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

2011

For calendar year 2011 or tax year beginning 03-01 , 2011, and ending 02-29 , 2012

Name of foundation: CLARENCE H & ANNA E LUTZ FOUNDATION

A Employer identification number: 57-0940342

Number and street (or P O box number if mail is not delivered to street address): 1373 WEST END RD

Room/suite:

B Telephone number (see instructions): (803)581-3743

City or town, state, and ZIP code: CHESTER, SC 29706

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: [X] 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) ▶ $ 5,517,075

J Accounting method [X] 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))

	Line	Description	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1	Contributions, gifts, grants, etc , received (attach schedule)				
	2	Check ▶ ☐ if the foundation is not required to attach Sch B				
	3	Interest on savings and temporary cash investments	206	206		
	4	Dividends and interest from securities	254,906	254,906		
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10	18,560			
	b	Gross sales price for all assets on line 6a 138,317				
	7	Capital gain net income (from Part IV, line 2)		18,560		
	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	273,672	273,672		
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc	27,000	27,000		
	14	Other employee salaries and wages				
	15	Pension plans, employee benefits				
	16a	Legal fees (attach schedule) STM107	17,500	17,500		
	b	Accounting fees (attach schedule)				
	c	Other professional fees (attach schedule)				
	17	Interest				
	18	Taxes (attach schedule) (see instructions) STM110	2,480	2,480		
	19	Depreciation (attach schedule) and depletion				
	20	Occupancy				
	21	Travel, conferences, and meetings	81	81		
	22	Printing and publications	200	200		
	23	Other expenses (attach schedule) STM103	4,136	4,136		
	24	**Total operating and administrative expenses.** Add lines 13 through 23	51,397	51,397		0
	25	Contributions, gifts, grants paid	240,000			240,000
	26	**Total expenses and disbursements.** Add lines 24 and 25	291,397	51,397		240,000
	27	Subtract line 26 from line 12				
	a	**Excess of revenue over expenses and disbursements**	(17,725)			
	b	**Net investment income** (if negative, enter -0-)		222,275		
	c	**Adjusted net income** (if negative, enter -0-)			0	

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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 (a) Book Value	End of year (b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing	224,518	71,891	71,891
	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			
	10a Investments - U S and state government obligations (attach schedule) STM136	35,199	30,199	31,038
	b Investments - corporate stock (attach schedule) STM137	3,496,667	3,692,699	3,974,972
	c Investments - corporate bonds (attach schedule) STM138	574,249	582,780	601,142
	11 Investments - land, buildings, and equipment basis ▶			
	Less accumulated depreciation (attach schedule) ▶			
	12 Investments - mortgage loans			
	13 Investments - other (attach schedule) STM118	948,527	983,799	834,102
	14 Land, buildings, and equipment basis ▶			
	Less accumulated depreciation (attach schedule) ▶			
	15 Other assets (describe ▶ STM120)	3,930	3,930	3,930
	16 Total assets (to be completed by all filers - see the instructions Also, see page 1, item I)	5,283,090	5,365,298	5,517,075
Liabilities	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable (attach schedule)			
	22 Other liabilities (describe ▶)			
	23 Total liabilities (add lines 17 through 22)	0	0	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ ☐ and complete lines 24 through 26 and lines 30 and 31.			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ ☒ and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds			
	28 Paid-in or capital surplus, or land, bldg , and equipment fund			
	29 Retained earnings, accumulated income, endowment, or other funds	5,283,090	5,365,298	
	30 Total net assets or fund balances (see instructions)	5,283,090	5,365,298	
	31 Total liabilities and net assets/fund balances (see instructions)	5,283,090	5,365,298	

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	5,283,090
2	Enter amount from Part I, line 27a	2	(17,725)
3	Other increases not included in line 2 (itemize) ▶	3	
4	Add lines 1, 2, and 3	4	5,265,365
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	5,265,365

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 (yr , mo , day)	(d) Date sold (yr , mo , day)
1a	See STM-134			
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	138,317		119,757	18,560
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				18,560
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 — 18,560

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

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☒ No

If "Yes," the foundation does not qualify under section 4940(e) Do not complete this part

1 Enter the appropriate amount in each column for each year, see the instructions before making any entries

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2010	193,700	5,156,517	0.037564
2009	286,784	4,402,658	0.065139
2008	315,000	4,986,116	0.063175
2007	315,931	6,249,690	0.050551
2006	291,621	6,468,675	0.045082

2	**Total** of line 1, column (d)	2	0.261512
3	Average distribution ratio for the 5-year base period - divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	0.052302
4	Enter the net value of noncharitable-use assets for 2011 from Part X, line 5	4	5,572,362
5	Multiply line 4 by line 3	5	291,446
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	2,223
7	Add lines 5 and 6	7	293,669
8	Enter qualifying distributions from Part XII, line 4	8	240,000

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate See the Part VI instructions

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

1a	Exempt operating foundations described in section 4940(d)(2), check here ▶ ☐ and enter "N/A" on line 1 Date of ruling or determination letter. ______ (attach copy of letter if necessary-see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ▶ ☐ and enter 1% of Part I, line 27b	1	4,446
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col (b)		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	2	0
3	Add lines 1 and 2	3	4,446
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	4	0
5	**Tax based on investment income.** Subtract line 4 from line 3 If zero or less, enter -0-	5	4,446
6	Credits/Payments		
a	2011 estimated tax payments and 2010 overpayment credited to 2011 — 6a: 4,580		
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	4,580
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	134
11	Enter the amount of line 10 to be. **Credited to 2012 estimated tax** ▶ **Refunded** ▶	11	134

Part VII-A Statements Regarding Activities

			Yes	No
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a		X
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)?	1b		X
	If the answer is "Yes" to **1a** or **1b,** attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.			
c	Did the foundation file **Form 1120-POL** for this year?	1c		X
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? If "Yes," attach a detailed description of the activities	2		X
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes	3		X
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		X
b	If "Yes," has it filed a tax return on **Form 990-T** for this year?	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T	5		X
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	X	
7	Did the foundation have at least $5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), and Part XV	7	X	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ SC			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	8b	X	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2011 or the taxable year beginning in 2011 (see instructions for Part XIV)? If "Yes," complete Part XIV	9		X
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10		X

Part VII-A Statements Regarding Activities (continued)

			Yes	No
11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation 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	X	

Website address ▶ HTTP://WWW.LUTZFOUNDATION.ORG

14 The books are in care of ▶ DEWEY GUYTON Telephone no ▶ 803-581-3743

Located at ▶ 1373 WEST END RD CHESTER, SC ZIP+4 ▶ 29706

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 |

			Yes	No
16	At any time during calendar year 2011, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?	16		X
	See the instructions for exceptions and filing requirements for Form TD F 90-22.1. If "Yes," enter the name of the foreign country ▶			

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

	File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			Yes	No
1a	During the year did the foundation (either directly or indirectly):				
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	☐ 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)?		1b		
	Organizations relying on a current notice regarding disaster assistance check here ▶ ☐				
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 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 ▶ ____, ____, ____, ____				
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 ▶ ____, ____, ____, ____				
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		X
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2011?		4b		X

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** No: X

If "Yes" to 6b, file Form 8870

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☒ No

b If yes, did the foundation receive any proceeds or have any net income attributable to the transaction? **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 See 990 OFOV	(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
DEWEY GUYTON 1373 WEST END RD CHESTER, SC 29706	PRESIDENT AND B 12	0	0	0
JOAN L GUYTON 1373 WEST END RD CHESTER, SC 29706	VP TREASURER 24	12,000	0	0
MARY S JOLLY 1373 WEST END RD CHESTER, SC 29706	VP TECHNOLOGY 10	5,000	0	0
SUSAN STEPHENSON 1373 WEST END RD CHESTER, SC 29706	VP EXTENDED REL 10	5,000	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
NONE				

Total number of other employees paid over $50,000 ▶

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

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

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

Part IX-A Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc	Expenses
1	
2	
3	
4	

Part IX-B Summary of Program-Related Investments (see 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	5,575,002
b	Average of monthly cash balances	1b	82,218
c	Fair market value of all other assets (see instructions)	1c	0
d	**Total** (add lines 1a, b, and c)	1d	5,657,220
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	0
3	Subtract line 2 from line 1d	3	5,657,220
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	84,858
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3. Enter here and on Part V, line 4	5	5,572,362
6	**Minimum investment return.** Enter 5% of line 5	6	278,618

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	278,618
2a	Tax on investment income for 2011 from Part VI, line 5	2a	4,446		
b	Income tax for 2011. (This does not include the tax from Part VI)	2b			
c	Add lines 2a and 2b			2c	4,446
3	Distributable amount before adjustments Subtract line 2c from line 1			3	274,172
4	Recoveries of amounts treated as qualifying distributions			4	
5	Add lines 3 and 4			5	274,172
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	274,172

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	240,000
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	240,000
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see instructions)	5	
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	240,000

Note. The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years

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				274,172
2 Undistributed income, if any, as of the end of 2011:				
a Enter amount for 2010 only			231,891	
b Total for prior years 2007, 2008, 2009		774,129		
3 Excess distributions carryover, if any, to 2011:				
a From 2006				
b From 2007				
c From 2008				
d From 2009				
e From 2010				
f **Total** of lines 3a through e				
4 Qualifying distributions for 2011 from Part XII, line 4 ▶ $ 240,000				
a Applied to 2010, but not more than line 2a			231,891	
b Applied to undistributed income of prior years (Election required - see instructions)				
c Treated as distributions out of corpus (Election required - see instructions)				
d Applied to 2011 distributable amount				8,109
e Remaining amount distributed out of corpus				
5 Excess distributions carryover applied to 2011 (If an amount appears in column (d), the same amount must be shown in column (a).)				
6 **Enter the net total of each column as indicated below:**				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5				
b Prior years' undistributed income Subtract line 4b from line 2b		774,129		
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		774,129		
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				266,063
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				
c Excess from 2009				
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)

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

Part 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))*

NONE,

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

NONE,

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

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

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

990APP

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				
AMERICAN RED CROSS P O BOX 353 CHESTER SC 29706		PUBLIC	FAMILY EMERG PROJ	18,500
ARMENIA UMC 1980 ROBERTS RD CHESTER SC 29706		PUBLIC	BOY SCOUT PROJECT	10,000
ARTS COUNCIL OF CHESTER COUNTY 123 MAIN ST CHESTER SC 29706		PUBLIC	GALLERY IMPROVEME	2,000
CHESTER CO COMM ALCOHOL DRUG 130 HUDSON ST CHESTER SC 29706		PUBLIC	FACILITY IMPROVEM	16,000
CHESTER CO FCA 1636 ASHFORD FERRY RD BLAIR SC 29015		PUBLIC	STUDENT BIBLES & CAMP SCHOLARSHIPS	8,000
CHESTER CO SCHOOL DIST CAREER 109 HINTON ST CHESTER SC 29706		PUBLIC	CAREER CENTER PROJECT	5,500
CHESTER CO SCHOOL DIST 109 HINTON ST CHESTER SC 29706		PUBLIC	COURTYARD AT HIGH SCHOOL	10,000
CHESTER COUNTY SCHOOL DIST 109 HINTON ST CHESTER SC 29706		PUBLIC	LEWISVILLE HIGH DEFIBRILATOR PROJECT	4,500
Total ▶ 3a				
b Approved for future payment				
Total ▶ 3b				

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				
CHILDRENS HOME OF LANCASTER P O BOX 416 LANCASTER SC 29721		PUBLIC	FOOD CLOTHING	13,000
CLEMSON UNIVERSITY 300 BRACKETT HALL CLEMSON SC 29634		PUBLIC	CHESTER COUNTY 4-H PROGRAM	6,000
CUMBERLAND COLLEGE MTN OUTREAC 6191 COLLEGE STATION DR WILLIAMSBURG KY 40769		PUBLIC	MOUNTAIN OUTREACH PROGRAM	20,000
HAWTHORNE CHRISTIAN ACADEMY P O BOX 1656 CHESTER SC 29706		PUBLIC	REPLACE CARPET	12,000
GOOD SAMARITAN MEDICAL CLINIC 139 CHURCH ST CHESTER SC 29706		PUBLIC	FILING UNITS	2,500
HARVEST HOPE FOOD BANK 2220 SHOP RD COLUMBIA SC 29201		PUBLIC	BACKPACK FEEDING PROGRAM	6,000
HORIZONS AFTERSCHOOL PROGRAM 729 VILLAGE DR CHESTER SC 29706		PUBLIC	PROMETHEAN INSTRU BOARD	13,500
LEWIS VOLUNTEER FIRE DEPT 1652 WOODS RD CHESTER SC 29706		PUBLIC	PURCHASE SERVICE TRUCK	12,000
Total . . . . ▶ 3a				
b Approved for future payment				
Total . . . . ▶ 3b				

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				
RICHARD WINN ACADEMY P O BOX 390 WINNSBORO SC 29180		PUBLIC	SMART BOARDS & ACCESSORIES	16,000
ST PAUL'S PRESBYTERIAN CHURCH 768 PINCKNEY RD CHESTER SC 29706		PUBLIC	PLAYGROUND EQUIP MAINTENANCE	2,500
YORK TECHNICAL COLLEGE FOUNDAT 452 SOUTH ANDERSON RD ROCK HILL SC 29730		PUBLIC	CHESTER CTR MEDICAL PROGRAM EXPANSION	30,000
UPPER PALMETTO YMCA 323 OAKLAND AVE ROCK HILL SC 29730		PUBLIC	RENOVATION PROJECT VI	17,500
CHESTER CO HISTORICAL SOCIETY 121A GADSDEN ST CHESTER SC 29706		PUBLIC	PRESERVATION EQUIPMENT	5,000
GIRL SCOUTS MOUNTAINS TO MIDLA 5 INDEPENDENCE POINTE STE 120 GREENVILLE SC 29615		PUBLIC	CHESTER CO GIRL SCOUTS LEADERSHIP PROJECT	7,000
THE MESSENGER CENTER P O BOX 2 ROCK HILL SC 29731		PUBLIC	EQUIPMENT	2,500
Total . . . . . . ▶ 3a				240,000
b Approved for future payment				
Total . . . . . . ▶ 3b				

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue:					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities					254,906
5 Net rental income or (loss) from real estate					
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal property					
7 Other investment income					
8 Gain or (loss) from sales of assets other than inventory					
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue a					
b					
c					
d					
e					
12 Subtotal Add columns (b), (d), and (e)					254,906

13 **Total.** Add line 12, columns (b), (d), and (e) . . . 13 254,906

(See worksheet in line 13 instructions to verify calculations)

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

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes) (See instructions)
	SEE ATTACHMENT NO. 11

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

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

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

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

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 & statements, & to the best of my knowledge & belief, it is true, correct, & complete Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge

X Dewey L Guyton X 6-26-12 X President

Signature of officer or trustee — Date — Title

May the IRS discuss this return with the preparer shown below (see inst)? ☒ Yes ☐ No

Paid Preparer Use Only

Print/Type preparer's name	Preparer's signature	Date	Check ☒ if self-employed	PTIN
Robert H Breakfield	Robert H Breakfield	06-22-2012	X	P00148771
Firm's name ▶ Robert H Breakfield			Firm's EIN ▶ 57-22-3855	
Firm's address ▶ P O Box 36061 ROCK HILL SC 29732			Phone no 803-329-4920	

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

Schedule of Contributors

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

OMB No 1545-0047

2011

Name of the organization	**Employer identification number**
CLARENCE H & ANNA E LUTZ FOUNDATION	57-0940342

Organization type (check one)

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

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

General Rule

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

Special Rules

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

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

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

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

Current Officers, Directors, Trustees, and Key Employees

1 List all officers, directors, trustees, and key employees for the year even if they were not compensated.

(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 deferred compensation	(e) Expense account, other allowances
SHEILA B BISHOP 1373 WEST END RD CHESTER, SC 29706	RECORDING SECRE 20	5,000	0	0

Name(s) as shown on return: CLARENCE H & ANNA E LUTZ FOUNDATION

FEIN: 57-0940342

FORM 990PF, PART II, LINE 13
INVESTMENTS: OTHER SCHEDULE

STATEMENT #118

CATEGORY	BOOK VALUE (BOY)	BOOK VALUE (EOY)	FMV (EOY)
MUTUAL FUNDS	948,527	983,799	834,102
TOTAL	948,527	983,799	834,102

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FORM 990PF, PART II, LINE 15
OTHER ASSETS SCHEDULE

STATEMENT #120

DESCRIPTION	BOY BOOK	EOY BOOK	FMV
COMPUTERS	3,930	3,930	3,930
TOTAL	3,930	3,930	3,930

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FORM 990PF, PART II, LINE 10(A)
INVESTMENTS: U.S. GOVERNMENT OBLIGATION SCHEDULE

STATEMENT #136

CATEGORY	BOOK VALUE (BOY)	BOOK VALUE (EOY)	FMV (EOY)
US GOVERNMENT OBLIGATIONS	30,199	30,199	31,038
TOTALS	30,199	30,199	31,038

INVESTMENTS: STATE AND LOCAL GOVERNMENT OBLIGATION SCHEDULE

CATEGORY	BOOK VALUE (BOY)	BOOK VALUE (EOY)	FMV (EOY)
STATE & MUNICIPAL GOVT OBLIGAT	5,000		
TOTALS	5,000		

Federal Supporting Statements

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Name(s) as shown on return: CLARENCE H & ANNA E LUTZ FOUNDATION

FEIN: 57-0940342

FORM 990PF, PART II, LINE 10(B)

INVESTMENTS: CORPORATE STOCK SCHEDULE

STATEMENT #137

CATEGORY	BOY	BOOK VALUE	EOY FMV
2500 AT&T INC COM	65,407	65,407	76,475
3000 RBS CAP (WAS ABN AMRO)	75,763	76,903	41,010
4000 AEGON NV PERP CAP SECS	99,676	105,218	90,320
800 AEGON NV PERP CAP SECS	18,761	21,044	19,832
1000 ABBOTT LABS COM	40,482	52,910	56,610
600 BANK OF AMERICA	29,310	29,334	4,782
500 REALTY INCOME CORP		12,500	12,815
1000 CSX		25,659	21,010
1000 BB&T	21,964	22,614	29,250
600 BAC CAP TR III GTD CAP SEC	15,000	16,050	14,820
1000 BRISTOL MYERS SQUIBB CO	26,249	27,579	32,170
3840 FRONTIER COMM CORP	39,226	42,106	17,626
500 FAIRPOINT COMMUNICATIONS C	3,587		
5000 DUKE ENERGY COM	92,559	97,509	104,600
1800 DU PONT E I DE NEMOURS	71,550	74,503	91,530
1500 FEDERAL RLTY INVT	34,878	38,958	143,025
1800 FEDERAL NATL MTG ASSN PFD	62,153	62,153	2,826
800 GALLAGHER ARTHUR J & CO	24,487		
2700 GALLAGHER ARTHUR J & CO	82,643	87,263	92,124
1500 GENERAL ELECTRIC	52,725	42,263	28,575
1300 GENERAL ELECTRIC		36,628	24,765
1500 JP MORGAN CHASE & CO	45,852	47,351	58,860
4000 JP MORGAN CHASE CAP XI	98,571	104,627	101,760
400 PNC FINL SVCS GROUP INC	16,244	33,049	23,808
142 MOTOROLA	13,758	25,931	7,072
125 MOTOROLA	12,110		4,963
2000 OLIN CORP NEW COM PAR $1	44,063	45,663	42,060
1000 CONOCOPHILLIPS	17,266	19,906	76,550
1000 PIEDMONT NATURAL GAS	33,188	34,348	32,400
2600 PFIZER	96,585	98,145	54,925
2500 SPECTRA	66,724	69,374	78,450
4500 PROGRESS ENERGY	171,650	181,186	238,860
4594 REGIONS FINL CORP NEW COM	150,533	150,717	26,461
1100 SAUL CTRS INC COM	21,262		
1900 SAUL CTRS INC COM	36,726	41,596	71,934
1000 SAUL CTRS INC COM	22,107	21,893	25,750
3500 SCANA CORP NEW	95,947	102,737	157,500
5000 SOUTHERN CO	113,269	122,631	220,950
500 TECO		16,878	8,975
2000 TECO	57,994	67,513	35,900
300 THORNBURG MTGE INC COM	8,867	8,867	1
3242 UDR INC COMM	51,970	54,564	81,115
3500 VERIZON COMMUNICATIONS	114,124	121,037	133,385
550 VIRGINIA ELEC & PWR $4.20	31,200	33,510	53,230
60 VIRGINIA ELEC & PWR $4.80	3,264	3,552	5,940

Name(s) as shown on return: CLARENCE H & ANNA E LUTZ FOUNDATION

FEIN: 57-0940342

FORM 990PF, PART II, LINE 10(B) STATEMENT #137

INVESTMENTS: CORPORATE STOCK SCHEDULE

CATEGORY	BOY	BOOK VALUE	EOY FMV
200 VIRGINIA ELEC & PWR $5	12,894	13,894	22,200
157 VIRGINIA ELEC & PWR $4.14	9,070	9,704	13,674
1000 WGL HOLDINGS INC COM	25,063	26,613	40,830
1449 WASH GAS LT PFD $4.25	87,346	93,504	125,339
1432 WASH GAS LT CO PFD $4.80	94,434	101,308	138,904
774 WASH GAS LT 5 PR	51,708	55,578	77,376
12837 WASHINGTON REAL ESTATE I	252,452	274,724	380,232
1500 XCEL ENERGY INC	31,166	35,433	39,735
1500 XCEL ENERGY INC		35,433	39,735
3000 WELLS FARGO PFD SEC	71,595	65,294	76,590
2500 AMERICAN ELECT POWER	109,290	113,915	4,025
1500 HOSPITALITY PP TRUST	70,483	73,183	37,095
2000 BANK OF AMERICA	13,800	16,925	45,750
2000 SYSCO CORP	59,110	61,211	58,840
1000 COMCAST CORP	25,111		
700 COCA COLA	31,891	33,207	48,902
1500 ROYAL BANK OF SCOTLAND	36,475	36,475	23,745
4000 WINDSTREAM CORP	56,628	58,540	48,320
1000 WINDSTREAM CORP		14,635	12,080
3000 KRAFT FOODS	104,678	108,158	114,210
3600 GENERAL MILLS INC	94,464	94,464	137,916
1500 PACKAGING CORP OF AMERICA	39,657		
1500 PACKAGING CORP OF AMERICA	39,658	28,825	44,460
TOTALS	3,496,667	3,692,699	3,974,972

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Name(s) as shown on return: CLARENCE H & ANNA E LUTZ FOUNDATION

FEIN: 57-0940342

FORM 990PF, PART II, LINE 10(C)
INVESTMENTS: CORPORATE BOND SCHEDULE

STATEMENT #138

CATEGORY	BOY	BOOK VALUE	EOY FMV
$50000 BORDEN INC 7.85%	49,303	50,000	39,000
$65000 CBS INC 7.125%	60,537	65,000	77,230
$30000 GENERAL ELECT CAP CORP	30,310	32,780	33,846
$20000 FORD MTR DEL DEB 6.5%	19,890	20,000	22,050
$20000 FORD MTR DEL GLOBAL LAN	19,803	20,000	25,675
$20000 GENL MTRS ACCEP 6.0%	20,000	20,000	18,376
$15000 GENL MTRS ACCEP 6.875%	15,005	15,000	15,238
$38000 GENL MTRS ACCEP 7.0%	38,000	38,000	37,053
$25000 GENL MTRS ACCEP 5.9%	25,000	25,000	23,612
$30000 PRUDENTIAL FINL INC	30,000	30,000	29,910
$25000 AVON PRODS INC	24,985	25,000	28,246
$30000 LEHMAN BROS HLDGS INC	30,000	30,000	8,138
$25000 BELLSOUTH CORP GLOBAL	24,985	25,000	30,700
$20000 GENERAL ELEC CAP CORP M	20,000	20,000	20,027
$40000 SBC COMMUNICATIONS INC	41,574	40,000	47,806
$20000 PHILIPS ELECTRS 7.25%	20,003	20,000	21,750
$30000 WAL MART STORES 7.25%	28,559	30,000	32,477
$15000 WESTINGHOUSE 8.625%	14,703	15,000	15,434
$47000 WESTINGHOUSE 7.875%	46,612	47,000	59,568
$15000 GENERAL ELECT CAP CORP	14,980	15,000	15,006
TOTALS	574,249	582,780	601,142

Federal Supporting Statements

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Name(s) as shown on return: CLARENCE H & ANNA E LUTZ FOUNDATION

Your Social Security Number: 57-0940342

FORM 990PF, PART I, LINE 23 - OTHER EXPENSES SCHEDULE

STATEMENT #103

DESCRIPTION	REVENUE AND EXPENSES	NET INVESTMENT	ADJUSTED NET INCOME	CHARITABLE PURPOSE
SAFETY DEPOSIT BOX RENTAL	0	0	0	0
OFFICE SUPPLY AND EXPENSE	1,292	1,292	0	0
DUES AND MEMBERSHIPS	695	695	0	0
DIRECTORS INSURANCE	750	750	0	0
PHONE AND INTERNET EXPENSE	1,078	1,078	0	0
STAFF EXPENSE	0	0	0	0
POSTAGE	221	221	0	0
MISCELLANEOUS	100	100	0	0
TOTALS	4,136	4,136	0	0

PG 01

FORM 990PF, PART I, LINE 16(A) - LEGAL FEES SCHEDULE

STATEMENT #107

DESCRIPTION	REVENUE AND EXPENSES	NET INVESTMENT	ADJUSTED NET INCOME	CHARITABLE PURPOSE
ROBERT H BREAKFIELD	17,500	17,500	0	0
TOTALS	17,500	17,500	0	0

Federal Supporting Statements

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Name(s) as shown on return: CLARENCE H & ANNA E LUTZ FOUNDATION

Your Social Security Number: 57-0940342

FORM 990PF, PART I, LINE 18 - TAXES SCHEDULE

STATEMENT #110

DESCRIPTION	REVENUE AND EXPENSES	NET INVESTMENT	ADJUSTED NET INCOME	CHARITABLE PURPOSE
FEDERAL INCOME TAX	2,480	2,480	0	0
TOTALS	2,480	2,480	0	0

PG 01

FORM 990-PF, PART IV, CAPITAL GAINS AND LOSSES INFORMATION (OVERFLOW)

STATEMENT #134

DESCRIPTION	P-PURCHASE D-DONATION	DATE ACQUIRED	DATE SOLD	SALES PRICE	DEPRECIATION	COST OR OTHER BASIS	GAIN OR LOSS	GAINS MINUS EXCESS OR LOSSES
1500SH PACKAGING CORP AMER	P	VARIOUS	2011-05-12	42,353		39,657	2,696	2,696
700SH SAUL CENTERS INC	P	VARIOUS	2011-06-29	26,255		14,017	12,238	12,238
400SH SAUL CENTERS INC	P	VARIOUS	2011-10-24	13,604		8,009	5,595	5,595
500SH FAIRPOINT	P	2008-06-25	2011-11-22			3,587	(3,587)	(3,587)
800SH ARTHUR GALLAGHER	P	VARIOUS	2012-01-24	26,105		24,487	1,618	1,618
1000SH COMCAST	P	VARIOUS	2011-11-25	25,000		25,000		
5000SH SPARTANBURG CNTY SC HOSP	P	1993-10-09	2011-10-03	5,000		5,000		
TOTAL				138,317		119,757	18,560	18,560

Federal Supporting Statements

Name(s) as shown on return: CLARENCE H & ANNA E LUTZ FOUNDATION

Your Social Security Number: 57-0940342

FORM 990PF, PART I, LINE 25 - SUBSIDIARY SCHEDULE

SUBSIDIARY STATEMENT

DESCRIPTION	REVENUE AND EXPENSES	NET INVESTMENT	ADJUSTED NET INCOME	CHARITABLE PURPOSE
VARIOUS CHARITIES	0	0	0	0
TOTALS	0	0	0	0

	Federal Supporting Statements	**2011** PG 01
Name(s) as shown on return		Your Social Security Number
CLARENCE H & ANNA E LUTZ FOUNDATION		57-0940342

FORM 990PF, PART XV, LINE 2 990APP

APPLICATION SUBMISSION INFORMATION

GRANT PROGRAM
CLARENCE E & ANNA LU

APPLICANT NAME
JOAN GUYTON

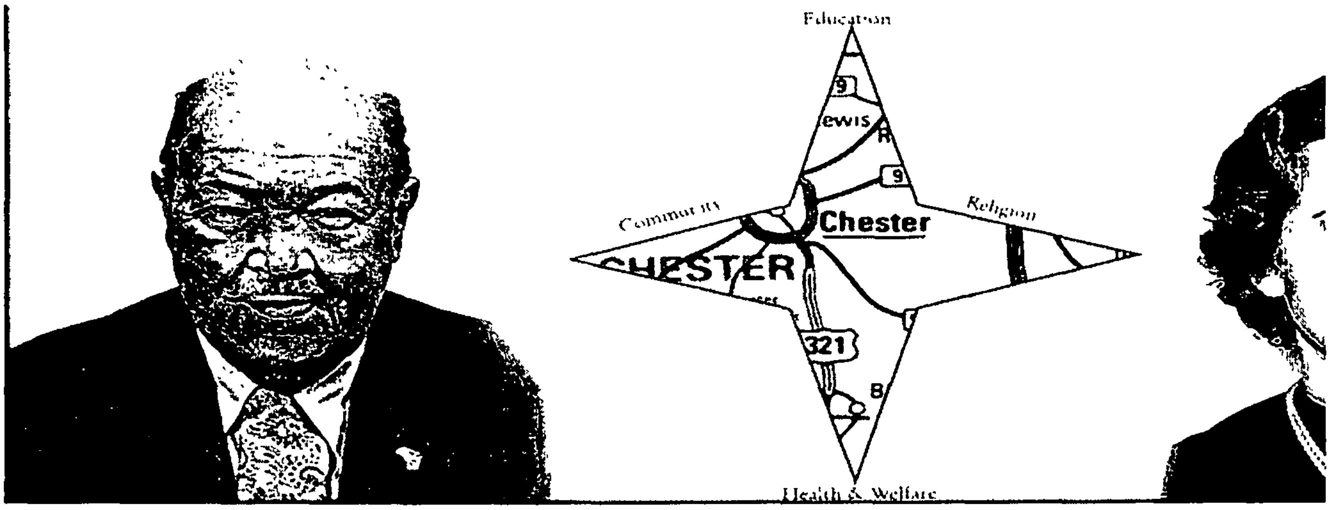
ADDRESS
1373 WEST END RD CHESTER SC 29706

TELEPHONE
803-581-3743

FORM & CONTENT
SEE ATTACHED GRANT GUIDELINES AND APPLICATIONS

SUBMISSION DEADLINE
NOV 30TH 5 PM

RESTRICTIONS ON AWARD
NO



The Clarence H. and Anna Elizabeth Lutz Foundation

Mission Statement

The Lutz Foundation was established in 1995 after the deaths of Clarence H. and Anna E. Lutz, who spent their last years living in Chester. Their purpose in endowing this foundation was to help fund various religious and community needs, as well as educational, health and welfare programs. In endowing these grants, our mission is to enrich as many lives as possible with the funds available each year. We hope to make our community a better place to live, raise a family, and retire, as a result of these endeavors.

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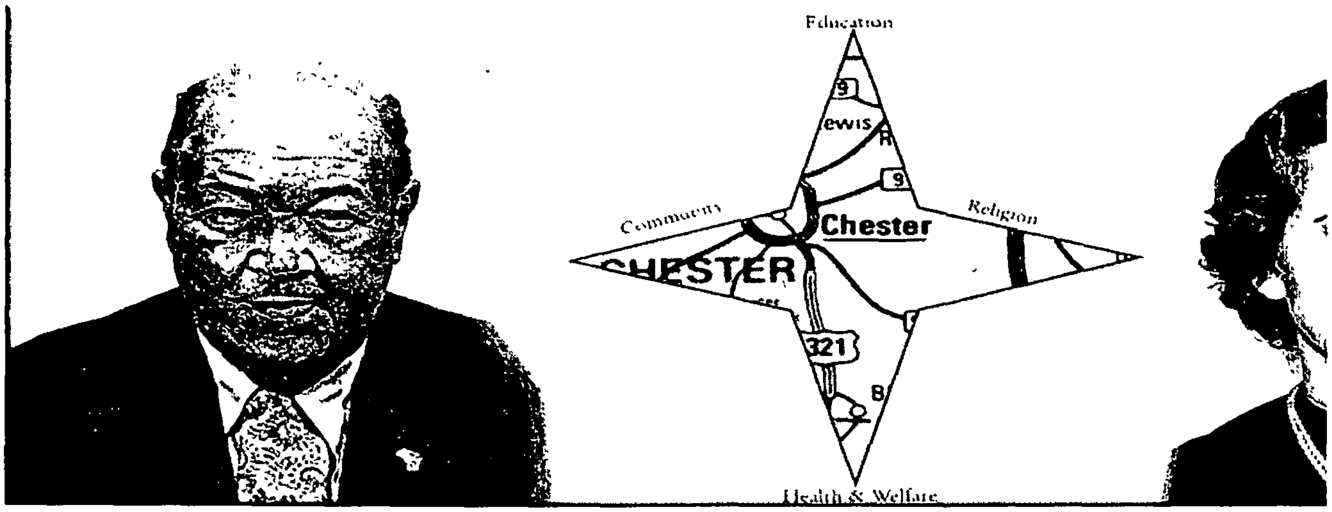

Mission Statement

The Lutz Foundation was established in 1995 after the deaths of Clarence H. and Anna E. Lutz, who spent their last years living in Chester. Their purpose in endowing this foundation was to help fund various religious and community needs, as well as educational, health and welfare programs. In endowing these grants, our mission is to enrich as many lives as possible with the funds available each year. We hope to make our community a better place to live, raise a family, and retire, as a result of these endeavors.

Board of Directors

Dewey G. Guyton President

Joan L. Guyton Vice-President & Treasurer

Mary S. Jolley Secretary

Susan L. Stephenson Public Relations

Robert H. Breakfield Legal Counsel

Eva Marie Staudt Investment Representative

Contact Information

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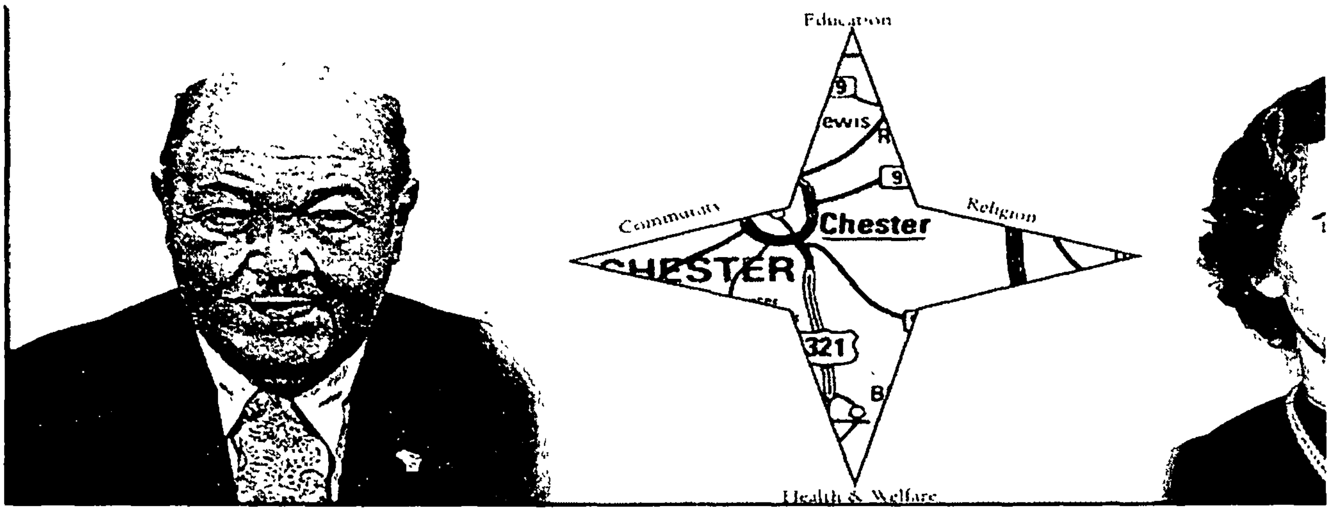
	Clarence H. Anna E. Lutz Foundation 1373 West End Hwy Chester, SC 29706 Foundation Phone: 803-385-5357 Residence Phone: 803-581-3743 Website: http://www.lutzfoundation.org *Email Address:* Joan Guyton: JGuyton@LutzFoundation.org Mary Jolley: MJolley@LutzFoundation.org



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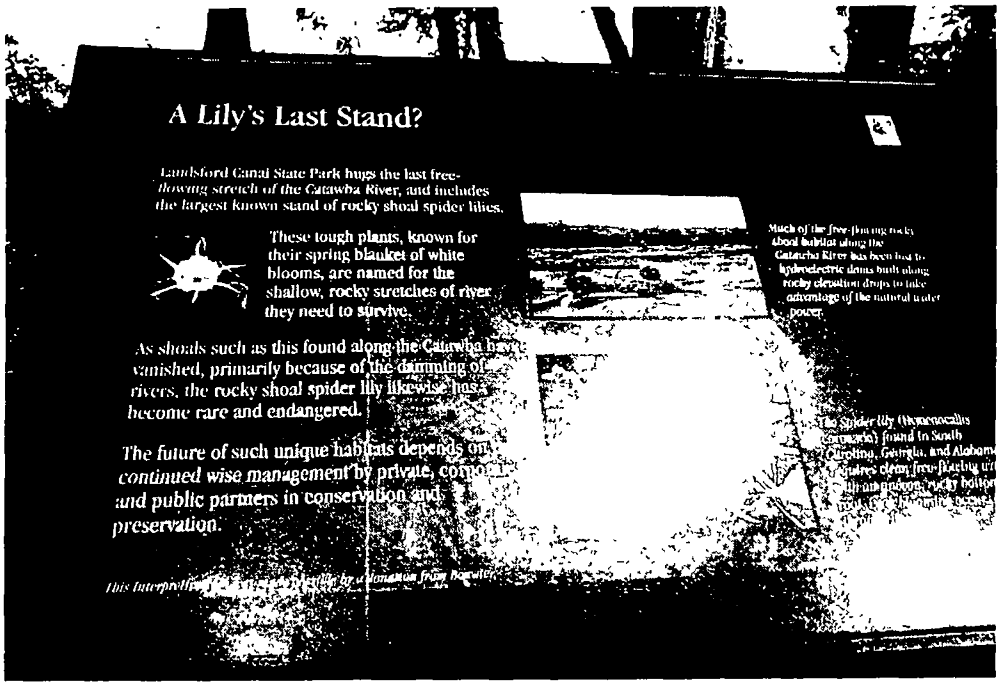
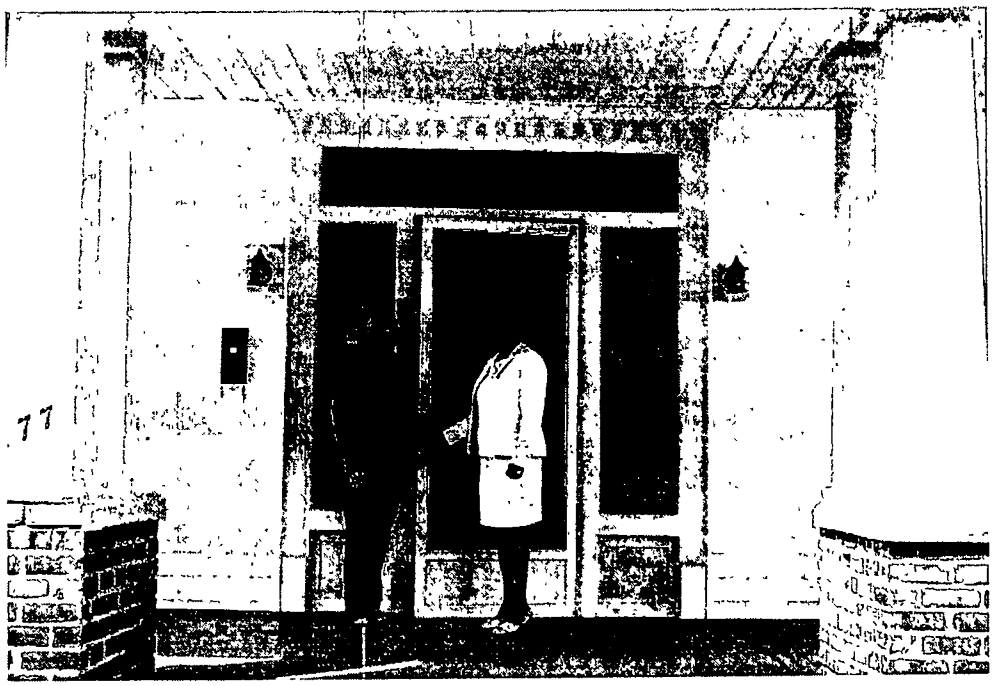
Education
Religion
Tax Documents

Community Projects that The Lutz Foundation has helped with.

Landsford Canal



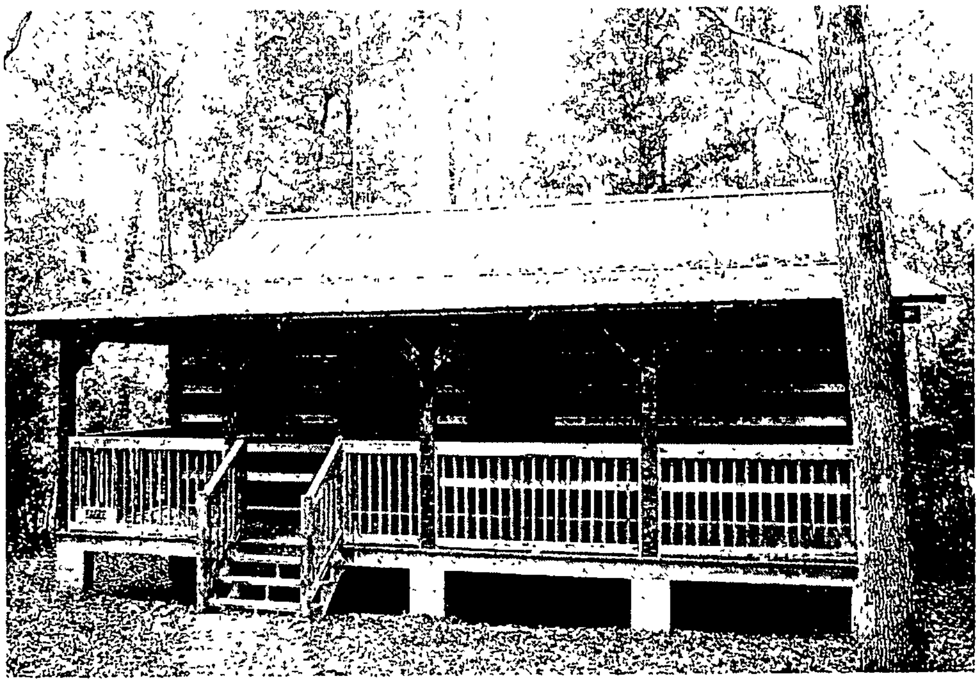
Visited on June 8th 2005.



Herbert Lutz House visited July 13th, helped with new siding.

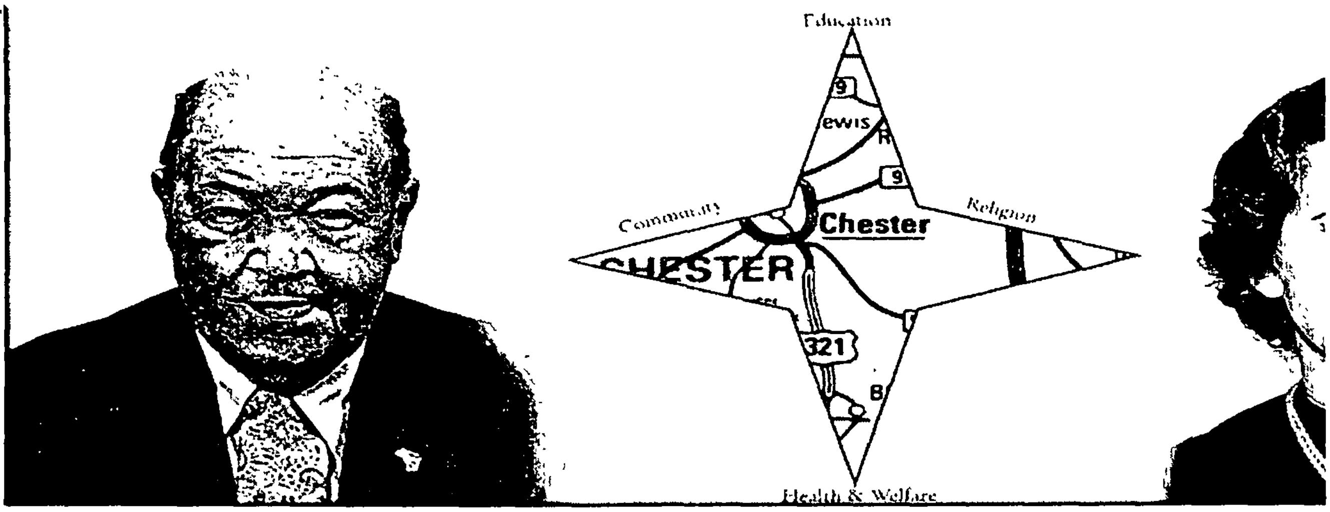
Family Connections in Rock Hill SC, helps families with children with disabilities.

Staff of the Good Samaritan Clinic in Chester SC, visited October 22nd.



Tree Tops program visited October 17th.

Pictures of the new Hospice building to be built in Rock Hill.



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- Education
- Religion
- Tax Documents

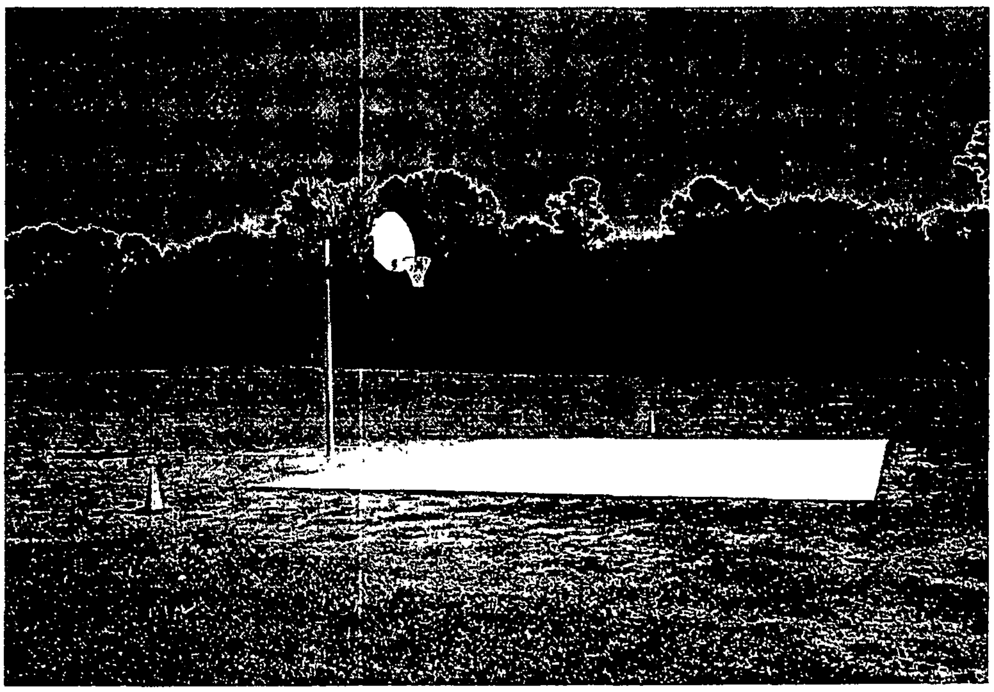
Educational Projects that The Lutz Foundation has helped with.

York Tech Nursing program first year in Chester.

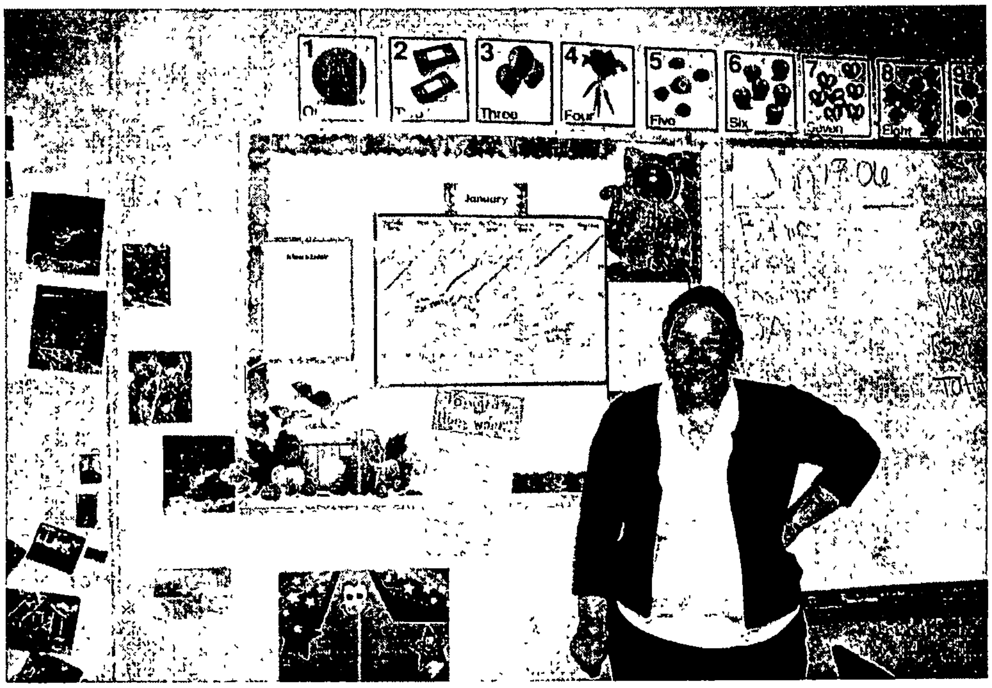
High School Rodeo June 3, 2005 Clemson SC.

High School Rodeo truck June 3, 2005.

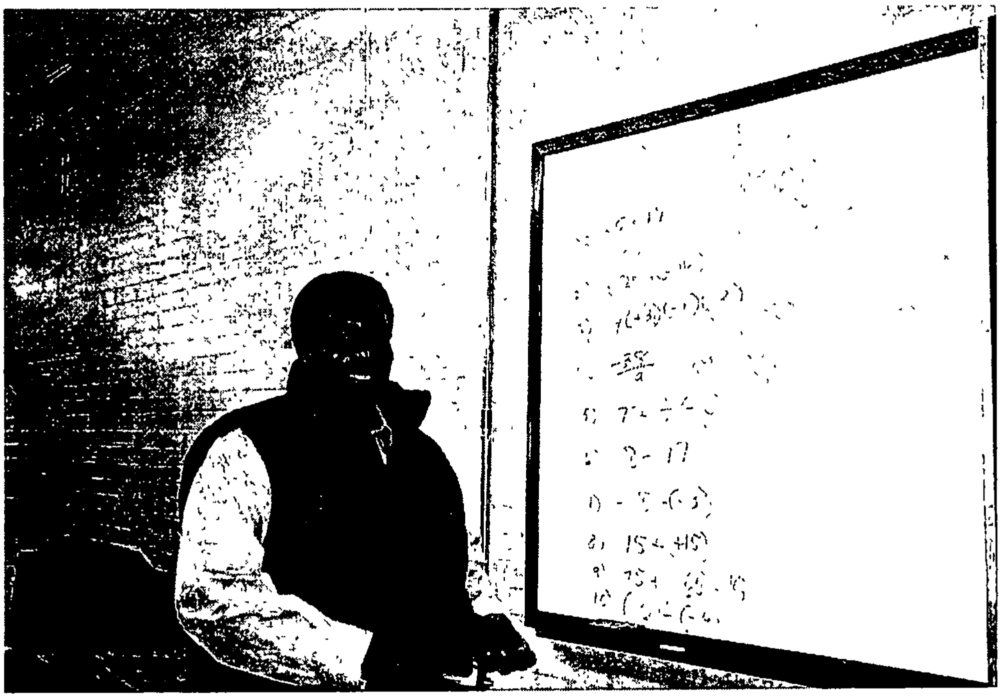
Clemson Extension summer programs for kids, visited July 6th.



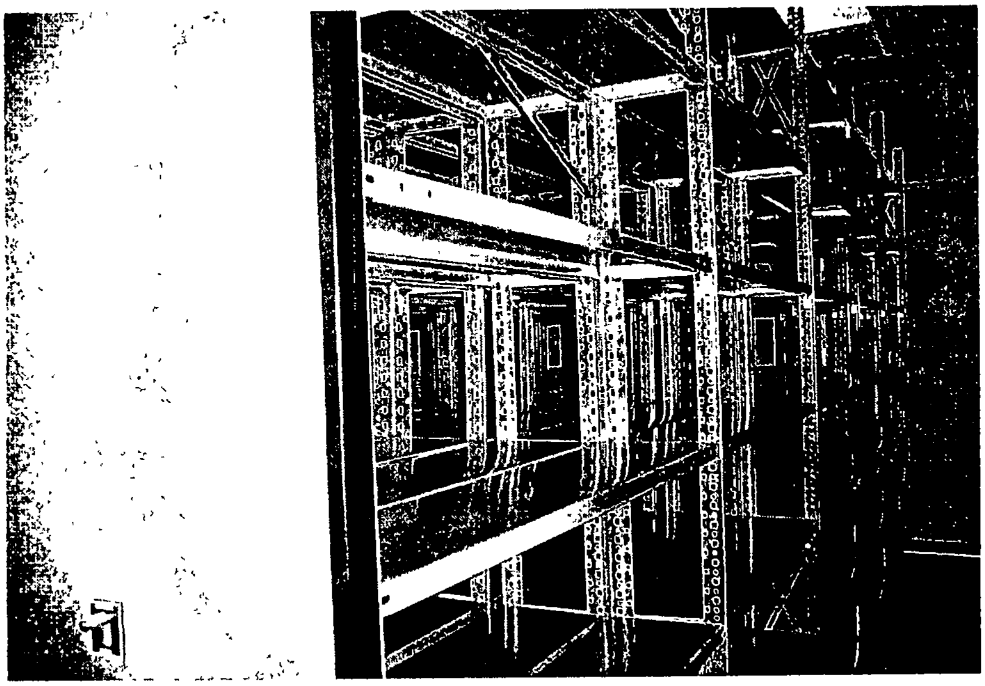
Baseball pad for School of Inquiry in Chester SC.



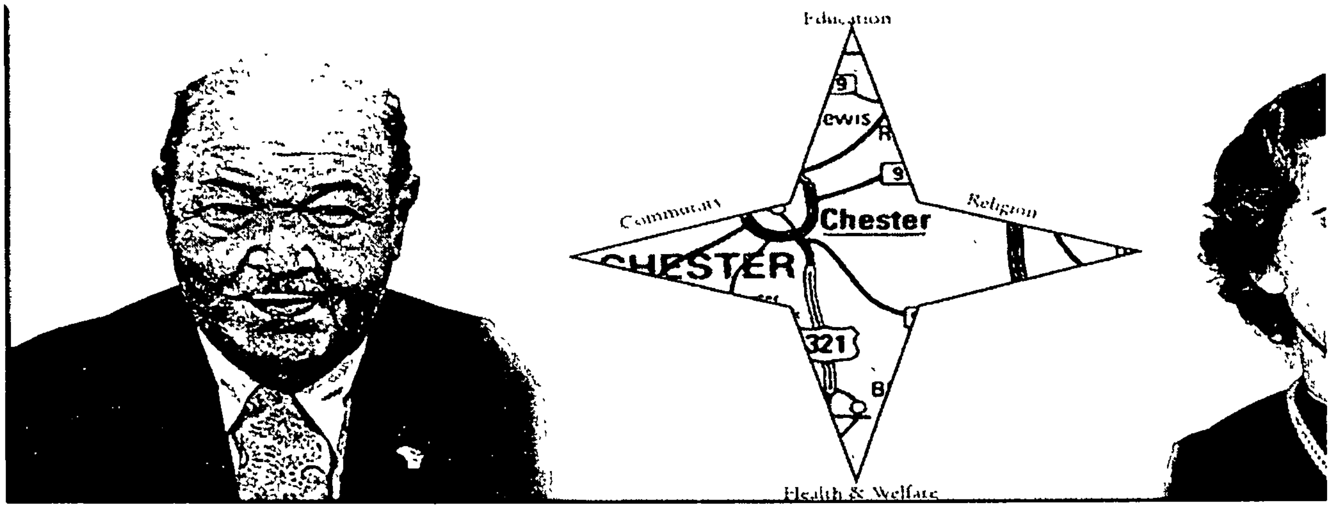
Onsite School for The Girl's Home in Rock Hill SC.



Adult Education school that helps 14 to 18 year olds that have dropped out of high school.



Compact shelving for Winthrop University for the Library.



- **Home**
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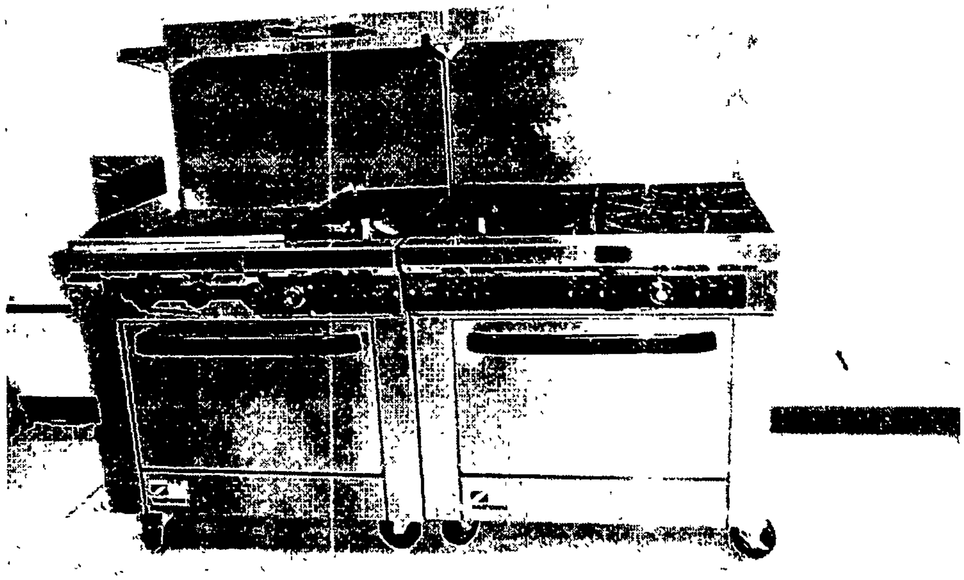
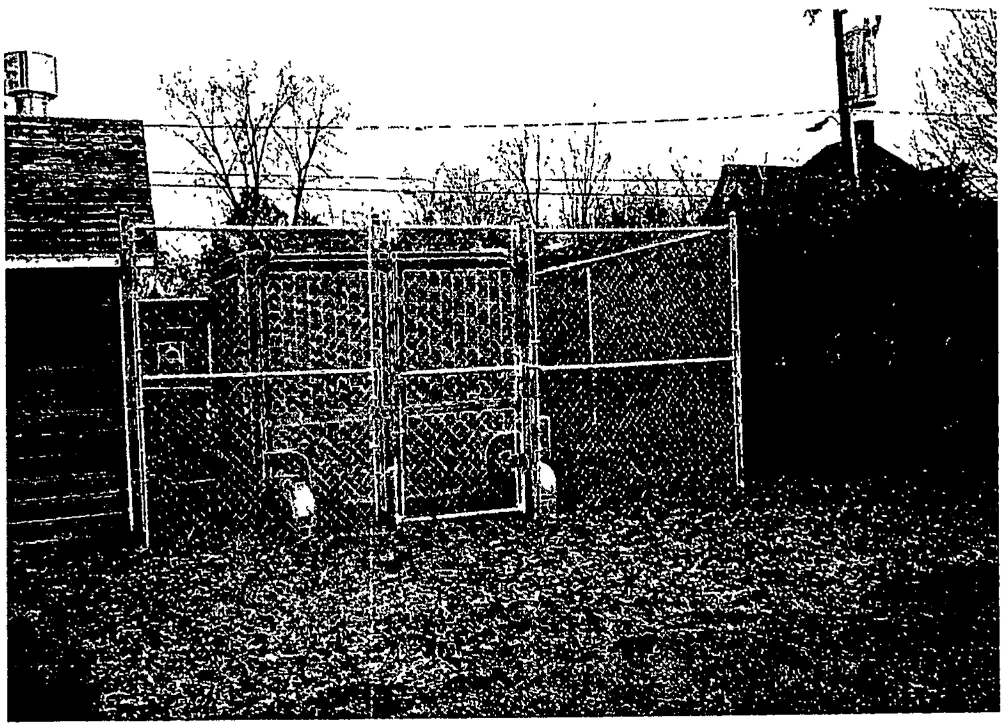
Church Projects that The Lutz Foundation has helped with.

Swing Sets and Playground for Lowrys Baptist Church, visited August 7



Kitchen appliances for Second Baptist Church in Chester SC, visited October 5th.



Air-condition Unit for Bethel Church in Chester SC, visited August 2nd

The Herbert and Anna Lutz Foundation
Internal Control
Policies & Procedures

Adopted April 28, 2010

REIMBURSEMENT OF EXPENSES OF BOARD MEMBERS AND EMPLOYERS

Policy

It is the policy of The Foundation that reimbursement will not be made to a Board of Director or any employee without the Board of Directors approval for any of the following expenditures.

- First class or charter travel
- Travel for companions (including spouses)
- Tax indemnification and gross-up payments
- Discretionary spending account
- Housing allowance or residence for personal use
- Payments for business use of personal residence
- Health or social club dues or initiation fees
- Personal services (e.g. maid, chauffeur, chef)

Dewey Guyton

Dewey Guyton

The Herbert and Anna Lutz Foundation
Internal Control
Policies & Procedures

Adopted April 28, 2010

BOARD OF DIRECTOR REIMBURSEMENT

Policy

It is the policy The Foundation that out of pocket costs incurred by a Board member for a Board approved business activity will be reimbursed.

Procedure

1. The Board member will submit receipts for any out of pocket costs from a Board approved business activity to the Board, along with an explanation of the expenditures.

2. The Board member will submit the approved expenditures for reimbursement to the Treasurer.

3. The Treasurer will process the check and mail to the Board member.

Dewey Guyton

Dewey Guyton

The Herbert and Anna Lutz Foundation
Internal Control
Policies & Procedures

Adopted April 28, 2010

DATA SECURITY BREACH

Policy

(A) It is the policy of The Foundation to disclose a breach of the security of it's computer system following discovery or notification of the breach in the security of the data to any person whose personal identifying information that was not encrypted, redacted or is reasonably believed to have been acquired by an unauthorized person when the illegal use of the information has occurred or is reasonably likely to occur or use the information creates a material risk of harm to the person. (SC Code Ann 39-1-901).

(B) A person conducting business in this State and maintaining computerized data or other data that includes personal identifying information that the person does not own shall notify the owner or licensee of the information of a breach of the security of the data immediately following discovery, if the personal identifying information was, or is reasonably believed to have been, acquired by an unauthorized person.

(C) The notification required by this policy may be delayed if a law enforcement agency determines that the notification impedes a criminal investigation.

Definition
"Breach of the security of the system" means unauthorized access to and acquisition of computerized data that was not rendered unusable through encryption, redaction, or other methods that compromises the security, confidentiality, or integrity of personal identifying information maintained by The Foundation, when illegal use of the information has occurred or is reasonably likely to occur or use of the information creates a material risk of harm to a person. Good faith acquisition of personal identifying information by an employee or agent of The Foundation for the purposes of its business is not a breach of the security of the system if the personal identifying information is not used or subject to further unauthorized disclosure.

Notification Requirements
(1) Written notice;
(2) Electronic notice;
(3) Telephone notice; or
(4) If a business provides notice to more than 500 persons at one time pursuant to this section, the business shall notify, without unreasonable delay, the Consumer Protection Division of the Department of Consumer Affairs.

Dewey Guyton
Dewey Guyton

The Herbert and Anna Lutz Foundation

Lutz Foundation Time Line

September 30th	Grant Programs / Projects must be completed by September 30th of each year.
September 30th	All site visits are to be completed and audit material on grants due by September 30th.
November 30th	New grant applications due and on the premises by Nov. 30th
December and January	Review grants in December. Visit and interview potential grant applicants during December and January.
Third week in January	Contract letters go out allowing two weeks to be signed. -- Write Eva for money to be transferred to Foundation Account.
Second Week in February	Write award letters and checks – Be sure to include our tax Id number on our award letters and enclose a copy of grant contract letter. -- Write letters to those that have been denied.
Fourth week in February	Make sure copies of all Grant letters have been returned, signed, and checks accounted for.

1373 West End Rd. Chester, SC 29706
Phone: 803-385-5357 Website: http://www.lutzfoundation.org

The Clarence H. and Anna Elizabeth Lutz Foundation

Guidelines for Grant Application

1. The Foundation provides assistance to established non-profit entities, not individuals.

2. The Foundation will consider applications for capital projects, equipment purchases and special projects that advance education, religion, community projects and health & welfare.

3. The Foundation will not consider requests for operating costs or general contributions to organizations.

4. The Foundation prefers to assist local non-profit organizations.

5. All applications must be submitted in DUPLICATE on foundation forms. No photocopies.

6. Return the application and requested supporting materials at your earliest convenience-but no later than December 1st of each year.

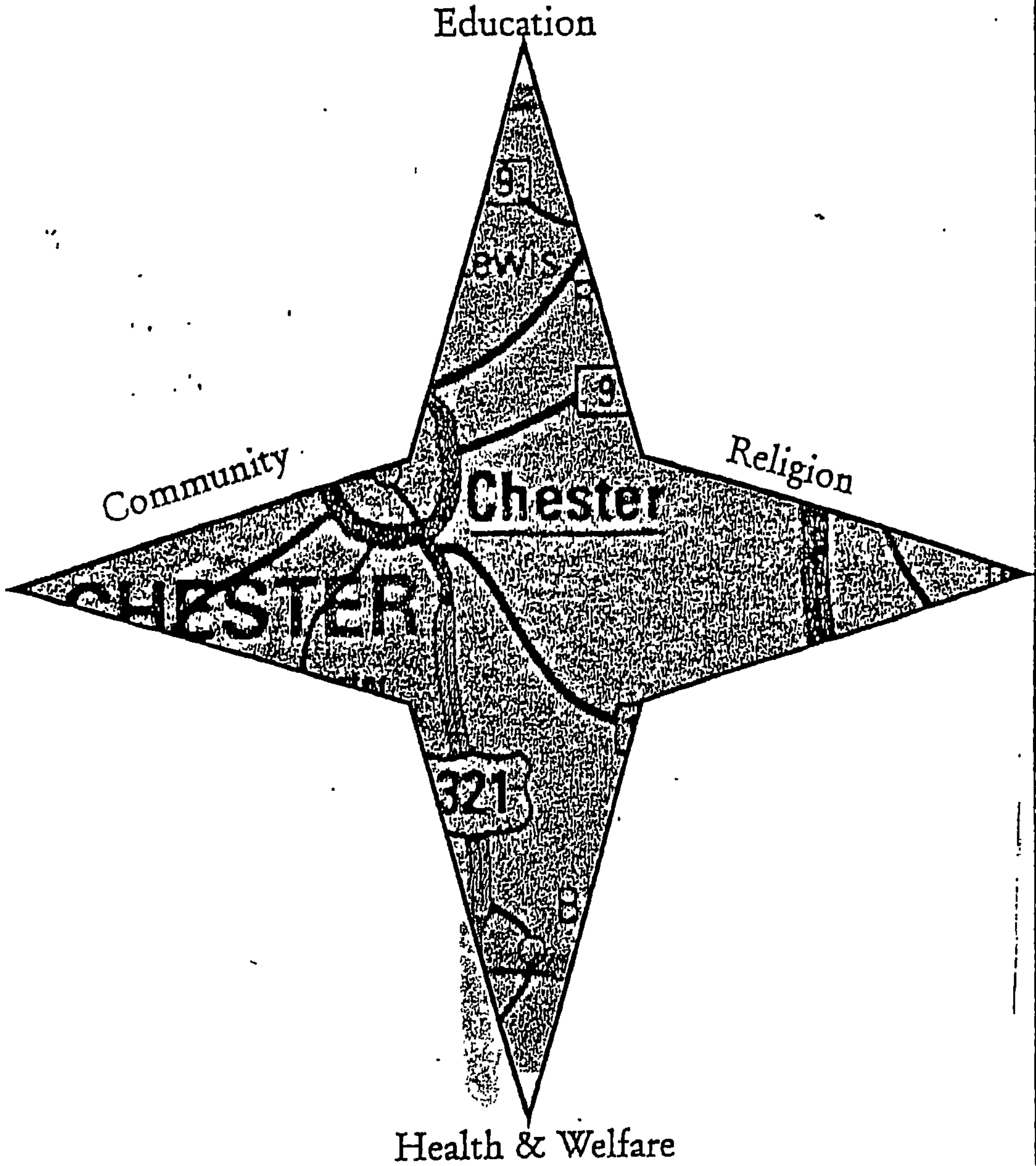
Board of Directors

Dewey Guyton	President & Chairman
Joan Guyton	Vice-President and Treasurer
Mary S. Jolley	Secretary
Susan Stephenson	Assistant Secretary

Robert H. Breakfield
Legal Counsel
PO Box 36061
Rock Hill, SC 29732
(803) 329-4920

Eva Marie Staudt,
Investment Advisor
Johnston Lemon and Co. Inc.
1101 Vermont Ave N.W. 8th floor
Washington, DC 2005-3521

The Clarence H. and Anna Elizabeth Lutz Foundation



Assisting Chester County and the Surrounding Counties with Funding for Education, Community, Health & Welfare and Religion

The Herbert and Anna Lutz Foundation

Chester, South Carolina

Application Guidelines

G. *Application Availability:*
Applications for the next fiscal year will be available from March 1st till November 1st of each year.

Supporting Document Guidelines

A. *Cover letter of not more than two pages covering the following points:*
1. *Purpose of organization, objectives and background of the project.*
2. *Demonstration of need.*
3. *Specific plans and timetable for project.*
   ***Note: September 30th of the grant year is the completion deadline on all grants.*
4. *Description of both the current and long-term funding plans.*
5. *Qualifications of the organization. (Copy of non-profit corporate charter) and personnel concerned (brief bio information regarding officers and board members).*

B. *An overall budget for the organization as well as a budget for the specific need or project. This budget should show sources of income as well as expenditure items.*

C. *List of current Board of Directors.*

D. *Copy of applicant's official notice of tax-exempt status under the Internal Revenue Code IRS 501c(3) letter.*

E. *Copy of applicant's most recent audit or compilation signed by an independent accountant.*

General Information

A. *Chester, York, Union and Lancaster counties will have primary consideration; however: grants are not limited to these counties.*

The Herbert and Anna Lutz Foundation

Chester, South Carolina

Application Guidelines

B. *The Foundation does not award grants for individuals, educational scholarships or for profit entities.*

C. *We strive to support entities that have a broad based community support program.*

D. *We do not fund general operating expenses or general fund campaigns. For example: salaries, utilities, depreciation, audits, telephone, travel expense, dues and subscriptions.*

E. *We support community, health, educational and religious projects in that order of interest.*

Officers

Dewey G. Guyton	*President*
Joan L. Guyton	*Exec. Vice-President/ Treasurer*
Mary S. Jolley	*Vice President/Technology*
Susan L. Stephenson	*Vice President/Public Relations*
Shelia P. Bishop	*Vice President/Recording*
Robert H. Breakfield	*Legal Counsel*
Eva Marie Staudt	*Investment Representative*

Contact Information

Clarence H. and Anna E. Lutz Foundation
1373 West End Hwy
Chester, SC 29706
Foundation Phone: 803-385-5357
Residence Phone: 803-581-3743
Website: *http://www.lutzfoundation.org*

Email Addresses

Joan Guyton: *JGuyton@lutzfoundation.org*
Mary Jolley: *MJolley@lutzfoundation.org*

Revised February 3, 2011

LUTZ FOUNDATION GRANTS APPROVED 2011-2012

AMERICAN NATIONAL RED CROSS *$18,500.00*

(53-0196605) EIN # Current
CEO: Katherine S. Correll, Executive Director **Ph.#** - 803/329-6575
Address: Upper Palmetto Chapter, 200 Piedmont Boulevard, Rock Hill, SC 29732
Email: correllk@usa.redcross.org **Contact Person:** Same **Address:** P. O. Box 353, 139 Cadz Street, Chester, SC 29706
Ph.# - 803/581-4820 **Email:** correllk@usa.redcross.org
PROJECT: Project Name: Family Emergency Assistance Program Provides to families who have lost their homes and possessions due to fires or other disaster; including: food, shelter, medicine, etc.
Amount Requested: $10,000.00 **Total Budget:**
Funds Received: Funds on hand - $10,025.00
Beginning Date: Immediately **End Date:** Funds depleted

ARMENIA UNITED METHODIST CHURCH *$10,000.00*

(57-0761025) EIN # Not on Guide Star
CEO: Troy Roberts, Scout Master Troop #66 **Address:** 1980 Roberts Road, Chester, SC 29706
Ph.# - 803/209-2341 **Email:** toaz@truvista.net
Contact Person: Same **Address:** Same
PROJECT: Gear Up For Adventure
Amount Requested: $20,000.00 **Total Budget:**
Funds Receive: $600.00
Beginning Date: January 1, 2012 **End Date:** September 30, 2012
Check equipment list amounts.

ARTS COUNCIL OF CHESTER COUNTY *$2,000.00*

(57-0718545) EIN # Current
CEO: Lauren Medlin, Director **Ph.#** - 803/581-2030
Address: 123 Main Street, P. O. Box 804, Chester, SC 29706
Email: artschester@truvista.net **Contact Person:** Same as above
PROJECT: Gallery Improvements. Better displaying and managing community art and increasing efficiency in the business operations. Purchase artwork display racks and risers, with additional rods for hanging system. New tables will allow more children in the youth art classes. Painting a new logo on the door will complete the outside appearance of gallery.
Amount Requested: $1,100.00 **Total Budget:** $1700.00
Funds Received: $600.00 SC Arts Commission
Beginning Date: March 2012 **End Date:** August 2012

CHESTER COUNTY COMMISSION ON ALCOHOL AND DRUG ABUSE *$16,000.00*

(57-0610928) EIN # Current **CEO:** Maria Bates, Executive Director **Address:** 130 Hudson Street, Chester, SC 29706 **Ph.#** - 803/377-8111 **Email:** mbates@hazelpittmancenter.com
Contact Person: Same **Address: Same**
PROJECT: Facility Improvement – New roof. First phase is completed but approximately $16,000. Needed to complete the project.
Amount Requested: $16,000.00 **Total Budget:** $18,500.00
Funds Received: $ 2,500.00 on hand
Beginning Date: Immediately, depending on weather **End Date:** 2 weeks after project begins

CHESTER COUNTY FELLOWSHIP OF CHRISTIAN ATHLETES **$8,000.00**

(44-0610626) EIN # Current
CEO: Les Steckel **Ph.#** - 816/921-0909 **Address:** 8701 Leeds Road, Kansas City, MO 64129 **Email:** lsteckel@fca.org **Contact Person:** Joe Pitt **Address:** 1636 Ashford Ferry Rd, Blair, SC 29015 **PH.#** - 864/429-6532 **Email:** jpitt@fca.org
PROJECT: Provide Bibles for 200 students, 50 coaches, and provide camp/retreat scholarships for students to attend.
Amount Requested: $8,000.00 **Total Budget:** $10,000.00
Funds Received: 0
Beginning Date: January 1, 2012 **End Date:** August 31, 2012

CHESTER COUNTY SCHOOL DISTRICT **$5,500.00**

Attached letter explains 501 (C) 3 status
Program name: Chester County Career Center Skills Vocational Education Competitions
CEO: Dr. John Taylor, Superintendent **Ph.#** - 803/581-9502 **Address:** 109 Hinton St., Chester, SC 29706 **Email:** jtaylor@chester.k12.sc.us **Contact Person:** Lee Green, Director, Chester County Career Center **Address:** 1324 JA Cochran Bypass, Chester, SC 29706 **PH.#** - 803/377-1991 **Email:** lgreen@chester.k12.sc.us
PROJECT: Provide opportunity Chester County high school students to attend and compete in industrial oriented competitions. Allow students to receive quality experiences in leadership, teamwork, citizenship and character development.
Amount Requested: $5,500.00 **Total Budget:** $17,000.00
Funds Received: $12,383.40
Beginning Date: March 29, 2012 **End Date:** June 2012

CHESTER COUNTY SCHOOL DISTRICT **$10,000.00**

(57-6000333)EIN # through Legistration
CEO: Mr. John Taylor, Superintendent **Ph.#** - 803/581-9500 **Address:** 109 Hinton St., Chester, SC 29706 **Email:** jtaylor@chester.k12.sc.us **Contact Person:** Jeff Gardner, Chester Senior High **Address:** 1330 JA Cochran Bypass, Chester, SC 29706 **PH.#** - 803/377-3161 **Email:**jgardner@chester.k12.sc.us
PROJECT: Create an aesthetically pleasing courtyard at CHS. Constructing benches, planting trees, and surfacing asphalt.
Amount Requested: $25,852.00 **Total Budget:** $26,352.00
Funds Received: $500.00 SCDHEC Grant
Beginning Date: November 2011 **End Date:** January 2012

CHESTER COUNTY SCHOOL DISTRICT **$4500.00**

CEO: **Address:** 1330 JA Cochran Bypass, Chester, SC 29706 **Contact Person:** Mallorie Easlick **Email:** **Address:** **PH#:** 803/377-3161
PROJECT: Automatic External Defibrillators. Lewisville football player died of sudden cardiac arrest during a game in 2010. Chester County Schools needing easily accessible AEDs and CPR training for more school faculty and staff members. Chester needs one more AED as well as CPR/AED training.
Amount Requested: $925.00 **Total Budget:** $1850.00
Funds Received: Did not give amount
Beginning Date: **End Date:**

CHESTER COUNTY HISTORICAL SOCIETY ***$5,000.00***

(57-0626537) Current
CEO: Gloria Kellerhals, President **Ph.# -** 803/581-3100 **Address:** 121A Gadsden St. Chester, SC 29706 **Email:** Gloria@wgpeople.com **Contact Person:** Same **Address:** P. O. Box 811, Chester, SC 29706 **Ph#:** 803/385-2332 **Email:** ccmuseum@truvista.net
PROJECT: Saving Henry O. Nichols Photographic Collection. The grant will be used to purchase equipment to preserve 500,000 photographs of Henry O. Nichols that span seventy two years of Chester County History. This collection is deteriorating quickly and new equipment is needed to save the records of the ordinary citizen's lives.
Amount Requested: $13,459.96 **Total Budget:** $34,908.00
Funds Received: Atax Payroll, Duke Energy, OmNova, and City of Chester $16,766.00
Beginning Date: Immediately **End Date:**

CHILDREN'S HOME OF LANCASTER COUNTY ***$13,000.00***

(57-0549954) EIN# Current
CEO: Annette Deese, Executive Director **Address:** PO Box 416, Lancaster, SC 29721 **Ph.# -** (803) 286-5277 **Email:** lchdirector@comporium.net **Contact Person:** Same
PROJECT: For food and clothing for children who are at the Lancaster Children's Home.
Amount Requested: $10,000.00 **Total Budget:** $15,500.00
Funds Received: $5,500.00
Beginning Date: January 2012 **End Date:** September 2012 **Salaries seem high?**

CLEMSON UNIVERSITY ***$6,000.00***

(57-6000254) EIN # Current
CEO: Dr. Gerald Sonnenfeld, Vice President of Research **Ph.# -** 864/656-2424
Address: 300 Brackett Hall, Box 345702, Clemson, SC 29634-5702 **Email:** cuosp@clemson.edu
Contact Person: Ms. Robin Currence, Chester County Extension Office **Email:** rcrrnc@clemson.edu
Address: 109 Ella Street, Chester, SC 29706 **PH.# -** 803/209-0538
PROJECT: Chester County 4-H and EFNEP 4-H. Provide research based, unbiased education for the adults and youth of SC in response to problems identified by citizens and extension professionals.
Amount Requested: $6000.00 **Total Budget:** $6000.00
Funds Received: $2600.00
Beginning Date: March 1, 2012 **End Date:** September 30, 2012

CUMBERLAND COLLEGE MOUNTAIN OUTREACH PROGRAM ***$20,000.00***

(61-1278580) EIN # Current
CEO: Dr. Jim Taylor, President **Ph.# -** 606/539-4201 **Address:** 6191 College Station Drive, Williamsburg, Kentucky 40769 **Email:** presoff@ucumberlands.edu **Contact Person:** Mr. Marc Hensley **Address:** 7521 College Station Drive, Williamsburg, Kentucky 40769
PH.# - 606/539-4346 **Email:** marc.hensley@ucumberlands.edu
PROJECT: Mountain Outreach Program. Help needy families with house repairs, plumbing, wiring, winterization of existing homes, and etc. Help with clothing, food, and toiletries from their warehouse that is open several days a week.
Amount Requested: $18,500.00 **Total Budget:** $541,310.00
Funds Received: Donations ($510,267.00)
Beginning Date: Ongoing Program **End Date:**

FIRST FREE WILL BAPTIST CHURCH **$12,000.00**
HAWTHORNE CHRISTIAN ACADEMY – (57-0744143)

EIN# Not found on Guide Star
CEO: Rev. James Sanders, Pastor and CEO **Ph.#** - 803/377-8235 **Address:** P. O. Box 1656, 790 Hawthorne Road, Chester, SC 29706 **Email:** mcassidy@hawthornechristian.com
Contact Person: Michelle D. Cassady **Address:** Same
PROJECT: Carpet replacement.
Amount Requested: $11,875.00 Total Budget: $12,875.00
Funds Received: $1000.00
Beginning Date: April 2012 **End Date:** August 2012

GIRL SCOUTS OF SOUTH CAROLINA –MOUNTAINS TO MIDLANDS **$7,000.00**

(57-0314433) EIN # could not locate
CEO: Kimberly D. Hutzell, President/CE) **Ph.#** - 800/849-4475 & 800/770-1400 **Address:** 5 Independence Pointe, Suite 120, Greenville, SC 29615 **Email:** khutzell@gssc-mm.org
Contact Person: Cherie Ellis, Community Development Manager, Chester County **Address:** 130 Pinnacle Point Court, Suite 100, Columbia, SC 29223 **PH.#** - 803/374-9994 **Email:** cellis@gssc-mm.org
PROJECT: Girl Scouts of Chester County – Bridging to the Next Century. The project will strengthen and expand the Girl Scout Leadership Experience in Chester County. The Girl Scouts nationwide will be celebrating their 100th anniversary. Several Special activities in Chester County will galvanize current and former Girl Scouts.
Amount Requested: $7,362.50 Total Budget: $7,362.50
Funds Received: $1,199.50 Remaining balance from Lutz Foundation's 2010-2011 Grant
Beginning Date: Upon receipt **End Date:** September 30, 2012

GOOD SAMARITAN MEDICAL CLINIC **$2,500.00**

(82-0549226) EIN # Current
CEO: John Hart, III; Executive Director **Address:** 139 Church Street, Chester, SC 29706
Ph.# - 803/385-6332 **Email:** Samaritan@truvista.net
Contact Person: John Hart **Address:** Same **Email:** Same
PROJECT: The clinic will replace old, non-compliant medical records filing units and add new compliant units to store overflow new records. Total of 8 units will be compliant.
Amount Requested: $2,500.00 Total Budget: $7,742.00
Funds Received: $5300.00
Beginning Date: March 3, 2012 **End Date:** September 30, 2012

HARVEST HOPE FOOD BANK **$6,000.00**

(57-0725560 EIN # Current
CEO: Denise R. Holland **Ph.#** -803/254-4432 ext. 1129 **Address:** 2220 Shop Road, P. O. Box 451, Columbia, SC 29201 **Email:** dholland@harvesthope.org **Contact Person:** Mary Louise, Resch, Gov. Relations & Grants Manager; Henry Counts, Child Feeding Program Coordinator **Address:** 1636 Ashford Ferry Rd, Blair, SC 29015 PH.# - 803/254-4432 ext/ 1118 **Email:** mlresch@harvesthope.org
PROJECT: Backpack Child Weekend Feeding Program. Serves approximately 40 children per week for 36 weeks. Backpacks sent home the last day of school each week. The packs contain child friendly foods that they can prepare themselves with little or no effort. Cost per child per week is $7.50.
Amount Requested: $5,800.00 Total Budget: $10,800.00
Funds Received: ?
Beginning Date: January 1, 2012 **End Date:** September 30, 2012

HORIZONS AFTERSCHOOL PROGRAM, INC. — *$13,500.00*

(57-1102644) EIN# Current
CEO: Wylie G. Frederick **Ph.#** - 803/377-7000 School, Cell #: 803/519-6845
Address: 729 Village Drive, Chester, SC 29706
Email: fredlaptop@truvista.net **Contact Person:** Same
PROJECT: To purchase one Promethean Board to enhance instruction and increase student learning in classrooms. This board and accessories will be portable and can be used by all teachers in all subject areas.
Amount Requested: $13,399.81 **Total Budget:** $13,399.81
Funds Received: None

LEWIS VOLUNTEER FIRE DEPARTMENT — *$12,000.00*

(57-1091961) EIN# Current
CEO: Jay Williams, President **Address:** 1652 Woods Road, Chester, SC 29706
Ph.# - 803/581-6900 or 803/230-1302 **Email:** LJCattle@truvista.net
Contact Person: Same **Address:** Same **Email:** Same
PROJECT: Purchased a 1986 International service truck. Cost of vehicle $20,000.00; a portion of the funds available $8,000.00. The balanced will be financed.
Amount Requested: $12,000.00 **Total Budget:** $20,000.00
Funds Received: $10,000.00 Donation checking account
Beginning Date: 12/1/2011 **End Date:** 2/15/2012

RICHARD WINN ACADEMY — *$16,000.00*

(57-049330) EIN # Current
CEO: Dr. Nancy Coleman, Head of School **Address:** PO Box 390, Winnsboro, SC 29180
Ph.# 803/635-5494 ext. 202 - **Email:** ncoleman@richardwinn.org
Contact Person: Lanna McMeekin, Director of Admissions and Development **Address:** Same
PH.# - 803/635-5494 ext. 206 **Email:** development@richardwinn.org
PROJECT: Phase IV Smart Boards, accessories and installation project.
Amount Requested: $16,000.00 **Total Budget:** $23,373.51
Funds Received: $7373.51
Beginning Date: Immediately **End Date:** Spring 2012

ST. PAUL'S PRESBYTERIAN CHURCH — *$2,500.00*

(57-0756137) EIN # not recorded
CEO: Benny McKay **Address:** 768 Pinckney Road, Chester, SC 29706
Ph.# - 803/377-1867 **Email:** None
Contact Person: Penny Hollis **Address:** 553 Lakenglen Road, Chester SC 29706
PH.# - 803/385-5772 **Email:** None
PROJECT: Help the Youth to maintain playground equipment for the church.
Amount Requested: $2,585.40 **Total Budget:** $2,585.40
Funds Received: None
Beginning Date: February 2012 **End Date:** August 2012

THE MESSENGER CENTER **$2,500.00**

(20-5854125) EIN# Current
CEO: Mary Anthony, Executive Director **Address:** PO Box 2, Rock Hill, SC 29731 **Ph.#** - (803) 980-0480 **Email:** themessagercenter@yahoo.com **Contact Person:** Same **PH.# Cell** – 803/379-0124 **Address:** Same **Email:** Same
PROJECT: Equipping for Daily Life and preparing students for Inner Healing. Need: DVD player, Bibles for adults and teens, AV cart, chairs, binding machine, camcorder with memory card, new desktop, printer paper, printer ink, binding covers, and binding combs.
Amount Requested: $3338.00 **Total Budget:** $3338.00
Funds Received: Once classes begin, money will start.
Beginning Date: January 2012 **End Date:** December 2012

YORK TECHNICAL COLLEGE FOUNDATION **$30,000.00**

(57-0756721) EIN # Current
CEO: Melanie E. Jones, Executive Director **Address:** 452 South Anderson Rd., Rock Hill, SC 29730 **Ph.#** - 803/327-8012 **Email:** mjones@yorktech.edu
Contact Person: Ernie Green **Address:** Same
PH.# 803/475-2833 **Email:** egreen@yorktech.edu
PROJECT: Chester Center- Medical Programs Expansion and Upgrades. This project will allow for the expansion of medical programs at the Chester Center of York Technical College. The EMS/EMT and Medical assisting programs require additional equipment. The Sustainable Agriculture Program is a new program for Chester and will encourage the production and entrepreneurial distribution of healthy produce.
Amount Requested: $30,000.00 **Total Budget:** $40,835.00
Funds Received: $ 10,835.00 YTC Foundation on hand
Beginning Date: March 2012 **End Date:** July 30, 2012

UPPER PALMETTO YMCA **$17,500.00**

(57-0335422) EIN# Current
CEO: Frank (Moe) Bell **Address:** 323 Oakland Ave., Rock Hill, SC 29730
Ph. # - 803/324-9622 ext. 22 **Email:** moebell@upymca.org
Contact Person: Scott Brown, Director **Address:** 157 Columbia St., Chester, SC 29706
PH.# 803/581-9622 **Email:** scottbrown@upymca.org
PROJECT: Renovation Project VI. Adding another aerobic room and installing new shower stalls in the men's and ladies locker room.
Amount Requested: $34,500.00 **Total Budget:** $34,500.00
Funds Received: seeking other sources
Beginning Date: Approval of grant **End Date:** June 2012