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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

2011

For calendar year 2011 or tax year beginning January 1, 2011, and ending December 31, 2011

Name of foundation Crum Family Charitable Foundation		A Employer identification number 72-1375432
Number and street (or P O box number if mail is not delivered to street address) 3355 Allendale Place	Room/suite	B Telephone number (see instructions) (334)8341565
City or town, state, and ZIP code Montgomery, AL 36111		C If exemption application is pending, check here ☐
G Check all that apply ☐ Initial return ☐ Initial return of a former public charity ☐ Final return ☐ Amended return ☐ Address change ☐ Name change		D 1. Foreign organizations, check here ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ☐
H Check type of organization ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here ☐
I Fair market value of all assets at end of year (from Part II, col (c), line 16) \$	J Accounting method ☒ Cash ☐ Accrual ☐ Other (specify) _____ (Part I, column (d) must be on cash basis)	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see 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)	11,860.00			
	2 Check ☐ if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments	168.73	168.73	168.73	
	4 Dividends and interest from securities	7902.86	7902.86	7902.86	
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10				
	b Gross sales price for all assets on line 6a				
	7 Capital gain net income (from Part IV, line 2)		8.77		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
b Less Cost of goods sold					
c Gross profit or (loss) (attach schedule)					
11 Other income (attach schedule)					
12 Total. Add lines 1 through 11	19931.59	8079.93	8071.59		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc.				
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)				
	c Other professional fees (attach schedule)				
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	134.84	134.84	134.84	134.84
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	132.00	132.00	132.00	132.00
	24 Total operating and administrative expenses. Add lines 13 through 23	266.84	266.84	266.84	266.84
	25 Contributions, gifts, grants paid	32425.00			32425.00
26 Total expenses and disbursements. Add lines 24 and 25	32691.84	266.84	266.84	32691.84	
27 Subtract line 26 from line 12					
a Excess of revenue over expenses and disbursements	-12,760.25				
b Net investment income (if negative, enter -0-)		7813.09			
c Adjusted net income (if negative, enter -0-)			7804.75		

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		121,038.61	96,468.09	96,468.09
	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 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		267.78	1515.28	1515.28
	10a	Investments—U S and state government obligations (attach schedule)				
	b	Investments—corporate stock (attach schedule)		389,627.44	420,655.12	577,709.48
	c	Investments—corporate bonds (attach schedule)				
Liabilities	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)		531,398.74	518,638.49	675,692.85
	17	Accounts payable and accrued expenses				
	18	Grants payable				
Net Assets or Fund Balances	19	Deferred revenue				
	20	Loans from officers, directors, trustees, and other disqualified persons				
	21	Mortgages and other notes payable (attach schedule)				
	22	Other liabilities (describe ▶)				
	23	Total liabilities (add lines 17 through 22)		0.00	0.00	
		Foundations that follow SFAS 117, check here ▶ ☐ and complete lines 24 through 26 and lines 30 and 31.				
	24	Unrestricted				
	25	Temporarily restricted				
	26	Permanently restricted				
		Foundations that do not follow SFAS 117, check here ▶ ☒ and complete lines 27 through 31.				
Net Assets or Fund Balances	27	Capital stock, trust principal, or current funds		531,398.74	518,638.49	
	28	Paid-in or capital surplus, or land, bldg., and equipment fund				
	29	Retained earnings, accumulated income, endowment, or other funds				
	30	Total net assets or fund balances (see instructions)		531,398.74	518,638.49	
	31	Total liabilities and net assets/fund balances (see instructions)		531,398.74	518,638.49	

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	531,398.74
2	Enter amount from Part I, line 27a	2	-12,760.25
3	Other increases not included in line 2 (itemize) ▶	3	
4	Add lines 1, 2, and 3	4	518,638.49
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	518,638.49

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	25 share HEICO	D	11/15/2004	04/25/2011
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 8 77			8 77
b			
c			
d			
e			

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

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

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	8 77
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 instructions). If (loss), enter -0- in Part I, line 8	3	8.77

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.

(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	30597.70	577292.73	0.0530
2009	20145.04	384216.45	0.0524
2008	15872.37	389141.53	0.0408
2007	20818.71	428924.83	0.0485
2006	21347.86	390796.76	0.0546

2	Total of line 1, column (d)	2	.2493
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	0499
4	Enter the net value of noncharitable-use assets for 2011 from Part X, line 5	4	655764.51
5	Multiply line 4 by line 3	5	32,722.65
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	80.80
7	Add lines 5 and 6	7	32,803.45
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	8	32,613.71

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

1a	Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1 Date of ruling or determination letter _____ (attach copy of letter if necessary—see instructions)			
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☐ and enter 1% of Part I, line 27b	1	161	60
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	161	60
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	161	60
6	Credits/Payments:			
a	2011 estimated tax payments and 2010 overpayment credited to 2011	6a	1515	28
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	1515	28
8	Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached	8		
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9		
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	1353	68
11	Enter the amount of line 10 to be Credited to 2012 estimated tax 1353.68 Refunded	11		

Part VII-A Statements 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			✓
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)?		✓
1b			✓
	<i>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</i>		
c	Did the foundation file Form 1120-POL for this year?		✓
1c			✓
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? <i>If "Yes," attach a detailed description of the activities.</i>	2	✓
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? <i>If "Yes," attach a conformed copy of the changes</i>	3	✓
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a	✓
b	If "Yes," has it filed a tax return on Form 990-T for this year?	4b	
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If "Yes," attach the statement required by General Instruction T.</i>	5	✓
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	✓
7	Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col. (c), and Part XV</i>	7	✓
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ Alabama		
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 <i>General Instruction G</i> ? <i>If "No," attach explanation</i>	8b	✓
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)? <i>If "Yes," complete Part XIV</i>	9	✓
10	Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses</i>	10	✓

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		✓
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		✓
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ►	13	✓	
14	The books are in care of ► Gertrude L Crum Telephone no ► 334-834-1565 Located at ► 3355 Allendale Place, Montgomery, AL ZIP+4 ► 36111-1634			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041—Check here and enter the amount of tax-exempt interest received or accrued during the year ► 15			
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? See the instructions for exceptions and filing requirements for Form TD F 90-22.1. If "Yes," enter the name of the foreign country ►	16	Yes	No

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

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

		Yes	No
1a	During the year did the foundation (either directly or indirectly):		
(1)	Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☒ No		
(2)	Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No		
(3)	Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No		
(4)	Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☒ No		
(5)	Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☒ No		
(6)	Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days) ☐ Yes ☒ No		
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here ► ☐	1b	
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2011?	1c	
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? ☐ Yes ☐ No If "Yes," list the years ► 20 , 20 , 20 , 20		
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions)	2b	
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ► 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? ☐ Yes ☒ 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? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2011.)	3b	✓
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	✓
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	✓

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

- 5a** During the year did the foundation pay or incur any amount to:
- (1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☒ No
- (2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☒ No
- (3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☒ No
- (4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see instructions) ☐ Yes ☒ No
- (5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☒ No
- b** If any answer is "Yes" to 5a(1)–(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)? **5b**
- Organizations relying on a current notice regarding disaster assistance check here ☒
- c** If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? ☐ Yes ☐ No
- If "Yes," attach the statement required by Regulations section 53.4945–5(d).
- 6a** Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? ☐ Yes ☒ No
- b** Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? **6b** ☒
- If "Yes" to 6b, file Form 8870
- 7a** At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☒ No
- b** If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction? **7b**

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors**1 List all officers, directors, trustees, foundation managers and their compensation** (see 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
William B. Crum 3355 Allendale Place, Montgomery, AL 36111	Co-Trustee 1 hour	-0-	-0-	-0-
Gertrude L. Crum 3355 Allendale Place, Montgomery, AL 36111	Co-Trustee 1 hour	-0-	-0-	-0-
Laura L. Crum 3159 LeBron Road, Montgomery, AL 36106	Co-Trustee 3 5 hours	-0-	-0-	-0-

2 Compensation of five highest-paid employees (other than those included on line 1—see 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
Not applicable				

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 instructions). If none, enter "NONE."

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
not applicable		
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 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 instructions.	
3	
Total. Add lines 1 through 3	▶

Part X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see instructions.)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	552731.77
b	Average of monthly cash balances	1b	113019.00
c	Fair market value of all other assets (see instructions)	1c	
d	Total (add lines 1a, b, and c)	1d	
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	
2	Acquisition indebtedness applicable to line 1 assets	2	
3	Subtract line 2 from line 1d	3	665750.77
4	Cash deemed held for charitable activities. Enter 1 1/2 % of line 3 (for greater amount, see instructions)	4	9986.26
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	655764.51
6	Minimum investment return. Enter 5% of line 5	6	32788.23

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

1	Minimum investment return from Part X, line 6	1	32788.23
2a	Tax on investment income for 2011 from Part VI, line 5	2a	80.80
b	Income tax for 2011. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	80.80
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	32707.43
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	32707.43
6	Deduction from distributable amount (see instructions)	6	
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	32707.43

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	32,691.84
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	32,691.84
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 instructions)	5	78.13
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	32,613.71

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 instructions)

	(a) Corpus	(b) Years prior to 2010	(c) 2010	(d) 2011
1 Distributable amount for 2011 from Part XI, line 7				32,707.43
2 Undistributed income, if any, as of the end of 2011				
a Enter amount for 2010 only				
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				762.89
d From 2009				1833.93
e From 2010		2596.85		
f Total of lines 3a through e				
4 Qualifying distributions for 2011 from Part XII, line 4: \$ 32691.84				
a Applied to 2010, but not more than line 2a				
b Applied to undistributed income of prior years (Election required—see instructions)				
c Treated as distributions out of corpus (Election required—see instructions)				32691.84
d Applied to 2011 distributable amount				
e Remaining amount distributed out of corpus				15.59
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:		2596.85		
a Corpus Add lines 3f, 4c, and 4e Subtract line 5				
b Prior years' undistributed income. Subtract line 4b from line 2b				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed				
d Subtract line 6c from line 6b. Taxable amount—see instructions				
e Undistributed income for 2010. Subtract line 4a from line 2a. Taxable amount—see instructions				
f Undistributed income for 2011 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2012				0.00
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions)				
8 Excess distributions carryover from 2006 not applied on line 5 or line 7 (see 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				747.30
c Excess from 2009				1833.93
d Excess from 2010				
e Excess from 2011				

Part XIV Private Operating Foundations (see 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 foundation is a private operating foundation described in section ☐ 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 $\frac{2}{3}$ 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 XV Supplementary Information (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year—see 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 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 Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year				
Children's Harbor 1 Our Children's Hwy Alexander City, AL 35010-8620		Public	Unrestricted	\$50 00
Renascence, Inc 215 Clayton St, Montgomery, AL 36104		Public	Unrestricted	\$50 00
Montgomery aka River Region United Way PO Box 6135, Montgomery, AL 36106		Public	Unrestricted	\$750.00
Huntingdon College 1500 East Fairview Avenue, Montgomery AL 36106		Public	Unrestricted	\$500 00
Stegall Seminary Scholarship Foundation P O Box 241661 Montgomery AL 36124		Public	Unrestricted	\$250 00
Special Olympics of Alabama 880 South Court Street, Montgomery, AL 36104		Public	Unrestricted	\$100.00
Boys & Girls Clubs of Montgomery Foundation PO Box 234, Montgomery AL 36101		Public	Unrestricted	\$100.00
Foundation for the History of Women in Medicine P O Box 543, Pottstown, PA		Public	Unrestricted	\$100 00
Cloverdale Playhouse 960 Cloverdale Road Montgomery AL 36106		Public	Unrestricted	\$500 00
Trinity Presbyterian School 1700 East Trinity Boulevard Montgomery AL 36106		Public	Unrestricted	\$50 00
From Attached Schedule				\$29,975
Total			3a	32,425 00
b Approved for future payment				
Total			3b	

Enter gross amounts unless otherwise indicated.

(See worksheet in line 13 instructions to verify calculations)

Line No.

Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes) (See instructions)

[illegible]

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

		Yes	No
1	Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?		
a	Transfers from the reporting foundation to a noncharitable exempt organization of:		
	(1) Cash	1a(1)	✓
	(2) Other assets	1a(2)	✓
b	Other transactions:		
	(1) Sales of assets to a noncharitable exempt organization	1b(1)	✓
	(2) Purchases of assets from a noncharitable exempt organization	1b(2)	✓
	(3) Rental of facilities, equipment, or other assets	1b(3)	✓
	(4) Reimbursement arrangements	1b(4)	✓
	(5) Loans or loan guarantees	1b(5)	✓
	(6) Performance of services or membership or fundraising solicitations	1b(6)	✓
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c	✓
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) is based on all information of which preparer has any knowledge.					May the IRS discuss this return with the preparer shown below (see instructions)? ☐ Yes ☐ No	
	5-15-2012 Signature of officer or trustee Date Title						
Paid Preparer Use Only	Print/Type preparer's name		Preparer's signature		Date	Check ☐ if self-employed	PTIN
	Firm's name ▶					Firm's EIN ▶	
	Firm's address ▶					Phone no	

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

OMB No 1545-0047

2011

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

Name of the organization

Crum Family Charitable Foundation

Employer identification number

72-1375432

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 foundationCheck 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 Crum Family Charitable Foundation	Employer identification number 72-1375432
--	---

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

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	William B. Crum 3355 Allendale Place Montgomery, AL 36111-1634	\$ 11,860.00	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II if there is a noncash contribution)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)

Employer identification number

72-1375432

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

[illegible]

Part I, Line 18 Taxes

Excise Tax on Investment Income On 2010 Return	\$ 50 45
Tax Refund	
Foreign Tax	\$ 84 39
Total	\$ 134 84

Part II, Line 10, Investments - Securities as of December 31, 2011

<u>Corporate Name</u>	<u>No of Shares</u>	<u>Book Value</u>	<u>Fair Market Value</u>	<u>Date Acquired</u>
Amgen	1000	\$ 56,995 00	\$ 64,210.00	12/04/2009
Apple Computer	50	\$ 3,589 25	\$ 20,250 00	12/14/2005
AT&T (T)	132	\$ 2,764 50	\$ 3,991 68	12/14/2005
Axcelis Technologies, Inc (ACLS)	353	\$ 4,461 92	\$ 469 49	02/11/2002
Bank of Montreal (BMO)	200	\$ 12,170 66	\$ 10,962 00	10/19/2010
Campbell Soup Company(CPB)	100	\$ 3,016 50	\$ 3,324 00	12/14/2005
CenturyLink, Inc (CTL)	411	\$ 13,347.94	\$ 15,289.20	06/12/2009
CBS Corp CL A	16	\$ 78 44	\$ 442 88	05/28/1998
The Coca-Cola Company (KO)	100	\$ 6,718.75	\$ 10,495 50	05/29/1997
	50	\$ 3,946.90		05/28/1998
Coherent, Inc (COHR)	400	\$ 11,500 00	\$ 20,908 00	02/11/2002
Cousins Properties (CUZ)	500	\$ 3,807 98	\$ 3,339 61	05/15/2009
	6	\$ 46 38		08/03/2009
	3	\$ 21 82		10/26/2009
	3	\$ 21 90		02/01/2010
	3	\$ 20 94		05/03/2010
	3	\$ 20 85		08/02/2010
	3	\$ 24 09		11/01/2010
CVS Caremark (CVS)	1000	\$ 30,945 00	\$ 40,780.00	12/04/2009
Cytec, Industries, Inc (CYT)	300	\$ 7,228 00	\$ 13,395 00	02/11/2002
Dell, Inc (DELL)	1,900	\$ 60,760 00	\$ 27,797 00	01/17/2006
Gardner Denver (GDI)	600	\$ 9,915.00	\$ 46,236 00	11/15/2004
General Electric (GE)	100	\$ 5,906.30	\$ 1,791 00	10/03/2000
Golden Enterprises (GLDC)	2400	\$ 6,288 00	\$ 8,688 00	11/15/2004
Goodyear Tire & Rubber co (GT)	800	\$ 11,860.00	\$ 11,336 00	02/16/2011
Heico (HEIA)	156	\$ 2,528 40	\$ 6,138 60	11/15/2004
Hershey Foods Corp (HSY)	200	\$ 5,106.30	\$ 12,356.00	10/20/1999
Hewlett Packard (HPQ)	200	\$ 10,425 00	\$ 5,152.00	05/29/1997
McKesson HBOC (MCK)	1,000	\$ 27,625.00	\$ 77,910 00	09/18/2000
Microsoft Corp (MSFT)	100	\$ 5,871 90	\$ 2,596.00	12/ /1999
Pfizer (PFE)	150	\$ 5,331.25	\$ 3,246.00	05/28/1998
Regions Financial (RF)	100	\$ 3,421.00	\$ 430.00	12/14/2005
Ruby Tuesday (RT)	596	\$ 6,928 00	\$ 4,112 40	04/28/2010
Southern Company	500	\$ 15,641 08	\$ 23,145 00	03/30/2009
United Health Group	2,400	\$ 66,420 00	\$ 121,632 00	12/04/2009
Viacom, Inc Class A (VIA)	16	\$ 803 56	\$ 853 28	05/28/1998
Wells Fargo (WFC)	20	\$ 2,804 76	\$ 551 20	12/13/2002
Walt Disney Holding Co (DIS)	150	\$ 5,668 75	\$ 5,625.00	05/28/1998
Zimmer Holdings, Inc	192	\$ 6,624 00	\$ 10,256.64	02/11/2002
Total		\$ 420,655 12	\$ 577,709 48	

Part XV Supplementary Information (Continued)

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

<u>Recipient Name and Address</u> a Paid During the Year	<u>Foundation Status of Recipient</u>	<u>Purpose of Grant or Contribution</u>	<u>Amount</u>
First United Methodist Church 2416 W Cloverdale Park Montgomery, AL 36106	Public	Annual Budget Tornado Relief Unrestricted	\$11,850 00
Crimson Tide Foundation P O Box 870343 Tuscaloosa, AL 35487	Public	Unrestricted	\$5,000 00
American Red Cross of Central Alabama 5015 Woods Crossing Montgomery, AL 36106	Public	Disaster Relief Japan & Alabama	\$2,250 00
The University of Alabama ATO Building Fund	Public	Capital Campaign	\$1,000 00
Governor's Tornado Relief Fund Neighbors Helping Neighbors, Inc c/o The Tuscaloosa News P O Box 20187 Tuscaloosa, AL 35402-0187	Public	Unrestricted Tornado Relief	\$1,000 00
Sweet Home Fund Alma Foundation c/o Bryant Bank 1550McFarland Blvd N Tuscaloosa, AL 35406	Public	Tornado Relief	\$1,000 00
The University of Alabama School of Law Farrah Law Alumni Society Office of Law Advancement Box 870382 Tuscaloosa, AL 35487-0382	Public	Unrestricted Tornado Relief	\$1,000 00
The University of Alabama UA Acts of Kindness Fund Box 870101 Tuscaloosa, AL 35487-0101	Public	Tornado Relief	\$500 00
The Salvation Army P O Box 4839 Montgomery, AL 36103-4839	Public	Charitable	\$ 500 00

<u>Recipient Name and Address</u>	<u>Foundation Status of Recipient</u>	<u>Purpose of Grant or Contribution</u>	<u>Amount</u>
Nick's Kids Fund Box 870323 Tuscaloosa, AL 35487	Public	Tornado Relief	\$500 00
Development Office The Montgomery Academy 3240 Vaughn Road Montgomery, AL 36106-2725	Public	Unrestricted Education	\$500.00
Capri Community Film Society 1045 E. Fairview Avenue Montgomery, AL 36106	Public	Building Fund	\$400 00
Montgomery Museum Fine Arts 1 Festival Drive Montgomery, AL 36117	Public	Unrestricted	\$300 00
Alabama Shakespeare Festival 1 Festival Drive Montgomery, AL 36117	Public	Unrestricted	\$250 00
Annual Fund Sweet Briar College P O Box 1057 Sweet Briar, VA 24595	Public	Unrestricted	\$250.00
Junior League of Montgomery 3570 Carter Hill Road Montgomery AL 36111	Public	Unrestricted Promote voluntarism	\$250 00
Junior Achievement of Birmingham 216 Aquarius Drive #319 Birmingham, AL 35209	Public	Unrestricted	\$200.00
Medical Outreach Ministries PO Box 250612, Montgomery, AL 36125	Public	Health Unrestricted	\$ 400 00
National Alumni Association The University of Alabama P.O. Box 861928 Tuscaloosa, AL 35486-9978	Public	Unrestricted	\$100.00
Family Sunshine Center P O Box 5160 Montgomery, AL 36103-5160	Public	Unrestricted	\$300 00
Landmarks Foundation of Montgomery 301 Columbus Street Montgomery, AL 36104	Public	Unrestricted Historic Preservation	\$100 00

<u>Recipient Name and Address</u>	<u>Foundation Status of Recipient</u>	<u>Purpose of Grant or Contribution</u>	<u>Amount</u>
Drexel University College of Medicine 3141 Chestnut Street, Main Building Suite 310 Pennsylvania, PA 19104	Public	Unrestricted	\$200.00
Montgomery County Historical Society PO Box 1829 Montgomery, AL 36102	Public	Unrestricted	\$200 00
Montgomery Area Food Bank 521 Trade Center Street Montgomery, AL 36108	Public	Unrestricted Charity	\$100 00
Citizens Against Government Waste 1301 Pennsylvania Avenue NW Suite 1075 Washington, DC 20004	Public	Unrestricted	\$200 00
The Montgomery Symphony Orchestra P O Box 1864 Montgomery, AL 36102-1864	Public	Unrestricted	\$ 150 00
Clefworks P O Box 242307 Montgomery, AL 36124-2307	Public	Unrestricted	\$100 00
Calvin Alumni Association Calvin College 3201 Burton St SE Grand Rapids, MI 49502-4632	Public	Unrestricted	\$150 00
St John's Episcopal Church 113 Madison Avenue Montgomery, AL 36104	Public	Religious	\$50.00
Alabama Law Foundation PO Box 4129 Montgomery, AL 36101	Public	Unrestricted	\$ 50 00
Cancer Wellness Foundation 4145 Carmichael Road Montgomery, AL 36106	Public	Unrestricted	\$ 50 00
Special Olympics of Alabama 880 South Court Street Montgomery, AL 36104	Public	Unrestricted	\$100 00
Big Oak Ranch Post Office Box 507 Springville, AL 35146	Public	Unrestricted	\$50 00

<u>Recipient Name and Address</u>	<u>Foundation Status of Recipient</u>	<u>Purpose of Grant or Contribution</u>	<u>Amount</u>
Mayo Clinic Department of Development 4500 San Pablo Road Jacksonville, FL 32224	Public	Lung Transplant Unit	\$50 00
AIDB Foundation Attn: Lynne Hanner P O Box 698 Talladega, AL 35161	Public	Unrestricted Alabama Institute Def & Blind	\$50 00
Montgomery YMCA William C Chandler Endowment Foundation P O Box 2336 Montgomery, AL 36104	Public	Endowment Fund	\$50 00
Hospice of Montgomery 1111 Holloway Park Montgomery, AL 36117	Public	Unrestricted	\$50 00
Alabama Law Foundation Post Office Box 4129 Montgomery, AL 36101-4129	Public	Unrestricted	\$50 00
UAB Gift Records A B 1230 1530 3 rd Avenue, South Birmingham, AL 35294-0112	Public	Lisa Chambless Scholarship Fund	\$50 00
Little Sandy Ridge Presbyterian Church P O. Box 395 Ft Deposit, AL 36032	Public	Unrestricted	\$50 00
Covenant Presbyterian Church 5 Arden Road Montgomery, AL 36109	Public	Unrestricted	\$ 50 00
Lowndesboro Presbyterian Church P.O Box 72 Lowndesboro, AL 36752	Public	Unrestricted	\$50 00
Scieroderma Research Foundation 220 Montgomery Street Suite 1411 San Francisco, CA 94104	Public	Unrestricted	\$50 00
TOTAL			<u>\$29,975 00</u>