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 JUL 1, 2011 , and ending JUN 30, 2012

Name of foundation: FLORENCE B. TRUEMAN EDUCATIONAL TRUST

A Employer identification number: 52-1649301

Number and street (or P O box number if mail is not delivered to street address): 401 FAIRLEIGH COURT | Room/suite:

B Telephone number: 410-741-5602

City or town, state, and ZIP code: TRACY'S LANDING, MD 20779

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) ▶$ 720,435.

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))

		(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			N/A	
	2 Check ▶ [X] if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	1.	1.		STATEMENT 1
	4 Dividends and interest from securities	14,238.	14,238.		
	5a Gross rents	15,000.	15,000.		STATEMENT 2
	b Net rental income or (loss) -532.				STATEMENT 3
	6a Net gain or (loss) from sale of assets not on line 10	12,141.			
	b Gross sales price for all assets on line 6a 96,260.				
	7 Capital gain net income (from Part IV, line 2)		12,141.		
	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)				
	11 Other income				
	12 Total. Add lines 1 through 11	41,380.	41,380.		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	5,182.	1,036.		4,146.
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees				
	b Accounting fees STMT 4	4,080.	4,080.		0.
	c Other professional fees				
	17 Interest				
	18 Taxes STMT 5	2,233.	2,233.		0.
	19 Depreciation and depletion	8,275.	8,275.		
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses STMT 6	8,571.	8,571.		0.
	24 Total operating and administrative expenses. Add lines 13 through 23	28,341.	24,195.		4,146.
	25 Contributions, gifts, grants paid	33,850.			33,850.
	26 Total expenses and disbursements. Add lines 24 and 25	62,191.	24,195.		37,996.
	27 Subtract line 26 from line 12:				
	a Excess of revenue over expenses and disbursements	-20,811.			
	b Net investment income (if negative, enter -0-)		17,185.		
	c Adjusted net income (if negative, enter -0-)			N/A	

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Part II Balance Sheets (Attached schedules and amounts in the description column should be for end-of-year amounts only)			Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash - non-interest-bearing	14,356.	9,018.	9,018.
	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			
	7	Other notes and loans receivable ▶			
		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			
	b	Investments - corporate stock			
	c	Investments - corporate bonds			
	11	Investments - land, buildings, and equipment basis ▶ 218,587.			
		Less accumulated depreciation STMT 8 ▶ 179,348.	47,154.	39,239.	182,500.
	12	Investments - mortgage loans			
	13	Investments - other STMT 9	464,919.	457,721.	527,717.
	14	Land, buildings, and equipment basis ▶ 3,744.			
		Less accumulated depreciation STMT 7 ▶ 3,684.	420.	60.	1,200.
	15	Other assets (describe ▶)			
	16	**Total assets** (to be completed by all filers)	526,849.	506,038.	720,435.
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			
	22	Other liabilities (describe ▶ SECURITY DEPOSIT)	1,200.	1,200.	
	23	**Total liabilities** (add lines 17 through 22)	1,200.	1,200.	
Net Assets or Fund Balances		**Foundations that follow SFAS 117, check here ▶ [X] and complete lines 24 through 26 and lines 30 and 31.**			
	24	Unrestricted	525,649.	504,838.	
	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			
	30	**Total net assets or fund balances**	525,649.	504,838.	
	31	**Total liabilities and net assets/fund balances**	526,849.	506,038.	

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	525,649.
2	Enter amount from Part I, line 27a	2	-20,811.
3	Other increases not included in line 2 (itemize) ▶	3	0.
4	Add lines 1, 2, and 3	4	504,838.
5	Decreases not included in line 2 (itemize) ▶	5	0.
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	504,838.

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				
b	SEE ATTACHED STATEMENTS			
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				
b				
c				
d				
e	96,260.		84,119.	12,141.

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				12,141.

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 — 12,141.

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)
If (loss), enter -0- in Part I, line 8 — 3 — N/A

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 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	40,520.	774,686.	.052305
2009	28,522.	815,449.	.034977
2008	53,234.	752,924.	.070703
2007	56,362.	1,030,466.	.054696
2006	51,494.	1,027,343.	.050123

2	Total of line 1, column (d)	2	.262804
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	.052561
4	Enter the net value of noncharitable-use assets for 2011 from Part X, line 5	4	735,275.
5	Multiply line 4 by line 3	5	38,647.
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	172.
7	Add lines 5 and 6	7	38,819.
8	Enter qualifying distributions from Part XII, line 4	8	37,996.

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	344.
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	344.
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	344.
6 Credits/Payments				
a 2011 estimated tax payments and 2010 overpayment credited to 2011	6a	763.		
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	763.
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	419.
11 Enter the amount of line 10 to be **Credited to 2012 estimated tax** ▶	419.	**Refunded** ▶	11	0.

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 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 ▶ $ 0. (2) On foundation managers ▶ $ 0.			
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ▶ $ 0.			
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? *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? N/A	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) ▶ MD			
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)*

		Line	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 ▶ N/A			
14	The books are in care of ▶ J. SCOTT WHITNEY Telephone no. ▶410-741-5602			
	Located at ▶401 FAIRLEIGH COURT, TRACY'S LANDING, MD ZIP+4 ▶20779			
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 N/A			
16	At any time during calendar year 2011, did the foundation have an interest in or a signature or other authority over a bank, 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.		Line	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)?	N/A	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		X
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)	N/A	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.)*	N/A	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)? ☐ 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)? N/A | 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? N/A ☐ 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 | | 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? N/A | 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.

(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
J. SCOTT WHITNEY 401 FAIRLEIGH COURT TRACYS LANDING, MD 20779	TRUSTEE 2.00	3,095.	0.	0.
LAURENCE CUMBERLAND MAIN STREET PRINCE FREDERICK, MD 20678	TRUSTEE 2.00	2,087.	0.	0.

2 Compensation of five highest-paid employees (other than those included on line 1). 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 ▶ 0

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

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

(a) Name and address of each person paid more than $50,000	(b) Type of service	(c) Compensation
NONE		
Total number of others receiving over $50,000 for professional services	▶	0

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 COLLEGE SCHOLARSHIPS WERE AWARDED TO STUDENTS WHO ATTENDED PUBLIC SCHOOL IN CALVERT COUNTY, MARYLAND.	33,850.
2	
3	
4	

Part IX-B Summary of Program-Related Investments

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1 N/A	
2	
All other program-related investments See instructions. 3	
Total. Add lines 1 through 3 ▶	0.

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	538,972.
b	Average of monthly cash balances	1b	25,000.
c	Fair market value of all other assets	1c	182,500.
d	**Total** (add lines 1a, b, and c)	1d	746,472.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation) — 1e: 0.		
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	746,472.
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	11,197.
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3 Enter here and on Part V, line 4	5	735,275.
6	**Minimum investment return.** Enter 5% of line 5	6	36,764.

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	36,764.
2a	Tax on investment income for 2011 from Part VI, line 5 — 2a: 344.		
b	Income tax for 2011 (This does not include the tax from Part VI) — 2b:		
c	Add lines 2a and 2b	2c	344.
3	Distributable amount before adjustments Subtract line 2c from line 1	3	36,420.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	36,420.
6	Deduction from distributable amount (see instructions)	6	0.
7	**Distributable amount** as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1	7	36,420.

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	37,996.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	**Qualifying distributions.** Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	37,996.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b	5	0.
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	37,996.

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				36,420.
2 Undistributed income, if any, as of the end of 2011				
a Enter amount for 2010 only			35,180.	
b Total for prior years: ______ , ______ , ______		0.		
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	0.			
4 Qualifying distributions for 2011 from Part XII, line 4 ▶ $ 37,996.				
a Applied to 2010, but not more than line 2a			35,180.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2011 distributable amount				2,816.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2011 (If an amount appears in column (d), the same amount must be shown in column (a))	0.			0.
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	0.			
b Prior years' undistributed income Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b Taxable amount - see instructions		0.		
e Undistributed income for 2010 Subtract line 4a from line 2a Taxable amount - see instr			0.	
f Undistributed income for 2011 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2012				33,604.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)	0.			
8 Excess distributions carryover from 2006 not applied on line 5 or line 7	0.			
9 **Excess distributions carryover to 2012.** Subtract lines 7 and 8 from line 6a	0.			
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) N/A

1 a 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
2 a 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

J. SCOTT WHITNEY, 410-741-5602
401 FAIRLEIGH COURT, TRACYS LANDING, MD 20779

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

SEE ATTACHED APPLICATION

c Any submission deadlines

APRIL 15TH

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

STUDENTS WHO ATTENDED PUBLIC SCHOOL IN CALVERT COUNTY, MD.

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				
VARIOUS - SEE ATTACHED SCHEDULE			TO HELP PAY FOR COLLEGE EDUCATION FOR STUDENTS IN CALVERT COUNTY, MARYLAND.	33,850.
Total			▶ 3a	33,850.
b Approved for future payment				
NONE				
Total			▶ 3b	0.

Form **990-PF** (2011)

123611 12-02-11

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.	Unrelated business income (a) Business code	Unrelated business income (b) Amount	Excluded by section 512, 513, or 514 (c) Exclusion code	Excluded by section 512, 513, or 514 (d) Amount	(e) Related or exempt function income
1 Program service revenue:					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments			14	1.	
4 Dividends and interest from securities			14	14,238.	
5 Net rental income or (loss) from real estate					
a Debt-financed property					
b Not debt-financed property	531110	-532.			
6 Net rental income or (loss) from personal property					
7 Other investment income					
8 Gain or (loss) from sales of assets other than inventory			18	12,141.	
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)		-532.		26,380.	0.

13 Total. Add line 12, columns (b), (d), and (e) 13 25,848.

(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)

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
		N/A	

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
N/A		

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 instr)? ☒ Yes ☐ No

Whitney 11/7/12 TRUSTEE

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
BART LANMAN		11/6/12		P00064378

Firm's name ▶ SQUIRE, LEMKIN + COMPANY LLP — Firm's EIN ▶ 52-2041603

Firm's address ▶ 111 ROCKVILLE PIKE, SUITE 475 ROCKVILLE, MD 20850 — Phone no 301-424-6800

Form **990-PF** (2011)

123622 12-02-11

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	DELAWARE CORP BOND INST	P	VARIOUS	08/26/11
b	FEDRTD STRG VL DV FD INS	P	07/13/10	09/16/11
c	HARTFORD CAPITAL APP I	P	05/12/10	09/16/11
d	CALVERT SHORT DURATION	P	VARIOUS	09/16/11
e	PIMCO TOTAL RETURN FUND	P	05/12/10	09/16/11
f	FEDRTD STRG VL DV FD INS	P	08/31/11	09/16/11
g	WELLSFARGO ADV SLL CP AD	P	03/07/11	09/16/11
h	HARTFORD CAPITAL APP I	P	10/12/10	09/16/11
i	CALVERT SHORT DURATION	P	VARIOUS	09/16/11
j	PIMCO TOTAL RETURN FUND	P	08/31/11	09/16/11
k	TEMPLETON GLOBAL BD FUND	P	08/26/11	09/16/11
l	TEMPLETON GLBL BOND FUND ADVCL	P	08/26/11	09/16/11
m	PIONEER STRATEGIC	P	10/12/11	01/10/12
n	PIONEER STRATEGIC	P	12/30/11	01/10/12
o	PIMCO TOTAL RETURN FUND	P	VARIOUS	03/23/12

	(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	6,860.		6,853.	7.
b	390.		339.	51.
c	806.		846.	-40.
d	11,217.		11,280.	-63.
e	559.		567.	-8.
f	2.		2.	0.
g	366.		400.	-34.
h	3,922.		4,178.	-256.
i	396.		404.	-8.
j	1.		1.	0.
k	1.		1.	0.
l	1,169.		1,204.	-35.
m	78.		81.	-3.
n	7.		7.	0.
o	1,516.		1,508.	8.

	Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Losses (from col (h)) Gains (excess of col (h) gain over col (k), but not less than "-0-")
	(i) F M V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
a				7.
b				51.
c				-40.
d				-63.
e				-8.
f				0.
g				-34.
h				-256.
i				-8.
j				0.
k				0.
l				-35.
m				-3.
n				0.
o				8.

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	
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) If (loss), enter "-0-" in Part I, line 8	3	

123591
05-01-11

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	TMPLTON GLBL BD FD ADV CL	P	VARIOUS	03/23/12
b	DREYFUS APPRECIATION FUND	P	12/22/11	03/23/12
c	AMERICAN NCT INFL ADJ BD INV	P	05/12/10	06/08/12
d	AMERICAN CENTURY	P	05/12/10	06/08/12
e	EV FLOATING RATE CL I	P	VARIOUS	06/08/12
f	EV FLOATING RATE CL I	P	VARIOUS	06/08/12
g	PIMCO LONG TERM US	P	VARIOUS	06/08/12
h	PRUDENTIAL JENSON VALUE CL Z	P	05/12/10	03/23/12
i	FIRST EAGLE GOLD FD	P	VARIOUS	03/23/12
j	FEDERATED STRG VL DV FD INS	P	07/13/10	03/23/12
k	PIMCO TOTAL RETURN FUND	P	VARIOUS	03/23/12
l	DREYFUS APPRECIATION FUND	P	10/12/10	03/23/12
m	PRUDENTIAL JENSON VALUE CL Z	P	11/28/11	03/23/12
n	FIRST EAGLE GOLD FD	P	VARIOUS	03/23/12
o	TEMPLETON GLBL BOND FUND ADVCL	P	08/26/11	09/16/11

	(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	5,672.		5,923.	-251.
b	20.		19.	1.
c	678.		603.	75.
d	11.		9.	2.
e	6,655.		6,788.	-133.
f	298.		296.	2.
g	6,815.		6,198.	617.
h	4,097.		3,615.	482.
i	4,689.		5,536.	-847.
j	1,456.		1,193.	263.
k	9,861.		9,888.	-27.
l	1,919.		1,578.	341.
m	8.		7.	1.
n	711.		865.	-154.
o	7.		7.	0.

	Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Losses (from col (h)) Gains (excess of col (h) gain over col (k), but not less than "-0-")
	(i) F M V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
a				-251.
b				1.
c				75.
d				2.
e				-133.
f				2.
g				617.
h				482.
i				-847.
j				263.
k				-27.
l				341.
m				1.
n				-154.
o				0.

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	
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) If (loss), enter "-0-" in Part I, line 8	3	

123591
05-01-11

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	FIRST EAGLE GLOBAL FUND CLASS A	P	12/23/98	06/08/12
b	CAPITAL GAINS DIVIDENDS			
c				
d				
e				
f				
g				
h				
i				
j				
k				
l				
m				
n				
o				

	(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	23,000.		13,923.	9,077.
b	3,073.			3,073.
c				
d				
e				
f				
g				
h				
i				
j				
k				
l				
m				
n				
o				

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) Losses (from col (h)) Gains (excess of col (h) gain over col (k), but not less than "-0-")
a				9,077.
b				3,073.
c				
d				
e				
f				
g				
h				
i				
j				
k				
l				
m				
n				
o				

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	12,141.
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) If (loss), enter "-0-" in Part I, line 8	3	N/A

123591
05-01-11

2011 DEPRECIATION AND AMORTIZATION REPORT

FORM 990-PF PAGE 1 990-PF

Asset No	Description	Date Acquired	Method	Life	Conv	Line No	Unadjusted Cost Or Basis	Bus % Excl	Section 179 Expense	* Reduction In Basis	Basis For Depreciation	Beginning Accumulated Depreciation	Current Sec 179 Expense	Current Year Deduction	Ending Accumulated Depreciation
35	COMPUTER	06/25/04	SL	5.00		16	1,944.				1,944.	1,944.		0.	1,944.
36	COMPUTER	09/03/07	SL	5.00		16	1,799.				1,799.	1,380.		360.	1,740.
	* TOTAL 990-PF PG 1 DEPR						3,743.				3,743.	3,324.		360.	3,684.

128111
05-01-11

(D) - Asset disposed

* ITC, Salvage, Bonus, Commercial Revitalization Deduction, GO Zone

FORM 990-PF INTEREST ON SAVINGS AND TEMPORARY CASH INVESTMENTS STATEMENT 1

SOURCE	AMOUNT
BANKS	1.
TOTAL TO FORM 990-PF, PART I, LINE 3, COLUMN A	1.

FORM 990-PF RENTAL INCOME STATEMENT 2

KIND AND LOCATION OF PROPERTY	ACTIVITY NUMBER	GROSS RENTAL INCOME
CONDOMINIUM - SOLOMONS ISLAND	1	15,000.
TOTAL TO FORM 990-PF, PART I, LINE 5A		15,000.

FORM 990-PF RENTAL EXPENSES STATEMENT 3

DESCRIPTION	ACTIVITY NUMBER	AMOUNT	TOTAL
DEPRECIATION		7,915.	
TAXES		2,233.	
MAINTENANCE FEES		5,384.	
- SUBTOTAL -	1		15,532.
TOTAL RENTAL EXPENSES			15,532.
NET RENTAL INCOME TO FORM 990-PF, PART I, LINE 5B			-532.

FORM 990-PF ACCOUNTING FEES STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING	4,080.	4,080.		0.
TO FORM 990-PF, PG 1, LN 16B	4,080.	4,080.		0.

FORM 990-PF TAXES STATEMENT 5

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
TAXES	2,233.	2,233.		0.
TO FORM 990-PF, PG 1, LN 18	2,233.	2,233.		0.

FORM 990-PF OTHER EXPENSES STATEMENT 6

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
BANK FEES	43.	43.		0.
MISCELLANEOUS	889.	889.		0.
SECURITIES FEES	2,255.	2,255.		0.
MAINTENANCE FEES	5,384.	5,384.		0.
TO FORM 990-PF, PG 1, LN 23	8,571.	8,571.		0.

FORM 990-PF DEPRECIATION OF ASSETS NOT HELD FOR INVESTMENT STATEMENT 7

DESCRIPTION	COST OR OTHER BASIS	ACCUMULATED DEPRECIATION	BOOK VALUE	FAIR MARKET VALUE
COMPUTER	1,944.	1,944.	0.	500.
COMPUTER	1,799.	1,740.	59.	700.
TO 990-PF, PART II, LN 14	3,743.	3,684.	59.	1,200.

FORM 990-PF DEPRECIATION OF ASSETS HELD FOR INVESTMENT STATEMENT 8

DESCRIPTION	COST OR OTHER BASIS	ACCUMULATED DEPRECIATION	BOOK VALUE
SOLOMONS CONDO	217,655.	178,416.	39,239.
WASHER/DRYER CONDO	932.	932.	0.
TOTAL TO FM 990-PF, PART II, LN 11	218,587.	179,348.	39,239.

FORM 990-PF OTHER INVESTMENTS STATEMENT 9

DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
FIRST EAGLE GLOBAL FUND	COST	147,419.	220,595.
INCOME FUND OF AMERICA	COST	200,461.	194,261.
MUTUAL FUNDS	COST	109,841.	112,861.
TOTAL TO FORM 990-PF, PART II, LINE 13		457,721.	527,717.

Last Name	First Name	Address	City	State	Zip Code	School	12-13 award
Brown	Brittany	1785 Stinnett Road	Huntingtown	MD	20639	University of Maryland College Park	$1,000
Camp	Joshua	4243 Baden Drive	Huntingtown	MD	20639	PGCC Marshall University	$1,500
Chapman	Shakira	45 Mason Road	Prince Frederick	MD	20678	College of Southern Maryland	$1,000
Cleary	Colin	3402 Bristol Court	Chesapeake Beach	MD	20732	University of Maryland College Park	$1,500
Cooke	Tierra	8518 Stock Drive	Lusby	MD	20657	Husson University	$1,500
Cooke	Torez	8518 Stock Drive	Lusby	MD	20657	Frostburg State University	$1,500
Gerardy	Rachel	3114 Kenni Lane	Dunkirk	MD	20754	University of Maryland	$1,000
Graham	Christopher	5680 Mackall Road	St. Leonard	MD	20685	College of Southern Maryland	$1,000
Green	Cheyenne	3124 Whispering Drive	Prince Frederick	MD	20678	Pfeiffer University	$1,000
Gregory	Nicholas	6005 Quarles Road	St Leonard	MD	20685	Towson University	$1,000
Grover	Tyler	4740 St. Leonard Road	St. Leonard	MD	20685	University of Maryland College Park	$1,500
Harrison	Emily	810 Noble Court	Prince Frederick	MD	20678	Salisbury University	$1,000
Hause	Julia	9515 Howes Road	Dunkirk	MD	20754	St. Mary's College of Maryland	$1,000
Hendrix	Nathan	12948 Hauser Court	Lusby	MD	20657	Liberty University	$1,000
House	Brandon	1465 Apple Court	St. Leonard	MD	20685	College of Southern Maryland	$1,000
Huseman	Carly	8762 Chesapeake Lighthouse Drive	North Beach	MD	20714	College of Southern Maryland	$1,000
Huseman	Katherine	623 Running Fox Road	Lusby	MD	20657	Frederick Community College	$1,000
Jones	Darius	11640 Cowpoke Circle	Lusby	MD	20657	Shepard University	$1,000
Kmett'Pendry	Casey	1050 Tiffany Park	Owings	MD	20736	Liberty University	$1,500
Kong	Emily	64 Scarlett Drive	Huntingtown	MD	20639	Boston University	$1,000
Krudder	Nathaniel	3045 Blackberry Lane	Prince Frederick	MD	20678	University of Maryland College Park	$1,000
Lane	Brandon	7012 Silver Charm Lane	Chesapeake Beach	MD	20732	College of Southern Maryland	$1,000
Long	Travon	5420 Laurel Trail	St. Leonard	MD	20685	Stevenson University	$1,500
Mackall	Riddicia L.	455 Ponds Wood Road	Huntingtown	MD	20639	Howard University	$1,500
Miller	Christina	7819 Pine Boulevard	Lusby	MD	20657	Pace University	$1,000
Whitney	James	171 MF Bowen Road	Huntingtown	MD	20639	University of Maryland College Park	$1,500
Widman	Charles	2470 Harrison Court	Chesapeake Beach	MD	20732	Salisbury University	$1,000
Widman	David	2470 Harrison Court	Chesapeake Beach	MD	20732	Salisbury University	$1,000
Williams	Emily	2495 Chaneyville Road	Owings	MD	20736	University of Mississippi	$1,000
Worth	Allison	3030 Drury Lane	Dunkirk	MD	20754	Marshall University	$1,000
*Cox	Charles	1590 Sixes Road	Frederick	MD	20678		-$650
						Total	$33,850

* Check never cashed from a prior year awardee.

Florence B. Trueman Scholarship Trust
J. Scott Whitney, Trustee
401 Fairleigh Court
Tracy's Landing, MD 20779
Phone (410) 741-5602
Scott.Whitney@dhs.gov

APPLICATION - New ( ) Renewal ( )

I. Personal Information

Student Name ____
Last First M.I.

Home Mailing Address ____
(P.O. Box, or street, city, state, and zip)

E- Mail Address ______________________________

Home Phone__________ DOB ________ SS#____________

Parent(s) or Guardian(s)____

II. Academic Information (Part A – *First time applicants*, Part B – *Renewal applicants*)

Part A. Academic Information – First time applicants only

1. Name of High School ________________________________
2. Graduation Year _______ 3. Class Rank ____ out of _____ students
4. Grade Point Average (GPA) _______ (Transcript required.)
5. SAT scores (verbal) _____ (math) _____ ( ) not required by selected institution
6. Career Goal(s) ____________________________________

____

7. Academic Honors and/or Recognition received (Grades 9 through 12). Attach additional pages if necessary.

______________________________ ______________________________

______________________________ ______________________________

8. Hobbies, interests, or special talents. Attach additional pages if necessary.

____________________ ____________________

____________________ ____________________

9. Give COMPLETE name and address of the school you plan to attend

____

____

____

10. Have you received an unconditional acceptance letter? (   )Yes   ( ) No

11. Intended Major ____________________   Minor __________________

12. Write a brief essay entitled "What I will bring to my community through advanced education." The essay should not exceed 600 words (approximately 2 pages double spaced, preferably typed). Attach as addendum 2.

13. Obtain two (2) letters of recommendation supporting your application. These may come from teachers, employers, clergy, or other community member who knows you and can share insights as to your potential for success. Attach as addendum 3.

Part B. Academic Information - ***Renewal applicants only***

1. GPA _________ (Transcript required.)
2. Hours completed last year? _________
3. Academic year for which this application applies:

   ( ) Freshman ( ) Sophomore ( ) Junior ( ) Senior

4. Has there been a change in your College/University or major?

   ( ) No ( )Yes   If yes, please explain.

____

____

5. Have you received an unconditional acceptance letter? (   )Yes   ( ) No

III. Extracurricular/Community Service Activities. List and briefly describe any extracurricular and community service activities. Sufficient detail should be included for the selection committee to best understand your accomplishments. Attach as Addendum 1.

- **First time applicants** - Identify activities you participated in during grades 9 through 12. Include relevant dates and average time spent at the activity e.g., Grades 10 - 12 – played varsity soccer - 20 hours per week during the season, selected "most sportsmanlike" by teammates in senior year.

- **Renewal applicants** - Identify activities you have participated in at your college/university. Include relevant dates and average time spent at the activity e.g., Freshman Year – worked on the staff of school newspaper 6-10 hours/week editing sports articles.

IV. Estimated Expenses (if actual costs unknown, provide estimate)

1. Tuition: $ __________
2. Room & Board: $ __________
3. Fees: $ __________
4. Other Costs: $ __________ Describe: ______________________________
5. Books (estimate): $ __________

Total $ __________

V. Financial Information

1. Have you applied for and/or received any other scholarships? ( ) No ( ) Yes If yes, please list the name and amount of any award(s).

______________________________ ______________________________

______________________________ ______________________________

______________________________ ______________________________

2. Have you completed a Free Application for Federal Student Aid (FAFSA)?

a. ( ) Yes (attach a copy of your student aid report (SAR) and proceed to section VI, Student Certification.

b. ( ) No If no, please the remainder of Section V. Information provided in this section will be considered confidential by the trustees and the selection committee.

3. Statement of **STUDENT INCOME/ASSETS:**

a. Will you be working while attending college?

( ) No ( ) Yes, anticipated income per year $ __________

b. Other assets available to you to help defray the costs of college, i.e., personal savings, bonds, investments, etc.

______________________________ ______________________________

______________________________ ______________________________

4. Statement of **PARENTS' INCOMES/ASSETS**

a. Mother or Guardian's:

Occupation ______________________ Annual Income $ _______

b. Father or Guardian's:

Occupation ______________________ Annual Income $ _______

c. Other (i.e., social security, alimony, child support, family/friend assistance, etc.)

______________________________ $ ________

______________________________ $ ________

______________________________ $ ________

d. Total Income and Other financial support $ ________

e. Other assets available to help defray the costs of college i.e., personal savings, bonds, investments, etc.

________________ ________________

________________ ________________

5. Dependent Information. List all dependents claimed by your parent(s) or guardian(s).

Name	Relationship	Age	College (Yes/No)	Estimated Education Expenses

6. Other family or financial information. If there is any additional information you would like the selection committee to consider when making an award determination please provide.

____

____

____

____

VI. Student Certification

I hereby certify that the information provided in this application is accurate and complete to the best of my knowledge. I understand the selection committee may request further information for clarification purposes. In the event an award is given, I understand the trustees will provide my name, address, social security number and the amount of any award to the Internal Revenue Service as required by law.

Student signature ______________________________ Date ____________

Parent(s) or guardian(s) ____

Mail to: Florence B. Trueman Scholarship Trust
Mr. J. Scott Whitney, Trustee
401 Fairleigh Court
Tracy's Landing, Maryland 20779

Does your application package contain the following?

	Requirement	**New Applicant**	**Renewal Applicant**
1	Application (completed & signed)		
2	Transcript – most current		
3	Addendum 1 – Listing of Extracurricular/Community Service		
4	Addendum 2 Brief Essay		N/A
5	Addendum 3 Letters of Recommendation		N/A
6	FAFSA &SAR (if applicable)		

Maryland Department of Assessments and Taxation
Real Property Data Search ([illegible])
[illegible] COUNTY

Go Back
View Map
New Search
GroundRent Redemption
GroundRent
Registration

Account Identifier: District - 01 Account Number - 210262

Owner Information

Owner Name:	FLORENCE B TRUEMAN SCHOLARSHIP TRUST	**Use:** **Principal Residence:**	RESIDENTIAL CONDOMINIUM NO
Mailing Address:	C/O SCOTT WHITNEY 401 FAIRLEIGH CT TRACYS LANDING MD 20779-2405	**Deed Reference:**	1) /00503/ 00722 2)

Location & Structure Information

Premises Address	**Legal Description**
1223 BACK CREEK LOOP SOLOMONS 20688-0000 CONDO UNIT 1223	UNIT 1223 BLDG L & MARINA UNIT P-10 Waterfront SOLOMONS LANDING

Map	Grid	Parcel	Sub District	Subdivision	Section	Block	Lot	Assessment Area	Plat No:
0044	0016	0597		0186			1223	3	Plat Ref:

Special Tax Areas	**Town** **Ad Valorem** **Tax Class**	NONE

Primary Structure Built	Enclosed Area	Property Land Area	County Use
1989			

Stories	Basement	Type	Exterior
		CONDO HI RISE	

Value Information

	Base Value	Value	Phase-in Assessments	
		As Of 01/01/2012	As Of 07/01/2012	As Of 07/01/2013
Land	60,000	51,000		
Improvements:	151,200	131,500		
Total:	211,200	182,500	182,500	182,500
Preferential Land:	0			0

Transfer Information

Seller:	SOLOMON'S LANDING LIMITED PTNRSHP	**Date:**	01/03/1990	**Price:**	$212,000
Type:	ARMS LENGTH IMPROVED	**Deed1:**	ABE /00503/ 00722	**Deed2:**	
Seller:		**Date:**		**Price:**	
Type:		**Deed1:**		**Deed2:**	
Seller:		**Date:**		**Price:**	
Type:		**Deed1:**		**Deed2:**	

Exemption Information

Partial Exempt Assessments	Class	07/01/2012	07/01/2013
County	000	0 00	
State	000	0 00	
Municipal	000	0 00	0 00

Tax Exempt:	**Special Tax Recapture:**
Exempt Class:	NONE

Homestead Application Information

Homestead Application Status: No Application