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Form 990-PF

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

OMB No 1545-0052

2011

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 2011, or tax year beginning 01-01-2011 , and ending 12-31-2011

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
J CLYDE AND VELMA APOLLOS ENGLAND FAMILY
CHARITABLE FOUNDATION NO 2

A Employer identification number
20-7277315

Number and street (or P O box number if mail is not delivered to street address)
1820 SCOTTSVILLE ROAD

Room/suite

B Telephone number (see page 10 of the instructions)
(270) 782-4471

City or town, state, and ZIP code
BOWLING GREEN, KY 42103

C If exemption application is pending, check here ☐

D 1. Foreign organizations, check here ☐

2. Foreign organizations meeting the 85% test, check here and attach computation ☐

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

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

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

I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 1,389,143

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

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see page 11 of the instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)				
	2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	207	207	207	
	4 Dividends and interest from securities.	60,228	60,228	60,228	
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	7,387			
	b Gross sales price for all assets on line 6a _____ 259,794				
	7 Capital gain net income (from Part IV , line 2)		7,387		
	8 Net short-term capital gain			3,173	
	9 Income modifications				
	10a Gross sales less returns and allowances				
Operating and Administrative Expenses	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)	145			
	12 Total. Add lines 1 through 11	67,967	67,822	63,608	
	13 Compensation of officers, directors, trustees, etc				
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)	893			893
	b Accounting fees (attach schedule)	2,600	1,300		1,300
	c Other professional fees (attach schedule)	21,237	10,619		10,618
	17 Interest				
	18 Taxes (attach schedule) (see page 14 of the instructions)	826	826		
	19 Depreciation (attach schedule) and depletion . . .				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)				
	24 Total operating and administrative expenses.				
	Add lines 13 through 23	25,556	12,745		12,811
	25 Contributions, gifts, grants paid	58,000			58,000
	26 Total expenses and disbursements. Add lines 24 and 25	83,556	12,745		70,811
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	-15,589			
	b Net investment income (if negative, enter -0-)		55,077		
	c Adjusted net income (if negative, enter -0-)			63,608	

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)	Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing	102,631	86,799	86,799
	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 (attach schedule) (see page 15 of the instructions)			
	7	Other notes and loans receivable (attach schedule) ▶ _____ Less allowance for doubtful accounts ▶ _____			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10a	Investments—U S and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)	897,737	902,105	903,700
	c	Investments—corporate bonds (attach schedule).	406,915	402,790	398,644
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)			
	14	Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
15	Other assets (describe ▶ _____)				
16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	1,407,283	1,391,694	1,389,143	
Liabilities	17	Accounts payable and accrued expenses			
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶ _____)			
	23	Total liabilities (add lines 17 through 22)		0	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/> 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 ▶ <input checked="" 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	1,407,283	1,391,694	
	30	Total net assets or fund balances (see page 17 of the instructions)	1,407,283	1,391,694	
	31	Total liabilities and net assets/fund balances (see page 17 of the instructions)	1,407,283	1,391,694	

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	1,407,283
2	Enter amount from Part I, line 27a	2	-15,589
3	Other increases not included in line 2 (itemize) ▶ _____	3	
4	Add lines 1, 2, and 3	4	1,391,694
5	Decreases not included in line 2 (itemize) ▶ _____	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	1,391,694

Part IV

Capital Gains and Losses for Tax on Investment Income

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

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a	See Additional Data Table		
b			
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
a	See Additional Data Table		
b			
c			
d			
e			

2	Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	7,387
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see pages 13 and 17 of the instructions) If (loss), enter -0- in Part I, line 8		3	3,173

Part V

Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income)

If section 4940(d)(2) applies, leave this part blank

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☒ No
If "Yes," the foundation does not qualify under section 4940(e) Do not complete this part

1 Enter the appropriate amount in each column for each year, see page 18 of the instructions before making any entries			
(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2010	69,095	1,518,737	0 04550
2009	83,818	1,435,303	0 05840
2008	37,815	1,576,761	0 02398
2007			
2006			

2	Total of line 1, column (d).	2	0 12788
3	Average distribution ratio for the 5-year base period—divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	0 04263
4	Enter the net value of noncharitable-use assets for 2011 from Part X, line 5.	4	1,486,773
5	Multiply line 4 by line 3.	5	63,374
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	551
7	Add lines 5 and 6.	7	63,925
8	Enter qualifying distributions from Part XII, line 4. If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate See the Part VI instructions on page 18	8	70,811

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

1a		Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> 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 <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b		1	551
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	
3		Add lines 1 and 2.		3	551
4		Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		4	
5		Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0-		5	551
6		Credits/Payments			
a		2011 estimated tax payments and 2010 overpayment credited to 2011	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	
8		Enter any penalty for underpayment of estimated tax Check here <input checked="" type="checkbox"/> if Form 2220 is attached		8	11
9		Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed		9	562
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 2012 estimated tax	Refunded	11	

Part VII-AStatements Regarding Activities

1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		Yes	No
		1a		No
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)?			No
	If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.			
c	Did the foundation file Form 1120-POL for this year?	1c		No
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation \$ _____ (2) On foundation managers \$ _____			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers \$ _____			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS?	2		No
	If "Yes," attach a detailed description of the activities.			
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes	3		No
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a		No
b	If "Yes," has it filed a tax return on Form 990-T for this year?	4b		No
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year?	5		No
	If "Yes," attach the statement required by General Instruction T.			
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either <ul style="list-style-type: none">By language in the governing instrument, orBy 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		No
7	Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), and Part XV	7	Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see page 19 of the instructions) KY _____			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation .	8b	Yes	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2011 or the taxable year beginning in 2011 (see instructions for Part XIV on page 27)? If "Yes," complete Part XIV	9		No
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10		No

Part VII-A

Statements Regarding Activities *(continued)*

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see page 20 of the instructions).	11		No
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address N/A	13	Yes	
14	The books are in care of BB&T TRUST DEPARTMENT Telephone no (270) 782-4471 Located at 1820 SCOTTSVILLE ROAD BOWLING GREEN KY ZIP +4 421033302			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here <input type="checkbox"/> and enter the amount of tax-exempt interest received or accrued during the year.	15		
16	At any time during calendar year 2011, 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	Yes	No
See 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? <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 20 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here. <input type="checkbox"/>	1b		No
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 2011?	1c		No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2011, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2011? If "Yes," list the years 20____, 20____, 20____, 20____ <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see page 20 of the instructions).	2b		No
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here 20____, 20____, 20____, 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
b	If "Yes," did it have excess business holdings in 2011 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? (<i>Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2011.</i>)	3b		No
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2011?	4b		No

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required (continued)

5a	During the year did the foundation pay or incur any amount to			
	(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
	(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
	(3) Provide a grant to an individual for travel, study, or other similar purposes?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
	(4) Provide a grant to an organization other than a charitable, etc , organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see page 22 of the instructions).	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> 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?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
b	If any answer is "Yes" to 5a(1)–(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see page 22 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here.	5b		No
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? <i>If "Yes," attach the statement required by Regulations section 53.4945–5(d).</i>			
6a	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?			
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? <i>If "Yes" to 6b, file Form 8870.</i>	6b		No
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?			
b	If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?	7b		No

Part VIII

Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors

1 List all officers, directors, trustees, foundation managers and their compensation (see page 22 of the instructions).				
(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
WADE MARKHAM 1101 COLLEGE ST BOWLING GREEN, KY 42101	Trustee 0 00	0		
ANN BETH MOORE 100 N MAIN ST TOMPKINSVILLE, KY 42167	Trustee 0 00	0		
JOHN TAYLOR 101 MCKENNA ST GLASGOW, KY 42142	Trustee 0 00	0		
DENNIS LONGEST 1820 SCOTTSVILLE RD BOWLING GREEN, KY 42103	Trustee 0 00	0		
2 Compensation of five highest-paid employees (other than those included on line 1—see page 23 of the instructions). If none, enter "NONE."				
(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				
Total number of other employees paid over \$50,000.				

Part VIII

Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)

3 Five highest-paid independent contractors for professional services (see page 23 of the instructions). If none, enter "NONE".

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
Total number of others receiving over \$50,000 for professional services.		

Part IX-A

Summary of Direct Charitable Activities

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

	Expenses
1	
2	
3	
4	

Part IX-B

Summary of Program-Related Investments (see page 23 of the instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1	
2	
All other program-related investments. See page 24 of the instructions	
3	
Total. Add lines 1 through 3.	

Part X

Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see page 24 of the instructions.)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes		
a	Average monthly fair market value of securities.	1a	1,416,242
b	Average of monthly cash balances.	1b	93,172
c	Fair market value of all other assets (see page 24 of the instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	1,509,414
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	
3	Subtract line 2 from line 1d.	3	1,509,414
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see page 25 of the instructions).	4	22,641
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	1,486,773
6	Minimum investment return. Enter 5% of line 5.	6	74,339

Part XI

Distributable Amount (see page 25 of the instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ☒ and do not complete this part.)

1	Minimum investment return from Part X, line 6.	1	74,339
2a	Tax on investment income for 2011 from Part VI, line 5.	2a	551
b	Income tax for 2011 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	551
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	73,788
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	73,788
6	Deduction from distributable amount (see page 25 of the instructions).	6	
7	Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1.	7	73,788

Part XII

Qualifying Distributions (see page 25 of the instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc , purposes		
a	Expenses, contributions, gifts, etc —total from Part I, column (d), line 26.	1a	70,811
b	Program-related investments—total from Part IX-B.	1b	
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	70,811
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see page 26 of the instructions).	5	551
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	70,260
Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years			

Part XIII

Undistributed Income (see page 26 of the instructions)

	(a) Corpus	(b) Years prior to 2010	(c) 2010	(d) 2011
1	Distributable amount for 2011 from Part XI, line 7			
2	Undistributed income, if any, as of the end of 2011			
a	Enter amount for 2010 only. 57,809			
b	Total for prior years 20____, 20____, 20____			
3	Excess distributions carryover, if any, to 2011			
a	From 2006.			
b	From 2007.			
c	From 2008.			
d	From 2009.			
e	From 2010.			
f	Total of lines 3a through e.			
4	Qualifying distributions for 2011 from Part XII, line 4 ▶ \$ 70,811			
a	Applied to 2010, but not more than line 2a 57,809			
b	Applied to undistributed income of prior years (Election required—see page 26 of the instructions)			
c	Treated as distributions out of corpus (Election required—see page 26 of the instructions). . . . 0			
d	Applied to 2011 distributable amount. 13,002			
e	Remaining amount distributed out of corpus			
5	Excess distributions carryover applied to 2011 (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 page 27 of the instructions . . .			
e	Undistributed income for 2010 Subtract line 4a from line 2a Taxable amount—see page 27 of the instructions			
f	Undistributed income for 2011 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2011. 60,786			
7	Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see page 27 of the instructions).			
8	Excess distributions carryover from 2006 not applied on line 5 or line 7 (see page 27 of the instructions).			
9	Excess distributions carryover to 2012. Subtract lines 7 and 8 from line 6a.			
10	Analysis of line 9			
a	Excess from 2007.			
b	Excess from 2008.			
c	Excess from 2009.			
d	Excess from 2010.			
e	Excess from 2011.			

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

1a

If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2011, enter the date of the ruling.

b

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

☐ 4942(j)(3) or ☐ 4942(j)(5)

2a	Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed.	Tax year	Prior 3 years			(e) Total
		(a) 2011	(b) 2010	(c) 2009	(d) 2008	
b	85% of line 2a					
c	Qualifying distributions from Part XII, line 4 for each year listed.					
d	Amounts included in line 2c not used directly for active conduct of exempt activities.					
e	Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c.					
3	Complete 3a, b, or c for the alternative test relied upon					
a	"Assets" alternative test—enter					
	(1) Value of all assets					
	(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b	"Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed.					
c	"Support" alternative test—enter					
	(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties).					
	(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii).					
	(3) Largest amount of support from an exempt organization					
	(4) Gross investment income					

Part XVSupplementary Information (Complete this part only if the organization had \$5,000 or more in assets at any time during the year—see page 27 of the instructions.)

1

Information Regarding Foundation Managers:

a

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

b

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

2

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

Check here ☒ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. (see page 28 of the instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d.

a

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

b

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

c

Any submission deadlines

d

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

Part XV **Supplementary Information** (continued)

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

Recipient	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
Name and address (home or business)				
a <i>Paid during the year</i> INDIAN CREEK BAPTIST CHURCH 489 FLIPPIN LAMB RD TOMPKINSVILLE, KY 42167	DONOR/DONEE	501(c)(3)	CHURCH BUILDING PROGRAM	13,000
MONROE COUNTY SCHOOL BOARD OF EDUCA 309 EMBERTON ST TOMPKINSVILLE, KY 42168	DONOR/DONEE	501(c)(3)	SUPPORT PUBLIC EDUCATION	45,000
Total			3a	58,000
b <i>Approved for future payment</i>				
Total			3b	

Enter gross amounts unless otherwise indicated		Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See page 28 of the instructions)
		(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1	Program service revenue					
a	_____					
b	_____					
c	_____					
d	_____					
e	_____					
f	_____					
g	Fees and contracts from government agencies					
2	Membership dues and assessments. . . .					
3	Interest on savings and temporary cash investments			14	207	
4	Dividends and interest from securities. . . .			14	60,228	
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					7,387
9	Net income or (loss) from special events					
10	Gross profit or (loss) from sales of inventory. .					
11	Other revenue a COURT SETTLEMENT					145
b	_____					
c	_____					
d	_____					
e	_____					
12	Subtotal Add columns (b), (d), and (e). .				60,435	7,532
13	Total. Add line 12, columns (b), (d), and (e).					67,967





[illegible]

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?		Yes	No
a	Transfers from the reporting foundation to a noncharitable exempt organization of			
	(1) Cash.	1a(1)		No
	(2) Other assets.	1a(2)		No
b	Other transactions			
	(1) Sales of assets to a noncharitable exempt organization.	1b(1)		No
	(2) Purchases of assets from a noncharitable exempt organization.	1b(2)		No
	(3) Rental of facilities, equipment, or other assets.	1b(3)		No
	(4) Reimbursement arrangements.	1b(4)		No
	(5) Loans or loan guarantees.	1b(5)		No
	(6) Performance of services or membership or fundraising solicitations.	1b(6)		No
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees.	1c		No
d	If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received.			

[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

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				
	*****			2012-03-06	*****
	Signature of officer or trustee			Date	Title
	Paid Preparer's Use Only	Preparer's Signature  LARRY C HOWLETT		Date	Check if self-employed <input checked="" type="checkbox"/>
		Firm's name  Larry Howlet Cpa PLLC		Firm's EIN 	
Firm's address  996 Wilkinson Trace Ste 81 BOWLING GREEN, KY 42103		Phone no (270) 842-4242			

May the IRS discuss this return with the preparer shown above? See instructions ☒ Yes ☐ No

Additional Data

Software ID: 11000144
Software Version: 2011v1.2
EIN: 20-7277315
Name: J CLYDE AND VELMA APOLLOS ENGLAND FAMILY
CHARITABLE FOUNDATION NO 2

Form 990PF - Special Condition Description:

Special Condition Description

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

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
120 CVS CORP	P	2008-10-10	2011-03-22
88310 MONEY MARKET FUNDS	P	2008-05-20	2011-10-20
50 TYCO INTERNATIONAL	P	2010-03-04	2011-06-24
50 TE CONNECTIVITY LTD	P	2010-12-22	2011-03-22
120 COVIDIEN PLC	P	2010-09-23	2011-03-22
30 WAL-MART STORES	P	2010-09-23	2011-06-24
40 VERIZON COMMUNICATION	P	2010-12-22	2011-03-22
160 UNILEVER	P	2010-03-24	2011-03-22
20 TARGET CORP	P	2010-09-23	2011-06-24
40 STRYKER CORP	P	2010-09-23	2011-03-22
120 STATE STREET CORP	P	2010-03-24	2011-03-22
2110 T ROWE PRICE	P	2011-03-22	2011-06-24
240 PFIZER INC	P	2010-09-23	2011-06-24
1969 PIMCO FOREIGN BOND	P	2010-01-01	2011-03-22
50 JOHNSON & JOHNSON	P	2007-10-31	2011-03-22
80 INTEL	P	2008-01-10	2011-03-22
120 HEWLETT PACKARD	P	2010-09-23	2011-06-24
72 HARBOR INTERNATIONAL	P	2007-04-13	2011-03-22
1722 FIDELITY ADVISOR STRATEGIC	P	2002-12-08	2011-06-24
20 EXXON	P	2011-03-22	2011-06-24
3169 DODGE & COX	P	2009-08-31	2011-03-22
30 COCO-COCA	P	2010-06-22	2011-03-22
35 BERKSHIRE HATHAWAY INC	P	2008-10-10	2011-06-24
215 643 ARTISAN MID CAP VALUE	P	2008-05-20	2011-06-24
50 LOCKHEED MARTIN	P	2010-12-22	2011-06-29
170 LOWE'S COMPANY	P	2010-12-22	2011-06-24

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

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
4,015		3,656	359
86,907		86,905	2
2,322		1,856	466
1,699		1,769	-70
6,298		4,642	1,656
1,572		1,612	-40
1,472		1,402	70
4,726		4,595	131
932		1,078	-146
2,477		1,919	558
5,235		5,123	112
20,659		20,047	612
4,867		4,111	756
20,407		18,863	1,544
2,939		3,194	-255
1,603		1,805	-202
4,194		4,948	-754
4,451		4,813	-362
21,898		21,279	619
1,546		1,650	-104
42,529		40,924	1,605
1,906		1,585	321
2,616		2,603	13
4,621		4,196	425
3,978		3,479	499
3,925		4,353	-428

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			359
			2
			466
			-70
			1,656
			-40
			70
			131
			-146
			558
			112
			612
			756
			1,544
			-255
			-202
			-754
			-362
			619
			-104
			1,605
			321
			13
			425
			499
			-428

TY 2011 Accounting Fees Schedule

Name: J CLYDE AND VELMA APOLLOS ENGLAND FAMILY
CHARITABLE FOUNDATION NO 2

EIN: 20-7277315

Software ID: 11000144

Software Version: 2011v1.2

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LARRY C HOWLETT	2,500	1,250	0	1,250
BETH MOORE	100	50	0	50

**TY 2011 Investments Corporate
Bonds Schedule**

Name: J CLYDE AND VELMA APOLLOS ENGLAND FAMILY
CHARITABLE FOUNDATION NO 2

EIN: 20-7277315

Software ID: 11000144

Software Version: 2011v1.2

Name of Bond	End of Year Book Value	End of Year Fair Market Value
PIMCO FOREIGN BOND		
FIDELITY ADVISOR STRATEGIC INC		
DODGE & COX INCOME FUND		
BB&T TOTAL RETURN BOND CL 1 FUND		
BB&T INTER US GOVT CL1 FUND		
STERLING CAPITAL INTERMEDIATE US GOVT	83,846	85,674
STERLING CAPITAL TOTAL RETURN BOND FUND	62,610	61,486
PRINCIPAL PREFERRED SECURITIES FUND	20,047	18,599
PIMCO TOTAL RETURN FUND CLASS I	39,718	39,213
METROPOLITAN WEST TOTAL RETURN BOND FUND	102,680	100,239
FEDERATED INTERMEDIATE CORP BOND CLASS I	21,685	21,359
FEDERATED HIGH YIELD BOND INST CL FUND	8,077	8,583
AMERICAN CENTURY DIVERSIFIED BOND FUND	64,127	63,491

TY 2011 Investments Corporate
Stock Schedule

Name:

J CLYDE AND VELMA APOLLOS ENGLAND FAMILY
CHARITABLE FOUNDATION NO 2

EIN:

20-7277315

Software ID:

11000144

Software Version:

2011v1.2

Name of Stock	End of Year Book Value	End of Year Fair Market Value
COVIDIEN PLC		
STRYKER CORP		
PFIZER INC		
JOHNSON & JOHNSON		
STATE STREET CORP		
UNILEVERPLC SPONSORED ADR		
CVS CAREMARK CORP		
PIMCO COMMODITY REAL RETURN STRATEGY	32,523	26,189
AQR MANAGED FUTURES STRATEGY	7,746	7,415
VERIZON COMMUNICATIONS		
AT&T INC	6,181	8,014
STERLING CAPITAL SMALL VALUE	33,309	33,249
UTILITIES SELECT SECTOR SPDR	1,480	1,799
OPPENHEIMER DEVELOPING MARKETS	90,016	74,042
LIZARD EMERGING MARKETS	52,651	51,626
HARDING LOEVNER INTERNATIONAL	66,948	68,471
HARBOR INTERNATIONAL FUND	38,879	33,731
GOLDMAN SACHS GROWTH OPPORTUNITY	97,362	94,790
EAGLE SMALL CAP GROWTH FUND	34,622	40,569
COHEN & STEERS	36,169	33,111
BB&T CAPITAL SMALL CAP		
ARTISAN INTERNATIONAL SMALL CAP	24,580	23,842
ARTISAN MID CAP VALUE	72,376	79,031
INTERNATIONAL PAPER COMPANY	5,452	7,696
ALCOA INC	14,316	8,131
TE CONNECTIVITY LTD	7,397	8,011
TYCO ELECTRONICS		
TEXAS INSTRUMENTS	4,878	4,366
ORACLE CORP	6,180	8,593
MICROSOFT CORP	10,725	12,071
INTERNATIONAL BUSINESS MACHINE	3,860	5,516
INTEL	3,979	4,607
HEWLETT PACKARD COMPANY		
GOOGLE INC	4,390	8,397
CORNING INC	3,483	2,336
CISCO SYSTEMS	8,659	8,733
APPLE COMPUTER CORP	11,334	15,390
TYCO INTERNATIONAL LTD	5,989	7,474
SOUTHWEST AIRLINES	8,774	5,906
LOCKHEED MARTIN CORP		
GENERAL ELECTRIC COMPANY	8,342	8,059
FEDEX CORP	4,009	3,758
ABB LTD SPONS ADR	5,160	6,685
THERMO FISHER SCIENTIFIC INC	6,478	5,396
ST JUDE MEDICAL INC	6,079	4,459
NOVARIS AG ADR	3,153	3,430
MERCK & CO INC	5,036	6,409
MEDTRONICS INC	8,898	9,180
AMGEN INC	5,163	5,779
ABBOTT LABORATORIES	7,566	8,434
WEYERHAEUSER COMPANY	3,488	3,174
WELLS FARGO	4,636	4,547
THE TRAVELERS COMPANIES	4,971	9,763
MORGAN STANLEY	3,831	1,967
MEDLIFE INC.	12,977	9,666
JP MORGAN CHASE & CO	8,355	6,317
BERKSHIRE HATHAWAY INC	2,603	2,670
BANK OF AMERICA	5,284	2,113
AON CORP	5,836	5,616
AMERICAN EXPRESS	3,445	3,773
SUNCOR ENERGY	5,842	5,189
SCHLUMBERGER LTD	3,615	5,738
EXXON MOBIL CORP	4,846	5,933
CONOCOPHILLIPS	9,020	12,752
CHEVRON CORP	6,391	11,172
CENONUS ENERGY	9,141	9,296
WAL-MART STORES	4,774	5,378
PROCTOR GAMBLE	1,842	2,001
PEPSICO INC	6,670	8,294
KRAFT FOODS, INC	6,516	7,472
COCA-COLA COMPANY	1,302	1,399
TARGET CORP	8,149	8,195
STAPLES INC.	7,435	5,487
LOWE'S COMPANIES INC	3,073	3,045
THE WALT DISNEY CORP	6,300	9,362
COMCAST CORP CLASS A	4,998	6,402
CARNIVAL CORP	2,623	2,284

TY 2011 Legal Fees Schedule

Name: J CLYDE AND VELMA APOLLOS ENGLAND FAMILY
CHARITABLE FOUNDATION NO 2

EIN: 20-7277315

Software ID: 11000144

Software Version: 2011v1.2

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ENGLISH LUCAS PRIEST & OWSLEY	893	0	0	893

TY 2011 Other Income Schedule

Name: J CLYDE AND VELMA APOLLOS ENGLAND FAMILY
CHARITABLE FOUNDATION NO 2

EIN: 20-7277315

Software ID: 11000144

Software Version: 2011v1.2

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
COURT SETTLEMENT	145		

TY 2011 Other Professional Fees Schedule

Name: J CLYDE AND VELMA APOLLOS ENGLAND FAMILY
CHARITABLE FOUNDATION NO 2

EIN: 20-7277315

Software ID: 11000144

Software Version: 2011v1.2

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
BB&T TRUST DEPT	21,237	10,619	0	10,618

TY 2011 Taxes Schedule

Name: J CLYDE AND VELMA APOLLOS ENGLAND FAMILY
CHARITABLE FOUNDATION NO 2

EIN: 20-7277315

Software ID: 11000144

Software Version: 2011v1.2

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Net Investment Tax	826	826		