



See a Social Security Number? Say Something!  
Report Privacy Problems to <https://public.resource.org/privacy>  
Or call the IRS Identity Theft Hotline at 1-800-908-4490



## Return of Private Foundation

OMB No 1545-0052

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

2010

Department of the Treasury  
Internal Revenue Service

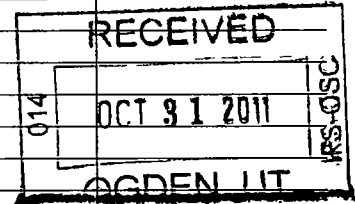
Note The foundation may be able to use a copy of this return to satisfy state reporting requirements.

For calendar year 2010, or tax year beginning JUL 1, 2010, and ending JUN 30, 2011

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<br><b>FLORENCE B. TRUEMAN EDUCATIONAL TRUST</b>                                                                                                                                                                                |                                                                                                                                                  | A Employer identification number<br><b>52-1649301</b>                                                                                                                        |
| Number and street (or P O box number if mail is not delivered to street address)<br><b>401 FAIRLEIGH COURT</b>                                                                                                                                    | Room/suite                                                                                                                                       | B Telephone number<br><b>410-741-5602</b>                                                                                                                                    |
| City or town, state, and ZIP code<br><b>TRACY'S LANDING, MD 20779</b>                                                                                                                                                                             |                                                                                                                                                  | C If exemption application is pending, check here <input type="checkbox"/>                                                                                                   |
| H Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation<br><input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation |                                                                                                                                                  | D 1. Foreign organizations, check here <input type="checkbox"/><br>2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/> |
| I Fair market value of all assets at end of year<br>(from Part II, col. (c), line 16)<br><b>\$ 777,401.</b> (Part I, column (d) must be on cash basis.)                                                                                           | J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual<br><input type="checkbox"/> Other (specify) _____ | E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>                                                                |
|                                                                                                                                                                                                                                                   |                                                                                                                                                  | F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>                                                             |

| Part I Analysis of Revenue and Expenses<br>(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a).) |  | (a) Revenue and expenses per books | (b) Net investment income | (c) Adjusted net income | (d) Disbursements for charitable purposes (cash basis only) |
|-----------------------------------------------------------------------------------------------------------------------------------------------------|--|------------------------------------|---------------------------|-------------------------|-------------------------------------------------------------|
| 1 Contributions, gifts, grants, etc., received                                                                                                      |  |                                    |                           | N/A                     |                                                             |
| 2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B                                                       |  |                                    |                           |                         |                                                             |
| 3 Interest on savings and temporary cash investments                                                                                                |  | 30.                                | 30.                       |                         |                                                             |
| 4 Dividends and interest from securities                                                                                                            |  | 15,150.                            | 15,150.                   |                         |                                                             |
| 5a Gross rents                                                                                                                                      |  | 16,800.                            | 16,800.                   |                         | STATEMENT 1                                                 |
| b Net rental income or (loss) <b>-2,434.</b>                                                                                                        |  |                                    |                           |                         | STATEMENT 2                                                 |
| 6a Net gain or (loss) from sale of assets not on line 10                                                                                            |  | 2,127.                             |                           |                         |                                                             |
| b Gross sales price for all assets on line 6a <b>59,480.</b>                                                                                        |  |                                    |                           |                         |                                                             |
| 7 Capital gain net income (from Part IV, line 2)                                                                                                    |  |                                    | 2,127.                    |                         |                                                             |
| 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)                                                                                                                            |  |                                    |                           |                         |                                                             |
| 11 Other income                                                                                                                                     |  |                                    |                           |                         |                                                             |
| 12 Total Add lines 1 through 11                                                                                                                     |  | 34,107.                            | 34,107.                   |                         |                                                             |
| 13 Compensation of officers, directors, trustees, etc                                                                                               |  | 5,104.                             | 1,021.                    |                         | 4,083.                                                      |
| 14 Other employee salaries and wages                                                                                                                |  |                                    |                           |                         |                                                             |
| 15 Pension plans, employee benefits                                                                                                                 |  |                                    |                           |                         |                                                             |
| 16a Legal fees                                                                                                                                      |  |                                    |                           |                         |                                                             |
| b Accounting fees <b>STMT 3</b>                                                                                                                     |  | 3,925.                             | 3,925.                    |                         | 0.                                                          |
| c Other professional fees                                                                                                                           |  |                                    |                           |                         |                                                             |
| 17 Interest                                                                                                                                         |  |                                    |                           |                         |                                                             |
| 18 Taxes <b>STMT 4</b>                                                                                                                              |  | 2,233.                             | 2,233.                    |                         | 0.                                                          |
| 19 Depreciation and depletion                                                                                                                       |  | 8,275.                             | 8,275.                    |                         |                                                             |
| 20 Occupancy                                                                                                                                        |  |                                    |                           |                         |                                                             |
| 21 Travel, conferences, and meetings                                                                                                                |  |                                    |                           |                         |                                                             |
| 22 Printing and publications                                                                                                                        |  |                                    |                           |                         |                                                             |
| 23 Other expenses <b>STMT 5</b>                                                                                                                     |  | 12,305.                            | 12,305.                   |                         | 0.                                                          |
| 24 Total operating and administrative expenses. Add lines 13 through 23                                                                             |  | 31,842.                            | 27,759.                   |                         | 4,083.                                                      |
| 25 Contributions, gifts, grants paid                                                                                                                |  | 36,500.                            |                           |                         | 36,500.                                                     |
| 26 Total expenses and disbursements. Add lines 24 and 25                                                                                            |  | 68,342.                            | 27,759.                   |                         | 40,583.                                                     |
| 27 Subtract line 26 from line 12:                                                                                                                   |  |                                    |                           |                         |                                                             |
| a Excess of revenue over expenses and disbursements                                                                                                 |  | -34,235.                           |                           |                         |                                                             |
| b Net investment income (if negative, enter -0-)                                                                                                    |  |                                    | 6,348.                    |                         |                                                             |
| c Adjusted net income (if negative, enter -0-)                                                                                                      |  |                                    |                           | N/A                     |                                                             |



| Part II Balance Sheets      |                                                                                                                                          | Attached schedules and amounts in the description column should be for end-of-year amounts only |                |                       |
|-----------------------------|------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------|----------------|-----------------------|
|                             |                                                                                                                                          | Beginning of year                                                                               | End of year    |                       |
|                             |                                                                                                                                          | (a) Book Value                                                                                  | (b) Book Value | (c) Fair Market Value |
| Assets                      | 1 Cash - non-interest-bearing                                                                                                            | 51,174.                                                                                         | 14,356.        | 14,356.               |
|                             | 2 Savings and temporary cash investments                                                                                                 |                                                                                                 |                |                       |
|                             | 3 Accounts receivable ▶                                                                                                                  |                                                                                                 |                |                       |
|                             | Less: allowance for doubtful accounts ▶                                                                                                  |                                                                                                 |                |                       |
|                             | 4 Pledges receivable ▶                                                                                                                   |                                                                                                 |                |                       |
|                             | Less: allowance for doubtful accounts ▶                                                                                                  |                                                                                                 |                |                       |
|                             | 5 Grants receivable                                                                                                                      |                                                                                                 |                |                       |
|                             | 6 Receivables due from officers, directors, trustees, and other disqualified persons                                                     |                                                                                                 |                |                       |
|                             | 7 Other notes and loans receivable ▶                                                                                                     |                                                                                                 |                |                       |
|                             | Less: allowance for doubtful accounts ▶                                                                                                  |                                                                                                 |                |                       |
|                             | 8 Inventories for sale or use                                                                                                            |                                                                                                 |                |                       |
|                             | 9 Prepaid expenses and deferred charges                                                                                                  |                                                                                                 |                |                       |
|                             | 10a Investments - U.S. and state government obligations                                                                                  |                                                                                                 |                |                       |
|                             | b Investments - corporate stock                                                                                                          |                                                                                                 |                |                       |
|                             | c Investments - corporate bonds                                                                                                          |                                                                                                 |                |                       |
| Liabilities                 | 11 Investments - land, buildings, and equipment basis ▶ 218,587.                                                                         |                                                                                                 |                |                       |
|                             | Less accumulated depreciation STMT 6 ▶ 171,433.                                                                                          | 55,069.                                                                                         | 47,154.        | 211,200.              |
|                             | 12 Investments - mortgage loans                                                                                                          |                                                                                                 |                |                       |
|                             | 13 Investments - other STMT 7                                                                                                            | 454,061.                                                                                        | 464,919.       | 551,426.              |
|                             | 14 Land, buildings, and equipment: basis ▶ 3,744.                                                                                        |                                                                                                 |                |                       |
|                             | Less accumulated depreciation STMT 8 ▶ 3,324.                                                                                            | 780.                                                                                            | 420.           | 419.                  |
|                             | 15 Other assets (describe ▶)                                                                                                             |                                                                                                 |                |                       |
|                             | 16 Total assets (to be completed by all filers)                                                                                          | 561,084.                                                                                        | 526,849.       | 777,401.              |
|                             | 17 Accounts payable and accrued expenses                                                                                                 |                                                                                                 |                |                       |
|                             | 18 Grants payable                                                                                                                        |                                                                                                 |                |                       |
| Net Assets or Fund Balances | 19 Deferred revenue                                                                                                                      |                                                                                                 |                |                       |
|                             | 20 Loans from officers, directors, trustees, and other disqualified persons                                                              |                                                                                                 |                |                       |
|                             | 21 Mortgages and other notes payable                                                                                                     |                                                                                                 |                |                       |
|                             | 22 Other liabilities (describe ▶ SECURITY DEPOSIT)                                                                                       | 1,200.                                                                                          | 1,200.         |                       |
|                             | 23 Total liabilities (add lines 17 through 22)                                                                                           | 1,200.                                                                                          | 1,200.         |                       |
|                             | Foundations that follow SFAS 117, check here ▶ <input checked="" type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31. |                                                                                                 |                |                       |
|                             | 24 Unrestricted                                                                                                                          | 559,884.                                                                                        | 525,649.       |                       |
|                             | 25 Temporarily restricted                                                                                                                |                                                                                                 |                |                       |
|                             | 26 Permanently restricted                                                                                                                |                                                                                                 |                |                       |
|                             | Foundations that do not follow SFAS 117, check here ▶ <input type="checkbox"/> 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                                                                                                     | 559,884.                                                                                        | 525,649.       |                       |
|                             | 31 Total liabilities and net assets/fund balances                                                                                        | 561,084.                                                                                        | 526,849.       |                       |

## 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<br>(must agree with end-of-year figure reported on prior year's return) | 1 | 559,884. |
| 2 Enter amount from Part I, line 27a                                                                                                                            | 2 | -34,235. |
| 3 Other increases not included in line 2 (itemize) ▶                                                                                                            | 3 | 0.       |
| 4 Add lines 1, 2, and 3                                                                                                                                         | 4 | 525,649. |
| 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 | 525,649. |

**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<br>P - Purchase<br>D - Donation | (c) Date acquired<br>(mo., day, yr.) | (d) Date sold<br>(mo., day, yr.) |
|------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------|--------------------------------------|----------------------------------|
| 1a                                                                                                                                 |                                                  |                                      |                                  |
| b SEE ATTACHED STATEMENT                                                                                                           |                                                  |                                      |                                  |
| c                                                                                                                                  |                                                  |                                      |                                  |
| d                                                                                                                                  |                                                  |                                      |                                  |
| e                                                                                                                                  |                                                  |                                      |                                  |

| (e) Gross sales price | (f) Depreciation allowed<br>(or allowable) | (g) Cost or other basis<br>plus expense of sale | (h) Gain or (loss)<br>(e) plus (f) minus (g) |
|-----------------------|--------------------------------------------|-------------------------------------------------|----------------------------------------------|
| a                     |                                            |                                                 |                                              |
| b                     |                                            |                                                 |                                              |
| c                     |                                            |                                                 |                                              |
| d                     |                                            |                                                 |                                              |
| e 59,480.             |                                            | 57,353.                                         | 2,127.                                       |

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

| (i) F.M.V. as of 12/31/69 | (j) Adjusted basis<br>as of 12/31/69 | (k) Excess of col. (i)<br>over col. (j), if any | (l) Gains (Col. (h) gain minus<br>col. (k), but not less than -0-) or<br>Losses (from col. (h)) |
|---------------------------|--------------------------------------|-------------------------------------------------|-------------------------------------------------------------------------------------------------|
| a                         |                                      |                                                 |                                                                                                 |
| b                         |                                      |                                                 |                                                                                                 |
| c                         |                                      |                                                 |                                                                                                 |
| d                         |                                      |                                                 |                                                                                                 |
| e                         |                                      |                                                 | 2,127.                                                                                          |

|                                                                                                                                                                                 |                                                                                                                 |   |        |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------|---|--------|
| 2 Capital gain net income or (net capital loss)                                                                                                                                 | <div> <div>If gain, also enter in Part I, line 7</div> <div>If (loss), enter -0- in Part I, line 7</div> </div> | 2 | 2,127. |
| 3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6):<br>If gain, also enter in Part I, line 8, column (c).<br>If (loss), enter -0- in Part I, line 8 |                                                                                                                 | 3 | N/A    |

**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 instructions before making any entries.

| (a)<br>Base period years<br>Calendar year (or tax year beginning in) | (b)<br>Adjusted qualifying distributions | (c)<br>Net value of noncharitable-use assets | (d)<br>Distribution ratio<br>(col. (b) divided by col. (c)) |
|----------------------------------------------------------------------|------------------------------------------|----------------------------------------------|-------------------------------------------------------------|
| 2009                                                                 | 28,522.                                  | 815,449.                                     | .034977                                                     |
| 2008                                                                 | 53,234.                                  | 752,924.                                     | .070703                                                     |
| 2007                                                                 | 56,362.                                  | 1,030,466.                                   | .054696                                                     |
| 2006                                                                 | 51,494.                                  | 1,027,343.                                   | .050123                                                     |
| 2005                                                                 | 51,433.                                  | 1,016,597.                                   | .050593                                                     |

|                                                                                                                                                                                |   |          |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---|----------|
| 2 Total of line 1, column (d)                                                                                                                                                  | 2 | .261092  |
| 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 | .052218  |
| 4 Enter the net value of noncharitable-use assets for 2010 from Part X, line 5                                                                                                 | 4 | 774,686. |
| 5 Multiply line 4 by line 3                                                                                                                                                    | 5 | 40,453.  |
| 6 Enter 1% of net investment income (1% of Part I, line 27b)                                                                                                                   | 6 | 63.      |
| 7 Add lines 5 and 6                                                                                                                                                            | 7 | 40,516.  |
| 8 Enter qualifying distributions from Part XII, line 4                                                                                                                         | 8 | 40,583.  |

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.

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

|                                                                                                                                                                                                                                        |    |      |     |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----|------|-----|
| 1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1.<br>Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions) |    | 1    | 63. |
| b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b                                                                           |    |      |     |
| c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b).                                                                                                             |    | 2    | 0.  |
| 2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)                                                                                                                            |    | 3    | 63. |
| 3 Add lines 1 and 2                                                                                                                                                                                                                    |    | 4    | 0.  |
| 4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)                                                                                                                          |    | 5    | 63. |
| 5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-                                                                                                                                              |    |      |     |
| 6 Credits/Payments:                                                                                                                                                                                                                    |    |      |     |
| a 2010 estimated tax payments and 2009 overpayment credited to 2010                                                                                                                                                                    | 6a | 826. |     |
| 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  | 826. |     |
| 8 Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> 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 | 763. |     |
| 11 Enter the amount of line 10 to be: Credited to 2011 estimated tax <input checked="" type="checkbox"/> 763. Refunded <input type="checkbox"/>                                                                                        | 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?                                                                                                                                                                    |     | X  |
| 1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)?<br>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. |     | X  |
| 1c Did the foundation file Form 1120-POL for this year?                                                                                                                                                                                                                                                                                    |     | X  |
| d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year:<br>(1) On the foundation. <input checked="" type="checkbox"/> \$ 0. (2) On foundation managers. <input checked="" type="checkbox"/> \$ 0.                                                                                             |     |    |
| e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. <input checked="" type="checkbox"/> \$ 0.                                                                                                                                                          |     |    |
| 2 Has the foundation engaged in any activities that have not previously been reported to the IRS?<br>If "Yes," attach a detailed description of the activities.                                                                                                                                                                            |     | X  |
| 3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes                                                                                                               |     | X  |
| 4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?                                                                                                                                                                                                                                             |     | X  |
| b If "Yes," has it filed a tax return on Form 990-T for this year?                                                                                                                                                                                                                                                                         |     |    |
| 5 Was there a liquidation, termination, dissolution, or substantial contraction during the year?<br>If "Yes," attach the statement required by General Instruction T.                                                                                                                                                                      |     | X  |
| 6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either:<br>• By language in the governing instrument, or<br>• 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?       |     | X  |
| 7 Did the foundation have at least \$5,000 in assets at any time during the year?<br>If "Yes," complete Part II, col (c), and Part XV.                                                                                                                                                                                                     | X   |    |
| 8a Enter the states to which the foundation reports or with which it is registered (see instructions) <input checked="" type="checkbox"/> MD                                                                                                                                                                                               |     |    |
| 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                                                                                                                              | X   |    |
| 9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2010 or the taxable year beginning in 2010 (see instructions for Part XIV)? If "Yes," complete Part XIV                                                                                     |     | X  |
| 10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses                                                                                                                                                                                                      |     | X  |

N/A

Form 990-PF (2010)

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

|    |                                                                                                                                                                                                                                                                                                                                                       |    |     |         |
|----|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----|-----|---------|
| 11 | At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)                                                                                                                                                               | 11 |     | X       |
| 12 | Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?                                                                                                                                                                                                                                 | 12 |     | X       |
| 13 | Did the foundation comply with the public inspection requirements for its annual returns and exemption application?<br>Website address <b>N/A</b>                                                                                                                                                                                                     | 13 | X   |         |
| 14 | The books are in care of <b>J. SCOTT WHITNEY</b> Telephone no. <b>410-741-5602</b><br>Located at <b>401 FAIRLEIGH COURT, TRACY'S LANDING, MD</b> ZIP+4 <b>20779</b>                                                                                                                                                                                   |    |     |         |
| 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 <b>15</b> <b>N/A</b>                                                                                                                                              |    |     |         |
| 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?<br>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 <b>N/A</b> | 16 | Yes | No<br>X |

**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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No                                                                                                                                                                                                                                                                                                                                                    |     |    |
| (2) | Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No                                                                                                                                                                                                                                                                                                                            |     |    |
| (3) | Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No                                                                                                                                                                                                                                                                                                                                                |     |    |
| (4) | Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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.) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No                                                                                                                                                                                           |     |    |
| b   | If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 22 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here <b>N/A</b>                                                                                                                                                                         | 1b  |    |
| 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? <b>N/A</b>                                                                                                                                                                                                                                                                                                        | 1c  | X  |
| 2   | Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):                                                                                                                                                                                                                                                                                                                            |     |    |
| a   | At the end of tax year 2010, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2010? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No<br>If "Yes," list the years <b>N/A</b>                                                                                                                                                                                                                                              | 2a  |    |
| b   | Are there any years listed in 2a for which the foundation is <b>not</b> 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 instructions.) <b>N/A</b>                                                                                                                                                                               | 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. <b>N/A</b>                                                                                                                                                                                                                                                                                                                                                                               |     |    |
| 3a  | Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No                                                                                                                                                                                                                                                                                                            | 3a  |    |
| 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) <b>N/A</b> | 3b  |    |
| 4a  | Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?                                                                                                                                                                                                                                                                                                                                                                                           | 4a  | X  |
| b   | Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2010?                                                                                                                                                                                                                                                                         | 4b  | X  |

Form 990-PF (2010)

**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)?

☐ 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 instructions)?

N/A

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?

N/A

☐ 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

6b

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

X

If "Yes" to 6b, file Form 8870.

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?

☐ Yes ☒ No

b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?

N/A

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.

| (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 |
|----------------------------|-----------------------------------------------------------|-------------------------------------------|-----------------------------------------------------------------------|---------------------------------------|
| J. SCOTT WHITNEY           | TRUSTEE                                                   |                                           |                                                                       |                                       |
| 401 FAIRLEIGH COURT        |                                                           |                                           |                                                                       |                                       |
| TRACYS LANDING, MD 20779   | 2.00                                                      | 3,056.                                    | 0.                                                                    | 0.                                    |
| LAURENCE CUMBERLAND        | TRUSTEE                                                   |                                           |                                                                       |                                       |
| MAIN STREET                |                                                           |                                           |                                                                       |                                       |
| PRINCE FREDERICK, MD 20678 | 2.00                                                      | 2,048.                                    | 0.                                                                    | 0.                                    |
|                            |                                                           |                                           |                                                                       |                                       |
|                            |                                                           |                                           |                                                                       |                                       |
|                            |                                                           |                                           |                                                                       |                                       |
|                            |                                                           |                                           |                                                                       |                                       |

2 Compensation of five highest-paid employees (other than those included on line 1). 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

Form 990-PF (2010)

**Part VIII****Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors** (continued)**3** Five highest-paid independent contractors for professional services. 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 COLLEGE SCHOLARSHIPS WERE AWARDED TO STUDENTS WHO ATTENDED PUBLIC SCHOOL IN CALVERT COUNTY, MARYLAND. | 36,500.  |
| 2                                                                                                       |          |
| 3                                                                                                       |          |
| 4                                                                                                       |          |

**Part IX-B****Summary of Program-Related Investments**

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.

|                                                          | Amount |
|----------------------------------------------------------|--------|
| 1 N/A                                                    |        |
| 2                                                        |        |
| All other program-related investments. See instructions. |        |
| 3                                                        |        |

Total. Add lines 1 through 3

0.

Form 990-PF (2010)

**Part X** Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see 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 | 519,286. |
| b | Average of monthly cash balances                                                                            | 1b | 55,997.  |
| c | Fair market value of all other assets                                                                       | 1c | 211,200. |
| d | <b>Total</b> (add lines 1a, b, and c)                                                                       | 1d | 786,483. |
| 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  | 786,483. |
| 4 | Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)   | 4  | 11,797.  |
| 5 | <b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. Enter here and on Part V, line 4 | 5  | 774,686. |
| 6 | <b>Minimum investment return.</b> Enter 5% of line 5                                                        | 6  | 38,734.  |

**Part XI** Distributable Amount (see 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  | 38,734. |
| 2a | Tax on investment income for 2010 from Part VI, line 5                                                    | 2a | 63.     |
| b  | Income tax for 2010. (This does not include the tax from Part VI.)                                        | 2b |         |
| c  | Add lines 2a and 2b                                                                                       | 2c | 63.     |
| 3  | Distributable amount before adjustments. Subtract line 2c from line 1                                     | 3  | 38,671. |
| 4  | Recoveries of amounts treated as qualifying distributions                                                 | 4  | 0.      |
| 5  | Add lines 3 and 4                                                                                         | 5  | 38,671. |
| 6  | Deduction from distributable amount (see instructions)                                                    | 6  | 0.      |
| 7  | <b>Distributable amount as adjusted.</b> Subtract line 6 from line 5. Enter here and on Part XIII, line 1 | 7  | 38,671. |

**Part XII** 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                                                     | 1a | 40,583. |
| 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 | <b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4                 | 4  | 40,583. |
| 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 | 5  | 63.     |
| 6 | <b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4                                                             | 6  | 40,520. |

**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.

Form 990-PF (2010)

**Part XIII** Undistributed Income (see instructions)

|                                                                                                                                                                                   | (a)<br>Corpus | (b)<br>Years prior to 2009 | (c)<br>2009 | (d)<br>2010 |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------|----------------------------|-------------|-------------|
| <b>1</b> Distributable amount for 2010 from Part XI, line 7                                                                                                                       |               |                            |             | 38,671.     |
| <b>2</b> Undistributed income, if any, as of the end of 2010                                                                                                                      |               |                            |             |             |
| <b>a</b> Enter amount for 2009 only                                                                                                                                               |               |                            | 37,092.     |             |
| <b>b</b> Total for prior years:                                                                                                                                                   |               | 0.                         |             |             |
| <b>3</b> Excess distributions carryover, if any, to 2010:                                                                                                                         |               |                            |             |             |
| <b>a</b> From 2005                                                                                                                                                                |               |                            |             |             |
| <b>b</b> From 2006                                                                                                                                                                |               |                            |             |             |
| <b>c</b> From 2007                                                                                                                                                                |               |                            |             |             |
| <b>d</b> From 2008                                                                                                                                                                |               |                            |             |             |
| <b>e</b> From 2009                                                                                                                                                                |               |                            |             |             |
| <b>f</b> Total of lines 3a through e                                                                                                                                              | 0.            |                            |             |             |
| <b>4</b> Qualifying distributions for 2010 from Part XII, line 4: ► \$ 40,583.                                                                                                    |               |                            |             |             |
| <b>a</b> Applied to 2009, but not more than line 2a                                                                                                                               |               |                            | 37,092.     |             |
| <b>b</b> Applied to undistributed income of prior years (Election required - see instructions)                                                                                    |               | 0.                         |             |             |
| <b>c</b> Treated as distributions out of corpus (Election required - see instructions)                                                                                            | 0.            |                            |             |             |
| <b>d</b> Applied to 2010 distributable amount                                                                                                                                     |               |                            |             | 3,491.      |
| <b>e</b> Remaining amount distributed out of corpus                                                                                                                               | 0.            |                            |             |             |
| <b>5</b> Excess distributions carryover applied to 2010 (If an amount appears in column (d), the same amount must be shown in column (a).)                                        | 0.            |                            |             | 0.          |
| <b>6</b> Enter the net total of each column as indicated below:                                                                                                                   |               |                            |             |             |
| <b>a</b> Corpus. Add lines 3f, 4c, and 4e. Subtract line 5                                                                                                                        | 0.            |                            |             |             |
| <b>b</b> Prior years' undistributed income. Subtract line 4b from line 2b                                                                                                         |               | 0.                         |             |             |
| <b>c</b> 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.                         |             |             |
| <b>d</b> Subtract line 6c from line 6b. Taxable amount - see instructions                                                                                                         |               | 0.                         |             |             |
| <b>e</b> Undistributed income for 2009. Subtract line 4a from line 2a. Taxable amount - see instr.                                                                                |               |                            | 0.          |             |
| <b>f</b> Undistributed income for 2010. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2011                                                              |               |                            |             | 35,180.     |
| <b>7</b> Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)                                                     | 0.            |                            |             |             |
| <b>8</b> Excess distributions carryover from 2005 not applied on line 5 or line 7                                                                                                 | 0.            |                            |             |             |
| <b>9</b> Excess distributions carryover to 2011. Subtract lines 7 and 8 from line 6a                                                                                              | 0.            |                            |             |             |
| <b>10</b> Analysis of line 9:                                                                                                                                                     |               |                            |             |             |
| <b>a</b> Excess from 2006                                                                                                                                                         |               |                            |             |             |
| <b>b</b> Excess from 2007                                                                                                                                                         |               |                            |             |             |
| <b>c</b> Excess from 2008                                                                                                                                                         |               |                            |             |             |
| <b>d</b> Excess from 2009                                                                                                                                                         |               |                            |             |             |
| <b>e</b> Excess from 2010                                                                                                                                                         |               |                            |             |             |



**Part XV** **Supplementary Information** (continued)**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

| Recipient<br>Name and address (home or business)                           | If recipient is an individual,<br>show any relationship to<br>any foundation manager<br>or substantial contributor | Foundation<br>status of<br>recipient | Purpose of grant or<br>contribution | Amount  |
|----------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------|--------------------------------------|-------------------------------------|---------|
| <b>a</b> <i>Paid during the year</i><br>VARIOUS - SEE ATTACHED<br>SCHEDULE |                                                                                                                    |                                      |                                     | 36,500. |
| <b>Total</b>                                                               |                                                                                                                    |                                      | <b>3a</b>                           | 36,500. |
| <b>b</b> <i>Approved for future payment</i><br><br>NONE                    |                                                                                                                    |                                      |                                     |         |
| <b>Total</b>                                                               |                                                                                                                    |                                      | <b>3b</b>                           | 0.      |



## Part XVII

## Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

- |          |                                                                                                                                                                                                                                                                                                                                                                                              | Yes | No |
|----------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----|----|
| <b>1</b> | 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?                                                                                                                                          |     |    |
| <b>a</b> | Transfers from the reporting foundation to a noncharitable exempt organization of:                                                                                                                                                                                                                                                                                                           |     |    |
|          | (1) Cash                                                                                                                                                                                                                                                                                                                                                                                     |     | X  |
|          | (2) Other assets                                                                                                                                                                                                                                                                                                                                                                             |     | X  |
| <b>b</b> | Other transactions:                                                                                                                                                                                                                                                                                                                                                                          |     |    |
|          | (1) Sales of assets to a noncharitable exempt organization                                                                                                                                                                                                                                                                                                                                   |     | X  |
|          | (2) Purchases of assets from a noncharitable exempt organization                                                                                                                                                                                                                                                                                                                             |     | X  |
|          | (3) Rental of facilities, equipment, or other assets                                                                                                                                                                                                                                                                                                                                         |     | X  |
|          | (4) Reimbursement arrangements                                                                                                                                                                                                                                                                                                                                                               |     | X  |
|          | (5) Loans or loan guarantees                                                                                                                                                                                                                                                                                                                                                                 |     | X  |
|          | (6) Performance of services or membership or fundraising solicitations                                                                                                                                                                                                                                                                                                                       |     | X  |
| <b>c</b> | Sharing of facilities, equipment, mailing lists, other assets, or paid employees                                                                                                                                                                                                                                                                                                             |     | X  |
| <b>d</b> | 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. |     |    |

[illegible]

- 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 |
|--------------------------|--------------------------|---------------------------------|
| N/A                      |                          |                                 |
|                          |                          |                                 |
|                          |                          |                                 |
|                          |                          |                                 |
|                          |                          |                                 |

**Sign  
Here**

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

Signature of officer or trustee

Date \_\_\_\_\_

**TRUSTEE**

Title

**Paid  
Preparer  
Use Only**

Print/Type preparer's name

Preparer's signature

Date \_\_\_\_\_

Check ☐ self-employed

|      |  |
|------|--|
| PTIN |  |
|------|--|

BART LANMAN

Firm's name ► **SQUIRE, LEMKIN + COMPANY LLP**

Firm's EIN ▶

Firm's address ► 111 ROCKVILLE PIKE, SUITE 475  
ROCKVILLE, MD 20850

Phone no. **301-424-6800**

**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,<br>2-story brick warehouse; or common stock, 200 shs. MLC Co. |                                | (b) How acquired<br>P - Purchase<br>D - Donation | (c) Date acquired<br>(mo., day, yr.) | (d) Date sold<br>(mo., day, yr.) |
|--------------------------------------------------------------------------------------------------------------------------------------|--------------------------------|--------------------------------------------------|--------------------------------------|----------------------------------|
| 1a                                                                                                                                   | PRUDENTIAL JENSEN VALUE FD     |                                                  | 05/12/10                             | 07/13/10                         |
| b                                                                                                                                    | EATON VANCE LARGE CAP          |                                                  | 05/12/10                             | 07/13/10                         |
| c                                                                                                                                    | THORNBURG INTL FD              |                                                  | 05/12/10                             | 10/12/10                         |
| d                                                                                                                                    | EATON VANCE LARGE CAP          |                                                  | 05/12/10                             | 10/12/10                         |
| e                                                                                                                                    | MAINSTAY LARGE CAP             |                                                  | 05/12/10                             | 10/12/10                         |
| f                                                                                                                                    | FPA MEW INCOME                 |                                                  | 05/12/10                             | 10/12/10                         |
| g                                                                                                                                    | AMERICAN CENTURY INFLATION ADJ |                                                  | 05/12/10                             | 03/07/11                         |
| h                                                                                                                                    | NEUBERG BERMAN GENESIS         |                                                  | 05/12/10                             | 03/07/11                         |
| i                                                                                                                                    | FEDERATED STRATEGIC            |                                                  | 07/13/10                             | 03/07/11                         |
| j                                                                                                                                    | WF GOVT SEC FD                 |                                                  | 05/12/10                             | 03/07/11                         |
| k                                                                                                                                    | HARTFORD CAPITAL APP           |                                                  | 05/12/10                             | 03/07/11                         |
| l                                                                                                                                    | IVY ASSET STRATEGY             |                                                  | 05/12/10                             | 03/07/11                         |
| m                                                                                                                                    | PIMCO TOTAL RETURN             |                                                  | 05/12/10                             | 03/07/11                         |
| n                                                                                                                                    | DREYFUS APPRECIATION           |                                                  | 10/12/10                             | 03/07/11                         |
| o                                                                                                                                    | FIRST EAGLE GOLD FD            |                                                  | 10/12/10                             | 04/27/11                         |

| (e) Gross sales price | (f) Depreciation allowed<br>(or allowable) | (g) Cost or other basis<br>plus expense of sale | (h) Gain or (loss)<br>(e) plus (f) minus (g) |
|-----------------------|--------------------------------------------|-------------------------------------------------|----------------------------------------------|
| a 3,130.              |                                            | 3,294.                                          | -164.                                        |
| b 2,085.              |                                            | 2,254.                                          | -169.                                        |
| c 5,703.              |                                            | 5,136.                                          | 567.                                         |
| d 4,774.              |                                            | 4,915.                                          | -141.                                        |
| e 10,445.             |                                            | 10,189.                                         | 256.                                         |
| f 7,220.              |                                            | 7,259.                                          | -39.                                         |
| g 409.                |                                            | 404.                                            | 5.                                           |
| h 6,037.              |                                            | 5,094.                                          | 943.                                         |
| i 303.                |                                            | 270.                                            | 33.                                          |
| j 10,426.             |                                            | 10,440.                                         | -14.                                         |
| k 4,772.              |                                            | 4,236.                                          | 536.                                         |
| l 1,269.              |                                            | 1,112.                                          | 157.                                         |
| m 573.                |                                            | 585.                                            | -12.                                         |
| n 1,169.              |                                            | 1,066.                                          | 103.                                         |
| o 1,165.              |                                            | 1,099.                                          | 66.                                          |

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

| (i) F.M.V. as of 12/31/69 | (j) Adjusted basis<br>as of 12/31/69 | (k) Excess of col. (i)<br>over col. (j), if any | (l) Losses (from col. (h))<br>Gains (excess of col. (h) gain over col. (k),<br>but not less than "-0-") |
|---------------------------|--------------------------------------|-------------------------------------------------|---------------------------------------------------------------------------------------------------------|
| a                         |                                      |                                                 | -164.                                                                                                   |
| b                         |                                      |                                                 | -169.                                                                                                   |
| c                         |                                      |                                                 | 567.                                                                                                    |
| d                         |                                      |                                                 | -141.                                                                                                   |
| e                         |                                      |                                                 | 256.                                                                                                    |
| f                         |                                      |                                                 | -39.                                                                                                    |
| g                         |                                      |                                                 | 5.                                                                                                      |
| h                         |                                      |                                                 | 943.                                                                                                    |
| i                         |                                      |                                                 | 33.                                                                                                     |
| j                         |                                      |                                                 | -14.                                                                                                    |
| k                         |                                      |                                                 | 536.                                                                                                    |
| l                         |                                      |                                                 | 157.                                                                                                    |
| m                         |                                      |                                                 | -12.                                                                                                    |
| n                         |                                      |                                                 | 103.                                                                                                    |
| o                         |                                      |                                                 | 66.                                                                                                     |

|   |                                                                                                                                                                                 |   |        |
|---|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---|--------|
| 2 | Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7<br>If (loss), enter "-0-" in Part I, line 7 }                                             | 2 | 2,127. |
| 3 | Net short-term capital gain or (loss) as defined in sections 1222(5) and (6):<br>If gain, also enter in Part I, line 8, column (c).<br>If (loss), enter "-0-" in Part I, line 8 | 3 | N/A    |

2010 DEPRECIATION AND AMORTIZATION REPORT

FORM 990-PF PAGE 1

990-PF

| Asset No | Description              | Date Acquired | Method | Life | Conv | Line No | Unadjusted Cost Or Basis | Bus % Excl | Section 179 Expense | * Reduction In Basis | Basis For Depreciation | Beginning Accumulated Depreciation | Current Sec 179 Expense | Current Year Deduction | Ending Accumulated Depreciation |
|----------|--------------------------|---------------|--------|------|------|---------|--------------------------|------------|---------------------|----------------------|------------------------|------------------------------------|-------------------------|------------------------|---------------------------------|
| 35       | COMPUTER                 | 06/25/04      | SL     | 5.00 | HY   | 16      | 1,944.                   |            |                     |                      | 1,944.                 | 1,944.                             |                         | 0.                     | 1,944.                          |
| 36       | COMPUTER                 | 09/03/07      | SL     | 5.00 | HY   | 16      | 1,799.                   |            |                     |                      | 1,799.                 | 1,020.                             |                         | 360.                   | 1,380.                          |
|          | * TOTAL 990-PF PG 1 DEPR |               |        |      |      |         | 3,743.                   |            |                     |                      | 3,743.                 | 2,964.                             |                         | 360.                   | 3,324.                          |

| FORM 990-PF                           | RENTAL INCOME      | STATEMENT              | 1 |
|---------------------------------------|--------------------|------------------------|---|
| KIND AND LOCATION OF PROPERTY         | ACTIVITY<br>NUMBER | GROSS<br>RENTAL INCOME |   |
| CONDOMINIUM - SOLOMONS ISLAND         | 1                  | 16,800.                |   |
| TOTAL TO FORM 990-PF, PART I, LINE 5A |                    | 16,800.                |   |

| FORM 990-PF                                       | RENTAL EXPENSES    | STATEMENT | 2       |
|---------------------------------------------------|--------------------|-----------|---------|
| DESCRIPTION                                       | ACTIVITY<br>NUMBER | AMOUNT    | TOTAL   |
| DEPRECIATION                                      |                    | 7,915.    |         |
| CLEANING                                          |                    | 1,806.    |         |
| TAXES                                             |                    | 2,233.    |         |
| MAINTENANCE FEES                                  |                    | 7,280.    |         |
| - SUBTOTAL -                                      | 1                  |           | 19,234. |
| TOTAL RENTAL EXPENSES                             |                    |           | 19,234. |
| NET RENTAL INCOME TO FORM 990-PF, PART I, LINE 5B |                    |           | -2,434. |

| FORM 990-PF                  | ACCOUNTING FEES              |                                   |                               | STATEMENT                     | 3 |
|------------------------------|------------------------------|-----------------------------------|-------------------------------|-------------------------------|---|
| DESCRIPTION                  | (A)<br>EXPENSES<br>PER BOOKS | (B)<br>NET INVEST-<br>MENT INCOME | (C)<br>ADJUSTED<br>NET INCOME | (D)<br>CHARITABLE<br>PURPOSES |   |
|                              | 3,925.                       | 3,925.                            |                               | 0.                            |   |
| TO FORM 990-PF, PG 1, LN 16B | 3,925.                       | 3,925.                            |                               | 0.                            |   |

| FORM 990-PF                 | TAXES                        |                                   |                               | STATEMENT                     | 4 |
|-----------------------------|------------------------------|-----------------------------------|-------------------------------|-------------------------------|---|
| DESCRIPTION                 | (A)<br>EXPENSES<br>PER BOOKS | (B)<br>NET INVEST-<br>MENT INCOME | (C)<br>ADJUSTED<br>NET INCOME | (D)<br>CHARITABLE<br>PURPOSES |   |
| TAXES                       | 2,233.                       | 2,233.                            |                               | 0.                            |   |
| TO FORM 990-PF, PG 1, LN 18 | 2,233.                       | 2,233.                            |                               | 0.                            |   |

| FORM 990-PF                 | OTHER EXPENSES               |                                   |                               | STATEMENT                     | 5 |
|-----------------------------|------------------------------|-----------------------------------|-------------------------------|-------------------------------|---|
| DESCRIPTION                 | (A)<br>EXPENSES<br>PER BOOKS | (B)<br>NET INVEST-<br>MENT INCOME | (C)<br>ADJUSTED<br>NET INCOME | (D)<br>CHARITABLE<br>PURPOSES |   |
| BANK FEES                   | 2,222.                       | 2,222.                            |                               | 0.                            |   |
| MISCELLANEOUS               | 997.                         | 997.                              |                               | 0.                            |   |
| CLEANING                    | 1,806.                       | 1,806.                            |                               | 0.                            |   |
| MAINTENANCE FEES            | 7,280.                       | 7,280.                            |                               | 0.                            |   |
| TO FORM 990-PF, PG 1, LN 23 | 12,305.                      | 12,305.                           |                               | 0.                            |   |

| FORM 990-PF                        | DEPRECIATION OF ASSETS HELD FOR INVESTMENT |                             |            | STATEMENT | 6 |
|------------------------------------|--------------------------------------------|-----------------------------|------------|-----------|---|
| DESCRIPTION                        | COST OR<br>OTHER BASIS                     | ACCUMULATED<br>DEPRECIATION | BOOK VALUE |           |   |
| SOLOMONS CONDO                     | 217,655.                                   | 170,501.                    | 47,154.    |           |   |
| WASHER/DRYER CONDO                 | 932.                                       | 932.                        | 0.         |           |   |
| TOTAL TO FM 990-PF, PART II, LN 11 | 218,587.                                   | 171,433.                    | 47,154.    |           |   |

| FORM 990-PF                            | OTHER INVESTMENTS   |            |                      | STATEMENT | 7 |
|----------------------------------------|---------------------|------------|----------------------|-----------|---|
| DESCRIPTION                            | VALUATION<br>METHOD | BOOK VALUE | FAIR MARKET<br>VALUE |           |   |
| FIRST EAGLE GLOBAL FUND                | COST                | 155,620.   | 245,649.             |           |   |
| INCOME FUND OF AMERICA                 | COST                | 200,461.   | 192,806.             |           |   |
| MUTUAL FUNDS                           | COST                | 108,838.   | 112,971.             |           |   |
| TOTAL TO FORM 990-PF, PART II, LINE 13 |                     | 464,919.   | 551,426.             |           |   |

---

---

FORM 990-PF      DEPRECIATION OF ASSETS NOT HELD FOR INVESTMENT      STATEMENT      8

---

---

| DESCRIPTION                        | COST OR<br>OTHER BASIS | ACCUMULATED<br>DEPRECIATION | BOOK VALUE |
|------------------------------------|------------------------|-----------------------------|------------|
| COMPUTER                           | 1,944.                 | 1,944.                      | 0.         |
| COMPUTER                           | 1,799.                 | 1,380.                      | 419.       |
| TOTAL TO FM 990-PF, PART II, LN 14 | 3,743.                 | 3,324.                      | 419.       |

| New/Renew | Online | Last Name    | First Name | Address                      | City             | State | Zip Code | Phone Number | SSN | School                                | 11 Award | Check Number |
|-----------|--------|--------------|------------|------------------------------|------------------|-------|----------|--------------|-----|---------------------------------------|----------|--------------|
| N         | x      | Adams        | David      | 15 Aspen Woods Drive         | Sunderland       | MD    | 20689    | 410-286-3788 |     | Stevenson University                  | \$500    | 2913         |
| R         |        | Baker        | Jaclyn     | 3535 Pine Tree Road          | Port Republic    | MD    | 20676    | 410-586-3974 |     | University of Maryland College Park   | \$500    | 2914         |
| N         | x      | Behroozford  | Inge       | 9901 Greening Court          | Dunkirk          | MD    | 20754    | 443-550-3865 |     | Virginia Commonwealth                 | \$500    | 2961         |
| N         | x      | Biscoe       | Turquoise  | 8452 Walnut Avenue           | Lusby            | MD    | 20657    | 301-481-4665 |     | Garrett College                       | \$1,000  | 2950         |
| N         | x      | Chaffee      | Kacie      | 13240 Olivet Road            | Lusby            | MD    | 20657    | 410-326-1378 |     | Salisbury University                  | \$500    | 2915         |
| N         | x      | Chan         | Doreen     | 1809 Fenwicke Court          | Huntingtown      | MD    | 20639    | 410-535-0270 |     | California Institute of Technology    | \$1,000  | 2964         |
| N         | x      | Cleary       | Sean       | 3402 Bristol Court           | Chesapeake Beach | MD    | 20732    | 410-257-3771 |     | Georgia Institute of Technology       | \$500    | 2916         |
| N         | x      | Colgan       | Caroline   | 6036 Clairemont Drive        | Owings           | MD    | 20736    | 301-855-6701 |     | Salisbury University                  | \$500    | 2949         |
| N         |        | Connell      | Kathryn    | 6200 Earl Street             | Owings           | MD    | 20736    | 301-855-0071 |     | Robert Morris University              | \$1,000  | 2917         |
| N         | x      | Cooke        | Tierra     | 8518 Stock Drive             | Lusby            | MD    | 20657    | 443-968-2089 |     | Husson University                     | \$1,000  | 2962         |
| N         | x      | Crane        | Sonya      | PO Box 123                   | North Beach      | MD    | 20714    | 410-257-2708 |     | Community College of Baltimore County | \$1,000  | 2959         |
| N         | x      | Cummings     | John       | 1220 Sheridan Drive          | Owings           | MD    | 20736    | 301-855-7558 |     | Piedmont College                      | \$500    | 2963         |
| N         |        | Darrach      | Zachary    | 3555 Pine Tree Road          | Port Republic    | MD    | 20676    | 410-586-9862 |     | Full Sail University                  | \$500    | 2918         |
| N         | x      | Denny        | Carolyn    | 12975 Sailboat Lane          | Lusby            | MD    | 20657    | 410-326-7072 |     | Mary Baldwin College                  | \$1,000  | 2919         |
| N         | x      | Denny        | Kimberly   | 12975 Sailboat Lane          | Lusby            | MD    | 20657    | 410-326-7072 |     | Mary Baldwin College                  | \$1,000  | 2920         |
| N         | x      | Dent         | Randi      | 1461 Knight Avenue           | Dunkirk          | MD    | 20754    | 443-451-3377 |     | Washington and Lee                    | \$1,000  | 2951         |
| N         |        | Fletcher III | Ernest     | 3140 Ponds Wood Road         | Huntingtown      | MD    | 20639    | 410-535-2241 |     | Anne Arundel Community College        | \$500    | 2921         |
| N         | x      | Gutierrez    | Lizabeth   | 11777 Little Cove Point Road | Lusby            | MD    | 20657    | 443-624-9183 |     | George Mason                          | \$1,000  | 2948         |
| R??       |        | Hause        | Colby      | 9515 Howes Road              | Dunkirk          | MD    | 20754    | 410-286-7476 |     | Eckerd College                        | \$1,000  | 2922         |
| N         |        | Hause        | Julia      | 9515 Howes Road              | Dunkirk          | MD    | 20754    | 410-286-7476 |     | St Mary's College of Maryland         | \$1,000  | 2923         |
| R??       |        | Hause        | Lauren     | 9515 Howes Road              | Dunkirk          | MD    | 20754    | 410-286-7476 |     | University of Maryland College Park   | \$1,000  | 2924         |
| N         | x      | Heim         | Clancey    | 3442 Jones Road              | Dunkirk          | MD    | 20754    | 301-855-4957 |     | Towson University                     | \$1,000  | 2925         |
| N         | x      | Hernandez    | Adrian     | 11955 Luray Lane             | Dunkirk          | MD    | 20754    | 410-286-9560 |     | Marshall University                   | \$1,000  | 2947         |
| N         | x      | Hobbs        | Shania     | 9909 Jonathan Drive          | Dunkirk          | MD    | 20754    | 410-286-9018 |     | Towson University                     | \$500    | 2926         |
| N         |        | Huseman      | Katherine  | 623 Running Fox Road         | Lusby            | MD    | 20657    | 410-394-0166 |     | The Art Institute of Boston           | \$500    | 2928         |
| N         | x      | Itschner     | Jonathan   | 3122 Great Reward Way        | Huntingtown      | MD    | 20639    | 410-535-5307 |     | West Virginia University              | \$1,000  | 2946         |
| R         |        | Jeschelink   | Lauren E   | 990 Alameda Drive            | Huntingtown      | MD    | 20639    | 410-535-9494 |     | Shepherd University                   | \$1,000  | 2929         |
| N         |        | Jones        | Keonna     | PO Box 615                   | Owings           | MD    | 20736    | 301-855-0434 |     | Bowie State University                | \$500    | 2930         |
| N         |        | Jones        | Shakia     | 3258 Solomons Island Road    | Huntingtown      | MD    | 20639    | 410-535-7659 |     | Howard University                     | \$500    | 2931         |
| N         | x      | Kapelka      | Anthony    | 3570 Hilltop Drive           | Port Republic    | MD    | 20676    | 410-586-3827 |     | York College                          | \$500    | 2955         |
| N         | x      | Kletter      | Dylan      | 600 Patuxent Reach Drive     | Prince Frederick | MD    | 20678    | 410-474-9177 |     | Coastal Carolina University           | \$500    | 2957         |
| N         | x      | Leggett      | Summer     | 4002 Lakeview Turn           | Dunkirk          | MD    | 20754    | 410-286-3820 |     | Brigham Young University              | \$500    | 2953         |
| N         | x      | Long         | Travon     | 5420 Laurel Trail            | St Leonard       | MD    | 20685    | 410-586-0938 |     | Stevenson University                  | \$500    | 2932         |
| R         | x      | Mackall      | Riddicia L | 455 Ponds Wood Road          | Huntingtown      | MD    | 20639    | 410-535-3896 |     | Howard University                     | \$1,000  | 2933         |
| N         | x      | Pfeiffer     | Samantha   | 2661 Aspen Road              | Port Republic    | MD    | 20676    | 410-586-1635 |     | Edinboro University of Pennsylvania   | \$1,000  | 2945         |
| N         | x      | Piason       | Michelle   | 2115 Smoky Road              | Huntingtown      | MD    | 20639    | 410-257-9366 |     | University of South Carolina          | \$1,000  | 2952         |
| N         |        | Pope         | Rachel     | 4400 Pleasant Court          | Huntingtown      | MD    | 20639    | 410-610-7738 |     | University of Maryland Eastern Shore  | \$1,000  | 2934         |
| N         | x      | Potts        | Andrew     | PO Box 141                   | St Leonard       | MD    | 20685    | 410-586-9812 |     | College of Southern Maryland          | \$500    | 2956         |
| N         | x      | Reilly       | Thomas     | 1842 Oriole Way              | St Leonard       | MD    | 20685    | 410-586-1370 |     | West Virginia University              | \$500    | 2944         |
| R         |        | Rice         | Allison N  | 1260 M I Bowen Road          | Prince Frederick | MD    | 20678    | 410-535-6173 |     | Salisbury University                  | \$500    | 2935         |
| N         | x      | Rice         | Eric       | 12628 High Sierra Road       | Lusby            | MD    | 20657    | 410-326-2076 |     | College of Southern Maryland          | \$500    | 2965         |
| N         |        | Stearns      | Jordan     | 11569 Tomahawk Trail         | Lusby            | MD    | 20657    | 410-326-0006 |     | College of Southern Maryland          | \$500    | 2936         |
| N         |        | Torney       | DaShawn    | 4040 Hamp-Lee Drive          | Huntingtown      | MD    | 20639    | 410-414-9967 |     | Stevenson University                  | \$500    | 2938         |
| N         | x      | Toye         | Tiffany    | 5820 Mackall Road            | St Leonard       | MD    | 20685    | 410-586-0413 |     | Morgan State University               | \$1,000  | 2954         |
| R         |        | Vogt         | Teresa     | 5650 Warren Drive            | Huntingtown      | MD    | 20639    | 410-610-0290 |     | University of Maryland                | \$500    | 2939         |
| N         | x      | Widman       | David      | 2470 Harrison Court          | Chesapeake Beach | MD    | 20732    | 410-286-8276 |     | Salisbury University                  | \$1,000  | 2943         |
| N         | x      | Wilkerson    | Briana     | 695 Ponds Wood Road          | Huntingtown      | MD    | 20639    | 410-535-0843 |     | University of Maryland Eastern Shore  | \$500    | 2941         |
| N         | x      | Williams     | Emily      | 2495 Chaneyville Road        | Owings           | MD    | 20736    | 301-855-0324 |     | University of Mississippi             | \$1,000  | 2942         |
| N         | x      | Zegel        | Ashley     | 2785 Queensberry Drive       | Huntingtown      | MD    | 20639    | 443-975-7134 |     | Salisbury University                  | \$1,000  | 2958         |

\$36,500

Florence B. Trueman Scholarship Trust  
J. Scott Whitney, Trustee  
401 Fairleigh Court  
Tracy's Landing, MD 20779  
Phone (410) 741-5602  
JScottWhitney@aol.com

---

APPLICATION - New ( ) Renewal ( )

**I. Personal Information**

Student Name \_\_\_\_\_  
Last First M.I.  
Home Mailing Address \_\_\_\_\_  
(P.O. Box, or street, city, state, and zip)  
E- Mail Address \_\_\_\_\_  
Home Phone \_\_\_\_\_ DOB \_\_\_\_\_ SS# \_\_\_\_\_  
Parent(s) or Guardian(s) \_\_\_\_\_

**II. Academic Information (Part A – First time applicants, Part B – Renewal applicants)**

***Part A. Academic Information – First time applicants only***

1. Name of High School \_\_\_\_\_
2. Graduation Year \_\_\_\_\_ 3. Class Rank \_\_\_\_ out of \_\_\_\_ students
4. Grade Point Average (GPA) \_\_\_\_\_ (Transcript required.)
5. SAT scores (verbal) \_\_\_\_\_ (math) \_\_\_\_\_ ( ) not required by selected institution
6. Career Goal(s) \_\_\_\_\_  
\_\_\_\_\_
7. Academic Honors and/or Recognition received (Grades 9 through 12). Attach additional pages if necessary.  
\_\_\_\_\_  
\_\_\_\_\_

8. Hobbies, interests, or special talents. Attach additional pages if necessary.  
\_\_\_\_\_  
\_\_\_\_\_

9. Give COMPLETE name and address of the school you plan to attend

---

---

---

10. Have you received an unconditional acceptance letter? ( ) Yes ( ) No

11. Intended Major \_\_\_\_\_ Minor \_\_\_\_\_

12. Write a brief essay entitled "What I will bring to my community through advanced education." The essay should not exceed 600 words (approximately 2 pages double spaced, preferably typed). Attach as addendum 2.

13. Obtain two (2) letters of recommendation supporting your application. These may come from teachers, employers, clergy, or other community member who knows you and can share insights as to your potential for success. Attach as addendum 3.

**Part B. Academic Information - *Renewal applicants only***

1. GPA \_\_\_\_\_ (Transcript required.)

2. Hours completed last year? \_\_\_\_\_

3. Academic year for which this application applies:

( ) Freshman ( ) Sophomore ( ) Junior ( ) Senior

4. Has there been a change in your College/University or major?

( ) No ( ) Yes If yes, please explain.

---

---

5. Have you received an unconditional acceptance letter? ( ) Yes ( ) No

**III. Extracurricular/Community Service Activities.** List and briefly describe any extracurricular and community service activities. Sufficient detail should be included for the selection committee to best understand your accomplishments. Attach as Addendum 1.

- **First time applicants** - Identify activities you participated in during grades 9 through 12. Include relevant dates and average time spent at the activity e.g., Grades 10 - 12 – played varsity soccer - 20 hours per week during the season, selected "most sportsmanlike" by teammates in senior year.
- **Renewal applicants** - Identify activities you have participated in at your college/university. Include relevant dates and average time spent at the activity e.g., Freshman Year – worked on the staff of school newspaper 6-10 hours/week editing sports articles.

**IV. Estimated Expenses** (if actual costs unknown, provide estimate)

- |                      |    |       |                 |
|----------------------|----|-------|-----------------|
| 1. Tuition:          | \$ | _____ |                 |
| 2. Room & Board:     | \$ | _____ |                 |
| 3. Fees:             | \$ | _____ |                 |
| 4. Other Costs:      | \$ | _____ | Describe: _____ |
| 5. Books (estimate): | \$ | _____ |                 |
| Total                | \$ | _____ |                 |

**V. Financial Information**

1. Have you applied for and/or received any other scholarships? ( ) No ( ) Yes If yes, please list the name and amount of any award(s).

|       |       |
|-------|-------|
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |

2. Have you completed a Free Application for Federal Student Aid (FAFSA)?

a. ( ) Yes (attach a copy of your student aid report (SAR) and proceed to section VI, Student Certification.

b. ( ) No If no, please the remainder of Section V. Information provided in this section will be considered confidential by the trustees and the selection committee.

3. Statement of **STUDENT INCOME/ASSETS**:

- a. Will you be working while attending college?

( ) No ( ) Yes, anticipated income per year \$ \_\_\_\_\_

b. Other assets available to you to help defray the costs of college, i.e., personal savings, bonds, investments, etc.

|       |       |
|-------|-------|
| _____ | _____ |
| _____ | _____ |

4. Statement of **PARENTS' INCOMES/ASSETS**

- a. Mother or Guardian's:

Occupation \_\_\_\_\_ Annual Income \$ \_\_\_\_\_

- b. Father or Guardian's:

Occupation \_\_\_\_\_ Annual Income \$ \_\_\_\_\_

c. Other (i.e., social security, alimony, child support, family/friend assistance, etc.)

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

d. Total Income and Other financial support \$ \_\_\_\_\_

e. Other assets available to help defray the costs of college i.e., personal savings, bonds, investments, etc.

\_\_\_\_\_  
\_\_\_\_\_

5. Dependent Information. List all dependents claimed by your parent(s) or guardian(s).

| Name | Relationship | Age | College<br>(Yes/No) | Estimated<br>Education<br>Expenses |
|------|--------------|-----|---------------------|------------------------------------|
|      |              |     |                     |                                    |
|      |              |     |                     |                                    |
|      |              |     |                     |                                    |
|      |              |     |                     |                                    |
|      |              |     |                     |                                    |
|      |              |     |                     |                                    |

6. Other family or financial information. If there is any additional information you would like the selection committee to consider when making an award determination please provide.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

## VI. Student Certification

I hereby certify that the information provided in this application is accurate and complete to the best of my knowledge. I understand the selection committee may request further information for clarification purposes. In the event an award is given, I understand the trustees will provide my name, address, social security number and the amount of any award to the Internal Revenue Service as required by law.

Student signature \_\_\_\_\_ Date \_\_\_\_\_

Parent(s) or guardian(s) \_\_\_\_\_

Mail to: Florence B. Trueman Scholarship Trust  
Mr. J. Scott Whitney, Trustee  
401 Fairleigh Court  
Tracy's Landing, Maryland 20779

Does your application package contain the following?

|   | Requirement                                               | New Applicant | Renewal Applicant |
|---|-----------------------------------------------------------|---------------|-------------------|
| 1 | Application (completed & signed)                          |               |                   |
| 2 | Transcript – most current                                 |               |                   |
| 3 | Addendum 1 – Listing of Extracurricular/Community Service |               |                   |
| 4 | Addendum 2<br>Brief Essay                                 |               | N/A               |
| 5 | Addendum 3<br>Letters of Recommendation                   |               | N/A               |
| 6 | FAFSA & SAR (if applicable)                               |               |                   |