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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
THE JOANNA FOUNDATION

A Employer identification number
57-0314444

Number and street (or P O box number if mail is not delivered to street address) PO BOX 308
Room/suite

B Telephone number (see page 10 of the instructions)
(843) 792-0868

City or town, state, and ZIP code
SULLIVANS ISLAND, SC 294820308

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)* ▶$ 3,799,036

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))*

			(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	541	541		
	4	Dividends and interest from securities	77,661	77,661		
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10	-40,186			
	b	Gross sales price for all assets on line 6a 765,813				
	7	Capital gain net income (from Part IV, line 2)		0		
	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)	2,009	2,009		
	12	**Total.** Add lines 1 through 11	40,025	80,211		
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc	36,983	5,547		31,436
	14	Other employee salaries and wages				
	15	Pension plans, employee benefits	2,829	424		2,405
	16a	Legal fees (attach schedule)				
	b	Accounting fees (attach schedule)	7,325	7,325		0
	c	Other professional fees (attach schedule)	13,144	13,144		0
	17	Interest				
	18	Taxes (attach schedule) (see page 14 of the instructions)	908	908		0
	19	Depreciation (attach schedule) and depletion				
	20	Occupancy				
	21	Travel, conferences, and meetings	3,925	589		3,336
	22	Printing and publications				
	23	Other expenses (attach schedule)	4,585	687		3,898
	24	**Total operating and administrative expenses.** Add lines 13 through 23	69,699	28,624		41,075
	25	Contributions, gifts, grants paid	136,000			136,000
	26	**Total expenses and disbursements.** Add lines 24 and 25	205,699	28,624		177,075
	27	Subtract line 26 from line 12				
	a	**Excess of revenue over expenses and disbursements**	-165,674			
	b	**Net investment income** (if negative, enter -0-)		51,587		
	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	(c) Fair Market Value
Assets	1 Cash—non-interest-bearing		1	1
	2 Savings and temporary cash investments	113,800	292,319	292,319
	3 Accounts receivable ▶			
	Less allowance for doubtful accounts ▶	351		
	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	1,247	1,247	1,247
	10a Investments—U S and state government obligations (attach schedule)	51,220	30,504	30,980
	b Investments—corporate stock (attach schedule)	3,286,990	2,960,547	3,474,489
	c Investments—corporate bonds (attach schedule)			
	11 Investments—land, buildings, and equipment basis ▶			
	Less accumulated depreciation (attach schedule) ▶			
	12 Investments—mortgage loans			
	13 Investments—other (attach schedule)			
	14 Land, buildings, and equipment basis ▶ 2,299			
	Less accumulated depreciation (attach schedule) ▶ 2,299			
	15 Other assets (describe ▶)			
	16 **Total assets** (to be completed by all filers—see the instructions Also, see page 1, item I)	3,453,608	3,284,618	3,799,036
Liabilities	17 Accounts payable and accrued expenses	65	67	
	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 ▶)	3,318	0	
	23 **Total liabilities** (add lines 17 through 22)	3,383	67	
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	3,450,225	3,284,551	
	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			
	28 Paid-in or capital surplus, or land, bldg , and equipment fund			
	29 Retained earnings, accumulated income, endowment, or other funds			
	30 **Total net assets or fund balances** (see page 17 of the instructions)	3,450,225	3,284,551	
	31 **Total liabilities and net assets/fund balances** (see page 17 of the instructions)	3,453,608	3,284,618	

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	3,450,225
2	Enter amount from Part I, line 27a	2	-165,674
3	Other increases not included in line 2 (itemize) ▶	3	0
4	Add lines 1, 2, and 3	4	3,284,551
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	3,284,551

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			(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	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	-40,186
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	153,134	3,152,211	0 048580
2008	185,965	3,879,748	0 047932
2007	219,319	4,477,196	0 048986
2006	191,689	4,174,922	0 045914
2005	194,771	3,693,210	0 052738

2	**Total** of line 1, column (d)	2	0 244150
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 048830
4	Enter the net value of noncharitable-use assets for 2010 from Part X, line 5	4	3,498,238
5	Multiply line 4 by line 3	5	170,819
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	516
7	Add lines 5 and 6	7	171,335
8	Enter qualifying distributions from Part XII, line 4	8	177,075

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	516
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	516
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	516
6	Credits/Payments				
a	2010 estimated tax payments and 2009 overpayment credited to 2010	6a	3,076		
b	Exempt foreign organizations—tax withheld at source	6b			
c	Tax paid with application for extension of time to file (Form 8868)	6c			
d	Backup withholding erroneously withheld	6d			
7	Total credits and payments Add lines 6a through 6d			7	3,076
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	2,560
11	Enter the amount of line 10 to be **Credited to 2011 estimated tax** ▶ 2,560		**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) ▶ SC			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? *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 ▶WWW JOANNAFOUNDATION ORG

14 The books are in care of ▶MARGARET P SCHACHTE Telephone no ▶(843) 883-9199

Located at ▶PO BOX 308 SULLIVANS ISLAND SC ZIP+4 ▶29482

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		
	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
See Additional Data Table				

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	3,311,335
b	Average of monthly cash balances	1b	236,369
c	Fair market value of all other assets (see page 24 of the instructions)	1c	3,807
d	**Total** (add lines 1a, b, and c)	1d	3,551,511
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	3,551,511
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see page 25 of the instructions)	4	53,273
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3 Enter here and on Part V, line 4	5	3,498,238
6	**Minimum investment return.** Enter 5% of line 5	6	174,912

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	174,912
2a	Tax on investment income for 2010 from Part VI, line 5 — 2a: 516		
b	Income tax for 2010 (This does not include the tax from Part VI) — 2b:		
c	Add lines 2a and 2b	2c	516
3	Distributable amount before adjustments Subtract line 2c from line 1	3	174,396
4	Recoveries of amounts treated as qualifying distributions	4	0
5	Add lines 3 and 4	5	174,396
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	174,396

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	177,075
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	177,075
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	516
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	176,559

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				174,396
2 Undistributed income, if any, as of the end of 2010				
a Enter amount for 2009 only.			1,871	
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 ▶ $ 177,075				
a Applied to 2009, but not more than line 2a			1,871	
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.				174,396
e Remaining amount distributed out of corpus	808			
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	808			
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	808			
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. . . . 808				

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

MARGARET P SCHACHTE
PO BOX 308
SULLIVANS ISLAND,SC 29482
(843) 883-9199

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

IN LETTER FORM, INCLUDING APPLICABLE FINANCIAL NEED DATA

c Any submission deadlines

THE FOUNDATION HAS THREE FUNDING CYCLES PER YEAR UPCOMING DEADLINES ARE POSTED ON ITS WEBSITE

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

THE FUNDING AREA FOCUSES ON SOUTH CAROLINA THE FOUNDATION GENERALLY DOES NOT REVIEW REQUESTS FROM ORGANIZATIONS THAT DO NOT HAVE A SIGNIFICANT IMPACT WITHIN AT LEAST ONE OF FIVE DESIGNATED COUNTIES BERKELEY, CHARLESTON, DORCHESTER, LAURENS AND NEWBERRY

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**				136,000
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	541	
4 Dividends and interest from securities. . . .			14	77,661	
5 Net rental income or (loss) from real estate					
a Debt-financed property.					
b Not debt-financed property.					
6 Net rental income or (loss) from personal property					
7 Other investment income.			14	2,009	
8 Gain or (loss) from sales of assets other than inventory			18	-40,186	
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		40,025	0

13 Total. Add line 12, columns (b), (d), and (e). **13** 40,025

(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

******	2011-07-06	******
Signature of officer or trustee	Date	Title

Paid Preparer's Use Only

		Date	Check if self-employed ☐	PTIN
Preparer's Signature	CHRIS M DUNCAN CPA			
Firm's name	GLASERDUNCAN CPAS		Firm's EIN	
Firm's address	1040 ANNA KNAPP BLVD MOUNT PLEASANT, SC 29464		Phone no (843) 849-0655	

Additional Data

Software ID:
Software Version:
EIN: 57-0314444
Name: THE JOANNA FOUNDATION

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	AMGEN INC (520 SHARES)	P	2010-07-02	2010-12-10
B	ANALOG DEVICES INC (965 SHARES)	P	2009-12-03	2010-09-24
C	AVALONBAY COMMNTYS INC (150 SHRS)	P	2008-05-22	2010-09-24
D	BAXTER INTL INC (200 SHRS)	P	2010-05-13	2010-09-24
E	BAXTER INTL INC (150 SHRS)	P	2010-06-02	2010-09-24
F	BAXTER INTL INC (460 SHRS)	P	2009-08-19	2010-09-24
G	ITAU SA ADR REP 500 PFD (1,85 SHRS)	P	2009-12-30	2010-12-10
H	INTL BUSINESS MACHS CORP (175 SHRS)	P	2008-12-30	2010-09-28
I	MASTERCARD INC CLASS A (110 SHRS)	P	2009-07-31	2010-12-17
J	NEXTERA ENERGY INC	P	2006-01-26	2010-11-23
K	NORTHERN TRUST CORP (415 SHRS)	P	2009-05-08	2010-09-28
L	TIME WARNERS CABLE INC (570 SHRS)	P	2010-03-03	2010-09-24
M	ANADARKO PETROLEUM CORP (510 SHRS)	P	2009-12-30	2010-06-21
N	CARNIVAL CORP (795 SHRS)	P	2009-09-30	2010-03-11
O	CORNING INC (400 SHRS)	P	2009-12-03	2010-07-16
P	TRANSOCEAN LTD SWITZERLAND (250 SHRS)	P	2007-12-18	2010-04-22
Q	CHEVRON CORP (250 SHRS)	P	2008-12-30	2010-05-13
R	CORNING INC (1,250 SHRS)	P	2001-02-16	2010-07-16
S	EXCELON CORP (374 SHRS)	P	2008-01-31	2010-06-04
T	FRESENIUS MEDICAL CARE AG & CO KGAA SPONS ADR (530 SHRS)	P	2009-02-10	2010-07-02
U	GILEAD SCIENCES INC (775 SHRS)	P	2007-10-15	2010-05-13
V	GOOGLE INC CLASS A (50 SHRS)	P	2009-05-08	2010-07-15
W	MONSATO CO (330 SHRS)	P	2008-12-30	2010-04-07
X	OCCIDENTAL PRETROLEUM CORP (550 SHRS)	P	2007-10-15	2010-05-13
Y	PAYCHEX INC (750 SHRS)	P	2007-05-23	2010-03-11
Z	QUEST DIAGNOSTICS INC (500 SHARES)	P	2006-10-10	2010-02-09
AA	WTS RAYTHEON COMPANY (219 SHRS)	P	2008-12-30	2010-03-11
AB	STAPLES INC (1,170 SHRS)	P	2008-12-30	2010-06-04
AC	TECO ENERGY INC (750 SHRS)	P	2001-01-17	2010-03-11
AD	TECO ENERGY INC (1,000 SHRS)	P	2001-10-29	2010-03-11

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	THERMO FISHER SCIENTIFIC INC (500 SHRS)	P	2008-07-07	2010-04-07
AF	THERMO FISHER SCIENTIFIC INC (200 SHRS)	P	2008-12-30	2010-04-07
AG	VERIZON COMMUNICATIONS (920 SHRS)	P	2009-02-10	2010-03-03
AH	EUROPACIFIC GROWTH FUND (238 095 SHRS)	P	2001-07-17	2010-03-05
AI	EUROPACIFIC GROWTH FUND (293 396 SHRS)	P	2001-08-10	2010-03-05
AJ	GROWTH FUND OF AMERICA (718 391 SHRS)	P	2003-09-24	2010-03-05
AK	CAPITAL GAINS DIVIDENDS	P		

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	27,606		27,289	317
B	28,425		29,794	-1,369
C	15,620		15,052	568
D	9,589		9,060	529
E	7,192		6,349	843
F	22,054		26,018	-3,964
G	28,827		29,383	-556
H	23,489		14,619	8,870
I	24,262		21,515	2,747
J	35,523		28,934	6,589
K	19,676		22,253	-2,577
L	29,615		27,152	2,463
M	21,903		32,641	-10,738
N	29,077		26,564	2,513
O	6,672		7,187	-515
P	22,055		33,754	-11,699
Q	19,560		18,282	1,278
R	20,849		41,184	-20,335
S	13,888		28,715	-14,827
T	27,967		23,020	4,947
U	30,580		32,973	-2,393
V	24,280		20,155	4,125
W	22,189		23,079	-890
X	45,794		38,512	7,282
Y	23,558		30,470	-6,912
Z	27,529		25,041	2,488
AA	4,062		4,062	0
AB	24,406		20,815	3,591
AC	11,656		20,712	-9,056
AD	15,542		26,397	-10,855

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	25,546		28,934	-3,388
AF	10,219		6,757	3,462
AG	26,498		27,918	-1,420
AH	8,960		6,883	2,077
AI	11,040		8,506	2,534
AJ	20,000		16,020	3,980
AK	105			105

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				317
B				-1,369
C				568
D				529
E				843
F				-3,964
G				-556
H				8,870
I				2,747
J				6,589
K				-2,577
L				2,463
M				-10,738
N				2,513
O				-515
P				-11,699
Q				1,278
R				-20,335
S				-14,827
T				4,947
U				-2,393
V				4,125
W				-890
X				7,282
Y				-6,912
Z				2,488
AA				0
AB				3,591
AC				-9,056
AD				-10,855

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				-3,388
AF				3,462
AG				-1,420
AH				2,077
AI				2,534
AJ				3,980
AK				105

Form 990PF Part VIII Line 1 - List all officers, directors, trustees, foundation managers and their compensation

(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
MARGARET P SCHACHTE 1768 ATLANTIC AVENUE SULLIVANS ISLAND, SC 29482	VICE PRESIDENT 8 00	36,983	0	0
WALTER C REGNERY 1768 ATLANTIC AVENUE SULLIVANS ISLAND, SC 29482	PRESIDENT 0 50	0	0	0
CHARLES E MENEFEE JR 6119 BEARS BLUFF ROAD WADMALAW ISLAND, SC 29487	SEC /TREASURE 0 50	0	0	0
EUGENIE F REGNERY 2714 CAST NET ROAD JOHNS ISLAND, SC 29455	TRUSTEE 0 50	0	0	0
PATRICIA L REGNERY 1514 VILLAGE SQUARE MOUNT PLEASANT, SC 29464	TRUSTEE 0 50	0	0	0
YONGE R JONES 108 ROPER MEADOW DRIVE SIMPSONVILLE, SC 29681	TRUSTEE 0 50	0	0	0
MARY BETH GREENSLADE 7198 SC HIGHWAY 219 NEWBERRY, SC 29108	TRUSTEE 0 50	0	0	0
EUGENIE J PARKER 4246 TIMBERLANE DRIVER COLUMBIA, SC 29205	TRUSTEE 0 50	0	0	0

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*				
SOUTH CAROLINA COASTAL CONSERVATION LEAGUE 328 EAST BAY STREET CHARLESTON, SC 29402			GENERAL SUPPORT	10,000
THE CHARLESTON MUSEUM 360 MEETING STREET CHARLESTON, SC 29403			GENERAL SUPPORT	3,000
CITY OF CHARLESTON CULTURAL AFFAIRS OFFICE 180 MEETING STREET STE 200 CHARLESTON, SC 29401			GENERAL SUPPORT - PICCOLO SPOLETO	1,000
CONCERNED CITIZENS OF SOL LEGARE 1999 SOL LEGARE ROAD CHARLESTON, SC 29412			GENERAL SUPPORT	1,000
FOOTLIGHT PLAYERS 20 QUEEN STREET CHARLESTON, SC 29401			GENERAL SUPPORT	1,000
FORT SUMTER-FORT MOULTRIE HISTORICAL TRUST 40 EAST BAY STREET CHARLESTON, SC 29401			GENERAL SUPPORT	3,000
NEWBERRY OPERA HOUSE 1201 MCKIBBEN STREET NEWBERRY, SC 29108			GENERAL SUPPORT	4,000
SC MARITIME FOUNDATION 480 EAST BAY STREET F CHARLESTON, SC 29403			GENERAL SUPPORT	1,000
PALMETTO PROJECT FBO YO ART PROJECT 1031 CHUCK DAWLEY BLVD 5 MT PLEASANT, SC 29464			GENERAL SUPPORT	2,000
AMERICAN COLLEGE OF THE BUILDING ARTS 21 MAGAZINE STREET CHARLESTON, SC 29401			GENERAL SUPPORT	4,000
JAMES ISLAND COMMUNITY EDUCATION 1000 FORT JOHNSON ROAD CHARLESTON, SC 29412			GENERAL SUPPORT	2,000
JOANNA WOODSON ELEMENTARY SCHOOL 510 SOUTH ELLIS ROAD JOANNA, SC 29351			GENERAL SUPPORT	3,000
HARRY HAMPTON WILDLIFE FUND PO BOX 2641 COLUMBIA, SC 29202			GENERAL SUPPORT	1,000
LEARNING THROUGH LOGGERHEADS PO BOX 682 EDISTO ISLAND, SC 29438			GENERAL SUPPORT	2,000
CAMP GOOD TIMES 3321 LADSON ROAD LADSON, SC 29456			GENERAL SUPPORT	1,000
Total . . . . ▶ **3a**				136,000

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*				
CAR SEATS FOR KELLY 209 LYNTON CT GOOSE CREEK,SC 29445			GENERAL SUPPORT	1,000
CHARLESTON AREA CHILDREN'S GARDEN PROJECT PO BOX 13302 JAMES ISLAND,SC 29422			GENERAL SUPPORT	2,000
EAST COOPER MEALS ON WHEELS 2304 N HWY 17 MT PLEASANT,SC 29466			GENERAL SUPPORT	1,000
HALOS 3366 RIVERS AVENUE NORTH CHARLESTON,SC 29405			GENERAL SUPPORT	1,000
WINGS FOR KIDS PO BOX 71648 NORTH CHARLESTON,SC 29405			GENERAL SUPPORT	4,000
CHARLESTON ACADEMY OF MUSIC 189 RUTLEDGE AVENUE CHARLESTON,SC 29403			GENERAL SUPPORT	2,500
CHARLESTON LIBRARY SOCIETY 164 KING STREET CHARLESTON,SC 29401			GENERAL SUPPORT	2,500
AVIAN CONSERVATION CENTER 4872 SEEWEE ROAD AWENDAW,SC 29429			GENERAL SUPPORT	5,000
LOWCOUNTRY OPEN LAND TRUST 485 EAST BAY STREET A CHARLESTON,SC 29403			GENERAL SUPPORT	4,000
PALMETTO CONSERVATION FUND 722 KING STREET COLUMBIA,SC 29205			GENERAL SUPPORT	3,000
AMERICAN RED CROSS - CAROLINA LOWCOUNTRY CHAPTER 8085 RIVERS AVENUE F NORTH CHARLESTON,SC 29406			GENERAL SUPPORT	1,000
BOYS AND GIRLS OF THE TRIDENT AREA PO BOX 20879 CHARLESTON,SC 29413			GENERAL SUPPORT	1,500
CALEB'S DRAGON FLY DREAMS 664 FOREST BROOK ROAD MYRTLE BEACH,SC 29579			GENERAL SUPPORT	1,000
CAROLINA YOUTH DEVELOPMENT CENTER 5055 LAKAWANNA BLVD NORTH CHARLESTON,SC 29405			GENERAL SUPPORT	3,000
LOWCOUNTRY FOOD BANK 2864 AZALEA DRIVE CHARLESTON,SC 29405			GENERAL SUPPORT	2,500
Total . . . . ▶ **3a**				136,000

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*				
ST JAMES SOUTH SANTEE SENIOR AND COMMUNITY CENTER 710 SOUTH SANTEE ROAD MCCLELLANVILLE,SC 29458			GENERAL SUPPORT	2,000
TRIDENT LITERACY ASSOCIATION 5416 RIVERS AVENUE 201 NORTH CHARLESTON,SC 29406			GENERAL SUPPORT	2,000
MCCLELLANVILLE ARTS COUNCIL 733 PINCKNEY STREET MCCLELLANVILLE,SC 29458			GENERAL SUPPORT	2,000
NEWBERRY OPERA HOUSE 1201 MCKIBBEN STREET NEWBERRY,SC 29108			GENERAL SUPPORT	1,000
TEACHERS SUPPLY CLOSET PO BOX 12476 CHARLESTON,SC 29422			GENERAL SUPPORT	3,000
EDISTO ISLAND OPEN LAND TRUST 547 HIGWAY 174 EDISTO ISLAND,SC 29438			GENERAL SUPPORT	4,000
THE NATURE CONSERVANCY 2231 DEVINE STREET COLUMBIA,SC 29205			GENERAL SUPPORT	1,000
SOUTH CAROLINA ENVIRONMENTAL LAW PROJECT 430 HIGHWAY MARKET STREET GEORGETOWN,SC 29440			GENERAL SUPPORT	3,000
SOUTHERN ENVIRONMENTAL LAW CENTER 43 BROAD STREET STE 300 CHARLESTON,SC 29401			GENERAL SUPPORT	2,500
ST LUKE LUTHERAN CHURCH FOR THE ARK 206 CENTRAL AVENUE SUMMERVILLE,SC 29483			GENERAL SUPPORT	2,500
FREE MEDICAL CLINIC OF NEWBERRY 2568 KINARD STREET NEWBERRY,SC 29108			GENERAL SUPPORT	1,000
LOWCOUNTRY LOCAL FIRST 1345 AVENUE G AA NORTH CHARLESTON,SC 29405			GENERAL SUPPORT	3,000
CHARLESTON LEADERSHIP FOUNDATION - BE A MENTOR PO BOX 1062 CHARLESTON,SC 29402			GENERAL SUPPORT	2,000
CENTER FOR HEIRS PROPERTY PRESERVATION 1535 SAM RITTENBERG BLVD SUITE D CHARLESTON,SC 29407			GENERAL SUPPORT	3,000
COASTAL COMMUNITY FOUNDATION FOR CHARLESTON VOLUNTEERS FOR LITERACY 635 RUTLEDGE AVENUE CHARLESTON,SC 29403			GENERAL SUPPORT	2,000
Total . . . . ▶ 3a				136,000

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*				
CRISIS MINISTRIES 573 MEETING STREET CHARLESTON,SC 29403			GENERAL SUPPORT	4,000
EAST COOPER COMMUNITY OUTREACH 1145 SIX MILE ROAD MT PLEASANT,SC 29466			GENERAL SUPPORT	2,000
EAST COOPER HABITAT FOR HUMANITY 1558 BEN SAWYER BOULEVARD STE A MT PLEASANT,SC 29464			GENERAL SUPPORT	3,000
FIELDS TO FAMILIES 222 W COLEMAN BLVD MT PLEASANT,SC 29464			GENERAL SUPPORT	5,000
LOWCOUNTRY ALLIANCE FOR MODEL COMMUNITIES 2202 BECKER STREET CHARLESTON,SC 29405			GENERAL SUPPORT	1,000
OPERATION HOME 1250 FAIRMONT AVENUE MT PLEASANT,SC 29464			GENERAL SUPPORT	2,500
REIN AND SHINE 5220 BEDAW FARM DRIVE AWENDAW,SC 29429			GENERAL SUPPORT	2,500
SEEWALL CHILD PO BOX 1025 BEAUFORT,SC 29901			GENERAL SUPPORT	2,500
SIMPLY DEVINE GARDEN PO BOX 20025 CHARLESTON,SC 29413			GENERAL SUPPORT	1,500
YMCA OF GREATER CHARLESTON 61 CANNON STREET CHARLESTON,SC 29403			GENERAL SUPPORT	1,000
ART FORMS AND THEATER CONCEPTS PO BOX 20130 CHARLESTON,SC 29413			GENERAL SUPPORT	1,000
CHRIST CENTRAL MINISTRIES 159 CHURCH STREET WAGENER,SC 29164			GENERAL SUPPORT	1,000
SEXUAL TRAUMA AND COUNSELING CENTER 115 E ALEXANDER AVE GREENWOOD,SC 29646			GENERAL SUPPORT	1,000
Total . . . . ▶ **3a**				136,000

TY 2010 Accounting Fees Schedule

Name: THE JOANNA FOUNDATION

EIN: 57-0314444

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING	7,325	7,325		0

TY 2010 Investments Corporate Stock Schedule

Name: THE JOANNA FOUNDATION

EIN: 57-0314444

Name of Stock	End of Year Book Value	End of Year Fair Market Value
CORPORATE STOCKS AND MUTUAL FUNDS	2,960,547	3,474,489

TY 2010 Investments Government Obligations Schedule

Name:	THE JOANNA FOUNDATION
EIN:	57-0314444
US Government Securities - End of Year Book Value:	30,504
US Government Securities - End of Year Fair Market Value:	30,980
State & Local Government Securities - End of Year Book Value:	0
State & Local Government Securities - End of Year Fair Market Value:	0

TY 2010 Other Expenses Schedule

Name: THE JOANNA FOUNDATION

EIN: 57-0314444

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
TELEPHONE	799	120		679
OFFICE SUPPLIES	202	30		172
POSTAGE	300	45		255
WEBHOSTING	155	23		132
MISCELLANEOUS	59	9		50
MEMBERSHIPS	1,495	224		1,271
INSURANCE	1,575	236		1,339

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TY 2010 Other Income Schedule

Name: THE JOANNA FOUNDATION

EIN: 57-0314444

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
KINDER MORGAN ENERGY PARTNERS, LP	2,009	2,009	2,009

TY 2010 Other Liabilities Schedule

Name: THE JOANNA FOUNDATION

EIN: 57-0314444

Description	Beginning of Year - Book Value	End of Year - Book Value
ACCRUED PAYROLL AND TAXES	3,318	0

TY 2010 Other Professional Fees Schedule

Name: THE JOANNA FOUNDATION

EIN: 57-0314444

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT MANAGEMENT FEES	13,144	13,144		0

TY 2010 Taxes Schedule

Name: THE JOANNA FOUNDATION

EIN: 57-0314444

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOREIGN INCOME TAXES	866	866		0
ADR FEES	42	42		0