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Form 990-PF

# **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

Open to Public Inspection

Department of the Treasury Internal Revenue Service Note The foundation may

For calendar year 2012 or tax year beginning

Foi	cale	endar year 2012 or tax year beginning	, an	nd ending				
Na	ne of	foundation			Ā	Employer identification nur	nber	
The	Arth	nur W Perdue Foundation, Inc				52-60543	332	
		and street (or P O box number if mail is not delivered to street address	ess)	Room/suite	В	Telephone number (see instru	uctions)	
Fou	ındat	ion Source 501 Silverside Rd		123		(800) 839-	1754	_
Crt	or to	wn, state, and ZIP code			С	If exemption application is per	nding, check here	▶ 🗀
Wil	ming	ton	DE	19809-1377				
			I return of a former pu	ublic charity	Ь	1. Foreign organizations, chec	ck here	▶□
			nded return	•	l	2 Foreign organizations meet	ting the 85% test	
		Address change Nam	e change			check here and attach com	•	▶ □
Н	Che	ck type of organization X Section 501(c)(3) exert	npt private foundation	· · · · · · · · · · · · · · · · · · ·	۱_			
$\Box$		- · · · · - · · · · · · · · · · · · · ·	ther taxable private f		-	If private foundation status was under section 507(b)(1)(A), ch		▶ □
<u> </u>		market value of all assets at end J Accounting in	<u></u>	· · · · · ·	_	If the foundation is in a 60-mo		
		ear (from Part II, col (c),		Accidai	[	under section 507(b)(1)(B), ch		▶ □
	•	16) ►\$23,958,833 (Part I, column (c		ıs)	l			ш
Рa	rt I	Analysis of Revenue and Expenses (The total of	(a) Revenue and				(d) Disbursen	nents
		amounts in columns (b), (c), and (d) may not necessarily equal	expenses per	(b) Net investm income	ent	(c) Adjusted net income	for charitab purposes	
		the amounts in column (a) (see instructions) )	books	income		income.	(cash basis o	
	1	Contributions, gifts, grants, etc., received (attach schedule)	250					
	2	Check ► X if the foundation is not required to attach Sch B						
	3	Interest on savings and temporary cash investments						
	4	Dividends and interest from securities .	610,463	610	),46	63		
	5 8	a Gross rents						
ð	١	b Net rental income or (loss)						
2	6 8	Net gain or (loss) from sale of assets not on line 10	300,580					
Revenue	1	b Gross sales price for all assets on line 6a 1,645,110						
8	7	Capital gain net income (from Part IV, line 2)		300	0,5	80		
	8	Net short-term capital gain	100					i
	9	Income modifications	5013 [17]					
	l .	d Gross sales less returns and allowances	9 7010					
	ľ	b Less Cost of goods sold .  c Gross profit or (loss) (attach schedule)		<u> </u>		-		
	11	C Gross profit or (loss) (attach schedule) Other income (attach schedule)	55,568	5!	5,5	68		
	12	Total. Add lines 1 through 11	966,861	966				
	40	Compensation of officers, directors, trustees, etc	500,001	300	5,0			
Expenses	14	Other employee salanes and wages					-	
ü	15	Pension plans, employee benefits .			_			
ğ	16	a Legal fees (attach schedule)						
		<b>b</b> Accounting fees (attach schedule)						
and Administrative		c Other professional fees (attach schedule)	29,680	20	6,2	35		3,445
ā	17	Interest						
ī	18	Taxes (attach schedule) (see instructions)	7,700					
듵	19	Depreciation (attach schedule) and depletion .	, <u> </u>					
þ	20	Occupancy						
P	21	Travel, conferences, and meetings .						
a	22	Printing and publications .						<del></del>
Þ	23	Other expenses (attach schedule)	68,984					68,984
Operating	24	Total operating and administrative expenses.	400 004	•	6 0	25		70 400
ere	25	Add lines 13 through 23 .	106,364		6,2	35 0		72,429
o	25	Contributions, gifts, grants paid .	798,999			25		98,999
_	20	Total expenses and disbursements. Add lines 24 and 25	905,363	2	6,2	35 0	<del> 8</del>	71,428
	27	Subtract line 26 from line 12						
	1	a Excess of revenue over expenses and disbursements b Net investment income (if negative, enter -0-)	61,498	0.4	0,3	76	<del>                                     </del>	
	1	c Adjusted net income (if negative, enter -0-)		37	٠,٠	0	<del>                                     </del>	
_	Ц	- riajastou not moomo (n nogunto, emer o )	1				<u> </u>	

Form **990-PF** (2012)

Pai	- 11	Balance Sheets Attached schedules and amounts in the description column	Beginning of year	End	of year
I GL	L III	should be for end-of-year amounts only (See instructions )	(a) Book Value	(b) Book Value	(c) Fair Market Value
	1	Cash—non-interest-bearing			
	2	Savings and temporary cash investments			
	3	Accounts receivable			ļJ
1		Less allowance for doubtful accounts			ļ
	4	Pledges receivable			ļ
Assets		Less allowance for doubtful accounts			
- 1	5	Grants receivable			<del> </del>
	6	Receivables due from officers, directors, trustees, and other			
		disqualified persons (attach schedule) (see instructions)			ļ
	7	Other notes and loans receivable (attach schedule)			
		Less allowance for doubtful accounts			
ts	8	Inventories for sale or use			
SSE	9	Prepaid expenses and deferred charges			
Ä		Investments—U.S. and state government obligations (attach schedule)			
	ı	b Investments—corporate stock (attach schedule)	19,140,850	19,202,399	21,704,179
		Investments—corporate bonds (attach schedule)			
	11	Investments—land, buildings, and equipment basis			
		Less accumulated depreciation (attach schedule)			<del> </del>
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule) .	2,254,654		2,254,654
	14	Land, buildings, and equipment basis ▶		<del></del> <del></del>	
		Less accumulated depreciation (attach schedule)			<u> </u>
	15	Other assets (describe  )			
i	16	Total assets (to be completed by all filers—see the			
		instructions Also, see page 1, item l) .	21,395,504	21,457,053	23,958,833
	17	Accounts payable and accrued expenses			4
S	18	Grants payable			4
ij	19	Deferred revenue			4
ᅙ	20	Loans from officers, directors, trustees, and other disqualified persons			4
Liabilities	21	Mortgages and other notes payable (attach schedule)			4
_	22	Other liabilities (describe	_		-
	23	Total liabilities (add lines 17 through 22)	0		<u> </u>
S		Foundations that follow SFAS 117, check here .			
ë		and complete lines 24 through 26 and lines 30 and 31.			
an	24	Unrestricted			_]
Balances	25	Temporarily restricted			_
	26	Permanently restricted			<u>.</u>
Net Assets or Fund		Foundations that do not follow SFAS 117, check here			
L.		and complete lines 27 through 31.			
0	27	Capital stock, trust principal, or current funds .			4
ets	28	Paid-in or capital surplus, or land, bldg, and equipment fund	ļ		_
SS	29	Retained earnings, accumulated income, endowment, or other funds	21,395,504	21,457,05	
ř	30	Total net assets or fund balances (see instructions)	21,395,504	21,457,05	4
Š	31	Total liabilities and net assets/fund balances (see	04.005.55	04 4== ==	.]
		instructions)	21,395,504	21,457,05	اد
	rt III	Analysis of Changes in Net Assets or Fund Balances	20 (	<del></del>	<del></del>
1		I net assets or fund balances at beginning of year—Part II, column (a), line	: 30 (must agree with		04.005.504
_		of-year figure reported on prior year's return)		1	21,395,504
		r amount from Part I, line 27a		. 2	61,498
3		r increases not included in line 2 (itemize) Returned Grant			51
4		lines 1, 2, and 3		4	21,457,053
5		reases not included in line 2 (itemize)			
_6	rota	I net assets or fund balances at end of year (line 4 minus line 5)—Part II, of	olumn (b), line 30		21,457,053

	2009	2,549,711	19,892,597		0 128174
	2008	493,530	11,004,679		0.044847
	2007	579,612	13,152,804		0 044068
	Total of line 1, column (d)			2	0 455654
3		e 5-year base period—divide the ation has been in existence if less		3	0 091131
4	Enter the net value of nonchar	table-use assets for 2012 from Pa	art X, line 5	4	23,373,258
5	Multiply line 4 by line 3			5	2,130,028
6	Enter 1% of net investment inc	ome (1% of Part I, line 27b)		6	9,404
7	Add lines 5 and 6			7	2,139,432
8	Enter qualifying distributions from	•		8	871,428
	If line 8 is equal to or greater the Part VI instructions	nan line 7, check the box in Part \	/I, line 1b, and complete that pa	rt using a 1%	tax rate See

Part VI

2

3

orm 9	990-PF (2012) The Arthur W Perdue Foundation, Inc	52-6054332	Pa	age 5
Part	VII-A Statements Regarding Activities (continued)			
11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions).	11		×
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had	l	1 1	
	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		<b>-</b>	
14	The books are in care of ▶ c/o Foundation Source Telephone no ▶	(80	0) 839-	1754
	Located at ► 501 Silverside Road, Suite 123 Wilmington DE ZIP+4 ► 1980	9-1377		<u></u>
15	Section 4947(a)(1) nonexempt chantable 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	<u> </u>		
16	At any time during calendar year 2012, did the foundation have an interest in or a signature or other authority		Yes	No
	over a bank, securities, or other financial account in a foreign country?	. 16	<u> </u>	Х
	See the instructions for exceptions and filing requirements for Form TD F 90-22 1 If "Yes," enter the name of			
	the foreign country			
Par	t 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?	No		
	You V	No		
	(3) Fulfilling goods, services, or racinities to (or accept them norm) a stoquenillo policy.	i 1	1	
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualities person.	의 140		
		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)?	<u>.</u> . <u>1b</u>	N/A	
	Organizations relying on a current notice regarding disaster assistance check here	] [		
С	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 2012?	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))			
а	At the end of tax year 2012, did the foundation have any undistributed income (lines 6d	7		
	and 6e, Part XIII) for tax year(s) beginning before 2012?	7 NO		
b	Are there any years listed in 2a for which the foundation is <b>not</b> applying the provisions of section 4942(a)(2)		i	ļ
	(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 )	<u>2</u> b	N/A	<u> </u>
С	If the provisions of section 4942(a)(2) are being applied to <b>any</b> of the years listed in 2a, list the years here  20, 20, 20			
За	Did the foundation hold more than a 2% direct or indirect interest in any business	_		1
Ju	enterprise at any time during the year?	X No		
b	If "Yes," did it have excess business holdings in 2012 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)			İ
	the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine		L	
	if the foundation had excess business holdings in 2012) .	3t	N/A	
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its chantable purposes?	. 48	3	Х

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 2012? .

4b

Fom	m 990-PF (2012) The Arthur W Perdue Fo	undation	, Inc					52-605	4332	Page 6
Рa	nrt VII-B Statements Regarding Ac	tivities	for Which For	m 4	720 May Be	Require	d (continu	ed)		
	During the year did the foundation pay or incu									
	(1) Carry on propaganda, or otherwise atte	mpt to infl	uence legislation (s	section	on 4945(e))? .		Yes	X No		
	(2) Influence the outcome of any specific pr								·	
	on, directly or indirectly, any voter regis	tration driv	/e <sup>?</sup> .				Yes	X No		
	(3) Provide a grant to an individual for trave	el study d	or other similar num	ooses	۶۶		X Yes	ΠNο		
	(4) Provide a grant to an organization other	•	• •						1	
	in section 509(a)(1), (2), or (3), or section						Yes	X No		
	(5) Provide for any purpose other than relig				, or			<u></u>	l	
	educational purposes, or for the preven			-			Yes	X No	l	
b			-			ns describe		٠.٠٠		
~	Regulations section 53 4945 or in a current ne								5b	X
	Organizations relying on a current notice rega	_	-			,		• İ 🗆		
С		_						ш		
·	tax because it maintained expenditure respor		· · · · · · · · · · · · · · · · · · ·		iom aic		Yes	□No		
	If "Yes," attach the statement required by Re	_		5(d)	·	·		Ш•		
6a	Did the foundation, during the year, receive a	-			nav					
Vu	premiums on a personal benefit contract?			, to	,		Yes	X No		
h	Did the foundation, during the year, pay prem	iiims dire	ectly or indirectly of	nan	ersonal benefit o	ontract?	Ш.	٠٠٠ ١٠٠	6b	X
~	If "Yes" to 6b, file Form 8870	ilairio, aire	out of maneout, of		ordonar bonom o				1	
7a	At any time during the tax year, was the found	dation a n	arty to a prohibited	tax s	shelter transactio	n?	Yes	X No		
	If "Yes," did the foundation receive any proce								7b	N/A
	art VIII Information About Office						rs Highly	/ Paid Fn		<u> </u>
	and Contractors	,c13, D1	rectors, rrust	,,	1 oundation	manago	. o,g,	, i aia Lii		
1	List all officers, directors, trustees, fou	ndation	managers and t	heir	compensation	(see inst	ructions).			
<u> </u>			) Title, and average		) Compensation	(d) C	ontributions to	(0)	Evnen	se account,
	(a) Name and address	1,	hours per week levoted to position	(If	not paid, enter -0-)		ee benefit plar red compensa	5		lowances
SE	E ATTACHMENT		revoted to position			und doion	rou componed			
									-	
					·					
	·			l						
2	Compensation of five highest-paid em	ployees	(other than thos	e in	cluded on line	1—see in	structions	). If none,		
	enter "NONE."									
			(b) Title, and avera	age T			) Contributions mployee bene		\ Evac-	sa account
(;	<ul> <li>a) Name and address of each employee paid more than</li> </ul>	\$50,000	hours per week	1	(c) Compensation		mployee bene ans and deferr			se account, lowances
			devoted to position	**1			compensation			
NC	ONE			l						
				.00						
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_			<b>_</b>	00			<del></del>			
				00						
			1			ļ				
<del></del>	stal number of other employees paid over \$	50 000		00				<b>•</b>		
- 0	naccionichei or order employees baid over 3	LILI LICILI								

Form 990-PF (2012) The Arthur W Perdue Foundation, Inc		52-6054332 Page <b>7</b>
Part VIII Information About Officers, Directors, Trustee	s, Foundation Managers, Highly P	aid 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
Foundation Source Philanthropic Services		
55 Walls Drive, Fairfield, CT 06824	Administrative	68,984
<del></del>		<del> </del>
		<del>                                     </del>
<del></del>		
Total number of others receiving over \$50,000 for professional services		
Part IX-A Summary of Direct Charitable Activities		
List the foundation's four largest direct charitable activities during the tax year. Include relevan		Expenses
the number of organizations and other beneficianes served, conferences convened, research	papers produced, etc	
1		
2		
<u> </u>		
3		
4		
Part IX-B Summary of Program-Related Investments (see		
1	rear on lines 1 and 2	Amount
<b>'</b>		
2		
All other program-related investments See instructions		
3		
Total Add lines 1 through 3		
TOTAL MOD BIES THILOUGH A	· . · . · · · · · · · · · · · · · · · ·	. 0

Par		founda	tions,
	see instructions )		
1 ,	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc.,	1	
	purposes		
а	Average monthly fair market value of securities	1a	21,467,071
b	Average of monthly cash balances	1b	7,471
С	Fair market value of all other assets (see instructions)	1c	2,254,654
d	Total (add lines 1a, b, and c)	1d	23,729,196
е	Reduction claimed for blockage or other factors reported on lines 1a and		
	1c (attach detailed explanation)		
2	Acquisition indebtedness applicable to line 1 assets	2	<del></del>
3	Subtract line 2 from line 1d	3	23,729,196
4	Cash deemed held for charitable activities Enter 1 ½ % of line 3 (for greater amount, see		
	instructions)	4	355,938
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	23,373,258
6	Minimum investment return. Enter 5% of line 5	6	1,168,663
Par			
	foundations and certain foreign organizations check here   And do not complete this part )		
1	Minimum investment return from Part X, line 6	1	1,168,663
2a	Tax on investment income for 2012 from Part VI, line 5		
b	Income tax for 2012 (This does not include the tax from Part VI)		
C	Add lines 2a and 2b	2c	18,808
3	Distributable amount before adjustments Subtract line 2c from line 1	3	1,149,855
4	Recoveries of amounts treated as qualifying distributions	4	51
5	Add lines 3 and 4	5	1,149,906
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	1,149,906
	VIII Ouglif in a Distail which of a constructions)	•	
Par	Qualifying Distributions (see instructions)		
1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes		
а	Expenses, contributions, gifts, etc —total from Part I, column (d), line 26	1a	871,428
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		
а	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	871,428
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	871,428
	Note. The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foun	dation	
	qualifies for the section 4940(e) reduction of tax in those years		

ar	t XIII Undistributed Incor	ne (see instructions	5)			
		_	(a)	(b)	(c)	(d)
1	Distributable amount for 2012 fro	om Part XI,	Corpus	Years prior to 2011	2011	2012
	line 7 .					1,149,906
2	Undistributed income, if any, as	of the end of 2012				
а					0	
b	Total for prior years 20,:	20, 20				
3	Excess distributions carryover, if					
а	From 2007					
b	From 2008 .					
C	From 2009	565,053				
d	From 2010	1,624,780				
е	From 2011	1,673,231				
f	Total of lines 3a through e		3,863,064			
4	Qualifying distributions for 2012	from Part				
	XII, line 4 ► \$8	371,428 <u></u>				
а	Applied to 2011, but not more the	an line 2a			·	
b	<ul> <li>Applied to undistributed income</li> </ul>	of prior years				
	(Election required—see instruction	ons)				
C	Treated as distributions out of co	orpus (Election				
	required—see instructions) .				- ·	
C	Applied to 2012 distributable am	1				871,428
е		' '				
5	Excess distributions carryover ap	' '	278,478			278,478
	(If an amount appears in columi					
_	same amount must be shown in	' ' '				]
6	Enter the net total of each col	lumn as				
	indicated below:		0.504.500			
a	• • • • • • • • • • • • • • • • • • • •		3,584,586			
	Prior years' undistributed income	e Subtract				1
_	line 4b from line 2b			0		
C	Enter the amount of prior years'					
	income for which a notice of defi	· ·				Ì
	been issued, or on which the sec					
	tax has been previously assessed  Subtract line 6c from line 6b. Tax					
•	amount—see instructions .	xable				1
	Undistributed income for 2011	Subtract line				
•	4a from line 2a Taxable amount					
	instructions	(—3CC			o	
f		Subtract				
•	lines 4d and 5 from line 1. This a					
	be distributed in 2013	amount moot				0
7	Amounts treated as distributions	sout of				
-	corpus to satisfy requirements in					
	section 170(b)(1)(F) or 4942(g)(	'				
8	Excess distributions carryover fr					
	not applied on line 5 or line 7 (se					
9	Excess distributions carryove	′				
	Subtract lines 7 and 8 from line		3,584,586			
10	Analysis of line 9					
á	a Excess from 2008					
ŀ	b Excess from 2009	286,575				
(	Excess from 2010	1,624,780				
(	d Excess from 2011	1,673,231				
	n Evene from 2012				ì	

For	n 990-PF (2012) The Arthur W Perdue Found	lation, Inc		_	52-605	
Pa	rt XIV Private Operating Foundations	(see instruction:	s and Part VII-A	, question 9)		N/A
1 a	If the foundation has received a ruling or determina					
	foundation, and the ruling is effective for 2012, ent	er the date of the ru	ılıng	<b>-</b>		
	Check box to indicate whether the foundation is a	private operating fo	undation described	in section	4942(j)(3) o	r 4942(J)(5)
2 a	Enter the lesser of the adjusted net income from Part I or the minimum	Tax year		Prior 3 years		(e) Total
	investment return from Part X for each	(a) 2012	(b) 2011	(c) 2010	(d) 2009	
	year listed					0
t	85% of line 2a					0
C	Qualifying distributions from Part XII,					
	line 4 for each year listed					0
C	Amounts included in line 2c not used directly for active conduct of exempt activities					0
e	Qualifying distributions made directly		<del> </del>			<u> </u>
	for active conduct of exempt activities					
	Subtract line 2d from line 2c					0
3	Complete 3a, b, or c for the alternative test relied upon					
a	"Assets" alternative test—enter					
	(1) Value of all assets					0
	(2) Value of assets qualifying					
	under section 4942(j)(3)(B)(i)					0
t	The important of the i			ļ		
	Part X, line 6 for each year listed .					0
C	"Support" alternative test—enter					
	(1) Total support other than gross					
	investment income (interest, dividends, rents, payments	Ì				
	on securities loans (section					
	512(a)(5)), or royalties) .		<u>.</u>		<u> </u>	0
	(2) Support from general public and 5 or more exempt					
	organizations as provided in					
	section 4942(j)(3)(B)(iii)		-		+	0
	(3) Largest amount of support from an exempt organization .					0
	(4) Gross investment income	-		-		0
Pa	art XV Supplementary Information (Co	mplete this pa	rt only if the fo	undation had \$	5.000 or more in	
	assets at any time during the ye			4	•,•••	
1	Information Regarding Foundation Manage			_		· · · · · · · · ·
	a List any managers of the foundation who have co	ntributed more than	2% of the total con	tributions received by	y the foundation	
	before the close of any tax year (but only if they h	ave contributed moi	re than \$5,000) (Se	ee section 507(d)(2))		
	DNE  List any managers of the foundation who own 109	// az mara af tha ata	als of a parmaration	(or on oqually large r	ortion of the	<u> </u>
	ownership of a partnership or other entity) of which				Jordon or title	
NC	ONE .		_			
2	Information Regarding Contribution, Grant	t, Gift, Loan, Sch	olarship, etc., Pr	ograms:		
	Check here   If the foundation only make	s contributions to pr	eselected charitable	e organizations and o	loes not accept	
	unsolicited requests for funds. If the foundation m	akes gifts, grants, e	tc (see instructions	s) to individuals or org	ganizations under	
	other conditions, complete items 2a, b, c, and d  The name, address, and telephone number or e-r	nail of the nargen to	whom applications	s abould be addresses		<del></del>
,	a The name, address, and telephone number of e-r	nail of the person to	whom applications	s stidulu be addresse	u	
SE	E ATTACHMENT					_
	b The form in which applications should be submitted	ed and information a	and materials they s	should include		
QE	E ATTACHMENT					
	E ATTACHMENT  C Any submission deadlines	· · · - · · · · · · · · · · · · · · · ·			<del></del>	<del></del>
	<b>,</b>					
	E ATTACHMENT	<del>, , , , , , , –</del>		<del></del>		
	d Any restrictions or limitations on awards, such as factors	by geographical are	eas, charitable fields	s, kinds of institutions	s, or other	
e.						
_01	EE ATTACHMENT	_				

ıaıı	$\Delta V$	Supplemental	y mormation (continued)	
3	Gran	nts and Contrib	utions Paid During the Year or Approved for Future Payment	

Recipient    If recipient is an individual, show any relationship to any foundation manager	f contribution	Amount
Name and address (home or husiness)   recipient	it	Amount
Name and address (home or business) or substantial contributor		
a Paid during the year 21ST CENTURY FAMILY LITERACY CENTER N/A 509(a)(1) 200 N. TALMAGE AVE	1) General & Unrestricted	1,000
AHOSKIE, NC 27910 ALLIANCE FOR THE CHESAPEAKE BAY INC 501 6TH ST  N/A 509(a)(1)	1) Charitable Event	10,000
ANNAPOLIS, MD 21403 ALLIANCE FOR THE CHESAPEAKE BAY INC 501 6TH ST  N/A 509(a)(1)	1) Charitable Event	5,000
ANNAPOLIS, MD 21403 ALZHEIMERS DISEASE AND RELATED DISORDERS N/A 1850 YORK RD STE D	1) Alzheimer's Association	5,000
TIMONIUM, MD 21093  AMERICAN CANCER SOCIETY INC  250 WILLIAMS ST NW  The state of t	Charitable Event	2,500
ATLANTA, GA 30303  AMERICAN CANCER SOCIETY INC  250 WILLIAMS ST NW  ATLANTA CA 20203	(1) Charitable Event	2,000
ATLANTA, GA 30303  AMERICAN RED CROSS  P.O BOX 3714  AND 04004	Disaster Relief Trailers Project	13,500
SALISBURY, MD 21801  AMERICAN RED CROSS - PEE DEE CHAPTER  1601A W LUCAS ST  FLORENCE CO 20024	(1) General & Unrestricted	1,000
FLORENCE, SC 29501 BERTIE COUNTY Y M C A INC PO BOX 834  509(a)(	Youth Basketball Program	10,000
WINDSOR, NC 27983 BIG BROTHERS BIG SISTERS 225 N HIGH ST  N/A 509(a)(	(1) General & Unrestricted	10,000
HARRISONBURG, VA 22802 BLIND INDUSTRIES & SERVICES OF MD  3345 WASHINGTON BLVD	(1) Rehabilitation Senior Services	2,500
BALTIMORE, MD 21227	<b>-</b>	700,000
Total See Attached Statement	<b>▶</b> 3a	798,999
Total	▶ 3b	0

Enter gross amounts unless otherwise indicated	Unrelated bus	siness income	Excluded by section	n 512, 513, or 514	(e)
	(a) Business code	(b) Amount	(c) Exclusion code	<b>(d)</b> Amount	Related or exempt function income (See instructions)
1 Program service revenue					<del></del>
a	-				
b					
cd	-				
	-				· · · · - · - ·
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			14	666,031	
5 Net rental income or (loss) from real estate					
a Debt-financed property					
<b>b</b> Not debt-financed property .					
6 Net rental income or (loss) from personal property .					
7 Other investment income					
${\bf 8}$ Gain or (loss) from sales of assets other than inventory .			18	300,580	
9 Net income or (loss) from special events	1				
<b>10</b> Gross profit or (loss) from sales of inventory .					
11 Other revenue a	-				<del>-</del>
<b>b</b>	-			- "	
c					
de					
12 Subtotal Add columns (b), (d), and (e)	-	0		966,611	0
12 Cubicial Flad Coldinate (b); (d); and (c)			<u> </u>		
13 Total, Add line 12, columns (b), (d), and (e)				13	966,611
<b>13</b> Total. Add line 12, columns (b), (d), and (e) . (See worksheet in line 13 instructions to verify calculations.)				13	966,611
			· Purposes	13	966,611
(See worksheet in line 13 instructions to verify calculations.)  Part XVI-B Relationship of Activities to the A  Line No. Explain below how each activity for which inco	ccomplishmen	t of Exempt F umn (e) of Part X	VI-A contributed in	mportantly to	
(See worksheet in line 13 instructions to verify calculations.)  Part XVI-B Relationship of Activities to the A	ccomplishmen	t of Exempt F umn (e) of Part X	VI-A contributed in	mportantly to	
(See worksheet in line 13 instructions to verify calculations.)  Part XVI-B Relationship of Activities to the A  Line No. Explain below how each activity for which inco	ccomplishmen	t of Exempt F umn (e) of Part X	VI-A contributed in	mportantly to	
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(See worksheet in line 13 instructions to verify calculations.)  Part XVI-B Relationship of Activities to the A  Line No. Explain below how each activity for which inco	ccomplishmen	t of Exempt F umn (e) of Part X	VI-A contributed in	mportantly to	
(See worksheet in line 13 instructions to verify calculations.)  Part XVI-B Relationship of Activities to the A  Line No. Explain below how each activity for which inco	ccomplishmen	t of Exempt F umn (e) of Part X	VI-A contributed in	mportantly to	
(See worksheet in line 13 instructions to verify calculations.)  Part XVI-B Relationship of Activities to the A  Line No. Explain below how each activity for which inco	ccomplishmen	t of Exempt F umn (e) of Part X	VI-A contributed in	mportantly to	
(See worksheet in line 13 instructions to verify calculations.)  Part XVI-B Relationship of Activities to the A  Line No. Explain below how each activity for which inco	ccomplishmen	t of Exempt F umn (e) of Part X	VI-A contributed in	mportantly to	
(See worksheet in line 13 instructions to verify calculations.)  Part XVI-B Relationship of Activities to the A  Line No. Explain below how each activity for which inco	ccomplishmen	t of Exempt F umn (e) of Part X	VI-A contributed in	mportantly to	
(See worksheet in line 13 instructions to verify calculations.)  Part XVI-B Relationship of Activities to the A  Line No. Explain below how each activity for which inco	ccomplishmen	t of Exempt F umn (e) of Part X	VI-A contributed in	mportantly to	
(See worksheet in line 13 instructions to verify calculations.)  Part XVI-B Relationship of Activities to the A  Line No. Explain below how each activity for which inco	ccomplishmen	t of Exempt F umn (e) of Part X	VI-A contributed in	mportantly to	
(See worksheet in line 13 instructions to verify calculations.)  Part XVI-B Relationship of Activities to the A  Line No. Explain below how each activity for which inco	ccomplishmen	t of Exempt F umn (e) of Part X	VI-A contributed in	mportantly to	
(See worksheet in line 13 instructions to verify calculations.)  Part XVI-B Relationship of Activities to the A  Line No. Explain below how each activity for which inco	ccomplishmen	t of Exempt F umn (e) of Part X	VI-A contributed in	mportantly to	
(See worksheet in line 13 instructions to verify calculations.)  Part XVI-B Relationship of Activities to the A  Line No. Explain below how each activity for which inco	ccomplishmen	t of Exempt F umn (e) of Part X	VI-A contributed in	mportantly to	
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(See worksheet in line 13 instructions to verify calculations.)  Part XVI-B Relationship of Activities to the A  Line No. Explain below how each activity for which inco	ccomplishmen	t of Exempt F umn (e) of Part X	VI-A contributed in	mportantly to	
(See worksheet in line 13 instructions to verify calculations.)  Part XVI-B Relationship of Activities to the A  Line No. Explain below how each activity for which inco	ccomplishmen	t of Exempt F umn (e) of Part X	VI-A contributed in	mportantly to	
(See worksheet in line 13 instructions to verify calculations.)  Part XVI-B Relationship of Activities to the A  Line No. Explain below how each activity for which inco	ccomplishmen	t of Exempt F umn (e) of Part X	VI-A contributed in	mportantly to	
(See worksheet in line 13 instructions to verify calculations.)  Part XVI-B Relationship of Activities to the A  Line No. Explain below how each activity for which inco	ccomplishmen	t of Exempt F umn (e) of Part X	VI-A contributed in	mportantly to	966,611
(See worksheet in line 13 instructions to verify calculations.)  Part XVI-B Relationship of Activities to the A  Line No. Explain below how each activity for which inco	ccomplishmen	t of Exempt F umn (e) of Part X	VI-A contributed in	mportantly to	

## Form 990-PF (2012) The Arthur W. Perdue Foundation, Inc. 52-6054332 Page **13** Part XVII Information Regarding Transfers To and Transactions and Relationships With Noncharitable **Exempt Organizations** Did the organization directly or indirectly engage in any of the following with any other organization described Yes No in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political a Transfers from the reporting foundation to a noncharitable exempt organization of (1) Cash . . . . . 1a(1) (2) Other assets . . 1a(2) Other transactions (1) Sales of assets to a noncharitable exempt organization . . . . . 1b(1) (2) Purchases of assets from a noncharitable exempt organization . . 1b(2) 1b(3) (4) Reimbursement arrangements . . . . . . . . . . 1b(4) (5) Loans or loan guarantees 1b(5) (6) Performance of services or membership or fundraising solicitations . . . . 1b(6) Sharing of facilities, equipment, mailing lists, other assets, or paid employees . . 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 nonchantable 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 X No If "Yes," complete the following schedule (a) Name of organization (b) Type of organization (c) Description of relationship Under penalties of penury, 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, preparer (other than taxpayer) is based on all information of which preparer has any knowledge. Sign May the IRS discuss this return with the preparer shown below (see Here | instructions)? X Yes No

Preparer's signature

Firm's address One Hollow Lane, Suite 212, Lake Success, NY 11042

Jeffrey D. Haskell

ature of officer or trustee Print/Type preparer's name

Jeffrey D. Haskell

► Foundation Source

Firm's name

Paid

Preparer

**Use Only** 

Check I if

PTIN

(800) 839-1754

Part I, Line 11 (990-PF) - Other Income

	55,568	55,568	0
	Revenue		
	and Expenses	Net Investment	Adjusted
Description	per Books	Income	Net Income
1 Interest on Promissory Note	55,568	55,568	

Part I, Line 16c (990-PF) - Other Professional Fees

		29,680	26,235	0	3,445
					Disbursements
		Revenue and	,		for Charitable
		Expenses per	Net Investment	Adjusted Net	Purposes
	Description	Books	Income	Income	(Cash Basis Only)
T1	Investment Management Services	26,235	26,235		0
_2	Other Professional Svcs - Review Comm	3,445	0		3,445

Part I, Line 18 (990-PF) - Taxes

		7,700	0	0	0
		Revenue		· =·	Disbursements
i		and Expenses	Net Investment	Adjusted	for Charitable
	Description	per Books	Income	Net Income	Purposes
1	Estimated Tax for 2012	7,700	0		0

Part I, Line 23 (990-PF) - Other Expenses

	68,984	0	0	68,984
	Revenue and			Disbursements
	Expenses	Net Investment	Adjusted Net	for Charitable
Description	per Books	Income	Income	Purposes
1 Administrative Fees	68,984	0		68,984

Part II, Line 10b (990-PF) - Investments - Corporate Stock

			19,140,850	19,202,399	0	21,704,179
		Num Shares/	Book Value	Book Value	FMV	FMV
i	Description	Face Value	Beg of Year	End of Year	Beg of Year	End of Year
1	VANGUARD FTSE ALL-WORLD EX-US INDE	24,660		2,081,025		2,204,847
_ 2	VANGUARD INFLATION PROTECTION SEC	147,630		1,558,073		1,715,459
3	VANGUARD TOTAL BOND MARKET INDEX	815,422		8,581,248		9,043,030
4	VANGUARD TOTAL STOCK MARKET INDEX	245 116		6 982 053		8 740 843

The Arthur W Perdue Foundation, Inc

52-6054332

## Part II, Line 13 (990-PF) - Investments - Other

		2,254,654	2,254,654	2,254,654
	Basis of	Book Value	Book Value	FMV
Asset Description	Valuation	Beg of Year	End of Year	End of Year
1 PERDUE INCORPORTED PROMISSORY NO			2,254,654	2,254,654

52-6054332

Part VIII, Line 1 (990-PF) - Compensation of Officers, Directors, Trustees and Foundation Managers

										0	0	. 0
$\lceil \rceil$	Name	Check "X" If Business	Street	Crty	State	Zıp Code	Foreign Country	Title	Avg Hrs Per Week	Compensation	Benefits	Expense Account
1	Eileen F Burza		Foundation Source 501 Silverside Rd	Wilmington	DE	19809		Dir / Sec / Treas	1 00	0	0	0
2	James A Perdue		Foundation Source 501 Silverside Rd	Wilmington	DE	19809		Pres / Dir / Grant Comm. Mbr	1 00	0	0	0
3	Mary H Perdue		Foundation Source 501 Silverside Rd	Wilmington	DE	19809		Dir	1 00	0	0	0
4	Sandra Spedden		Foundation Source 501 Silverside Rd	Wilmington	DE	19809		Dır	1 00	Ó	0	0
5	Whitney M Van Der Hyde		Foundation Source 501 Silverside Rd	Wilmington	DE	19809		Oit	1 00	0	0	0

The Arthur W. Perdue Foundation, Inc. EIN: 52-6054332
Taxable Year Ending December 31, 2012

## Form 990-PF, Part XV, Lines 2a-d - Information regarding contributions, grants, gifts etc

#### 2a. Contact Info:

Kim Nechay, c/o The Arthur W Perdue Foundation P O. Box 1537 Salisbury MD 21802 (410) 543-3289

### 2b. Form in which applications to be submitted and required application materials:

Use online website/application http://www.perdue.com/company/commitments/contributions/application.html

### 2c. Submission deadlines:

At the end of each quarter

#### 2d. Restrictions and limitations:

Our corporate giving philosophy is guided by the belief that we can make the most difference by strengthening our communities through a grassroots contribution program Requests from organizations that meet our Guidelines are managed at the local level. To support this local focus, each of our major facilities is afforded the opportunity to provide company funding to local organizations. As a company, we may also identify opportunities to work directly with organizations and programs that support our charitable giving objectives.

5,000

General & Unrestricted

Continue to Perdue Foundation, in		O-1	4	52-0054		V
Continuation of Part XV, Lin	<u>e 3a (990-PF) -</u>	Gran	ts and Con	tributions Paid	During the	<u>rear</u>
Recipient(s) paid during the year						
Name						
<b>DELAWARE TECHNICAL &amp; COMMUNIT</b>	TY COLLEGE EDUCA	TIONAL	_ FDN			
Street						
100 CAMPUS DR						
City		State	Zip Code	Foreign Counti		
DOVER		DE	19903			
Relationship	Foundation Status		•			
N/A	509(a)(3)					
Purpose of grant/contribution					Amount	
Food Safety Associate Degree Program						50,000
Name						
DISCOVERY PLACE INC						
Street						
301 N TRYON ST City		State	Zip Code	Foreign Count	•	
CHARLOTTE		NC	28202	Foreign Count	у	
Relationship	Foundation Status	140	20202			
N/A	509(a)(1)					
Purpose of grant/contribution	1000(a)(1)			<del></del>	Amount	
Discovery Place KIDS-Rockingham Cam	inaian				Amount	33,333
Discovery Flace RIDO-ROCKINGHAIII Carr	paigii		<del> </del>			33,333
Name						
JACQUELINE FRAGA						
Street						
EAST TENNESSEE STATE UNIV, P O	BOX 70732					
City		State	Zip Code	Foreign Count	ry	
JOHNSON CITY		TN	37614			
Relationship	Foundation Status					
N/A	N/A					
Purpose of grant/contribution					Amount	
Scholarship Grant						5,000
Name						
EASTERN SHORE REGIONAL LIBRAR	Y INC					
Street				•		
122 S DIVISION ST 126						
City	· · · · · · · · · · · · · · · · · · ·	State	Zip Code	Foreign Count	rv	
SALISBURY		MD	21801	J. 515.3	•	
Relationship	Foundation Status		1			
N/A	509(a)(1)					
Purpose of grant/contribution	1000(0)(1)				Amount	
Every Child Ready to Read Project						5,000
•					!	
Name						
FAMILY WELLNESS CENTER INC						
Street						
301 W FREDERICA ST			T <del>a.</del> 6 .	TE : 0 7		
City			Zip Code	Foreign Count	ry	
HARTFORD	Te	KY	42347			
Relationship	Foundation Status					
N/A	509(a)(1)				т:	
Purpose of grant/contribution					Amount	
General & Unrestricted					<u>L</u>	2,000
Name						
FOOD BANK OF DELAWARE INC						
Street		-				
14 GARFIELD WAY						
City	=:	State	Zip Code	Foreign Count	rv	
NEWARK		DE	19713		•	
Relationship	Foundation Status		·		<del>_</del>	
N/A	509(a)(2)					
Purpose of grant/contribution					Amount	
Milford Branch Capital Campaign						20,000

Continuation of Part XV, Lir	<u>ne 3a (990-PF) -</u>	Gran	ts and Con	tributions Paid	During th	<u>e Year</u>
Recipient(s) paid during the year						
Name						
FOODBANK OF SOUTHEASTERN VIR	GINIA		<del></del>			
Street 800 TIDEWATER DR						
City	<del></del>	State	Zip Code	Foreign Count	rv	
NORFOLK	!	VA	23504	, 5, 5, g., 5 5 2	- ,	
Relationship	Foundation Status	<u></u>				
N/A	509(a)(1)					
Purpose of grant/contribution					Amount	
E Shore Branch Cooler Replacement P	roject					13,000
Name						
FORT WILIAMS CHARITABLE FOUND	ATION					
Street						
PO BOX 6260 City		State	Zip Code	Foreign Count		
CAPE ELIZ		ME	04107	l Oleigh Count	. y	
Relationship	Foundation Status		10.1.07			
N/A	509(a)(2)					
Purpose of grant/contribution					Amount	
The Arboretum Project					<u> </u>	2,500
Name						
<b>GULF OF MAINE RESEARCH INSTITU</b>	TE					
Street						
350 COMMERCIAL ST			Ta: a .	le		
City		State ME	Zip Code	Foreign Count	ry	
PORTLAND Relationship	Foundation Status	I IVIE_	04101	I		
N/A	509(a)(1)					
Purpose of grant/contribution	1				Amount	
General & Unrestricted					1	2,500
Name						
HAMPTON UNIVERSITY						
Street						
11 FRISSEL AVENUE						
City		State		Foreign Count	try	
HAMPTON Paleting Philip	Foundation Status	VA	23669			
Relationship N/A	509(a)(1)					
Purpose of grant/contribution	1505(8)(1)	·	· · · · · · · · · · · · · · · · · · ·		Amount	
Perdue Scholarship Program						10,000
Name				· · · · · · · · · · · · · · · · · · ·		
HEALTHY LEARNERS						
Street	· <u>-</u>					
2475 E 22ND ST						
City		State	1 •	Foreign Count	try	
CLEVELAND	1=	OH	44115			
Relationship	Foundation Status					
N/A Purpose of grant/contribution	509(a)(3)				Amount	
Healthy Learners in Dillon, SC					Amount	10,000
· <del></del>						
Name JALEIGH M HARLOW						
Street				<del></del>	<del> </del>	
INDIANA STATE UNIVERSITY, 200 N	7TH ST, PH 100					
City	<del></del>	State	Zip Code	Foreign Count	try	
TERRE HAUTE		IN	47809		<u> </u>	
Relationship	Foundation Status					
N/A	N/A				TA	
Purpose of grant/contribution					Amount	5 000

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The Arthur W Perdue Foundation, Inc.

Scholarship Grant

5,000

FirstStep Program

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