Form **990-PF**

Department of the Treasury
Internal Revenue Service

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

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

OMB No 1545-0052

2010

For calendar year 2010, or tax year beginning OCT 1, 2010 **, and ending** SEP 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
JOAN BIEBERSON MCDONALD CHARITABLE TRUST
MEM SCHOLARSHIP FD FOR WHEELING PARK H.S

A Employer identification number
54-6478362

Number and street (or P O box number if mail is not delivered to street address)
C/O JANE ANDERSON, 401 MARKET STREET
Room/suite 401

B Telephone number
740-284-1682

City or town, state, and ZIP code
STEUBENVILLE, OH 43952

C If exemption application is pending, check here ▶ ☐
D 1. Foreign organizations, check here ▶ ☐
2. Foreign organizations meeting the 85% test, check here and attach computation ▶ ☐

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

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

I Fair market value of all assets at end of year *(from Part II, col. (c), line 16)* ▶$ 826,686.

J Accounting method: ☒ Cash ☐ Accrual ☐ Other (specify) *(Part I, column (d) must be on cash basis.)*

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

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue				
1 Contributions, gifts, grants, etc., received	97,971.			
2 Check ▶ ☐ if the foundation is not required to attach Sch B				
3 Interest on savings and temporary cash investments				
4 Dividends and interest from securities	21,249.	21,249.	21,249.	STATEMENT 1
5a Gross rents				
b Net rental income or (loss)				
6a Net gain or (loss) from sale of assets not on line 10	20,486.			
b Gross sales price for all assets on line 6a 612,963.				
7 Capital gain net income (from Part IV, line 2)		20,486.		
8 Net short-term capital gain			0.	
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	139,706.	41,735.	21,249.	
Operating and Administrative Expenses				
13 Compensation of officers, directors, trustees, etc	0.	0.	0.	0.
14 Other employee salaries and wages				
15 Pension plans, employee benefits				
16a Legal fees				
b Accounting fees STMT 2	710.	710.	0.	0.
c Other professional fees				
17 Interest				
18 Taxes STMT 3	465.	465.	0.	0.
19 Depreciation and depletion				
20 Occupancy				
21 Travel, conferences, and meetings				
22 Printing and publications				
23 Other expenses STMT 4	5,931.	5,931.	0.	0.
24 **Total operating and administrative expenses.** Add lines 13 through 23	7,106.	7,106.	0.	0.
25 Contributions, gifts, grants paid	31,000.			31,000.
26 **Total expenses and disbursements.** Add lines 24 and 25	38,106.	7,106.	0.	31,000.
27 Subtract line 26 from line 12:				
a Excess of revenue over expenses and disbursements	101,600.			
b **Net investment income** (if negative, enter -0-)		34,629.		
c **Adjusted net income** (if negative, enter -0-)			21,249.	

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Part II Balance Sheets (Attached schedules and amounts in the description column should be for end-of-year amounts only)		Beginning of year (a) Book Value	End of year (b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing			
	2 Savings and temporary cash investments			
	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 STMT 5	796,980.	898,580.	826,686.
	c Investments - corporate bonds			
	11 Investments - land, buildings, and equipment: basis ▶			
	Less accumulated depreciation ▶			
	12 Investments - mortgage loans			
	13 Investments - other			
	14 Land, buildings, and equipment: basis ▶			
	Less accumulated depreciation ▶			
	15 Other assets (describe ▶)			
	16 Total assets (to be completed by all filers)	796,980.	898,580.	826,686.
Liabilities	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe ▶)			
	23 Total liabilities (add lines 17 through 22)	0.	0.	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ ☐ and complete lines 24 through 26 and lines 30 and 31.			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ ☒ and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds	0.	0.	
	28 Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
	29 Retained earnings, accumulated income, endowment, or other funds	796,980.	898,580.	
	30 Total net assets or fund balances	796,980.	898,580.	
	31 Total liabilities and net assets/fund balances	796,980.	898,580.	

Part III Analysis of Changes in Net Assets or Fund Balances

1 Total net assets or fund balances at beginning of year - Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	796,980.
2 Enter amount from Part I, line 27a	2	101,600.
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	898,580.
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	898,580.

Part IV Capital Gains and Losses for Tax on Investment Income

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

	(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a				
b				
c				
d				
e	612,963.		592,477.	20,486.

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

	(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a				
b				
c				
d				
e				20,486.

2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7; If (loss), enter -0- in Part I, line 7 }	2	20,486.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8	3	0.

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) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2009	29,303.	724,227.	.040461
2008	22,399.	625,316.	.035820
2007	32,183.	875,232.	.036771
2006	31,573.	898,554.	.035138
2005	27,000.	812,093.	.033247

2 **Total** of line 1, column (d)	2	.181437
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	.036287
4 Enter the net value of noncharitable-use assets for 2010 from Part X, line 5	4	904,613.
5 Multiply line 4 by line 3	5	32,826.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	346.
7 Add lines 5 and 6	7	33,172.
8 Enter qualifying distributions from Part XII, line 4	8	31,000.

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 ▶ ☐ and enter "N/A" on line 1. Date of ruling or determination letter: ________ (attach copy of letter if necessary-see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ▶ ☐ and enter 1% of Part I, line 27b	1	693.
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b).		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	2	0.
3	Add lines 1 and 2	3	693.
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	0.
5	**Tax based on investment income.** Subtract line 4 from line 3. If zero or less, enter -0-	5	693.
6	Credits/Payments:		
a	2010 estimated tax payments and 2009 overpayment credited to 2010 — 6a		
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	0.
8	Enter any **penalty** for underpayment of estimated tax. Check here ☐ if Form 2220 is attached	8	4.
9	**Tax due.** If the total of lines 5 and 8 is more than line 7, enter **amount owed** ▶	9	697.
10	**Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶	10	
11	Enter the amount of line 10 to be: **Credited to 2011 estimated tax** ▶ **Refunded** ▶	11	

Part VII-A Statements Regarding Activities

			Yes	No
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a		X
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? *If the answer is "Yes" to* 1a *or* 1b, *attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities*	1b		X
c	Did the foundation file **Form 1120-POL** for this year?	1c		X
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. ▶ $ 0. (2) On foundation managers. ▶ $ 0.			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ $ 0.			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? *If "Yes," attach a detailed description of the activities.*	2		X
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? *If "Yes," attach a conformed copy of the changes*	3		X
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		X
b	If "Yes," has it filed a tax return on **Form 990-T** for this year? N/A	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? *If "Yes," attach the statement required by General Instruction T*	5		X
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6		X
7	Did the foundation have at least $5,000 in assets at any time during the year? *If "Yes," complete Part II, col. (c), and Part XV.*	7	X	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ WV			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by *General Instruction G? If "No," attach explanation*	8b	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*	9	X	
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10		X

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

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

Website address ▶ N/A

14 The books are in care of ▶ NANCY L. WILSON Telephone no. ▶ 740-284-1682

Located at ▶ 401 MARKET STREET, SUITE 401, STEUBENVILLE, OH ZIP+4 ▶ 43952

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of **Form 1041** - Check here ▶ ☐

and enter the amount of tax-exempt interest received or accrued during the year ▶ 15 N/A

			Yes	No
16	At any time during calendar year 2010, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?	16		X
	See page 20 of the instructions for exceptions and filing requirements for Form TD F 90-22.1. If "Yes," enter the name of the foreign country ▶			

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.

			Yes	No
1a	During the year did the foundation (either directly or indirectly):			
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☒ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☒ No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☒ No			
	(6) Agree to pay money or property to a government official? (**Exception** Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) ☐ Yes ☒ No			
b	If any answer is "Yes" to 1a(1)-(6), did **any** of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 22 of the instructions)? N/A	1b		
	Organizations relying on a current notice regarding disaster assistance check here ▶ ☐			
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2010?	1c		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? ☐ Yes ☒ No			
	If "Yes," list the years ▶ ____, ____, ____, ____			
b	Are there any years listed in 2a for which the foundation is **not** applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to **all** years listed, answer "No" and attach statement - see instructions.) N/A	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. ▶ ____, ____, ____, ____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☒ No			
b	If "Yes," did it have excess business holdings in 2010 as a result of **(1)** any purchase by the foundation or disqualified persons after May 26, 1969; **(2)** the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or **(3)** the lapse of the 10-, 15-, or 20-year first phase holding period? *(Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2010.)* N/A	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

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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		
b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?		6b	X
If "Yes" to 6b, file Form 8870			
7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	☐ Yes ☒ 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
S. JANE ANDERSON, ESQUIRE 1233 MAIN STREET, SUITE 2002 WHEELING, WV 260032839	TRUSTEE 0.00	0.	0.	75.
NANCY L. WILSON 1233 MAIN STREET, SUITE 2002 WHEELING, WV 260032839	TRUSTEE 0.00	0.	0.	375.
JAMES R. SHOCKLEY 1232 ELMHURST DRIVE WEIRTON, WV 26062	TRUSTEE 0.00	0.	0.	75.
SUSAN KRUKOWSKI 1424 OVERLOOK DRIVE WEIRTON, WV 26062	TRUSTEE 0.00	0.	0.	75.

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

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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 SEE STATEMENT 6	31,000.
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.

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	918,389.
b	Average of monthly cash balances	1b	
c	Fair market value of all other assets	1c	
d	**Total** (add lines 1a, b, and c)	1d	918,389.
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	918,389.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	13,776.
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3. Enter here and on Part V, line 4	5	904,613.
6	**Minimum investment return.** Enter 5% of line 5	6	45,231.

Part XI **Distributable Amount** (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ▶ [X] and do not complete this part.)

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

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	31,000.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	**Qualifying distributions** Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	31,000.
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	0.
6	**Adjusted qualifying distributions** Subtract line 5 from line 4	6	31,000.

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.

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Part XIII Undistributed Income (see instructions)

N/A

	(a) Corpus	(b) Years prior to 2009	(c) 2009	(d) 2010
1 Distributable amount for 2010 from Part XI, line 7				
2 Undistributed income, if any, as of the end of 2010				
a Enter amount for 2009 only				
b Total for prior years: ______ , ______ , ______				
3 Excess distributions carryover, if any, to 2010:				
a From 2005				
b From 2006				
c From 2007				
d From 2008				
e From 2009				
f **Total** of lines 3a through e				
4 Qualifying distributions for 2010 from Part XII, line 4: ▶ $				
a Applied to 2009, but not more than line 2a				
b Applied to undistributed income of prior years (Election required - see instructions)				
c Treated as distributions out of corpus (Election required - see instructions)				
d Applied to 2010 distributable amount				
e Remaining amount distributed out of corpus				
5 Excess distributions carryover applied to 2010 (If an amount appears in column (d), the same amount must be shown in column (a).)				
6 **Enter the net total of each column as indicated below:**				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5				
b Prior years' undistributed income. Subtract line 4b from line 2b				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed				
d Subtract line 6c from line 6b. Taxable amount - see instructions				
e Undistributed income for 2009. Subtract line 4a from line 2a. Taxable amount - see instr.				
f Undistributed income for 2010. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2011				
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)				
8 Excess distributions carryover from 2005 not applied on line 5 or line 7				
9 **Excess distributions carryover to 2011.** Subtract lines 7 and 8 from line 6a				
10 Analysis of line 9:				
a Excess from 2006				
b Excess from 2007				
c Excess from 2008				
d Excess from 2009				
e Excess from 2010				

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

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

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

	Tax year (a) 2010	Prior 3 years (b) 2009	(c) 2008	(d) 2007	(e) Total
2 a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed	21,249.	17,070.	23,064.	24,822.	86,205.
b 85% of line 2a	18,062.	14,510.	19,604.	21,099.	73,274.
c Qualifying distributions from Part XII, line 4 for each year listed	31,000.	29,491.	22,700.	32,871.	116,062.
d Amounts included in line 2c not used directly for active conduct of exempt activities	0.	0.	0.	0.	0.
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c	31,000.	29,491.	22,700.	32,871.	116,062.
3 Complete 3a, b, or c for the alternative test relied upon:					
a "Assets" alternative test - enter: (1) Value of all assets					0.
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					0.
b "Endowment" alternative test - enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed					0.
c "Support" alternative test - enter: (1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)		0.	0.	0.	0.
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)		0.	0.	0.	0.
(3) Largest amount of support from an exempt organization		0.	0.	0.	0.
(4) Gross investment income		19,133.	31,400.	68,810.	119,343.

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

1 Information Regarding Foundation Managers:

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

NONE

b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest.

NONE

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

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

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

WHEELING PARK HIGH SCHOOL GUIDANCE DEPARTMENT

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

SEE ATTACHED COPY OF TWO PAGE SCHOLARSHIP APPLICATION

c Any submission deadlines:

APRIL 15TH EACH YEAR

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

SEE THE ATTACHED SELCTION CRITERIA FORM PROVIDED TO ALL PROSPECTIVE APPLICANTS

Part XV Supplementary Information (continued)

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year				
SEE STATEMENT 7				
Total			▶ 3a	31,000.
b Approved for future payment				
NONE				
Total			▶ 3b	0.

Part XVI-A **Analysis of Income-Producing Activities**

Enter gross amounts unless otherwise indicated.	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue:					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities			14	21,249.	
5 Net rental income or (loss) from real estate:					
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal property					
7 Other investment income					
8 Gain or (loss) from sales of assets other than inventory			18	20,486.	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue:					
a					
b					
c					
d					
e					
12 Subtotal. Add columns (b), (d), and (e)		0.		41,735.	0.

13 Total. Add line 12, columns (b), (d), and (e) 13 41,735.

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

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

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

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

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

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

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

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 — Oct 28, 2011 — Date — Trustee — Title

Paid Preparer Use Only

Print/Type preparer's name	Preparer's signature	Date	Check ☒ if self-employed	PTIN
JAMES BRIDGES	James A Bridges	10/24/11		

Firm's name ▶ GREEN & BRIDGES, LLP — Firm's EIN ▶

Firm's address ▶ 232 THIRD AVENUE CARNEGIE, PA 15106 — Phone no. 412-276-3100

023622
04-26-11

Schedule B
(Form 990, 990-EZ, or 990-PF)
Department of the Treasury
Internal Revenue Service

Schedule of Contributors

▶ Attach to Form 990, 990-EZ, or 990-PF.

OMB No 1545-0047

2010

Name of the organization
JOAN BIEBERSON MCDONALD CHARITABLE TRUST
MEM SCHOLARSHIP FD FOR WHEELING PARK H.S

Employer identification number
54-6478362

Organization type (check one)

Filers of:	Section:
Form 990 or 990-EZ	☐ 501(c)( ) (enter number) organization
	☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation
	☐ 527 political organization
Form 990-PF	☒ 501(c)(3) exempt private foundation
	☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation
	☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule.**
Note. Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule See instructions.

General Rule

☒ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, $5,000 or more (in money or property) from any one contributor Complete Parts I and II.

Special Rules

☐ For a section 501(c)(3) organization filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), and received from any one contributor, during the year, a contribution of the greater of **(1)** $5,000 or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h or (ii) Form 990-EZ, line 1 Complete Parts I and II

☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, aggregate contributions of more than $1,000 for use *exclusively* for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals Complete Parts I, II, and III

☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions for use *exclusively* for religious, charitable, etc., purposes, but these contributions did not aggregate to more than $1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose Do not complete any of the parts unless the **General Rule** applies to this organization because it received nonexclusively religious, charitable, etc , contributions of $5,000 or more during the year ▶ $ ____________

Caution. An organization that is not covered by the General Rule and/or the Special Rules does not file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2 of its Form 990, or check the box on line H of its Form 990-EZ, or on line 2 of its Form 990-PF, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

Name of organization	Employer identification number
JOAN BIEBERSON MCDONALD CHARITABLE TRUST MEM SCHOLARSHIP FD FOR WHEELING PARK H.S	54-6478362

Part I **Contributors** (see instructions)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
1	TRUST UNDER WILL OF FRANK E, MCDONALD JANE ANDERSON/ WESBANCO BANK/ 1 BANK PLAZA WHEELING, WV 26003	$ 97,971.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II if there is a noncash contribution.)
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution.)
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution.)
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution.)

Name of organization	Employer identification number
JOAN BIEBERSON MCDONALD CHARITABLE TRUST MEM SCHOLARSHIP FD FOR WHEELING PARK H.S	54-6478362

Part II Noncash Property (see instructions)

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
1	1/2 REMAINDER OF TRUST RESIDUE HELD AS PUBLICLY TRADED MUTUAL FUND SHARES.	$ 97,971.	10/01/10

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		$	

Name of organization	Employer identification number
JOAN BIEBERSON MCDONALD CHARITABLE TRUST MEM SCHOLARSHIP FD FOR WHEELING PARK H.S	54-6478362

Part III **Exclusively religious, charitable, etc., individual contributions to section 501(c)(7), (8), or (10) organizations aggregating more than $1,000 for the year.** Complete columns **(a)** through **(e) and** the following line entry For organizations completing Part III, enter the total of *exclusively* religious, charitable, etc., contributions of **$1,000 or less** for the year (Enter this information once See instructions.) ▶ $

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

Part IV Capital Gains and Losses for Tax on Investment Income

	(a) List and describe the kind(s) of property sold, e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a	12489.881 SH BOND FUND OF AMERICA	P	VARIOUS	VARIOUS
b	1999.279 SH EUROPACIFIC GROWTH FUND	P	VARIOUS	VARIOUS
c	3006.235 SH GROWTH FUND OF AMERICA	P	VARIOUS	VARIOUS
d	2124.315 SH INVESTMENT COMPANY OF AMERICA	P	VARIOUS	VARIOUS
e	3945.380 SH NEW PERSPECTIVE FUND	P	VARIOUS	VARIOUS
f	3706.016 SH WASHINGTON MUTUAL FUND	P	VARIOUS	VARIOUS
g				
h				
i				
j				
k				
l				
m				
n				
o				

	(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a	154,000.		161,319.	<7,319.>
b	88,195.		70,977.	17,218.
c	93,921.		85,860.	8,061.
d	59,000.		65,624.	<6,624.>
e	112,847.		100,043.	12,804.
f	105,000.		108,654.	<3,654.>
g				
h				
i				
j				
k				
l				
m				
n				
o				

	Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
	(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a				<7,319.>
b				17,218.
c				8,061.
d				<6,624.>
e				12,804.
f				<3,654.>
g				
h				
i				
j				
k				
l				
m				
n				
o				

2	Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 / If (loss), enter "-0-" in Part I, line 7 }	2	20,486.
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter "-0-" in Part I, line 8	3	0.

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 1

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
AMERICAN BOND FUND OF AMERICA	3,644.	0.	3,644.
AMERICAN EUROPAC GROWTH FUND	1,084.	0.	1,084.
AMERICAN GROWTH FUND OF AMERICA	643.	0.	643.
AMERICAN INVESTMENT COMPANY OF AMERICA	2,544.	0.	2,544.
AMERICAN NEW PERSPECTIVE FUND	1,242.	0.	1,242.
AMERICAN WASHINGTON MUTUAL INVESTMENT FUND	2,236.	0.	2,236.
FEDERATED PRIME OBLIGATION FUND	1.	0.	1.
FEDERATED TOTAL RETURN BOND FUND	878.	0.	878.
FIDELITY FLOATING RATE HIGH INCOME FUND	323.	0.	323.
FIDELITY STRATEGIC INCOME FUND	2,049.	0.	2,049.
HARBOR INTERNATIONAL FUND	118.	0.	118.
PIMCO TOTAL RETURN FUND	1,759.	0.	1,759.
VANGUARD EQUITY INCOME FUND	571.	0.	571.
VANGUARD INV GRADE SHT TERM BOND FUND	414.	0.	414.
WESMARK BALANCED FUND	568.	0.	568.
WESMARK GOVERNMENT BOND FUND	2,292.	0.	2,292.
WESMARK GROWTH FUND	480.	0.	480.
WESMARK SMALL COMPANY GROWTH FUND	403.	0.	403.
TOTAL TO FM 990-PF, PART I, LN 4	21,249.	0.	21,249.

FORM 990-PF ACCOUNTING FEES STATEMENT 2

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING FEES	710.	710.	0.	0.
TO FORM 990-PF, PG 1, LN 16B	710.	710.	0.	0.

FORM 990-PF TAXES STATEMENT 3

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FEDERAL EXCISE TAX ON EXCESS INVESTMENT INCOME	188.	188.	0.	0.
FOREIGN TAXES ON DIVIDENDS	277.	277.	0.	0.
TO FORM 990-PF, PG 1, LN 18	465.	465.	0.	0.

FORM 990-PF OTHER EXPENSES STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
TRUSTEE EXPENSE REIMBURSEMENTS	600.	600.	0.	0.
ASSET MANAGEMENT FEES	5,331.	5,331.	0.	0.
TO FORM 990-PF, PG 1, LN 23	5,931.	5,931.	0.	0.

FORM 990-PF CORPORATE STOCK STATEMENT 5

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
AMERICAN BOND FUND OF AMERICA	36,711.	36,579.
AMERICAN EUROPACIFIC GROWTH FUND	0.	0.
AMERICAN GROWTH FUND OF AMERICA	0.	0.
AMERICAN INVESTMENT COMPANY OF AMERICA	113,908.	92,028.
AMERICAN NEW PERSPECTIVE FUND	0.	0.
AMERICAN WASHINGTON MUTUAL INVESTMENT FUND	52,211.	46,684.
ACTIVE ASSETS MONEY TRUST	0.	0.
ARTISAN MID CAP FUND	23,767.	26,416.
FEDERATED TOTAL RETURN BOND FUND	35,185.	36,970.
FIDELITY FLOATING RATE HIGH INCOME FUND	20,323.	19,462.
FIDELITY STRATEGIC INCOME FUND	42,049.	39,947.
HARBOR INTERNATIONAL FUND	65,381.	50,690.
OPPENHEIMER DEVELOPING MARKETS FUND	30,000.	23,221.
PIMCO TOTAL RETURN FUND	36,759.	35,071.
VANGUARD EQUITY INCOME FUND	25,571.	24,908.
VANGUARD SHT TERM INV GRADE BOND FUND	20,414.	20,187.
WESMARK BALANCED FUND	24,115.	29,249.

WESMARK GOVT BOND FUND	136,280.	139,121.
WESMARK GROWTH FUND	143,738.	126,395.
WESMARK SMALL COMPANY GROWTH FUND	86,998.	74,588.
FEDERATED PRIME OBLIGATION FUND	5,170.	5,170.
TOTAL TO FORM 990-PF, PART II, LINE 10B	898,580.	826,686.

FORM 990-PF SUMMARY OF DIRECT CHARITABLE ACTIVITIES STATEMENT 6

ACTIVITY ONE

SCHOLARSHIPS FOR HIGHER EDUCATION AND TRAINING TO INDIVIDUALS WHO ARE GRADUATES OF WHEELING PARK HIGH SCHOOL, WHEELING, WV BASED ON CRITERIA DEEMED APPROPRIATE BY TRUSTEES

	EXPENSES
TO FORM 990-PF, PART IX-A, LINE 1	31,000.

FORM 990-PF GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR STATEMENT 7

RECIPIENT NAME AND ADDRESS	RECIPIENT RELATIONSHIP AND PURPOSE OF GRANT	RECIPIENT STATUS	AMOUNT
AUBER, ERIC J. 4 FOREST AVENUE WHEELING, WV 26003	NONE COLLEGE SCHOLARSHIP	N/A	2,000.
DIEGMILLER, ROCKY LEO 1979 HIGHLAND LAND WHEELING, WV 26003	NONE COLLEGE SCHOLARSHIP	N/A	3,000.
EBRIGHT, ZEKE ANTHONY 99 NORTH 20TH ST, REAR WHEELING, WV 26003	NONE COLLEGE SCHOLARSHIP	N/A	2,500.
HEMPLEMANN, GRETTA 1208 HILDRETH AVENUE WHEELING, WV 26003	NONE COLLEGE SCHOLARSHIP	N/A	2,500.
KIMPEL, BENJAMIN DEAN RD #6, BOX 343 D WHEELING, WV 26003	NONE COLLEGE SCHOLARSHIP	N/A	4,000.
KOHLER, ERIN COLLEEN 132 KRUGER STREET WHEELING, WV 26003	NONE COLLEGE SCHOLARSHIP	N/A	3,000.
MATHIEU, ABIGAIL E. 67 BRIARWOOD DRIVE WHEELING, WV 26003	NONE COLLEGE SCHOLARSHIP	N/A	2,000.
MITCHELL, DOMINQUE 209 SOUTH BROADWAY WHEELING, WV 26003	NONE COLLEGE SCHOLARSHIP	N/A	1,000.

POLING, JUSTIN 2122 MARSHALL AVENUE WHEELING, WV 26003	NONE COLLEGE SCHOLARSHIP	N/A	1,500.
ROBINSON, MATHEW 18 MAPLE STREET WHEELING, WV 26003	NONE COLLEGE SCHOLARSHIP	N/A	1,500.
ROGERSON, ROBERT HANS 142 STONE CHURCH ROAD WHEELING, WV 26003	NONE COLLEGE SCHOLARSHIP	N/A	2,000.
TEUFEL, SPENCER PAUL 12 FERNWOOD AVENUE WHEELING, WV 26003	NONE COLLEGE SCHOLARSHIP	N/A	1,000.
ZOLLARS, JOSEPH D. 12 OGLEBAY ESTATES WHEELING, WV 26003	NONE COLLEGE SCHOLARSHIP	N/A	5,000.
TOTAL TO FORM 990-PF, PART XV, LINE 3A			31,000.

JOAN BIEBERSON McDONALD
WHEELING PARK HIGH SCHOOL SCHOLARSHIP FUND

I. Purpose: The purpose of this scholarship is to assist needy individuals to be able to pursue an education at a post high school technical school, college (2-year or 4-year,) Community College, university, or accredited trade, industrial, or technical institution.

II. Value The sum of the scholarship(s) will be not less than $1,000, or may be a greater amount, as determined by the Trustees.

III. Qualifications:

1. Recipient(s) should be a person(s) of high integrity, moral standards and ethical behavior.
2. It is preferred that the recipient(s) participated as a member(s) of a Wheeling Park High School sports program.
3. The recipient(s) must be either a graduating senior(s) of Wheeling Park High School or a previous-year recipient of an award from this scholarship trust.
4. The recipient(s) should have demonstrated a good academic achievement and the ability to succeed at an institution of higher learning.
5. Financial need should exist so that the awarding of the scholarship shall make a difference as to the recipient's(s') ability to pursue a higher education.
6. Grades are important, but shall not be the sole or overwhelming determinant in making the award(s). Great importance shall be given to the factors previously mentioned above.
7. It is not necessary that the student(s) attend a four-year college or university, junior college, or community college. Consideration shall also be given to those who express an interest in attending a program which leads to a job skill certification at an accredited trade, industrial, or technical institution.
8. Race, color, creed, national origin, gender, age, or physical disability shall not be considered as negative factors making the determination of the award(s). Equal opportunity shall be given to any student to make application and to be considered.
9. Previous recipients are eligible to re-apply for this scholarship throughout the course of their educational career.

IV. Selection: The scholarship(s) will be awarded upon the recommendation of the Trustees, who shall also be responsible for any follow-up actions.

V. Applications: Application blanks may be secured from the Guidance Department of the Wheeling Park High School. Completed applications **must** be returned to the Wheeling Park High School Guidance Department on or before **APRIL 1, 2011.**

VI. Notification: The recipient(s) of the scholarship(s) will be notified at the Wheeling Park High Senior Awards ceremony or, if a previous recipient, by mail.

JOAN BIEBERSON McDONALD
WHEELING PARK HIGH SCHOOL SCHOLARSHIP FUND

PREVIOUS RECIPIENT SCHOLARSHIP APPLICATION

APPLICATION MUST BE FULLY COMPLETED
BY APPLICANT OR APPLICANT MAY BE DISQUALIFIED

1. ____
NAME (Last) (First) (Middle)

2. ____
Street Address City State Zip Code Telephone No.

3. ____
Social Security No. (Optional) Date of Birth

4. ____
Father or Guardian's Name Occupation

____
Father or Guardian's Employer City Telephone No.

5. ____
Mother or Guardian's Name Occupation

____
Mother or Guardian's Employer City Telephone No.

6 Other Dependent Family Members in Same Household:
Name Relationship Age Indicate if other dependent family members are employed full time or are college students

____

____

____

7. Which post secondary school do you plan to attend in the upcoming year.

____

If this is different from the school you are currently attending, please provide the name of the school in which you are currently enrolled and briefly state the reason for your decision to change schools: _______

____

____

8. Please list the subject area in which applicant is enrolled. (If you are pursuing dual majors, please list both. If your major is currently undecided, please indicate the field of study you intend to pursue.)

____

____

9. For the next school year, student will
live on campus ☐ live off campus ☐ student will commute from home ☐

10. List your current Grade Point Average ________________

11. Are you the beneficiary of any other Scholarship Award or Financial Aid? Yes ☐ No ☐
If "yes," please list, stating the full name(s) of all scholarship(s), grant(s) or award(s) and the amount of same. Please do not abbreviate

12. Do you have or have you ever had a part time or full time job either during the school year or during the summer? Yes ☐ No ☐

If yes, please list name, address, and telephone number of employer(s), position(s) held, and dates of employment during the last four (4) years (attach additional pages, if necessary) Please indicate if the employment is part of a school work/study program If you have been employed during the school term, please indicate the average number of hours per week you are working.

13. List memberships and participation in school organizations and activities, including positions of leadership held, if any, since entering post secondary school Please do not abbreviate club organization names.

14. List memberships and participation in organizations and activities outside of school, including positions of leadership held, if any, since entering post secondary school. Please do not abbreviate names

15 List school or civic honors awarded since leaving high school ______________________________

16. Please state any unusual family or personal circumstances you feel warrant the attention of the Scholarship Committee.

17 Attach a **HANDWRITTEN** statement of no more than 200 words of your aspirations, plans, and goals for the future, and the reasons why you feel that continuing post secondary education will further your goals

JOAN BIEBERSON McDONALD
WHEELING PARK HIGH SCHOOL SCHOLARSHIP FUND

SCHOLARSHIP APPLICATION

APPLICATION MUST BE FULLY COMPLETED
BY APPLICANT OR APPLICANT MAY BE DISQUALIFIED

1. ____
NAME (Last) (First) (Middle)

2. ____
Street Address City State Zip Code Telephone No.

3. ______________________ 4 ______________________
Social Security No. (Optional) Date of Birth

5. ____
Father or Guardian's Name Occupation

6. ____
Father or Guardian's Employer City Telephone No.

7. ____
Mother or Guardian's Name Occupation

8. ____
Mother or Guardian's Employer City Telephone No.

9. Other Dependent Family Members in Same Household

Name	Relationship	Age	Indicate if other dependent family members are employed full time or are college students

10. Post Secondary School or College for which applicant's scholarship is requested

____

Student is: Accepted ☐ Pending ☐

11. Student will live on campus ☐ Student will commute ☐

12. Subject area applicant plans to pursue: ______________________

13. High School Grade Point Average ____________

14. Are you the beneficiary of any other Scholarship Award or Financial Aid? Yes ☐ No ☐

If "yes," please list, stating the full name(s) of all scholarship(s), grant(s) or award(s) and the amount of same Please do not abbreviate.

15 List memberships and participation in school organizations and activities, including positions of leadership held, if any. Please do not abbreviate club organization names

16 List memberships and participation in organizations and activities outside of school, including positions of leadership held, if any. Please do not abbreviate names.

17. List school or civic honors awarded.

18. List hobbies, accomplishments, talents, etc.

19. Please state any unusual family or personal circumstances you feel warrant the attention of the Scholarship Committee.

20. Please name three teachers who may be contacted as references.

21. Attach a **HANDWRITTEN** statement of no more than 200 words of your aspirations, plans, and goals for the future, and the reasons why you feel that post secondary education will further your goals.

22. Do you have or have you ever had a part time or full time job either during the school year or during the summer? Yes ☐ No ☐

If yes, please list name, address, and telephone number of employer(s), position(s) held, and dates of employment during the last four (4) years (attach additional pages, if necessary).