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# 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

ror	Calen	dar year 2011 or tax year deginning		, and ending		
Na	me of	foundation			A Employer identification	n number
I	on	nie & Carol Poole Fami	ly Foundation		56-2087730	)
		nd street (or P O box number if mail is not delivered to stree		Room/suite	B Telephone number	
	:/0	Carol J. Poole, P.O.	Box 20105		919-818-91	01
Cit	y or to	own, state, and ZIP code			C If exemption application is	pending, check here
R	al	eigh, NC 27619				
G	Check	all that apply: Initial return	Initial return of a fo	ormer public charity	D 1. Foreign organization	s, check here 🕨 🔲
		Final return	Amended return		_	
		Address change	Name change		Foreign organizations m 2. check here and attach c	eeting the 85% test, omputation
H (	Check	type of organization: X Section 501(c)(3)	exempt private foundation		E If private foundation sta	itus was terminated
	Se	ction 4947(a)(1) nonexempt charitable trust	Other taxable private founda		under section 507(b)(1	
I Fa	air ma	rket value of all assets at end of year   J   Accoun	ting method: Cash	X Accrual	F If the foundation is in a	60-month termination
(fi	rom I	Part II, col. (c), line 16)	Other (specify)		under section 507(b)(1	· · · · · · · · · · · · · · · · · · ·
_	-\$	1,027,024. (Part I, col	umn (d) must be on cash l	basis)		
Pa	<u>art l</u>	Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not	(a) Revenue and	(b) Net investment	(c) Adjusted net	(d) Disbursements for charitable purposes
		necessarily equal the amounts in column (a) )	expenses per books	ıncome	income	(cash basis only)
2017	1	Contributions, gifts, grants, etc., received			N/A	
7	2	Check If the loundation is not required to attach Sch. B				
	3	Interest on savings and temporary cash investments	34.	34	<del></del>	Statement 1
	4	Dividends and interest from securities	29,180.	29,180	•	Statement 2
WQ/	5a	Gross rents				
$\equiv$	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10 Gross sales price for all	-16,595.	····-		
	b	Gross sales price for all assets on line 6a 814,237.			<u></u>	
Revenue	7	Capital gain net income (from Part IV, line 2)		0	•	TIVED
3	8	Net short-term capital gain			RFC	FIVED
3	9	Income modifications Gross sales less returns			1112	100
	10a	and allowances			181 NUA	9 2012 0
	1	Less Cost of goods sold				1 9 2012   2
	1	Gross profit or (loss)			[2]	117
	11	Other income	10 (10	20 014	1 ngp	FN. ULL
	12	Total. Add lines 1 through 11	12,619.	29,214	•	0
	13	Compensation of officers, directors, trustees, etc	0.	0	•	0.
	14	Other employee salaries and wages				+
S	15	Pension plans, employee benefits Legal fees				
Šuš	104	Accounting fees			<del>                                     </del>	
xpenses		Other professional fees		······································		
ш	17	Interest			-	
aţį	18	Taxes			<u> </u>	
and Administrative	19	Depreciation and depletion	•			
Ē	20	Occupancy				
Ą	21	Travel, conferences, and meetings				
ē		Printing and publications				
ē.	1	Other expenses Stmt 3	13,461.	13,461		0.
atin	24	Total operating and administrative		1-4-	<u> </u>	1
Operating		expenses. Add lines 13 through 23	13,461.	13,461	.	0.
ō	25	Contributions, gifts, grants paid	5,600.			5,600.
	1	Total expenses and disbursements.				
	1	Add lines 24 and 25	19,061.	13,461		5,600.
	27	Subtract line 26 from line 12:				
	a	Excess of revenue over expenses and disbursements	-6,442.			
	b	Net investment income (if negative, enter -0-)		15,753		
		Adjusted net income (if negative, enter -0-)			N/A	
1235	01	I HA For Panerwork Reduction Act Notice se	a instructions			Form <b>QQQ-DF</b> (2011)

For	m 99	10-PF (2011) Lonnie & Carol Poole Far	mily Foundation  Beginning of year		2087730 Page 2
P	art	Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only	(a) Book Value	(b) Book Value	(c) Fair Market Value
	1	Cash - non-interest-bearing	(a) Dook value	(b) DOOK VAIDE	(c) I all Ivial Ket Value
	1	Savings and temporary cash investments	29,143.	69,399.	69,399.
		Accounts receivable	25,145.		05,555.
	"	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		228.	228.
	7	Other notes and loans receivable	-		
	'	Less: allowance for doubtful accounts			
G	8	Inventories for sale or use			
Assets	9	Prepaid expenses and deferred charges			
As	_	Investments - U.S. and state government obligations Stmt 4	112,631.	75,192.	76,450.
	1	Investments - corporate stock Stmt 5	442,331.	458,605.	456,764.
	I	Investments - corporate bonds Stmt 6	154,829.	228,626.	229,113.
		Investments - land, buildings, and equipment basis	134,023.	220,020.	227,113.
	''	Less accumulated depreciation			
	12	Investments - mortgage loans			<del></del>
	13	Investments - other Stmt 7	322,163.	222,605.	195,070.
	14	Land, buildings, and equipment; basis	322,103.	222,005.	173,070.
	'*	Less accumulated depreciation			
	15	Other assets (describe ►			
	'	other assets (describe >			
	16	Total assets (to be completed by all filers)	1,061,097.	1,054,655.	1,027,024.
	17	Accounts payable and accrued expenses	27002703.0	2703270334	2702770210
	18	Grants payable			
un.	19	Deferred revenue			
Ë	20	Loans from officers, directors, trustees, and other disqualified persons			
Liabilitres	21	Mortgages and other notes payable			
<u>"</u> "		Other liabilities (describe )			
	23	Total liabilities (add lines 17 through 22)	0.	0.	
		Foundations that follow SFAS 117, check here			
		and complete lines 24 through 26 and lines 30 and 31.			
ces	24	Unrestricted	1,061,097.	1,054,655.	
and	25	Temporarily restricted			
Ba	26	Permanently restricted			
2		Foundations that do not follow SFAS 117, check here			
Net Assets or Fund Balan		and complete lines 27 through 31.			
ō	27	Capital stock, trust principal, or current funds			
set	28	Paid-in or capital surplus, or land, bldg., and equipment fund			
Ä	29	Retained earnings, accumulated income, endowment, or other funds			
Ę	30	Total net assets or fund balances	1,061,097.	1,054,655.	
_			1 1 1		
	31	Total liabilities and net assets/fund balances	1,061,097.	1,054,655.	
Р	art	III Analysis of Changes in Net Assets or Fund B			
		I net assets or fund balances at beginning of year - Part II, column (a), line	30	<del></del>	<del></del>
•		t net assets or fund balances at beginning of year - Part II, column (a), line is agree with end-of-year figure reported on prior year's return)	ou .	1	1,061,097.
2	•	r amount from Part I, line 27a		2	-6,442.
		r increases not included in line 2 (itemize)		3	0.
		lines 1, 2, and 3		4	1,054,655.
		eases not included in line 2 (itemize)		5	1,054,055.
		I net assets or fund balances at end of year (line 4 minus line 5) - Part II, co	olumn (b), line 30	6	1,054,655.
					Form <b>990-PF</b> (2011)

	nie & Carol Pool	<u>e Fami</u>	ly Found	latio	<u>n</u>	5	<u>6-208</u>	<u>7730</u>	Page 3
(a) List and descr	and Losses for Tax on li ibe the kind(s) of property sold (e.ç rehouse; or common stock, 200 sh	ı., real estate,	Income	(b) How P - Pui D - Do	acquired rchase	(c) Date a	acquired ay, yr.)	(d) Dat (mo., da	e sold ay, yr.)
1a BB&T Attachment		<del></del>		1 5 50		Vari	ous	Vari	ous
b									
<u>c</u>									
_d							_		
<u>e</u>		T		<del></del>				L	
(e) Gross sales price	(f) Depreciation allowed (or allowable)		st or other basis expense of sale				ain or (loss s (f) minus		
a 814,237.			830,83	2.				-16	<u>,595.</u>
<u>b</u>									
С	_ <del>_</del>								
<u>d</u>		<u> </u>							
Complete only for assets showin	g gain in column (h) and owned by	the foundation	on 12/31/60	-		Causa (C	ot /h\ com		
Complete only for assets showing	(j) Adjusted basis	1	cess of col. (I)			(k), but r	ol. (h) gaın ıot less tha	n -0-) or	
(i) F.M.V. as of 12/31/69	as of 12/31/69		col. (j), if any			Losses	(from col. (	h))	
a .								-16	,595.
<b>b</b>									
С									
d									
<u>e</u>					<del></del>				
2 Capital gain net income or (net cap	pital loss) { If gain, also ente	r in Part I, line )- in Part I, line	7 7	}   2				16	,595.
3 Net short-term capital gain or (los	•								
If gain, also enter in Part I, line 8,		(0).		]					
If (loss), enter -0- in Part I, line 8	1 0 1 1010() (						N/A		
	nder Section 4940(e) for				ment inc	ome			
(For optional use by domestic private	foundations subject to the section	4940(a) tax on	net investment ir	ncome.)					
If section 4940(d)(2) applies, leave th	us part blank.								
Was the foundation liable for the sect	ion 4942 tax on the distributable ar	nount of any ve	ear in the base nei	rınd?				Yes	X No
If "Yes," the foundation does not quali									
1 Enter the appropriate amount in e	ach column for each year; see insti	ructions before	making any entri	es.					
(a) Base period years	(b)			(c)	·		Distrib	(d) oution ratio	
Calendar year (or tax year beginnin			Net value of no				(col. (b) div	rided by col.	
		3,774.			<u>32,646</u>				<u>45951</u>
2009		6,417.			31,769				89365
2008		23,837. 12,297.			<u>45,868</u> 19,457				<u>20596</u> 25606
2007		75,400.			<u>19,457</u> 40,393				<u> 55853</u>
		77,400.		<u> </u>	*0,393	+ -			<u></u>
2 Total of line 1, column (d)						2		1.7	37371
3 Average distribution ratio for the 5	5-year base period - divide the total	on line 2 by 5.	or by the number	of vears			-		<u> </u>
the foundation has been in existen	•	, .,		, ,		3	_	. 3	47474
4 Enter the net value of noncharitable	le-use assets for 2011 from Part X,	line 5				4		1,046	<u>,370.</u>
- ** ** * * * * * *						1 _ 1		262	F06
5 Multiply line 4 by line 3						_5			<u>,586.</u>
6 Enter 1% of net investment incom	ue /1% of Part I line 27h)					6			158.
O FURE 1/0 OF HEL HINESTRICHE HICOH	10 (170 OI 1 ait i, iiilio 27 O)					-			* O C T
7 Add lines 5 and 6						7		363	,744.
8 Enter qualifying distributions from	Part XII, line 4					8		5	,600.
	line 7, check the box in Part VI, line	e 1b, and comp	lete that part usin	ig a 1% tax	rate.				
See the Part VI instructions.				_			_		
								~~~ QQA_I	JE (0011)

_	irt VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4946	8 - 500 ii	/ 3 U		Page 4
_		3 - See II	1500	Clibi	15)
18	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%	-		<u>3</u>	<u> 15.</u>
	of Part I, line 27b				
	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b).				_
	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	7			<u>0.</u>
3	Add lines 1 and 2			3	<u> 15.</u>
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	<del></del>			<u>0.</u>
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-			3	<u> 15.</u>
6	Credits/Payments:				
	2011 estimated tax payments and 2010 overpayment credited to 2011 6a 5,911.				
	Exempt foreign organizations - tax withheld at source				
	Tax paid with application for extension of time to file (Form 8868)				
	Backup withholding erroneously withheld				
7	Total credits and payments. Add lines 6a through 6d			<u>5,9</u>	<u>11.</u>
8	Enter any penalty for underpayment of estimated tax. Check here if Form 2220 is attached				
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed				
10				<u>5,5</u>	96.
	Enter the amount of line 10 to be: Credited to 2012 estimated tax	Ш			<u>0.</u>
	art VII-A Statements Regarding Activities			V	NI -
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in			Yes	_
	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)?		1b		Х
	If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or	r			
	distributed by the foundation in connection with the activities				
	Did the foundation file Form 1120-POL for this year?		1¢		X
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year:				
	(1) On the foundation. $\triangleright$ \$ 0. (2) On foundation managers. $\triangleright$ \$ 0.				
е	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?		2		X
	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				٠,,
4-	bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		3		X
	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	NT / N	4a		X
		N/A	4b		v
Э	Was there a liquidation, termination, dissolution, or substantial contraction during the year?  If "Yes " attach the statement required by General Instruction T.		5		X
	If "Yes," attach the statement required by General Instruction T  Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either:				
U	By language in the governing instrument, or				
	<ul> <li>By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law</li> </ul>				
	remain in the governing instrument?		e	v	
7	Did the foundation have at least \$5,000 in assets at any time during the year?		6 7	X	
•	If "Yes," complete Part II, col. (c), and Part XV				
۵.	Enter the states to which the foundation reports or with which it is registered (see instructions)				
08	NC				
	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate)				
u	of each state as required by General Instruction G? If "No," attach explanation		8b	x	
a	Is the foundation claiming status as a private operating foundation within the meaning of section $4942(j)(3)$ or $4942(j)(5)$ for calendar		00		
•	year 2011 or the taxable year beginning in 2011 (see instructions for Part XIV)? If "Yes," complete Part XIV		9		х
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	1	10		$\frac{\hat{\mathbf{x}}}{\mathbf{x}}$
	1 165, attacht a scriedule listing their names and addresses	Forr	n <b>990</b>	-PF	

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P	art VII-A Statements Regarding Activities (continued)			
11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of			
	section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges?			
	If "Yes," attach statement (see instructions)	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	х	
	Website address ► N/A			
14	The books are in care of ▶ Lori Newsome Telephone no. ▶ 919-83	L8-9	101	
	Located at ▶P.O. Box 20105, Raleigh, NC ZIP+4 ▶2'			
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	N	/A	
16	At any time during calendar year 2011, did the foundation have an interest in or a signature or other authority over a bank,		Yes	No
	securities, or other financial account in a foreign country?	16		X
	See the instructions for exceptions and filing requirements for Form TD F 90-22.1. If "Yes," enter the name of the foreign		<b>-</b>	
	country <b>&gt;</b>			
Pá	art 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.	T	Yes	No
1:	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?			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from)			
	a disqualified person?			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?			
	(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)?			
	(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.)			
	of fany answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations			
٠	section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)?  N/A	1b		
	Organizations relying on a current notice regarding disaster assistance check here	10		
,	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected			
٠	before the first day of the tax year beginning in 2011?	10		X
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation	16		
-	defined in section 4942(j)(3) or 4942(j)(5)):			
9	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	1		
	before 2011? Yes X No			
	If "Yes," list the years \(\bigs\) , , ,			
ŀ	Are there any years listed in 2a for which the foundation is <b>not</b> applying the provisions of section 4942(a)(2) (relating to incorrect			
•	valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to <b>all</b> years listed, answer "No" and attach			
	statement - see instructions.)	2b		
,	of the provisions of section 4942(a)(2) are being applied to <b>any</b> of the years listed in 2a, list the years here.	20	ļ	
·	, , , ,			
32	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time			
-	during the year?			
H	of "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? (Use Schedule C.			
	Form 4720, to determine if the foundation had excess business holdings in 2011)  N/A	3ь		
4:	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	-	<u>x</u>
	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that	1		
	had not been removed from jeopardy before the first day of the tax year beginning in 2011?	4b		x
•		m <b>99</b> 0	-PF	
	T GI	500	1	,

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Part VII-B Statements Regarding Activities for Which	Form 4720 May Be I	Required (contin	nued)	<del></del>
5a During the year did the foundation pay or incur any amount to:				
(1) Carry on propaganda, or otherwise attempt to influence legislation (section	` ''		es X No	
(2) Influence the outcome of any specific public election (see section 4955); of	or to carry on, directly or indir	· —		
any voter registration drive?			es X No	
(3) Provide a grant to an individual for travel, study, or other similar purposes		Y	es X No	
(4) Provide a grant to an organization other than a charitable, etc., organization	on described in section			
509(a)(1), (2), or (3), or section 4940(d)(2)?			es 🗶 No	
(5) Provide for any purpose other than religious, charitable, scientific, literary	, or educational purposes, or			
the prevention of cruelty to children or animals?		Y(	es 🗶 No	
<b>b</b> If any answer is "Yes" to 5a(1)-(5), did <b>any</b> of the transactions fail to qualify un	der the exceptions described	ın Regulations		
section 53.4945 or in a current notice regarding disaster assistance (see instru	uctions)?		N/A	5b
Organizations relying on a current notice regarding disaster assistance check it	nere			
c if the answer is "Yes" to question 5a(4), does the foundation claim exemption f	rom the tax because it mainta	uned		
expenditure responsibility for the grant?	Ŋ	J∕A 🔲 Yo	es 🔲 No	
If "Yes," attach the statement required by Regulations section 53 494		•		1 1
6a Did the foundation, during the year, receive any funds, directly or indirectly, to	• •			1 1
a personal benefit contract?	F-3, F	□ Y <sub>1</sub>	es X No	1 1
b Did the foundation, during the year, pay premiums, directly or indirectly, on a j	nersonal benefit contract?		_	66 X
If "Yes" to 6b, file Form 8870	porconal bonont agricuot			**   A
7a At any time during the tax year, was the foundation a party to a prohibited tax	shelter transaction?	□ v <sub>4</sub>	es X No	
b If "Yes," did the foundation receive any proceeds or have any net income attrib				7b
Information About Officers Directors Tweet		nagers Highly		U
Part VIII Paid Employees, and Contractors	ecs, i ouridation wie	inagers, rugin	,	
1 List all officers, directors, trustees, foundation managers and their	compensation.	-·- <del></del>		
	(b) Title, and average	(c) Compensation	(d) Contributions to employee benefit plans	(e) Expense
(a) Name and address	hours per week devoted to position	(If not paid, enter -0-)	and deferred compensation	(e) Expense account, other allowances
Carol J. Poole	Pres/Direct	Cinter -0-)	compensation	unowandos
700 N. Peninsula	1105,211000			
New Smyrna Beach, FL 32169	5.00	0.	0.	0.
Robert H. Hall	Sec/Treas		0.	
2600 Hilltop Farms Road	Dec, II cas			
Apex, NC 27502	1.00	0.	0.	0.
mper, ne 2/302	1.00			
	-		İ	
	-			
2 Compensation of five highest-paid employees (other than those inc	luded on line 1) If none	enter "NONE "		
	(b) Title, and average	THE ITOME.	(d) Contributions to	(e) Expense
(a) Name and address of each employee paid more than \$50,000	hours per week	(c) Compensation	(d) Contributions to employee benefit plans and deferred	(e) Expense account, other
NONE	devoted to position		compensation	allowances
NONE	1			
			-	
	-			
	-			
<del></del>	-			
		<u> </u>		
	L	<u> </u>	<u> </u>	
Total number of other employees paid over \$50,000				0
			Enrm C	190-PF (2011)

form 990-PF (2011) Lonnie & Carol Poole Family Foundation	<u>_56-</u>	208773	0 Page 7
Part VIII Information About Officers, Directors, Trustees, Foundation Managers Paid Employees, and Contractors (continued)	s, Highly		
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) T	ype of service	(c)	Compensation
NONE			
	<del></del>		
	-		
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 number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	as the	Ехр	enses
1 <u>N/A</u>			
		1	
2			
	<del></del>		
3			
		-	
4			
· · · · · · · · · · · · · · · · · · ·		1	
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.	<del></del>	Am	ount
1 <u>N/A</u>		ļ	
		ł	
<u> </u>	<del></del>	<del> </del>	
		1	
	<del></del>	1	
All other program-related investments. See instructions.			
B		]	
		<u> </u>	
		ļ	
Total. Add lines 1 through 3		<u> </u>	0.
		Form 95	<b>0-PF</b> (2011)

For	rm 990-PF (2011) Lonnie & Carol Poole Family Foundation	<u> 56</u>	<u>6-2087730                                  </u>	Page 8
P	Part X Minimum Investment Return (All domestic foundations must complete this part. Foreign four	ndation	is, 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	1,017	759.
b	Average of monthly cash balances	1b	1,017, 44,	546.
C	Fair market value of all other assets	1c		
d	Total (add lines 1a, b, and c)	1d	1,062,	305.
е	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	1,062,	305.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4		935.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	1,046,	370.
6	Minimum investment return. Enter 5% of line 5	6		319.
_ [P	Part XI  Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and foreign organizations check here  and do not complete this part.)	d certai	n	
1	Minimum investment return from Part X, line 6	1	52	319.
2a	Tax on investment income for 2011 from Part VI, line 5			
b				
C	Add lines 2a and 2b	2c		315.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	52,	004.
4	Recoveries of amounts treated as qualifying distributions	4		0.
5	Add lines 3 and 4	5	52.	004.
6	Deduction from distributable amount (see instructions)	6		0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	52,	004.
P	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		600.
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	5,	600.
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	5,	600.
	Note. The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation q 4940(e) reduction of tax in those years.	ualifies	for the section	

Form **990-PF** (2011)

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2010	(c) 2010	(d) 2011
1 Distributable amount for 2011 from Part XI,				
line 7	1			52,004.
2 Undistributed income, if any, as of the end of 2011				
a Enter amount for 2010 only			0.	
b Total for prior years:				
		0.		
3 Excess distributions carryover, if any, to 2011:				
a From 2006 20,960.				
b From 2007 947,830.				
c From 2008 541,360.				
d From 2009 520,635.	1			
e From 2010 514,394.				
f Total of lines 3a through e	2,545,179.			
4 Qualifying distributions for 2011 from				
Part XII, line 4: ► \$ 5,600.				
a Applied to 2010, but not more than line 2a			0.	
<b>b</b> Applied to undistributed income of prior				
years (Election required - see instructions)		0.		
c Treated as distributions out of corpus				
(Election required - see instructions)	o .			
d Applied to 2011 distributable amount				5,600.
e Remaining amount distributed out of corpus	0.			3,000.
5 Excess distributions carryover applied to 2011	46,404.			46,404.
(If an amount appears in column (d), the same amount must be shown in column (a) )	10,101.			30, 203.
6 Enter the net total of each column as indicated below:				
8 Corpus Add lines 3f, 4c, and 4e Subtract line 5	<u>2,498,775.</u>			
<b>b</b> Prior years' undistributed income. Subtract				
line 4b from line 2b		0.		·
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		0.		
d Subtract line 6c from line 6b. Taxable				
amount - see instructions		0.		
e Undistributed income for 2010. Subtract line				
4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2011. Subtract				
lines 4d and 5 from line 1. This amount must				
be distributed in 2012				0.
7 Amounts treated as distributions out of				
corpus to satisfy requirements imposed by				
section 170(b)(1)(F) or 4942(g)(3)	0.			
8 Excess distributions carryover from 2006				
not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2012.		·=		
Subtract lines 7 and 8 from line 6a	2,498,775.			
O Analysis of line 9:				
a Excess from 2007 922, 386.	)			
<b>b</b> Excess from 2008 541,360.				
c Excess from 2009 520, 635.			ĺ	
d Excess from 2010 514, 394.	)			
e Excess from 2011				
				Form <b>990-PF</b> (2011)

Part XIV Private Operating	& Carol Poc	ole Family	Foundation		087730 Page 1
1 a If the foundation has received a ruling			<del></del>	N/A	
foundation, and the ruling is effective f					
<b>b</b> Check box to indicate whether the four			d in cootion	4942(j)(3) or 4	1942(j)(5)
	Tax year	ing roundation describer	Prior 3 years	] 4942(J)(3) 01] 4	1942())(5)
2 a Enter the lesser of the adjusted net income from Part I or the minimum	(a) 2011	<b>(b)</b> 2010	(c) 2009	(d) 2008	(e) Total
	(4)2011	(5) 20 10	(6) 2555	(6) 2500	(0) 10121
investment return from Part X for					
each year listed			<del></del>	<del></del>	<del> </del>
<b>b</b> 85% of line 2a			ļ	<del></del>	
<ul> <li>Qualifying distributions from Part XII,</li> <li>line 4 for each year listed</li> </ul>				1	
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.	.	1			1
Subtract line 2d from line 2c 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			+	<del>                                     </del>	
Part XV   Supplementary Info			y if the foundation	had \$5,000 or m	ore in assets
Information Regarding Foundation a List any managers of the foundation we year (but only if they have contributed Carol J. Poole	ho have contributed more		ntributions received by the	e foundation before the clo	ose of any tax
b List any managers of the foundation w other entity) of which the foundation h			n (or an equally large port	ion of the ownership of a p	partnership or
None					
2 Information Regarding Contribu	tion Crent Cife I -	Cabalarable 141			
Check here X if the foundation the foundation makes gifts, grants, etc.	only makes contributions	to preselected charitabl	e organizations and does		
a The name, address, and telephone nur	nber of the person to who	m applications should b	ne addressed:		-
b The form in which applications should	be submitted and informa	tion and materials they	should include:		
c Any submission deadlines:					<del>-</del>
d Any restrictions or limitations on awar	ds, such as by geographic	al areas, charitable field	s, kınds of institutions, or	other factors:	
-	,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,			-	

Form 990-PF (2011) Lonnie & Care Part XV Supplementary Information	ol Poole Family	<u> Foundati</u>	on <u>56-208</u>	7730 Page 11
3 Grants and Contributions Paid During the Y		Payment		
Recipient	If recipient is an individual, show any relationship to any foundation manager	Foundation status of	Purpose of grant or contribution	Amount
Name and address (home or business)	or substantial contributor	recipient		
a Paid during the year				
Environmental Research & Education Foundation		Public	Charitable	
3301 Benson Drive, Suite 301				
Raleigh, NC 27609				2,500,
upwg/ladu Pussall Galabritu Glassia		Public	Charitable	
UPMC/Andy Russell Celebrity Classic 3600 Forbes Ave		Public	Charitable	
Pittsburgh PA 15213				2,500
NC Hunter Jumper Association		Public	Charitable	
P.O. Box 33790				
Raleigh, NC 27636				600
	<u> </u>			
b Approved for future payment		<del></del>	<b>&gt;_3a</b>	5 600
a Approved to lattire payment				
None				
			Ì	
				:
Total			▶ 3b	.0.

Form **990-PF** (2011)

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

Enter gross amounts unless otherwise indicated.	Unrelate	ed business income		ded by section 512, 513, or 514	(e)
	(a) Business	(b) Amount	Exclu- sion code	(d) Amount	Related or exempt function income
1 Program service revenue:	code		code		
<u></u>	-	<del></del>	$\vdash$		
b			-		<del></del>
c	1		_		
d	-				
e	-	<u> </u>	1		_ <del></del>
f	·				
g Fees and contracts from government agencies			<u> </u>		
2 Membership dues and assessments					
3 Interest on savings and temporary cash	· I				
investments	_		14	34.	
4 Dividends and interest from securities			14	29,180.	
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				<del></del>	
8 Gain or (loss) from sales of assets other					
than inventory	1		18	-16,595.	
9 Net income or (loss) from special events		<del></del> -	10	-10,555.	
10 Gross profit or (loss) from sales of inventory	<del></del>		<del>  -  </del>	<del>                                     </del>	
	1		1		
11 Other revenue:	į				
<u>.</u>	-		<del>  -</del>		<del></del>
b			1		
C			<del> </del>	<del>_</del>	
d	-				
e	-		-	10 11	
12 Subtotal. Add columns (b), (d), and (e)	L		<u> </u>	12,619.	0.
13 Total. Add line 12, columns (b), (d), and (e)				13	12,619.
(See worksheet in line 13 instructions to verify calculations.)					
Part XVI-B Relationship of Activities	to the Acc	omplishment of Ex	cemp	t Purposes	
				<del></del>	
Line No. Explain below how each activity for which ind			A contri	outed importantly to the accom	plishment of
the foundation's exempt purposes (other tha	n by providing it	inds for such purposes).			
			_		
	_				
			_		
			_	<del></del>	
	_				
<del></del>		<del></del>			
<del>-  </del>					
			·	<del></del>	<del></del>

orm 990-PF (2		<u>e &amp; Carol</u>							Pag	<u>je 13</u>		
Part XVII	Information Re Exempt Organ		sfers To a	and Transac	tions a	nd Relat	ionships With Nonch	aritable				
1 Did the or			of the followin	o with any other	organizatioi	n described i	n section 501(c) of	TY Y	es	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?								i F				
	a Transfers from the reporting foundation to a noncharitable exempt organization of:											
										X		
(1) Cash (2) Other assets										X		
(2) Other assets										<u>~</u>		
b Other transactions:  (1) Sales of assets to a noncharitable exempt organization										X		
(1) Sales of assets to a noncharitable exempt organization (2) Purchases of assets from a noncharitable exempt organization										X		
		1b(2) 1b(3)	-	X								
(3) Rental of facilities, equipment, or other assets (4) Reimbursement arrangements										X		
٠,	s or loan guarantees							1b(4) 1b(5)	-	X		
	rmance of services or me	mherchin or fundrais	sina solicitatio	ne					$\dashv$	X		
, .	f facilities, equipment, ma	•	=					1b(6)	_	$\frac{\Lambda}{X}$		
_		-			chould alw	ave chow the	e fair market value of the goods					
							action or sharing arrangement		5,			
	i) the value of the goods, (			ou ioss triair iair ii	iai ket vaiut	in any nana	action of sharing arrangement	, Show iii				
	(b) Amount involved			e exempt organiza	tion	(d) Dec	cription of transfers, transactions, ar		Camer			
(2) 2	(b) / milouni milourou	(e) itamo or	N/A	oxompt organiza		(4) 563	cription of dansiers, dansactions, ar	U Silating artain	90111611	<u> </u>		
<del></del>			N/A		<del>.</del>	_	<del>_</del>					
				<del></del>		<del> </del>		<del></del>	_			
+ -						-						
<del></del>	<del></del>					<del> </del>	<del></del>					
				<del></del>		<del>                                     </del>						
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<del>-</del>			•									
						-						
	- 4-4	L										
	ndation directly or indirect	-	•		npt organiz	ations descri	Dea		77	١		
	501(c) of the Code (other	· ,	)(3)) or in sect	110ft 527 /				Yes	X	NO		
b if yes, co	omplete the following scho (a) Name of org			(h) Type of orga	nuzation T		(c) Description of relation	nchin				
		amzanom	-	(b) Type of orga	anization		(c) Description of relation	ISIIIP				
	N/A											
									_			
	<del></del>				<del></del>							
Under	penalties of perjury, I declare	that I have examined the	s return uncluden	l accompanyana ech	edules and s	tatemente and	I to the best of my knowledge					
and he	elief, it is true, correct, and con						renarer has any knowledge	May the IRS disc eturn with the p				
Sign Here	Male +14	etall.		1 4/		<b>*</b>		s <u>hown</u> below (se		)?		
🚩	nature of officer or trustee	icci			4/2	Title	1810	X Yes		No		
			Proparer's s	Date	<del> </del>		Check I if PTI					
	Print/Type preparer's na	IIIIC	Preparer's s	ignature		Date	Check if PTII self- employed	•				
Daid	T mi	D-1-4/	<i>{{ 1'}</i>	$\mathcal{L}_{\mathcal{A}}$	-	مالمان	1 '1	004405	^-			
Paid	J. Timmons			we want		11/13/12						
Preparer	Firm's name FHug	nes Pitt	ıan & G	upton, I	קרוי		Firm's EIN ► 56-	141520	2			
Use Only	Exemic address 5 4 =	00 0 3	- D!	G - 1	200							
	Firm's address ▶ 15				300			000 -	^ ^ ^			
	ı Ra	leigh. NC	. 2/607				I Phone on 919.	-232-5	91)(	J		

Form 990-PF Interest on Savi	ings a	nd Tem	porary Ca	sh Ir	nvestments	Statement	1
Source						Amount	
BB&T Investment Account #243							34.
Total to Form 990-PF, Part I,	, line	3, Co	lumn A				34.
Form 990-PF Dividend	ls and	Inter	est from	Secur	rities	Statement	2
Source		Gross	Amount		ital Gains ividends	Column (A Amount	)
BB&T Investment Account #243		29,180.			0.	29,180.	
Total to Fm 990-PF, Part I, ]		29,18		0.		29,180.	
Form 990-PF	C	ther E	xpenses			Statement	3
Description	Expe	a) nses Books	(b) Net Inve		(c) Adjusted Net Incom		
Management Fees Taxes	1	3,109.	13,109. 352.		<u></u>		0.
To Form 990-PF, Pg 1, ln 23		13,461. 13,		461.		0.	
Form 990-PF U.S. and S	State/	City G	overnment	Obli	igations	Statement	4
Description		U.S Gov'		Вос	ok Value	Fair Marke Value	t
US & State Government Obligat	ions	X			75,192.	76,4	50.
Total U.S. Government Obligations					75,192.	76,4	50.
Total State and Municipal Gov	vernme	nt Obl	igations				_
Total to Form 990-PF, Part II			'		75,192.	76,4	_

Form 990-PF	Corporate Stock		Statement 5		
Description		Book Value	Fair Market Value		
Corporate Stocks		458,605.	456,764.		
Total to Form 990-PF, Part II	, line 10b	458,605.	456,764.		
Form 990-PF	Corporate Bonds		Statement 6		
Description		Book Value	Fair Market Value		
Corporate Bonds		228,626.	229,113.		
Total to Form 990-PF, Part II	, line 10c	228,626.	229,113.		
Form 990-PF	Other Investments		Statement 7		
Description	Valuation Method	Book Value	Fair Market Value		
Corporate Obligations International Obligations Specialty Funds	COST COST COST	30,541. 90,914. 101,150.	29,238. 74,184. 91,648.		
Total to Form 990-PF, Part II	, line 13	222,605.	195,070.		

### Form **8868**

(Rev. January 2012)

Department of the Treasury Internal Revenue Service

# Application for Extension of Time To File an Exempt Organization Return

File a separate application for each return.

OMB No 1545-1709

Form 8868 (Rev 1-2012)

<ul><li>If you a</li></ul>	re filing for an Automatic 3-Month Extension, comple	te only Pa	art I and check this box			ightharpoons		
<ul><li>If you a</li></ul>	re filing for an Additional (Not Automatic) 3-Month Ex	tension, d	complete only Part II (on page 2 of	this form)				
Do not co	omplete Part II unless you have already been granted a	an automa	atic 3-month extension on a previous	sly filed Fo	rm 8868			
Electroni	c filing (e-file). You can electronically file Form 8868 if y	you need a	a 3-month automatic extension of tir	ne to file (6	6 months fo	r a corporation		
required t	o file Form 990-T), or an additional (not automatic) 3-mo	nth extens	sion of time. You can electronically f	ile Form 8	868 to requ	est an extension		
of time to	file any of the forms listed in Part I or Part II with the ex	ception of	Form 8870, Information Return for	Transfers	Associated	With Certain		
Personal	Benefit Contracts, which must be sent to the IRS in pap	er format	(see instructions). For more details	on the elec	tronic filing	of this form,		
visit www	irs gov/efile and click on e-file for Charities & Nonprofits					. <u> </u>		
Part I	Automatic 3-Month Extension of Time	e. Only s	submit original (no copies ne	eded).				
A corpora	tion required to file Form 990-T and requesting an autor	matic 6-mo	onth extension - check this box and	complete				
Part I only						▶ □		
	corporations (including 1120-C filers), partnerships, REM	IICs, and t	trusts must use Form 7004 to reques	st an exten	sion of time	•		
	ome tax returns.			1				
Type or	Name of exempt organization or other filer, see instru	ctions		Employe	on number (EIN) or			
print		_						
File by the	Lonnie & Carol Poole Family				X 56-2087730			
due date for	Number, street, and room or suite no. If a P.O. box, s	•				ber (SSN)		
filing your return See	c/o Carol J. Poole, P.O. Bo							
instructions	City, town or post office, state, and ZIP code. For a foreign address, see instructions							
	Raleigh, NC 27619	_						
	<b>5</b>							
Enter the	Return code for the return that this application is for (file	e a separa	ite application for each return)			0 4		
		D-4	I					
Applicati	on	Return	1			Return		
Is For		Code	Is For Form 990-T (corporation)			Code		
Form 990		01	Form 1041-A			07		
Form 990-BL Form 990-EZ		02 01				08		
		04	Form 4720 Form 5227			10		
Form 990-PF Form 990-T (sec 401(a) or 408(a) trust)		05	Form 6069			11		
	-T (trust other than above)	06	Form 8870			12		
1 0111 330	Lori Newsome		1 01111 0070			12		
• The bo	ooks are in the care of P.O. Box 20105	- Ra	leigh NC 27619					
	one No ▶ 919-818-9101	11(4)	FAX No ▶					
	organization does not have an office or place of business	s in the Ur	· · · · · · · · · · · · · · · · · · ·					
	s for a Group Return, enter the organization's four digit			If this is fo	r the whole	group, check this		
box ▶ [	If it is for part of the group, check this box	7						
	quest an automatic 3-month (6 months for a corporation							
			ition return for the organization nam		The extens	ion		
ıs fo	or the organization's return for							
_	X calendar year 2011 or							
▶[	tax year beginning	, an	nd ending					
			-		_			
2 If th	e tax year entered in line 1 is for less than 12 months, on Change in accounting period	heck reas	on Initial return	Fınal retur	n			
	is application is for Form 990-BL, 990-PF, 990-T, 4720,	or 6069, e	enter the tentative tax, less any			_		
nonrefundable credits. See instructions				3a	\$	<u> </u>		
b If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and								
estimated tax payments made. Include any prior year overpayment allowed as a credit.			3b	\$	5,911.			
	ance due. Subtract line 3b from line 3a Include your pa	•	• • •			-		
	using EFTPS (Electronic Federal Tax Payment System)			3c	\$	0.		
Caution	If you are going to make an electronic fund withdrawal a	with this F	orm 8868, see Form 8453.FO and F	orm 8870.	EO for nav	ment instructions		

LHA For Privacy Act and Paperwork Reduction Act Notice, see Instructions.

Form 8868 (Rev. 1-2012)					Page 2		
If you are filing for an Additional (Not Automatic) 3-Month Ex	tension.	complete only Part II and check this	box		▶ X		
Note. Only complete Part II if you have already been granted an a	-	-		8868	,		
If you are filing for an Automatic 3-Month Extension, comple		- · · · · · · · · · · · · · · · · · · ·					
Part II Additional (Not Automatic) 3-Month E			nal (no c	opies ne	eded).		
<u> </u>		<del></del>			, see instructions		
Type or Name of exempt organization or other filer, see instru			ion number (EIN) or				
print states of oxompt organization of other mer, see many	·						
Tombia C Const Deale Desile	Foun	dation	X	X 56-2087730			
due date for Number, street, and room or suite no. If a PO box, s			Social security number (SSN)				
filing your	Social Se	curity num	Der (33N)				
				······································			
City, town or post office, state, and ZIP code. For a form	oreign auc	ress, see instructions.					
matergit, NC 2/019							
F-A Alta D. A							
Enter the Return code for the return that this application is for (file	e a separa	ite application for each return)			0 4		
	T	T			<del></del>		
Application	Return	Application			Return Code		
ls For	Code	Is For	ls For				
Form 990	01						
Form 990-BL	02	Form 1041-A					
Form 990-EZ	01	Form 4720					
Form 990-PF	04	Form 5227					
Form 990-T (sec. 401(a) or 408(a) trust)	05	Form 6069			11		
Form 990-T (trust other than above)	06	Form 8870 12					
STOP! Do not complete Part II if you were not already granted	an autor	<u>natic 3-month extension on a prev</u>	iously file	d Form 88	<u> 168</u>		
Lori Newsome	_						
<ul> <li>The books are in the care of</li></ul>	<u>- Ra</u>	leigh, NC 27619					
Telephone No. ► 919-818-9101		FAX No. 🕨					
<ul> <li>If the organization does not have an office or place of business</li> </ul>					<b>▶</b> □		
<ul> <li>If this is for a Group Return, enter the organization's four digit</li> </ul>	Group Exe	emption Number (GEN) li	f this is fo	r the whole	group, check this		
box 🕨 💹 If it is for part of the group, check this box 🕨 🔙	and atta	ach a list with the names and EINs of	all memb	ers the ext	ension is for		
4 I request an additional 3-month extension of time until	Novem	<u>ber 15, 2012</u>					
5 For calendar year $2011$ , or other tax year beginning		, and ending	9		·		
6 If the tax year entered in line 5 is for less than 12 months, of	heck reas	on Initial return	Fınal ı	etum			
Change in accounting period							
7 State in detail why you need the extension							
Additional time is needed in a			<u>essar</u>	y inf	ormation		
to file a complete and accurat	<u>te re</u>	turn.					
8a If this application is for Form 990-BL, 990-PF, 990-T, 4720,	or 6069, e	enter the tentative tax, less any					
nonrefundable credits. See instructions			8a	\$	0.		
<b>b</b> If this application is for Form 990-PF, 990-T, 4720, or 6069,	enter any	refundable credits and estimated					
tax payments made. Include any prior year overpayment all							
previously with Form 8868			8b	\$	5,911.		
c Balance due. Subtract line 8b from line 8a. Include your pa	yment wit	th this form, if required, by using					
EFTPS (Electronic Federal Tax Payment System) See instr	uctions		8c	s	0.		
Signature and Verificat	ion mu	st be completed for Part II o	nly.				
Under penalties of perjury, I declare that I have examined this form, include	ding accomi	panying schedules and statements, and to	the best o	f my knowle	dge and belief,		
it is true, correct, and complete, and that I am authorized to prepare this fo	orm.	·		-	- ,		
Signature Title			Date	<b>•</b>			
					8868 (Rev 1-2012)		
					,		