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Form **990-PF**

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

OMB No 1545-0052

2010

Department of the Treasury Internal Revenue Service

Note. The foundation may be able to use a copy of this return to satisfy state reporting requirements For calendar year 2010, or tax year beginning

, 2010, and ending

G Che	ck all that apply:	Initial return		al Return	_ `	-	_		∐ Fır	nal return
		Amended retu	rn		Address	change	Na	_	change	
Corti	rude B. & Mor	timor Move E	ام در ده	lation				A	Employer identification no	ımber
	S. Columbia S		ouna	acion				В	62-0963317 Telephone number (see the	a unctrustions)
	el Hill, NC 2								919-967-2596	•
-	·							c	If exemption application i	
				-				D	• • • •	· • •
н С	heck type of organiz				mpt private f			1	2 Foreign organizations me	eting the 85% test, check
<u></u>	Section 4947(a)(1)				ther taxable		_	E	here and attach computat If private foundation stati	
	ır market value of all asse rom Part II, column (c), lırı	ets at end of year		ounting m Other (specif	ethod XC	ash LA	ccrual		under section 507(b)(1)(/	A), check here
⊳ s̀	, , , , , , , , , , , , , , , , , , , ,	´			d) must be or	n cash hasis	- ,	∤F	If the foundation is in a 6 under section 507(b)(1)(1)	
Part I			(, a, , ,						1	1
	Expenses (The	e total of amounts	ın		enue and s per books	(b) Net in		ent	(c) Adjusted net income	(d) Disbursements for charitable
	sarily equal the a	and (d) may not i amounts in column	neces- n (a)							purposes (cash basis only)
	(see the instruction		<u> </u>							(casir basis offiy)
		, grants, etc, received (60,000.				 	
	ш : :	foundn is not req to att vings and tempora				1				
	cash investme	ents	,							
	4 Dividends and inte	erest from securities			21,900.	<u></u>	21,9	<u>00</u>	. 21,900	
	b Net rental income or (loss)								 	· · · · · · · · · · · · · · · · · · ·
R		m sale of assets not on	line 10		-6,276.					
R E V	b Gross sales price to assets on line 6a	for all51,	<u>676.</u>							
Ë	7 Capital gain net in	2)					0.	· 	<u> </u>	
U	8 Net short-term 9 Income modifi	, ,							0	
E	10 a Gross sales less returns and									
	allowances b Less Cost of			 						
	goods sold	\							 	<u> </u>
	c Gross profit/(loss) (att sch) 11 Other income (attach schedule)			<u> </u>				_		
		(attaon someane)								
		es 1 through 11			75,624.		21,9	00	. 21,900	,
	i i	officers, directors, truster	es, etc		0.					
	14 Other employee sa	alaries and wages s, employee benef	its							
А	16a Legal fees (attach									
A D M	b Accounting fees (a	attach sch) See	St 1		1,045.		5	40	. <u> R</u> E	CEIVED
N	c Other prof fees (a	ittach sch)			_ <u>-</u>				N	10
OPER.	17 Interest		+m 2		400			^^	. 5-68	AR 2 1 2011 C
OPERAT	18 Taxes (attach schedule) 19 Depreciation (СШ 2		400.		4	00	· 	
Ţ	sch) and depl	etion							100	
G E	20 Occupancy 21 Travel, confer	ences, and meetir	200				_		<u> </u>	IDEN, UT
A E	22 Printing and p		iys						-	· · · · · · · · · · · · · · · · · · ·
AZ PE	23 Other expense	es (attach schedul	le)							
الم يحت		<u>See Stateme</u>			5,731.		5,7	31	•	-
MAR Smoze	24 Total operatine expenses. Ad	ng and administra Id lines 13 through	tive 123		7,176.		6,6	71		
	25 Contributions, gift	ts, grants paid Part	. XV		5,000.		, -			5,000.
<u> </u>	26 Total expense Add lines 24 a	es and disbursem	ents.		10 176		c e	71	. 0	
	27 Subtract line 2	26 from line 12:		 	12,176.	 	6,6	<i>1</i>		5,000.
-	a Excess of rev	enue over expens	ses	1 -	60 440					
The state of	and disburser	ments come (if negative, enter	0.)	<u> </u>	63,448.	 	15,2	20	 	
		come (if negative, enter me (if negative, enter -0				 	10,2	<u> </u>	21,900	
		, , , , , , , , , , , , ,								·

Par		Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)	Beginning of year		or year
			(a) Book Value	(b) Book Value	(c) Fair Market Value
	l	Cash — non-interest-bearing	384.	75 204	
	l	Savings and temporary cash investments	58,847.	75,384.	75,384.
	3	Accounts receivable			
	ء ا	Less allowance for doubtful accounts			
	4	Pledges receivable			
	_	Less: allowance for doubtful accounts			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see the instructions)			
	7				
A		Less: allowance for doubtful accounts			
Š	8	Inventories for sale or use		.	
A S S E T	9	Prepaid expenses and deferred charges			
s	10	Investments – U.S. and state government			
		obligations (attach schedule)			
	1	b Investments — corporate stock (attach schedule) Statement. 4	403,514.	434,968.	555,617.
		c Investments — corporate bonds (attach schedule) Statement. 5	184,785.	233,483.	243,235.
	11	Investments — land, buildings, and equipment: basis.			
		Less: accumulated depreciation (attach schedule)			
	12	Investments – mortgage loans			
	13	Investments — other (attach schedule) Statement 6	109,657.	76,800.	68,555.
	14	Land, buildings, and equipment basis			
		Less. accumulated depreciation (attach schedule)			
	15	/			
	<u> </u>	Total assets (to be completed by all filers — see instructions Also, see page 1, item I)	757,187.	820,635.	942,791.
'n	17	Accounts payable and accrued expenses			}
A B	18	Grants payable .			}
ĭ	19	Deferred revenue			
Ļ	21	Loans from officers, directors, trustees, & other disqualified persons Mortgages and other notes payable (attach schedule)		<u> </u>	
Ť	22	Other liabilities (describe			
Ė		·			İ
E S	23	Total liabilities (add lines 17 through 22)	0.	0.	
		Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31.			
NF	24	Unrestricted			
N F E U T N	25	Temporarily restricted			
D	26	Permanently restricted			
A B A L A		Foundations that do not follow SFAS 117, check here X and complete lines 27 through 31.			
EL	27	Capital stock, trust principal, or current funds	23,242.	23,242.	
SNC	28	Paid-in or capital surplus, or land, building, and equipment fund	722 045	707 202	
O E R S	29	Retained earnings, accumulated income, endowment, or other funds	733,945.	797,393.	Į.
кэ	30	Total net assets or fund balances (see the instructions) Total liabilities and net assets/fund balances	757,187.	820,635.	1
		(see the instructions)	757,187.	820,635.	1
Par	t III	Analysis of Changes in Net Assets or Fund Balance	es		
1	Tota	I net assets or fund balances at beginning of year - Part II, colu	ımn (a), lıne 30 (must aç	ree with	
_		of-year figure reported on prior year's return).		1	757,187.
2		er amount from Part I, line 27a		2	63,448.
3		Increases not included in line 2 (itemize).		3	020 625
4 5		Innes 1, 2, and 3 ases not included in line 2 (itemize).		5	820,635.
6		I net assets or fund balances at end of year (line 4 minus line 5)	- Part II column (b)		820,635.
<u> </u>	iota	The dissers of June balances at end of year (line 4 millus line 3)	- rait ii, colulliii (b), li	110 10	020,033.

(a) List and describ	the kind(s) of property sold (e g , rose; or common stock, 200 shares ML	eal estate, C Company)	D) How acquired P — Purchase D — Donation	(C) Date acquired (month, day, year)	(d) Date sold (month, day, year)
1a See Statement 7			D — Donation		
b				 	
c	-			 	
d					
e				 	
(e) Gross sales price	(f) Depreciation allowed	(g) Cost or other basis	I	(h) Gain or	(loss)
(c) aross sales price	(or allowable)	plus expense of sale		(e) plus (f) m	inus (g)
a					
b					
с					
d					·· -
е	 				
	ving gain in column (h) and owned by	the foundation on 12/31/69			
(i) Fair Market Value as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of column (i), if any		(I) Gains (Coli gain minus column (I ian -0-) or Losses (fi	k), but not less
					
ab					
					
d					
					
<u>e</u>				T	
2 Capital gain net income or (ne	— 1	enter in Part I, line 7 ter -0- in Part I, line 7	2	_	-6,276.
3 Net short-term capital gain or	(loss) as defined in sections 1222(5)	and (6):			
If gain, also enter in Part I, lin in Part I, line 8	e 8, column (c) (see the instructions)) If (loss), enter -0-	3		-798.
	er Section 4940(e) for Reduce	d Tax on Net Investmen		_	
	ction 4942 tax on the distributable an alify under section 4940(e). Do not co	• •	period?	Yes	X No
1 Enter the appropriate amount	in each column for each year, see th	e 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 asse	ts (co	(d) Distribution lumn (b) divided	
2009	<u> </u>	669,	563.		
2008			296.		
2007			448.		-
2006		530,	033.		
2005	157,093.	449,	522.		0.349467
2 Total of line 1, column (d)			2		0.349467
3 Average distribution ratio for t number of years the foundation	he 5-year base period — divide the to in has been in existence if less than !	otal on line 2 by 5, or by the 5 years	3		0.069893
4 Enter the net value of noncha	ritable-use assets for 2010 from Part	X, line 5	4		861,468.
5 Multiply line 4 by line 3			5		60,211.
6 Enter 1% of net investment in	come (1% of Part I. lino 27h)		6		
	come (1 % or Fait i, lille 2/D)				152.
7 Add lines 5 and 6			7		60,363.
8 Enter qualifying distributions f	rom Part XII, line 4 than line 7, check the box in Part VI,	long the good growth to the	8	W toursts Or	5,000.
n une o is equal to or greater					

Part VI Excise Tax Based on Investment Income (Section 4940), 4940(b), 4940(b), or 4948 – see the instructions) La Exempt content investment in the section 4947(a)(c), teck here	Form	990-PF (2010) Gertrude B. & Mortimer May Foundation 62-0963317		F	age 4
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here	Par	t VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see the instruc	tions)		
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here	1 a	Exempt operating foundations described in section 4940(d)(2), check here and enter 'N/A' on line 1.			
check here		Date of ruling or determination letter: (attach copy of letter if necessary — see instr.)			
c All other damestic foundations entar 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, column (b) 2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0.) 3 Add lines 1 and 2. 4 Subtitle A (income) lax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0.) 5 Tax based on investment income. Subtract line 4 from line 3 if zero or less, enter -0. 5 Tax based on investment income. Subtract line 4 from line 3 if zero or less, enter -0. 6 Credits/Payments a 200 estimated tax pints and 2009 evergoyment credited to 200 Exempt foreign organizations — tax withheld at source 6 Backup withholding erroneously withheld 7 Total credits and payments. Add lines 6a through 6d 8 Enter any penalty for underpayment of estimated tax Check here if Form 2220 is attached 9 Tax due if the tatof lines is and is more than line; fair amount ower if 10 enterpayment of the 10 bits of the tax of 10 enterpayment of the 10 bits of the tax of 10 enterpayment of the 10 bits of the tax of 10 enterpayment of the 10 bits of the tax of 10 enterpayment of the 10 bits of the tax of 10 enterpayment of the 10 bits of the tax of 10 enterpayment of the 10 bits of the tax of 10 enterpayment of the 10 bits of 10 enterpayment of the 10 enterpayment of the 10 bits of 13 enterpayment of 10 enterpayment of the 10 bits of 13 enterpayment of 10 enterpay	t				305.
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foundations only Others enter -0-) 3 Add lines 1 and 2 3 Add lines (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-) 5 Tax based on investment income. Subtract line 4 from line 3 lf zero or less, enter -0- 6 Credits-Payments a 200 estimated tax pmis and 2003 overpayment credited to 2010 b Exempt foreign organizations — Lax withheld at source c Tax paid with application for extension of time to file (Form 8868) 6 C. 6 d. 7 Total credits and payments. Add lines 6a through 6d 8 Enter any penalty for underpayment of estimated tax Check here If Form 2220 is attached 9 Tax due if the total files 3 and 8 is more than his 0, after amount overpaid 10 overpayment if line? Is more than the total of lines 5 and 8, inter the amount everpaid 11 Lefite the amound of line 10 to 8c credited to 2011 estimated tax 139. Refunded 11	c	All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, column (b)			
3 3 305. 4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-) 5 Tax based on investment income. Subtract line 4 from line 3 lf zero or less, enter -0- 5 Tax based on investment income. Subtract line 4 from line 3 lf zero or less, enter -0- 5 Credits/Payments 6 Credits/Payments 7 2010 ethinded by price and 2009 overpayment credited to 2010 6 Exempt foreign organizations — tax withheld at source 6 Crax paid with application for extension of turn to file (Form 8865) 6 C God and the spin carried of the standard s	2		-		_
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6 Credits/Payments a 2010 estemated tax pmts and 2009 everpayment credited to 2010 b Exempt foreign organizations — tax withheld at source c Tax paid with application for extension of time to file (Form 8868) d Backup withholding erroneously withheld d Total credits and payments. Add lines 5a through 6d 8 Enter any penalty for underpayment of estimated tax Check here if Form 2220 is attached 9 Tax due if the total of lines 5 and 8 is more than line 7, enter amount every and 10 Overpayment if line 1 is more than line 7, enter amount every and 11 Enter the amount of line 10 to the Credited to 2011 extentated tax 139 Refunded 11 0 0 1339. Part VII-A Statements Regarding Activities 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? b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see the instructions for definition)? 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-PDL for this year? d Enter the amount of any of 1a or in political expenditures (section 4955) imposed during the year. (1) On the foundation in Form 1120-PDL for this year? d Enter the remiturisement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers is 0. 2 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 detailed description of the activities 3 Has the foundation have unrelated business gross income of \$1,000 or more during the year? 15 Was there a liquidation, termination, dissolution, or substantial contraction during the year? 16 Are the requirements of \$cotion 508(e) (relating to sections 494) through	4				
a 2010 estimated tax pints and 2009 overgoyment credited to 2010 b Exempt foreign organizations — tax withheld at source c Tax paid with application for extension of time to file (Form 8868) d Backup withholding erroneously withheld 7 Total credits and payments. Add lines 6a through 6d 8 Enter any penalty for underpayment of estimated tax. Check here for Form 2220 is attached 9 Tax due if the total of lines 5 and 8 is more than line 7, enter amount owed 10 overgoyment if line 1 is more than the total of lines 5 and 8, enter the amount owed 11 Enter the amount of line 10 to be: Credited to 2011 estimated tax. 139. Refunded 11 0. Part VII-A Statements Regarding Activities 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? 1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see the instructions for definition); 1b If the enswer is "Yes" to 1 or 1 h, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities 1c Did it foundation life Form 1120-POL for this year? 1c If the enswer is "Yes" to 1 or 1 h, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities 1c If Yes, attach a detailed description of the activities of noticipation in an application of the activities and copies of any materials published or foundation managers \$ 0. 2 Has the foundation engaged in any activities that have not previously been reported to the IRS? 1 F'yes, attach a detailed description of the activities 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 4a Did the foundation have unrelated business gross inco	5				305.
b Exempt foreign organizations — tax withheld at source c Tax paid with application for extension of time to file (Form 8868) d Backup withholding erroneously withheld 7 Total credits and payments. Add lines 6a through 6d 8 Enter any penalty for underpayment of estimated tax. Check here	•	·			!
c Tax paid with application for extension of time to file (Form 8868) d Backup withholding erroneously withheld 7 Total credits and payments. Add lines 6a through 6d 8 Enter any penalty for underpayment of estimated tax Check here for Form 2220 is attached 9 Tax due if the total of lines 5 and 8 is more than the 7, enter amount ower and 10 overpayment If line? I sim more than the total of lines 5 and 8, enter the amount owerpaid 10 overpayment If line? I sim more than the total of lines 5 and 8, enter the amount owerpaid 11 Enter the amount of line 10 to be; Credited to 2011 estimated tax 139. Refunded 11 0. Part VII-A Statements Regarding Activities 11 a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign? b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see the instructions for definition)? 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 1b					i
d Backup withholding erroneously withheld 7 Total credits and payments. Add lines 6a through 6d 8 Enter any penalty for underpayment of estimated tax Check here if Form 2220 is attached 8 Total credits and payments. Add lines 6a through 6d 8 Enter any penalty for underpayment of estimated tax Check here if Form 2220 is attached 8 Total die if the total of lines 5 and 8 is more than line 7, eiter amount owed 9 To Add if the total of lines 5 and 8, is more than line 7, eiter amount ower and 1 the reference of the amount of line if 10 bits. Credited to 2011 estimated tax 1 Total During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or infervene in any political campaign? 1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or infervene in any political campaign? b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see the instructions for definition)? 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? d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year. (1) On the foundation managers \$ 0. (2) On foundation managers \$ 0. (2) On foundation managers \$ 0. (3) On the foundation during the year for political expenditure tax imposed on foundation managers \$ 0. (2) On foundation managers \$ 0. (3) On or foundation managers \$ 0. (4) On the foundation during the year for political expenditure tax imposed on foundation managers \$ 0. (2) On foundation during the year for political expenditure tax imposed on foundation managers \$ 0. (2) On foundation during the year for political expenditure tax imposed on foundation managers \$ 0. (2) On foundation during the year for political expenditure tax		· · · · · · · · · · · · · · · · · · ·			1
7 Total credits and payments. Add lines 6a through 6d 8 Enter any penalty for underpayment of estimated tax. Check here If Form 2220 is attached 9 Tax due if the total of lines 5 and 8 is more than line 7, enter amount owed 10 Overpayment if line 7 is more than the total of lines 5 and 8, enter the amount overpaid 11 Enter the amount of line 10 to be: Credited to 2011 estimated tax 139. Refunded 111 0. Part VII-A Statements Regarding Activities 1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or infervene in any political campaign? 1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see the instructions for definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities 1c Did the foundation file Form 1120-POL for this year? 1c Enter the amount (f any) of tax on political expenditures (section 4955) imposed during the year. 1) On the foundation * S					1
8 Enter any penalty for underpayment of estimated tax. Check here			-	4	144
9 Tax due if the total of lines 5 and 8 is more than line 7, enter amount owed 10 Overpayment if line 7 is more than the total of lines 5 and 8, enter the amount overpaid 11 Eater the amount of line 10 be. Credited to 2011 estimated tax 1 and puring 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 During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign? 1a X b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see the instructions for definition)? 1a X 1b X 1the answer is 'Yes' to 1 aor 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities 1b X 1c X 4 Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year. (i) On the foundation = \$ 0. (2) On foundation managers 2 Last the foundation = \$ 0. (2) On foundation managers 3 Has the foundation engaged in any activities that have not previously been reported to the IRS? 4 B Did 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 detailed description of the activities 3 Has the foundation have unrelated business gross income of \$1,000 or more during the year? 4 Did the foundation have unrelated business gross income of \$1,000 or more during the year? 5 X 4 Did the foundation have unrelated business gross income of \$1,000 or more during the year? 5 X 4 Did the foundation have unrelated business gross income of \$1,000 or more during the year? 5 X 5 X 7 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either. 6 By state legislation that effectively amends the governing ins	8	· · · · · · · · · · · · · · · · · · ·			
10 Overpayment If line 7 is more than the total of lines 5 and 8, enter the amount overpaid 11 Enter the amount of line 10 to be: Credited to 2011 estimated tax	9				0.
11 Either the amount of line 10 to be: Credited to 2011 estimated tax	10	├───		1	
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	BAA			0-PF	

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jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2010? BAA

charitable purposes?

Form **990-PF** (2010)

3**b**

4a

N/A

X

4a Did the foundation invest during the year any amount in a manner that would jeopardize its

b Did the foundation make any investment in a prior year (but after December 31, 1969) that could

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Part VII-B Statements Regarding Activiti		<u> 4720 May Be Requ</u>	uired (continued)		
5a During the year did the foundation pay or incu	•		□ 📾		
(1) Carry on propaganda, or otherwise attemp	ot to influence legislatio	n (section 4945(e))?	. Yes X	No	
(2) Influence the outcome of any specific pub on, directly or indirectly, any voter registra	lic election (see section ation drive?	1 4955), or to carry	Yes X	No	
(3) Provide a grant to an individual for travel,	study, or other similar	purposes?	Yes X	No	
(4) Provide a grant to an organization other the in section 509(a)(1), (2), or (3), or section	nan a charitable, etc, oi 4940(d)(2)? (see instri	rganization described uctions)	Yes X	No	
(5) Provide for any purpose other than religio educational purposes, or for the prevention	us, charitable, scientific n of cruelty to children	c, literary, or or animals?	Yes X	No	
b If any answer is 'Yes' to 5a(1)-(5), did any of described in Regulations section 53 4945 or ir (see instructions)?	the transactions fail to a current notice regard	qualify under the except ding disaster assistance	tions	5b	N/A
Organizations relying on a current notice rega	rding disaster assistan	ce check here	▶ 🗌		
c If the answer is 'Yes' to question 5a(4), does tax because it maintained expenditure respon		emption from the	N/A Yes	No	
If 'Yes,' attach the statement required by Reg	ulations section 53 494	5-5(d).			
6a Did the foundation, during the year, receive a on a personal benefit contract?		,	Yes X		- <u></u>
b Did the foundation, during the year, pay prem If 'Yes' to 6b. file Form 8870	iums, directly or indirec	tly, on a personal bene	fit contract?	6Ы	X
7a At any time during the tax year, was the found	dation a party to a proh	ubited tax shelter transa	ction? Yes X	No	
b If yes, did the foundation receive any proceed				7b	
Part VIII Information About Officers, D	irectors, Trustees,	Foundation Manag	jers, Highly Paid E	mployees	,
and Contractors					
1 List all officers, directors, trustees, foundation				T	
(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 other allow	
Barbara Dahl	President	0.	0.		0
800 S Columbia Street	0				
Chapel Hill, NC 27514					
_Bill Dahl	SecTreasurer	0.	0.		0
800 S Columbia Street	0				
Chapel Hill, NC 27514	<u></u>				
Susan Sharer 800 S Columbia	Vice Preside 0	0.	0.		0
Chapel Hill, NC 27514 Julia Dahl	Vice Preside		0		0
800 S Columbia Street	0	0.	0.		U
Chapel Hill, NC 27514					
2 Compensation of five highest-paid employed	es (other than those inc	cluded on line 1— see ir	structions). If none, e	nter '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 other allo	
None					
Total number of other amplement in the 650 00		<u> </u>	<u> </u>		
Total number of other employees paid over \$50,00	TEFA0306	07/23/10		<u> </u>	LPF (2010

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Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid and Contractors (continued)	Employees,
3 Five highest-paid independent contractors for professional services (see instructions). If none, enter 'NONE.'	
(a) Name and address of each person paid more than \$50,000 (b) Type of service	(c) Compensation
None	
	<u> </u>
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	T
organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1 Duke Lutherans	-
	- 5,000.
2	3,000.
	_
3	
3	-
	-
4	
	-
Part IX-B Summary of Program-Related Investments (see instructions)	
Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.	Amount
1 <u>N/A</u>	-
	-
2	
	_
	<u> </u>
All other program-related investments See instructions. 3	
~	-
	-
	0.
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Part X Minimum Investment Return (All domestic foundations must complete this part. For	oreign f	oundations,
see instructions.)	1	
1 Fair market value of assets not used (or held for use) directly in carrying out charitable, etc, purposes:	Alex Same	007.000
a Average monthly fair market value of securities.	1a	807,280.
b Average of monthly cash balances	1b	67,307.
c Fair market value of all other assets (see instructions)	1 c	074 507
d Total (add lines 1a, b, and c)	1 d	874,587.
e Reduction claimed for blockage or other factors reported on lines 1a and 1c		
(attach detailed explanation) 1e 0.	┤ 	0
2 Acquisition indebtedness applicable to line 1 assets	2	0.
3 Subtract line 2 from line 1d	3	874,587.
4 Cash deemed held for charitable activities. Enter 1-1/2% of line 3		12 110
(for greater amount, see instructions)	4	13,119.
5 Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	861,468.
6 Minimum investment return. Enter 5% of line 5	6	43,073.
Part XI: Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operand contain foreign exceptions about here.		oundations
and certain foreign organizations check here ► and do not complete this pa	art.)	42.072
1 Minimum investment return from Part X, line 6	रूप रूप र	43,073.
2a Tax on investment income for 2010 from Part VI, line 5 b Income tax for 2010 (This does not include the tax from Part VI) 2b		
b Income tax for 2010 (This does not include the tax from Part VI) c Add lines 2a and 2b		205
	2 c	305.
3 Distributable amount before adjustments Subtract line 2c from line 1	3	42,768.
4 Recoveries of amounts treated as qualifying distributions	4	40.760
5 Add lines 3 and 4	5	42,768.
6 Deduction from distributable amount (see instructions) 7 Distributable amount as educated Subtract less 6 from less 5. Entended as De LVIII de 1	6	40.760
7 Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1	7	42,768.
Part XIIF Qualifying Distributions (see 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		
	1 a	5,000.
b Program-related investments — total from Part IX-B	1 b	
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	拉撒	
a Suitability test (prior IRS approval required)	3a	

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

4 Qualifying distributions Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4

Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b (see instructions)

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b Cash distribution test (attach the required schedule)

Adjusted qualifying distributions. Subtract line 5 from line 4

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5,000

5,000.

3Ь

4

5

6

Part XIII Undistributed Income (see instructions)

(If an amount appears in column (d), the same amount must be shown in column (a)) 6 Enter the net total of each column as indicated below: a Corpus. Add lines 3f, 4c, and 4e Subtract line 5 b Prior years' undistributed income. Subtract line 4b from line 2b c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed d Subtract line 6c from line 6b Taxable amount — see instructions e Undistributed income for 2009. Subtract line 4a from line 2a. Taxable amount — see instructions f Undistributed income for 2010 Subtract lines 4d and 5 from line 1. This amount must be		(a) Corpus	(b) Years prior to 2009	(c) 2009	(d) 2010
2. Undistributed more, if any, as of the end of 200; a Enter amount for 2009 only b Total for prory years: 20					42 768
b Total for greer years: 20 _ 20 _ 20 _ 20 _ 30 _ 30 _ 30 _ 30 _	2 Undistributed income, if any, as of the end of 2010:				42,700.
3 Excess distributions carryover, if any, to 2010 b From 2006 c From 2008 c From 2008 c From 2008 c From 2008 c From 2009 c Excess from 2009 c Excess from 2009 c Excess from 2009 c From	a Enter amount for 2009 only .			0.	
a From 2005 c From 2007 d From 2007 d From 2009 f Total of lines 3a through e 4. Qualifying distributions for 2010 from Part XII, line 4 ▶ \$ 5,000. a Applied to 2009, distributions for 2010 from Part XII, line 4 ▶ \$ 5,000. a Applied to undistributed amome of prior years (Election required — see instructions) d Applied to undistributed amome of prior years (Election required — see instructions) d Applied to 2010 distributable amount of Remaining amount distributed out of corpus (Election required — see instructions) d Applied to 2010 distributable amount of Remaining amount distributed out of corpus (Election required — see instructions) d Applied to 2010 distributable amount of Remaining amount distributed out of corpus (Election required — see instructions) d Election required — see instructions b Excess distributions carryower applied to 2010 (37,768.) 5 Excess distributions carryower form 2005 not applied on line 5 of line 6 Trasble amount — see instructions d and 5 from line 1 This amount must be distributed in 2011 (38,786)			0.		
b From 2006 c From 2007 d From 2008 e From 2009 f Total of lines 3a through e 4. Qualifying distributions for 2010 from Part XII, line 4 P \$ 5,000. A Applied to 2009, but not more than line 2a b Applied to 2009, but not more than line 2a c Applied to undistributed income of prior years (Election required — see instructions) c Treated as distributions out of corpus (Election required — see instructions) d Applied to 2010 distributated amount e Remaining amount distributed out of corpus c Exxes distributions carpivar explete 2010 (If an amount appears in column (a), the same amount must be shown in column (a)) 6. Enter the net total of each column as indicated below: a Corpus At Bines 3f, 4s, and 4e Subtract line 5 b Prior years' undistributed income. Subtract line 4b from line 2b c Enter the amount of prior years' undistributed line 4b from line 2b c Enter the amount of prior years' undistributed line 4b from line 2b c Bine the section d 4942(a) task as been previously assessed d Subtract line 6c from line 6b Taxable amount — see instructions d Judicated line for 2010 Subtract lines d d and 5 from line 1 This amount must be d Lindshibuted income for 2010, Subtract lines d d and 5 from line 1 This amount must be d Lindshibuted income for 2010, Subtract lines d d and 5 from line 1 This amount must be d Lindshibuted income for 2010, Subtract lines d d and 5 from line 1 This amount must be d Lindshibuted income for 2010, Subtract lines d and 5 from line 1 This amount must be d Lindshibuted income for 2010, Subtract lines d and 5 from line 1 This amount must be d Lindshibuted income for 2010, Subtract lines d and 5 from line 6 or line 7 (see instructions) d Lindshibuted income for 2010, Subtract lines d and 5 from line 6 or line 7 (see instructions) d Lindshibuted income for 2010, Subtract lines d and 5 from line 7 income for 2010, Subtract lines d and 5 from line 7 income for 2010, Subtract lines d and 5 from line 7 income for 2010, Subtract lines d and 5 from line 7 income for 2010, Subtract lines d and 5 from li	i li ii				
G From 2007 If from 2008 If Total of lines 3a through e 73,624. 74,624. 75,624	10/0211				
d From 2008 e From 2009 f Total of lines 3a through e 4. Qualifying distributions for 2010 from Part XII, line 4 P \$ \$ 5,000. a Applied to 2009, but not more than line 2a b Applied to 2009, but not more than line 2a c Treated as distributions out of corpus (Election required – see instructions) d Applied to 2010 distributable amount. e Remaining amount distributed out of corpus (Election required – see instructions) d Applied to 2010 distributable amount. e Remaining amount distributed out of corpus (Election required – see instructions) 0 5,000. 4 Applied to 2010 distributable amount. e Remaining amount distributed out of corpus (If an amount appears in column (a), the same amount must be shown in column (a)) 6 Enter the net total of each column as indicated below: a Corpus. At least significant time 5 b Pror years' undistributed income. Subtract line 4 from line 2b c Enter the amount of prior years' undistributed income for 2010 subtract line 4 from line 2b d Subtract line 6c from line 6b Taxable amount – see instructions e Undistributed income for 2010 Subtract lines distributed in 2011 7 Amounts treated as distributions out of corpus to salary requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions) 9 Excess distributions carryover from 2005 not applied on line 6 or line 7 (see instructions) 9 Excess distributions carryover from 2005 b Excess from 2006 b Excess from 2009 c Excess from 2009 c Excess from 2009 c Excess from 2009 c Excess from 2009 c Excess from 2009 c Excess from 2009 c Excess from 2009 c Excess from 2009 c Excess from 2009 c Excess from 2009 c Excess from 2009 c Excess from 2009 c Excess from 2009					
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All, line 4 S 5 5,000. a Applied to 2009, but not more than line 2a b Applied to undistributed more of prior years (Election required — see instructions) d Applied to 2010 distributable amount e Remaining amount distributed out of corpus (Election required — see instructions) d Applied to 2010 distributable amount e Remaining amount distributed out of corpus Excess distributions carryover applied to 2010 (If an amount appears in column (a), the same amount must be shown in column (a)) Enter the net total of each column as indicated below: a Corpus. Add line 31, 4c, and 4e Subtract line 5 b Prior years' undistributed income. Subtract line 4b from line 5. c Enter the amount of prior years' undistribute ed income for which a notice of deficiency 4942(a) tak has been previously assessed d Subtract line 6c from line 6b Taxable amount — see instructions c Undistributed income for 2008. Subtract lines d and 5 from line 1. This amount must be distributed in 2011 This amount must be distributed in 2011 Amounts treated as distributions out of copus to salisty requirements imposed by section 1700(b)(1)(F) or 4942(g)(3) (see instructions) Excess distributions carryover from 2005 not applied on line 5 or line 7 (see instructions) Excess distributions carryover from 2005 not applied on line 5 or line 7 (see instructions) Excess from 2006 bExcess from 2008 d Excess from 2008 d Excess from 2008 d Excess from 2008 d Excess from 2008	-	/3,624.			
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6 Enter the net total of each column as indicated below: a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5 b Prior years' undistributed income. Subtract line 4b from line 2b c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed d Subtract line 6c from line 6b. Taxable amount — see instructions e Undistributed income for 2009. Subtract line 4a from line 2a. Taxable amount — see instructions f Undistributed income for 2010. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2011 7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(176) or 4942(g)(3) (see instructions) 8 Excess distributions carryover from 2005 not applied on line 5 or line 7 (see instructions) 9 Excess distributions carryover for 2011. Subtract lines 7 and 8 from line 6a 10. Analysis of line 9 a Excess from 2006 b Excess from 2007 c Excess from 2007 c Excess from 2008 d Excess from 2009 e Excess from 2010					
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Subtract lines 7 and 8 from line 6a 0. 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	•				··
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 Excess distributions carryover to 2011. Subtract lines 7 and 8 from line 6a	ი			
b Excess from 2007 c Excess from 2008 d Excess from 2009 e Excess from 2010			-		· · · · · · · · · · · · · · · · · · ·
c Excess from 2008 d Excess from 2009 e Excess from 2010	a Excess from 2006				
d Excess from 2009 e Excess from 2010	b Excess from 2007			į	
e Excess from 2010	c Excess from 2008				
	 				

Part XIV Private Operating Foundation			VII.A guestion 9	02-0963317	N/A
1a If the foundation has received a ruling or our is effective for 2010, enter the date of the	letermination letter				N/ R
b Check box to indicate whether the foundat	ion is a private ope	erating foundation o	lescribed in section	4942(j)(3) or	4942(j)(5)
2a Enter the lesser of the adjusted net	Tax year		Prior 3 years		
income from Part I or the minimum investment return from Part X for each year listed	(a) 2010	(b) 2009	(c) 2008	(d) 2007	(e) Total
b 85% of line 2a					
 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:					
 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 ha	d \$5,000 or mor	e in
assets at any time during th		structions.)			
Information Regarding Foundation Managa List any managers of the foundation who have close of any tax year (but only if they have None	nave contributed me	ore than 2% of the than \$5,000) (See	total contributions re section 507(d)(2))	eceived by the found	dation before the
b List any managers of the foundation who	own 10% or more o	f the stock of a cor	poration (or an equa	ally large portion of	the ownership of
a partnership or other entity) of which the None	foundation has a 1	0% or greater inter	est.	,	
2 Information Regarding Contribution, Gran	t Gift Loan Scho	larchin etc Progre			
Check here X if the foundation only n requests for funds. If the foundation make complete items 2a, b, c, and d	nakes contributions	to preselected cha	ritable organizations	s and does not acce anizations under oth	pt unsolicited er conditions,
a The name, address, and telephone number	r of the person to v	whom applications	should be addressed	d.	
	•				
b The form in which applications should be s	submitted and infor	mation and materia	als they should inclu	de:	
c Any submission deadlines:				*	
d Any restrictions or limitations on awards, s	such as by geograp	hical areas, charita	ble fields, kinds of i	nstitutions, or other	factors

TEEA0310L 02/16/11

Form **990-PF** (2010)

BAA

3 Grants and Contributions Paid During the Ye	ear or Approved for Fut	ure Paymen	ıt	
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of	Purpose of grant or contribution	Amount
Name and address (home or business)	substantial contributor	recipient	Contribution	
a Paid during the year Duke Lutherans 800 S Columbia St	None		Charitable	5,000.
Chapel Hill, NC 27514				
Total			<u>► 3a</u>	5,000.
b Approved for future payment				
Total			► 3b	,

Part XVI-A Analysis of Income-Producing Activities

nter gross amounts unless otherwise indicated.		ed business income		y section 512, 513, or 514	(e)	
	(a) Business code	(b) Amount	(c) Exclu- sion	(d) Amount	Related or exempt function income (see the instructions)	
1 Program service revenue:			code			
a	-					
b						
c			 			
d	 		+ +			
e	<u> </u>	<u> </u>	++		· · · · · · · · · · · · · · · · · · ·	
g Fees and contracts from government agencies			 			
2 Membership dues and assessments						
3 Interest on savings and temporary cash investments			1			
4 Dividends and interest from securities			14	21,900.		
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.	-6,326	
9 Net income or (loss) from special events						
10 Gross profit or (loss) from sales of inventory						
11 Other revenue		1.			<u> </u>	
a						
b						
c						
d						
e						
e Subtotal Add columns (b), (d), and (e)	Transfer of the state of			21,950.	-6,326	
Subtotal Add columns (b), (d), and (e) Total. Add line 12, columns (b), (d), and (e).			v.	21,950.	-6,326 15,624	
Subtotal Add columns (b), (d), and (e) Total. Add line 12, columns (b), (d), and (e) See worksheet in line 13 instructions to verify calculate	ons)			13	-6,326 15,624	
Subtotal Add columns (b), (d), and (e) Total. Add line 12, columns (b), (d), and (e) See worksheet in line 13 instructions to verify calculate	ons)	ishment of Exem		13	-6,326 15,624	
Subtotal Add columns (b), (d), and (e) Total. Add line 12, columns (b), (d), and (e).	ons) Accompl		pt Purpo	13 ses	15,624	
Subtotal Add columns (b), (d), and (e) Total. Add line 12, columns (b), (d), and (e). See worksheet in line 13 instructions to verify calculate. Part XVI-B Relationship of Activities to the	ons) Accompl		pt Purpo	13 ses	15,624	
Subtotal Add columns (b), (d), and (e) Total. Add line 12, columns (b), (d), and (e). See worksheet in line 13 instructions to verify calculate Part XVI-B Relationship of Activities to the Line No. Explain below how each activity for which is accomplishment of the foundation's exempt	ons) Accompl		pt Purpo	13 ses	15,624	
Subtotal Add columns (b), (d), and (e) Total. Add line 12, columns (b), (d), and (e). See worksheet in line 13 instructions to verify calculate Part XVI-B Relationship of Activities to the Line No. Explain below how each activity for which is accomplishment of the foundation's exempt	ons) Accompl		pt Purpo	13 ses	15,624	
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Subtotal Add columns (b), (d), and (e) Total. Add line 12, columns (b), (d), and (e). See worksheet in line 13 instructions to verify calculate Part XVI-B Relationship of Activities to the Line No. Explain below how each activity for which is accomplishment of the foundation's exempt	ons) Accompl		pt Purpo	13 ses	15,624	
Subtotal Add columns (b), (d), and (e) Total. Add line 12, columns (b), (d), and (e). See worksheet in line 13 instructions to verify calculate Part XVI-B Relationship of Activities to the Line No. Explain below how each activity for which is accomplishment of the foundation's exempt	ons) Accompl		pt Purpo	13 ses	15,624	
Subtotal Add columns (b), (d), and (e) Total. Add line 12, columns (b), (d), and (e). See worksheet in line 13 instructions to verify calculate Part XVI-B Relationship of Activities to the Line No. Explain below how each activity for which is accomplishment of the foundation's exempt	ons) Accompl		pt Purpo	13 ses	15,624	
Subtotal Add columns (b), (d), and (e) Total. Add line 12, columns (b), (d), and (e). See worksheet in line 13 instructions to verify calculate Part XVI-B Relationship of Activities to the Line No. Explain below how each activity for which is accomplishment of the foundation's exempt	ons) Accompl		pt Purpo	13 ses	15,624	
Subtotal Add columns (b), (d), and (e) Total. Add line 12, columns (b), (d), and (e). See worksheet in line 13 instructions to verify calculate Part XVI-B Relationship of Activities to the Line No. Explain below how each activity for which is accomplishment of the foundation's exempt	ons) Accompl		pt Purpo	13 ses	15,624	
Subtotal Add columns (b), (d), and (e) Total. Add line 12, columns (b), (d), and (e). See worksheet in line 13 instructions to verify calculate Part XVI-B Relationship of Activities to the Line No. Explain below how each activity for which is accomplishment of the foundation's exemption.	ons) Accompl		pt Purpo	13 ses	15,624	
Subtotal Add columns (b), (d), and (e) Total. Add line 12, columns (b), (d), and (e). See worksheet in line 13 instructions to verify calculate Part XVI-B Relationship of Activities to the Line No. Explain below how each activity for which is accomplishment of the foundation's exempt	ons) Accompl		pt Purpo	13 ses	15,624	
Subtotal Add columns (b), (d), and (e) Total. Add line 12, columns (b), (d), and (e). See worksheet in line 13 instructions to verify calculate Part XVI-B Relationship of Activities to the Line No. Explain below how each activity for which is accomplishment of the foundation's exempt	ons) Accompl		pt Purpo	13 ses	15,624	
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Subtotal Add columns (b), (d), and (e) Total. Add line 12, columns (b), (d), and (e). See worksheet in line 13 instructions to verify calculate Part XVI-B Relationship of Activities to the Line No. Explain below how each activity for which is accomplishment of the foundation's exemption.	ons) Accompl		pt Purpo	13 ses	15,624	
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Subtotal Add columns (b), (d), and (e) Total. Add line 12, columns (b), (d), and (e). See worksheet in line 13 instructions to verify calculate Part XVI-B Relationship of Activities to the Line No. Explain below how each activity for which is accomplishment of the foundation's exempt	ons) Accompl		pt Purpo	13 ses	15,624	

Form 990-PF (2010) Gertrude B. & Mortimer May Foundation 62-0963317 Part XVII Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations Part XVII

									Yes	Nia
1 Did the o	rganization directly d in section 501(c) o	or indirectly en	gage in any of the f	following wit	h any oth	ner organization	n 527		res	No_
relating t	o political organizati	ions?		,		or in section 5)Z7,			İ
	from the reporting	foundation to a	noncharitable exer	mpt organiza	ation of				-	ز.
(1) Cash								1a(1)		<u>X</u>
(2) Othe								1a (2)		X
b Other tra	risactions s of assets to a none	charitable even	ent organization					16(1)	-	X
	hases of assets from			ition				1b (2)		X
• • •	al of facilities, equip							1b (3)		X
1	bursement arranger	•						1b (4)		X
(5) Loan	s or loan guarantee:	s						1b (5)		X
(6) Perfo	ormance of services	or membership	or fundraising soli	citations				1 b (6)		Χ_
c Sharing	of facilities, equipme	ent, mailing list	s, other assets, or p	oaid employ	ees			1c	<u> </u>	_X
d If the ans	swer to any of the a	bove ıs 'Yes,' ç	omplete the followi	ng schedule	Column	(b) should alw	ays show the fair i	market val	ue of	
any trans	s, other assets, or s saction or sharing ar	rrangement, sh	ow in column (d) the	e value of the	ie rounda ie goods,	other assets,	ess than fair marke or services receive	et value in ed		
(a) Line no	(b) Amount involved	(c) Name of	noncharitable exempt or	ganızatıon	(d)	Description of trans	sfers, transactions, and	sharing arra	ngement	s
N/A										
		<u> </u>			<u> </u>				_	
		<u> </u>								
_					 					
				-	-	-	<u>-</u>			
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		<u> </u>	· · · · · · · · · · · · · · · · · · ·	_	 					
										
									_	
							-, -			
2a Is the for	undation directly or	indirectly affilia	ted with, or related	to one or n	nore tax-	exempt organiz	zations			
describe	d ın section 501(c) d	of the Code (oth	ner than section 501	I(c)(3)) or in	section	527?		Ye:	s X	No
b If 'Yes,'	complete the follows	ng schedule.								
	Name of organizati	on	(b) Type of	organization		(c) Description of re	ationship	_	
N/A			·							
	·			-						
										
				•••					-	
Under p	enalties of perjury, I declar and complete Declaration	re that I have examin	ned this return, including a	accompanying so	chedules an	d statements, and to	o the best of my knowled	ge and belief,	it is true	∍,
Sign	and complete Declaration	of preparer (outer a	an taxpayer of nouclary))	mormation	or writer preparer in	as any knowledge			
Here	2/10/0</td <td>m (B)</td> <td>3 NahV</td> <td>/</td> <td> 2</td> <td>1/6/2011</td> <td>▶ President</td> <td>-</td> <td></td> <td></td>	m (B)	3 NahV	/	2	1/6/2011	▶ President	-		
	nature of officer or trustee	as v	- 400		Date	HOLEUN	Title	-		
	Print/Type preparer's nar	me	Preparers sugnat	ture		Date	Check if X if	PTIN		
Paid	Phil Lozano		Phi	ano/a	سد	3-8-1(self-employed	N/A		
Preparer	· -		zano & Compa	/ / / -			Firm's EIN - N/A			
Jse Only	Firm's address	77 West F		610 1					.	
		resno, CA	93711				Phone no (559	9) 451-		
ВАА							•	Form 95	90-PF	(2010)

Schedule B (Form 990, 990-EZ, or 990-PF)

Department of the Treasury Internal Revenue Service

Schedule of Contributors

► Attach to Form 990, 990-EZ, or 990-PF

OMB No 1545-0047

2010

Name of the organization		Employer identification number				
Gertrude B. & Mortimer M.	ay Foundation	62-0963317				
Organization type (check one):						
Filers of:	Section:					
Form 990 or 990-EZ	501(c)() (enter number) organizatio 4947(a)(1) nonexempt charitable trust not 527 political organization					
Form 990-PF X 501(c)(3) exempt private foundation 4947(a)(1) nonexempt charitable trust treated as a private foundation 501(c)(3) taxable private foundation						
Check if your organization is covered by Note. Only a section 501(c)(7), (8), or (y the General Rule or a Special Rule 10) organization can check boxes for both the General	Rule and a Special Rule See instructions				
General Rule						
X For an organization filing Form 990 contributor (Complete Parts I and I	, 990-EZ, or 990-PF that received, during the year, \$5,0 I.)	000 or more (in money or property) from any one				
Special Rules						
\sim 509(a)(1) and 170(b)(1)(A)(v _i), and	n filing Form 990 or 990-EZ, that met the 33-1/3% supp received from any one contributor, during the year, a c 90, Part VIII, line 1h or (ii) Form 990-EZ, line 1. Compl	ontribution of the greater of (1) \$5,000 or				
aggregate contributions of more that	organization filing Form 990 or 990-EZ, that received f in \$1,000 for use <i>exclusively</i> for religious, charitable, so or animals Complete Parts I, II, and III	rom any one contributor, during the year, cientific, literary, or educational purposes, or				
contributions for use exclusively for if this box is checked, enter here the	organization filing Form 990 or 990-EZ, that received f religious, charitable, etc, purposes, but these contribute total contributions that were received during the year e parts unless the General Rule applies to this organiz	tions did not aggregate to more than \$1,000				
religious, charitable, etc, contributio	ons of \$5,000 or more during the year	► \$				
990-PF) but it must answer 'No' on Par	vered by the General Rule and/or the Special Rules doe t IV, line 2 of their Form 990, or check the box on line the filing requirements of Schedule B (Form 990, 990-t	H of its Form 990-EZ, or on line 2 of its Form				
BAA For Paperwork Reduction Act No.	otice, see the Instructions for Form 990,	Schedule B (Form 990, 990-EZ, or 990-PF) (2010)				

Schedule Name of org	B (Form 990, 990-EZ, or 990-PF) (2010)	Page 1	of 1 of Part I
-	de B. & Mortimer May Foundation		963317
Part I	Contributors (see instructions.)		-
(a) Number	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
1	Barbara Dahl		Person X
	800 S Columbia Street	\$60,000.	Payroll Noncash
	Chapel Hill, NC 27514		(Complete Part II if there is a noncash contribution.)
(a) Number	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
		\$	Person Payroll Noncash (Complete Part II if there is a noncash contribution)
(a) Number	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
		\$	Person Payroll Noncash (Complete Part II if there is a noncash contribution)
(a) Number	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
		\$	Person Payroll Noncash (Complete Part II if there is a noncash contribution.)
(a) Number	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
		\$	Person Payroll Noncash (Complete Part II if there is a noncash contribution)
(a) Number	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
		\$	Person Payroll Noncash (Complete Part II if there is a noncash contribution)
BAA	TEFA0702L 10/26/10	Schedule R (Form 99)) 990-F7 or 990-PF) (2010)

		-					
•							
	(Form 990, 990-EZ, or 990-PF) (2010)		Page			1	of Part II
lame of organ					mployer ide		number
Gertruc	de B. & Mortimer May Foundation			6	2-0963	3317	
Part II	Noncash Property (see instructions)						
(a) No. from Part I	(b) Description of noncash property given		FMV (o (see in	(c) or est struc	imate) tions)	Date	(d) received
	N/A		-				
		1					
		\$_				1	
(a) No. from Part I	(b) Description of noncash property given		FMV (o (see in	(c) or est strue	imate) tions)	Date	(d) received
		s					
		ऻॱ−				1	
(a) No. from Part I	(b) Description of noncash property given		FMV (c	(c) or est istru	imate) ctions)	Date	(d) received
		1					
		1					
		\$_					
(a) No. from Part I	(b) Description of noncash property given		FMV (d	(c) or est ostru	timate) ctions)	Date	(d) received
		┥				1	

BAA

(a) No. from Part I

(a) No. from Part I

Schedule **B** (Form 990, 990-EZ, or 990-PF) (2010)

(c) FMV (or estimate) (see instructions)

(c) FMV (or estimate) (see instructions) (d) Date received

(d) Date received

(b)
Description of noncash property given

(b)
Description of noncash property given

BAA

Relationship of transferor to transferee

Transferee's name, address, and ZIP + 4

(e) Transfer of gift

010	Federal S	Statements		Page 1
	Gertrude B. & Mor	timer May Foundation	n	62-0963317
Statement 1 Form 990-PF, Part I, Line 16b Accounting Fees				
Tax preparation		nses Investmen Books Income 1,045. \$ 54	Adjusted Net Incom O.	
Statement 2 Form 990-PF, Part I, Line 18 Taxes				
State and federal taxes	(a Expe <u>per E</u> Total <u>\$</u>	nses Investmen Books Income 400. \$ 40	Adjusted Net Incom	(d) Charitable Purposes 0. \$ 0.
Statement 3 Form 990-PF, Part I, Line 23 Other Expenses				
Investment fees	per_;	(a) (b) Net Investmen Income 5,731. \$ 5,73 \$ 5,73	nt Adjusted Net Incom 1.	
Statement 4 Form 990-PF, Part II, Line 10b Investments - Corporate Stocks				
Corporate Stocks		Valuation <u>Method</u>	Book <u>Value</u>	Fair MarketValue
Adobe Systems Amdocs Chevron/Texaco Colgate Dentsply Ecolab Edwards Lifescience Emerson Electric Exxon Mobil Expeditors Intl		Mkt Val Mkt Val Mkt Val Mkt Val Mkt Val Mkt Val Mkt Val Mkt Val Mkt Val Mkt Val Mkt Val	\$ 8,720. 9,535. 9,501. 7,472. 8,891. 7,971. 3,200. 3,945. 1,238. 6,637.	9,202. 11,862. 9,243. 9,397. 10,588. 12,126. 4,859. 1,828. 12,558.

Federal Statements

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Gertrude B. & Mortimer May Foundation

62-0963317

Statement 4 (continued) Form 990-PF, Part II, Line 10b Investments - Corporate Stocks

Corporate Stocks	Valuation <u>Method</u>	Book Value	Fair Market Value
Corporate Stocks L-3 Commun Northern Trust Nice Systems Noble Corp Nstar Patterson Co's Questar QEP Roper State Street Corp Stericycle The Southern Company VCA Antech Verizon Wells Fargo American Balanced Funds American Fund Capital Income American Fund New Perspective American Fund New World TRP Africa & Mid-East		<u>Value</u>	\$ 4,582. 8,034. 16,054. 8,048. 4,430. 0. 4,353. 9,078. 13,757. 1,390. 19,421. 1,338. 6,172. 1,431. 0. 110,333. 49,636. 57,429. 55,919.
Apache Corp Cerner Corp Flir Systems	Mkt Val Mkt Val Mkt Val Total <u>\$</u>	9,963. 7,467. 14,391. 434,968.	15,500. 19,422. 14,577.

Statement 5 Form 990-PF, Part II, Line 10c Investments - Corporate Bonds

Corporate Bonds	Valuation <u>Method</u>	Book Value	Fair Market <u>Value</u>
Bellsouth 4.75%	Mkt Val \$		
Bellsouth 5.20%	Mkt Val	9,544.	10,914.
Credit Suisse 6.125%	Mkt Val	10,526.	10,466.
Dean Witter 6.75%	Mkt Val	10,567.	11,044.
General Electric	Mkt Val	0.	0.
Goldman Sachs 5.35%	Mkt Val	9,821.	10,789.
Intl Lease 4.75%	Mkt Val	19,614.	20,100.
Morgan Stanley 5.375%	Mkt Val	9,976.	10,543.
Verizon	Mkt Val	10,280.	10,424.
Goldman Sachs 5.95%	Mkt Val	20,323.	21,748.
Chevron 4.95%	Mkt Val	20,962.	22,409.
Emerson 7.125%	Mkt Val	0.	0.
Johnston & Johnston	Mkt Val	22,014.	23,289.
Northern Trust	Mkt Val	10,509.	11,028.
Adobe 7.75%	Mkt Val	9,962.	10,231.
Adobe 3.25%	Mkt Val	27,626.	27,475.
Credit Suisse 5.4%	Mkt Val	20,326.	20,390.
Goldman Sachs 7.5%	Mkt Val	11,488.	11,703.
	Total \$	233,483.	\$ 243,235.

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Z	u		II.

Federal Statements

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Gertrude B. & Mortimer May Foundation

62-0963317

Statement 6 Form 990-PF, Part II, Line 13 Investments - Other

	Valuation	Book	Fair Market
	<u>Method</u>	<u>Value</u>	Value
Other Publicly Traded Securities			
Ishares Tr Msce Eafe	Mkt Val	\$ 22,899.	\$ 16,885.
Public Storage Reit	Mkt Val	2,104.	2,028.
Regency Centers Reit	Mkt Val	1,719.	845.
Vanguard Emerging Market	Mkt Val	22,466.	21,185.
Total Other Publicly Traded	I Securities	\$ 49,188.	\$ 40,943.
Other Securities			
Israel Bonds Total Other	Mkt Val	27,612.	27,612.
	Securities	\$ 27,612.	\$ 27,612.
	Total	\$ 76,800.	\$ 68,555.

Statement 7 Form 990-PF, Part IV, Line 1 Capital Gains and Losses for Tax on Investment Income

		(b) How	(c) Date	(d) Date
<u> Item</u>	(a) Description	<u> </u>	<u>Acquired</u>	_Sold
1	9 Frontier Comm	Purchased	1/01/2010	9/16/2010
2	16,000 CAT Bond	Purchased	1/06/2010	11/15/2010
3	130 Patterson	Purchased	11/30/2004	1/08/2010
4	55 Fed Ex	Purchased	11/03/2004	3/18/2010
5	90 Wells	Purchased	11/08/2004	3/18/2010
6	535 TRP Africa	Purchased	4/15/2008	3/18/2010
7	10,000 Emmerson bond	Purchased	5/05/2009	8/15/2010
8	10,000 GE bond	Purchased	4/15/2005	12/01/2010

	(e)	(f)	(g)	(h)	(i)	(j)	(k)	(1)
	Gross	Deprec.	Cost	Gain	FMV	Adj. Bas.	Excess	Gain
<u> Item</u>	<u>Sales</u>	<u> Allowed</u>	<u>Basis</u>	(Loss)	12/31/69	12/31/69	(i) - (i)	(Loss)
1	66.		0.	66.				\$ 66.
2	16,000.		16,864.	-864.				-864.
3	3,891.		5,135.	-1,244.				-1,244.
4	5,016.		5,220.	-204.				-204.
5	2,812.		2,710.	102.				102.
6	3,891.		7,319.	-3,428.				-3,428.
7	10,000.		10,754.	-754.				-754.
8	10,000.		9,950.	50.				50.
	·						Total	\$ -6,27 <u>6.</u>