERAL DYNAMICS CORP. (4.5% DTD 8/14/03 DUE, 8/15/10)	0	0
50M TARGET CORP 4% DTD 6/11/03 DUE 6/15/13	49,873	53,400
50M GENERAL ELECTRIC CORP. 5.45% DTD 12/6/02 DUE 1/15/13	50,468	53,770
50M JP MORGAN CHASE DTD 11/7/03 4.5% 11/15/10	0	0

TY 2010 Investments Corporate Stock Schedule

Name: EVAN G ROBERTS CHARITABLE TRUST

EIN: 55-6016455

Name of Stock	End of Year Book Value	End of Year Fair Market Value
381 SHS ABBOTT LABORATORIES	20,947	18,254
740 SHS ABB LTD	11,019	16,613
3,850.688 SHS ALLIANZ OCC OPPORTUNITY FUND	58,723	88,527
8,034.26 SHS AMERICAN CENTURY DIVERSIFIED BOND FUND	88,464	86,449
55 SHS APPLE COMPUTERS	14,346	17,741
5,343.873 SHS ARTISAN MID CAP VALUE	75,242	107,305
660 SHS AT&T	1,016	19,391
210 SHS AVERY DENNISON	5,124	8,891
1,140 SHS BANK OF AMERICA	15,289	15,208
240 SHS BARRICK GOLD	8,576	12,763
230 SHS CAMPBELL SOUP	7,452	7,993
1,060 SHS MICROSOFT	24,571	29,585
250 SHS CHEVRON TEXACO	8,413	22,813
100 SHS COCA COLA	5,268	6,577
270 SHS JOHNSON & JOHNSON	15,860	16,700
470 SHS CONOCOPHILLIPS	13,461	32,007
310 SHS COVIDIEN	11,986	14,155
914.233 SHS DODGE AND COX	12,269	12,095
200 SHS EXXON MOBIL	12,893	14,624
60 SHS FEDEX	5,323	5,581
9,819.777 SHS FEDERATED TOTAL RTN	112,584	111,160
1,140 SHS GENERAL ELECTRIC COMPANY	17,843	20,851
240SHS PEPSICO INC.	11,426	15,679
170 SHS PROCTOR AND GAMBLE	0	0
760 SHS INTEL	12,448	15,983
580 SHS WALT DISNEY	13,079	21,756
240 SHS STAPLES	4,934	5,465
180 SHS CVS CAREMARK	5,542	6,259
610 SHS SYSCO	0	0
262 SHS ANADARKO PETE CORP	0	0

Name of Stock	End of Year Book Value	End of Year Fair Market Value
270 SHS SCHLUMBERGER	13,389	22,545
187 SHS TRANSOCEAN INC	0	0
715 SHS US BANCORP	0	0
460 SHS WELLS FARGO	12,250	14,255
550 SHS MEDTRONIC	19,119	20,400
1000 SHS MERCK AND CO	15,612	20,543
1380 SHS APPLIED MATERIALS	0	0
503 SHS CISCO	11,170	10,176
340 SHS CORNING	5,086	6,569
530 SHS ORACLE	11,351	16,589
296 SHS QUALCOM	0	0
8618.99 SHS PIMCO	0	0
3,583.625 SHS AIM INTL GROWTH FUND	0	0
230 SHS AMGEN	0	0
110 SHS APACHE	0	0
280 SHS ARCHER DANIELS	0	0
6,901.536 SHS BB&T SPECIAL OPP FUND	89,858	122,847
320 SHS BAXTER INTL	12,706	14,174
270 SHS BERKSHIRE HATHAWAY INC	15,220	21,630
1,020 SHS COMCAST	13,586	22,409
390 SHS E I DUPONT	0	0
670 SHS EBAY	0	0
330 SHS EDISON INTL	0	0
540 SHS EMERSON ELECTRIC	0	0
240 SHS EXELON CORP	0	0
3,402.796 SHS FIDELITY ADVISOR SMALL CAP	63,292	89,664
1,650 SHS FINANCIAL SELECT SECTOR SPDR FUND	0	0
90 SHS SPDR GOLD TRUST	0	0
5,666.345 SHS GOLDMAN SACH GROWTH FUND	87,885	137,976
16 SHS GOOGLE	6,351	9,504

Name of Stock	End of Year Book Value	End of Year Fair Market Value
1,808.776 SHS HARBOR INTERNATIONAL	75,643	109,521
7,027.877 SHS HARDING LOEVNER INTL EQUITY	90,237	105,278
240 SHS HEWLETT PACKARD	8,861	10,104
110 SHS INTERNATIONAL BUSINESS MACHINES	11,055	16,144
440 SHS INTERNATIONAL PAPER COMPANY	10,220	11,986
290 SHS ISHARES LEHMAN TRES	30,818	31,181
280 SHS ISHARES SILVER TRUST	4,144	8,450
330 SHS JP MORGAN	12,525	13,999
600 SHS KRAFT FOODS	15,468	18,906
770 SHS KROGER CO	16,370	17,217
120 SHS LOCKHEED MARTIN	9,026	8,389
540 SHS LOWE'S	11,554	13,543
500 SHS METLIFE INC	17,849	22,220
420 SHS MORGAN STANLEY	10,881	11,428
150 SHS MONSANTO CO	0	0
130 SHS NOVARTIS	6,342	7,664
400 SHS PALL CORPORATION	10,324	19,832
790 SHS PFIZER	13,185	13,833
8,651.542 PIMCO TOTAL FUND	94,907	93,869
80 SHS PROCTOR AND GAMBLE	4,851	5,146
840 SHS SOUTHWEST AIRLINES	11,571	10,903
400 SHS SMITH INTL INC	0	0
390 SHS STATE STREET CORP	16,522	18,073
110 SHS STRYKER CORP	5,109	5,907
470 SHS SUNCOR ENERGY INC	12,949	17,996
100 SHS TARGET CORP	5,196	6,013
170 SHS TEXAS INSTRUMENTS	4,967	5,525
320 SHS TRAVELERS	12,461	17,827
480 SHS TYCO INTERNATIONAL LTD	18,335	19,891
680 SHS TYCO ELECTRONICS LTD	19,275	24,072

Name of Stock	End of Year Book Value	End of Year Fair Market Value
920 SHS UNILEVER	11,990	15,749
420 SHS UNITED HEALTH GROUP	0	0
7,289.793 SHS VANGUARD MIDCAP GROWTH	70,662	111,417
200 SHS VERIZON	6,034	7,156
920 SHS VODAFONE GROUP	0	0
370 SHS WALMART	19,431	19,954
430 SHS WELLPOINT INC	0	0
4,572.030 SHS LAZARD EMERGING MARKETS	63,871	99,579

TY 2010 Investments Government Obligations Schedule

Name:	EVAN G ROBERTS CHARITABLE TRUST
EIN:	55-6016455
US Government Securities - End of Year Book Value:	299,060
US Government Securities - End of Year Fair Market Value:	309,527
State & Local Government Securities - End of Year Book Value:	0
State & Local Government Securities - End of Year Fair Market Value:	0

TY 2010 Legal Fees Schedule

Name: EVAN G ROBERTS CHARITABLE TRUST

EIN: 55-6016455

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
HERNDON, MORTON, HERNODN & YAEGER	2,160	0		2,160

TY 2010 Other Expenses Schedule

Name: EVAN G ROBERTS CHARITABLE TRUST

EIN: 55-6016455

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ADR FEES	11	11		0

TY 2010 Taxes Schedule

Name: EVAN G ROBERTS CHARITABLE TRUST

EIN: 55-6016455

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
2010 FEDERAL TAX ESTIMATED PAYMENTS	600	0		0
FOREIGN TAX WITHHELD	46	0		0