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**Schedule B**

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

Department of the Treasury  
Internal Revenue Service

**Schedule of Contributors**

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

OMB No 1545-0047

**2011**

Name of the organization

Employer identification number

THE EPLEE FOUNDATION, INC.

56-1761082

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.

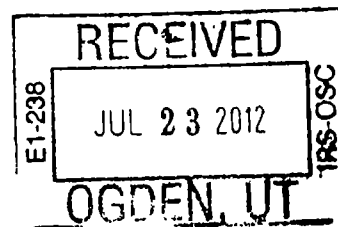
**Special Rules**

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, total 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 total 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 Part I, 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<br>THE EPLEE FOUNDATION, INC. | Employer identification number<br>56-1761082 |
|--|--|

**Part II** Noncash Property (see instructions). Use duplicate copies of Part II if additional space is needed.

| (a) No. from Part I | (b) Description of noncash property given            | (c) FMV (or estimate) (see instructions) | (d) Date received |
|---------------------|--|--|-------------------|
| 1                   | 187812.246 SHARE LORD ABBOTT SHORT DURATION INC FD A | \$ 865814.45                             | 8/2/2011          |
| 1                   | 27465.447 SHARES LORD ABBETT MUN SH DUR TF CL A      | \$ 434228.72                             | 8/2/2011          |
| 1                   | 93967.22 SHARES FEDERATED SHORT TERM MUN TR A        | \$ 967862.37                             | 8/2/2011          |
| 1                   | 30950.527 SHARES FRANKLIN FED TAX FREE INCOME A      | \$ 365525.72                             | 8/2/2011          |
| 1                   | 113871.779 INVESCO VK HIGH YIELD MUN FUND            | \$ 1051036.52                            | 8/2/2011          |
| 1                   | 582.403 SHARES INVESCO VK HIGH YIELD MUN FUNDS       | \$ 5404.70                               | 8/3/2011          |

|  |  |
|--|--|
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|--|--|

**Part II** Noncash Property (see instructions). Use duplicate copies of Part II if additional space is needed.

| (a) No.<br>from<br>Part I | (b)<br>Description of noncash property given                                 | (c)<br>FMV (or estimate)<br>(see instructions) | (d)<br>Date received |
|---------------------------|--|--|----------------------|
| 1                         | 694.681 SHARE LORD ABBOTT SHORT DURATION INC FD A<br>-----<br>-----<br>----- | \$ 3202.48                                     | 8/3/2011<br>-----    |
| 1                         | 47.592 SHARES LORD ABBETT MUN SH DUR TF CL A<br>-----<br>-----<br>-----      | \$ 753.38                                      | 8/3/2011<br>-----    |
| 1                         | 127.465 SHARES FEDERATED SHORT TERM MUN TR A<br>-----<br>-----<br>-----      | \$ 1314.16                                     | 8/3/2011<br>-----    |
| 1                         | 114.846 SHARES FRANKLIN FED TAX FREE INCOME A<br>-----<br>-----<br>-----     | \$ 1363.22                                     | 8/3/2011<br>-----    |
| -----                     | -----<br>-----<br>-----  | \$ -----                                       | -----                |
| -----                     | -----<br>-----<br>-----  | \$ -----                                       | -----                |

|   |   |
|---|---|
| Name of organization<br><b>THE EPLEE FOUNDATION, INC.</b> | Employer identification number<br><b>56-1761082</b> |
|---|---|

**Part III** Exclusively religious, charitable, etc., individual contributions to section 501(c)(7), (8), or (10) organizations that total 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.) ▶ \$ .....

Use duplicate copies of Part III if additional space is needed.

|   |                         |  |                                     |
|---|-------------------------|--|-------------------------------------|
| (a) No. from Part I                     | (b) Purpose of gift     | (c) Use of gift                          | (d) Description of how gift is held |
| -----                                   | -----<br>-----<br>----- | -----<br>-----<br>-----                  | -----<br>-----<br>-----             |
| <b>(e) Transfer of gift</b>             |                         |  |                                     |
| Transferee's name, address, and ZIP + 4 |                         | Relationship of transferor to transferee |                                     |
| -----<br>-----<br>-----                 |                         | -----<br>-----<br>-----                  |                                     |
| (a) No. from Part I                     | (b) Purpose of gift     | (c) Use of gift                          | (d) Description of how gift is held |
| -----                                   | -----<br>-----<br>----- | -----<br>-----<br>-----                  | -----<br>-----<br>-----             |
| <b>(e) Transfer of gift</b>             |                         |  |                                     |
| Transferee's name, address, and ZIP + 4 |                         | Relationship of transferor to transferee |                                     |
| -----<br>-----<br>-----                 |                         | -----<br>-----<br>-----                  |                                     |
| (a) No. from Part I                     | (b) Purpose of gift     | (c) Use of gift                          | (d) Description of how gift is held |
| -----                                   | -----<br>-----<br>----- | -----<br>-----<br>-----                  | -----<br>-----<br>-----             |
| <b>(e) Transfer of gift</b>             |                         |  |                                     |
| Transferee's name, address, and ZIP + 4 |                         | Relationship of transferor to transferee |                                     |
| -----<br>-----<br>-----                 |                         | -----<br>-----<br>-----                  |                                     |
| (a) No. from Part I                     | (b) Purpose of gift     | (c) Use of gift                          | (d) Description of how gift is held |
| -----                                   | -----<br>-----<br>----- | -----<br>-----<br>-----                  | -----<br>-----<br>-----             |
| <b>(e) Transfer of gift</b>             |                         |  |                                     |
| Transferee's name, address, and ZIP + 4 |                         | Relationship of transferor to transferee |                                     |
| -----<br>-----<br>-----                 |                         | -----<br>-----<br>-----                  |                                     |

|   |   |
|---|---|
| <b>Name of organization</b><br>THE EPLEE FOUNDATION, INC. | <b>Employer identification number</b><br>56-1761082 |
|---|---|

**Part I Contributors** (see instructions). Use duplicate copies of Part I if additional space is needed.

| (a)<br>No. | (b)<br>Name, address, and ZIP + 4   | (c)<br>Total contributions                      | (d)<br>Type of contribution  |
|------------|---|---|--|
| 1          | HERBERT W. EPLEE, SR AND WIFE SHIRLEY J EPLEE<br>-----<br>9059 WALKERS FERRY ROAD<br>-----<br>CHARLOTTE, NC 28214-3339<br>----- | \$ 3,765,005.72<br>-----                        | Person <input checked="" type="checkbox"/><br>Payroll <input type="checkbox"/><br>Noncash <input checked="" type="checkbox"/><br>(Complete Part II if there is a noncash contribution.)          |
| (a)<br>No. | (b)<br>Name, address, and ZIP + 4<br>-----<br>-----<br>-----<br>-----   | (c)<br>Total contributions<br>-----<br>\$ ----- | (d)<br>Type of contribution<br>Person <input type="checkbox"/><br>Payroll <input type="checkbox"/><br>Noncash <input type="checkbox"/><br>(Complete Part II if there is a noncash contribution ) |
| (a)<br>No. | (b)<br>Name, address, and ZIP + 4<br>-----<br>-----<br>-----<br>-----   | (c)<br>Total contributions<br>-----<br>\$ ----- | (d)<br>Type of contribution<br>Person <input type="checkbox"/><br>Payroll <input type="checkbox"/><br>Noncash <input type="checkbox"/><br>(Complete Part II if there is a noncash contribution ) |
| (a)<br>No. | (b)<br>Name, address, and ZIP + 4<br>-----<br>-----<br>-----<br>-----   | (c)<br>Total contributions<br>-----<br>\$ ----- | (d)<br>Type of contribution<br>Person <input type="checkbox"/><br>Payroll <input type="checkbox"/><br>Noncash <input type="checkbox"/><br>(Complete Part II if there is a noncash contribution ) |
| (a)<br>No. | (b)<br>Name, address, and ZIP + 4<br>-----<br>-----<br>-----<br>-----   | (c)<br>Total contributions<br>-----<br>\$ ----- | (d)<br>Type of contribution<br>Person <input type="checkbox"/><br>Payroll <input type="checkbox"/><br>Noncash <input type="checkbox"/><br>(Complete Part II if there is a noncash contribution ) |
| (a)<br>No. | (b)<br>Name, address, and ZIP + 4<br>-----<br>-----<br>-----<br>-----   | (c)<br>Total contributions<br>-----<br>\$ ----- | (d)<br>Type of contribution<br>Person <input type="checkbox"/><br>Payroll <input type="checkbox"/><br>Noncash <input type="checkbox"/><br>(Complete Part II if there is a noncash contribution.) |
| (a)<br>No. | (b)<br>Name, address, and ZIP + 4<br>-----<br>-----<br>-----<br>-----   | (c)<br>Total contributions<br>-----<br>\$ ----- | (d)<br>Type of contribution<br>Person <input type="checkbox"/><br>Payroll <input type="checkbox"/><br>Noncash <input type="checkbox"/><br>(Complete Part II if there is a noncash contribution.) |