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Form

990-PF

Department of the Treasury
Internal Revenue Service

Return of Private Foundation
or Section 4947(a)(1) Nonexempt Charitable Trust
Treated as a Private Foundation

Note. The foundation may be able to use a copy of this return to satisfy state reporting requirements

OMB No 1545-0052

2012

Open to Public Inspection

For calendar year 2012, or tax year beginning 01-01-2012 , and ending 12-31-2012

Name of foundation RICHARD M SCRUSHY CHARITABLE FOUNDATION INC		A Employer identification number 72-1374013	
Number and street (or P O box number if mail is not delivered to street address) 250 COMMERCE PARKWAY		B Telephone number (see instructions) (205) 978-9592	
City or town, state, and ZIP code PELHAM, AL 35124		C If exemption application is pending, check here ☐	
G Check all that apply ☐ Initial return ☐ Final return ☐ Address change ☐ Initial return of a former public charity ☐ Amended return ☐ Name change		D 1. Foreign organizations, check here ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ☐	
H Check type of organization ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here ☐	
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ☒ \$ 3,179,886	J Accounting method ☒ Cash ☐ Accrual ☐ Other (specify) ☐ (Part I, column (d) must be on cash basis.)	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐	

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)				
	2 Check ☒ if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	17,013	17,013		
	4 Dividends and interest from securities.	46,768	46,768		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	☒ 158,085			
	b Gross sales price for all assets on line 6a <u>1,165,761</u>				
	7 Capital gain net income (from Part IV, line 2)		158,085		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
Operating and Administrative Expenses	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)	☒ -34,481	-34,481		
	12 Total. Add lines 1 through 11	187,385	187,385		
	13 Compensation of officers, directors, trustees, etc	57,747			
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)	☒ 87,938			
	b Accounting fees (attach schedule)				
	c Other professional fees (attach schedule)				
	17 Interest	64			
	18 Taxes (attach schedule) (see instructions)				
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications	124			
	23 Other expenses (attach schedule)	☒ 114,884	114,747		
	24 Total operating and administrative expenses.				
	Add lines 13 through 23	260,757	114,747		0
	25 Contributions, gifts, grants paid	193,720			193,720
	26 Total expenses and disbursements. Add lines 24 and 25	454,477	114,747		193,720
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	-267,092			
	b Net investment income (if negative, enter -0-)		72,638		
	c Adjusted net income (if negative, enter -0-)				

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)	Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing			
	2	Savings and temporary cash investments	594,359	642,441	642,441
	3	Accounts receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	4	Pledges receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see page 15 of the instructions)			
	7	Other notes and loans receivable (attach schedule) ▶ _____ Less allowance for doubtful accounts ▶ _____			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10a	Investments—U S and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)	2,637,816	2,344,089	1,204,222
	c	Investments—corporate bonds (attach schedule).	142,383	142,383	187,742
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)	796,077	774,630	1,145,481
	14	Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	15	Other assets (describe ▶ _____)			
	16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	4,170,635	3,903,543	3,179,886

Liabilities	17	Accounts payable and accrued expenses			
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶ _____)			
	23	Total liabilities (add lines 17 through 22)		0	

Net Assets or Fund Balances		Foundations that follow SFAS 117, check here ▶ ☐ and complete lines 24 through 26 and lines 30 and 31.			
	24	Unrestricted			
	25	Temporarily restricted			
	26	Permanently restricted			
		Foundations that do not follow SFAS 117, check here ▶ ☒ and complete lines 27 through 31.			
	27	Capital stock, trust principal, or current funds			
	28	Paid-in or capital surplus, or land, bldg , and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds	4,170,635	3,903,543	
	30	Total net assets or fund balances (see page 17 of the instructions)	4,170,635	3,903,543	
	31	Total liabilities and net assets/fund balances (see page 17 of the instructions)	4,170,635	3,903,543	

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	4,170,635
2	Enter amount from Part I, line 27a	2	-267,092
3	Other increases not included in line 2 (itemize) ▶ _____	3	
4	Add lines 1, 2, and 3	4	3,903,543
5	Decreases not included in line 2 (itemize) ▶ _____	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	3,903,543

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	See Additional Data Table			
b				
c				
d				
e				

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a See Additional Data Table			
b			
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(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 See Additional Data Table			
b			
c			
d			
e			

2	Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	158,085
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8		3	53,763

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 page 18 of the instructions before making any entries			
(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2011	158,500	4,704,715	000 033690
2010	38,651	3,591,810	000 010761
2009			
2008			
2007			

2	Total of line 1, column (d).	2	000 044451
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	000 022226
4	Enter the net value of noncharitable-use assets for 2012 from Part X, line 5.	4	3,353,682
5	Multiply line 4 by line 3.	5	74,539
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	726
7	Add lines 5 and 6.	7	75,265
8	Enter qualifying distributions from Part XII, line 4. If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate See the Part VI instructions	8	193,720

Part VIExcise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the 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	726
c		All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)			
2		Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		2	
3		Add lines 1 and 2.		3	726
4		Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		4	
5		Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0-		5	726
6		Credits/Payments			
a		2012 estimated tax payments and 2011 overpayment credited to 2012	6a		
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	
8		Enter any penalty for underpayment of estimated tax Check here ☐ if Form 2220 is attached		8	14
9		Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed		9	740
10		Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid.		10	
11		Enter the amount of line 10 to be Credited to 2013 estimated tax ☒	Refunded ☐	11	

Part VII-AStatements Regarding Activities

1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		Yes	No
		1a		
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)?			
	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.	1b		
c	Did the foundation file Form 1120-POL for this year?	1c		No
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation ☒ \$ _____ (2) On foundation managers ☒ \$ _____			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ☒ \$ _____			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS?	2		No
	If "Yes," attach a detailed description of the activities.			
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes	3		No
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a		No
b	If "Yes," has it filed a tax return on Form 990-T for this year?	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year?	5		No
	If "Yes," attach the statement required by General Instruction T.			
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	Yes	
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	Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) ☒ AL _____			
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		
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 2012 or the taxable year beginning in 2012 (see instructions for Part XIV)? If "Yes," complete Part XIV	9		No
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10		No

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		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Yes	
Website address ▶NONE				
14	The books are in care of ▶MICHAEL A PLAIA Telephone no ▶(205) 978-9592 Located at ▶250 COMMERCE PARKWAY PELHAM AL ZIP +4 ▶35124			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here ▶ ☐ and enter the amount of tax-exempt interest received or accrued during the year ▶	15		
16	At any time during calendar year 2012, 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		No
See instructions for exceptions and filing requirements for Form TD F 90-22.1 If "Yes", enter the name of the foreign country ▶				

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			Yes	No
1a	During the year did the foundation (either directly or indirectly) (1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☒ No (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?. ☐ Yes ☒ No (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☒ No (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?. ☐ Yes ☒ No (6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days). ☐ Yes ☒ No			
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)?. . . Organizations relying on a current notice regarding disaster assistance check here. ▶ ☐	1b		
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2012?.	1c		No
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 2012, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2012?. ☐ Yes ☒ No If "Yes," list the years ▶ 20____, 20____, 20____, 20____			
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions).	2b		
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ▶ 20____, 20____, 20____, 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?. ☐ Yes ☒ No			
b	If "Yes," did it have excess business holdings in 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) the lapse of the 10-, 15-, or 20-year first phase holding period? (<i>Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2012.</i>).	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
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 2012?	4b		No

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required (continued)

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

Part VIII

Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors

1 List all officers, directors, trustees, foundation managers and their compensation (see instructions).				
(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
MICHAEL A PLAIA	PRESIDENT	11,695		
250 COMMERCE PARKWAY PELHAM,AL 35124	005 00			
AMY SCRUSHY ADAMS	DIRECTOR	11,970		
250 COMMERCE PARKWAY PELHAM,AL 35124	005 00			
CHRISTA SCRUSHY PLAIA	DIRECTOR	21,920		
250 COMMERCE PARKWAY PELHAM,AL 35124	005 00			
MARTIN ADAMS	DIRECTOR	12,162		
250 COMMERCE PARKWAY PELHAM,AL 35124	001 00			
2 Compensation of five highest-paid employees (other than those included on line 1—see instructions). If none, enter "NONE."				
(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
Total number of other employees paid over \$50,000.				

Part VIII

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation

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	N/A	0
2		
3		
4		

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1	
2	
All other program-related investments See page 24 of the instructions	
3	

Form **990-PF** (2012)

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	2,751,663
b	Average of monthly cash balances.	1b	653,090
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	3,404,753
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	
2	Acquisition indebtedness applicable to line 1 assets.	2	
3	Subtract line 2 from line 1d.	3	3,404,753
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	51,071
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	3,353,682
6	Minimum investment return. Enter 5% of line 5.	6	167,684

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	167,684
2a	Tax on investment income for 2012 from Part VI, line 5.	2a	726
b	Income tax for 2012 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	726
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	166,958
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	166,958
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	166,958

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	193,720
b	Program-related investments—total from Part IX-B.	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes.	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required).	3a	
b	Cash distribution test (attach the required schedule).	3b	
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	193,720
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	726
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	192,994
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 2011	(c) 2011	(d) 2012
1		Distributable amount for 2012 from Part XI, line 7			
2		Undistributed income, if any, as of the end of 2012			
a		Enter amount for 2011 only.			
b		Total for prior years 2008 , 2009 , 2010			
3		Excess distributions carryover, if any, to 2012			
a	From 2007.	938,225			
b	From 2008.	146,531			
c	From 2009.				
d	From 2010.	174,976			
e	From 2011.				
f		Total of lines 3a through e.			
4		Qualifying distributions for 2012 from Part XII, line 4 \$ 193,720			
a		Applied to 2011, but not more than line 2a			
b		Applied to undistributed income of prior years (Election required—see instructions).			
c		Treated as distributions out of corpus (Election required—see instructions).			
d		Applied to 2012 distributable amount.			
e		Remaining amount distributed out of corpus			
5		Excess distributions carryover applied to 2012 (If an amount appears in column (d), the same amount must be shown in column (a).)			
6		Enter the net total of each column as indicated below:			
a		Corpus Add lines 3f, 4c, and 4e Subtract line 5			
b		Prior years' undistributed income Subtract line 4b from line 2b.			
c		Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.			
d		Subtract line 6c from line 6b Taxable amount—see instructions.			
e		Undistributed income for 2011 Subtract line 4a from line 2a Taxable amount—see instructions.			
f		Undistributed income for 2012 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2013.			
7		Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions).			
8		Excess distributions carryover from 2007 not applied on line 5 or line 7 (see instructions).			
9		Excess distributions carryover to 2013. Subtract lines 7 and 8 from line 6a.			
10		Analysis of line 9			
a	Excess from 2008.	146,531			
b	Excess from 2009.				
c	Excess from 2010.	174,976			
d	Excess from 2011.				
e	Excess from 2012.	26,762			

Part XIV

Private Operating Foundations (see instructions and Part VII-A, question 9)

1a

If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2012, enter the date of the ruling.

b

Check box to indicate whether the organization is a private operating foundation described in section 4942(j)(3) or 4942(j)(5)

☐ 4942(j)(3) or ☐ 4942(j)(5)

2a	Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed.	Tax year	Prior 3 years			(e) Total
		(a) 2012	(b) 2011	(c) 2010	(d) 2009	
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 organization had \$5,000 or more in assets at any time during the year—see instructions.)

1

Information Regarding Foundation Managers:

a

List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000) (See section 507(d)(2))

b

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

2

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

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

a

The name, address, and telephone number or e-mail of the person to whom applications should be addressed

MICHAEL A PLAIA
250 COMMERCE PARKWAY
PELHAM,AL 35124
(205) 978-9592

b

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

NONE

c

Any submission deadlines

NONE

d

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

NONE

Form 990-PF (2012)

Part XV

Supplementary Information (continued)

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

Recipient	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
Name and address (home or business)				
a Paid during the year See Additional Data Table				
Total			3a	193,720
b Approved for future payment				
Total			3b	

Enter gross amounts unless otherwise indicated	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue					
a _____					
b _____					
c _____					
d _____					
e _____					
f _____					
g Fees and contracts from government agencies					
2 Membership dues and assessments.					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities.			14	63,781	
5 Net rental income or (loss) from real estate					
a Debt-financed property.					
b Not debt-financed property.					
6 Net rental income or (loss) from personal property					
7 Other investment income.			14	34,481	
8 Gain or (loss) from sales of assets other than inventory			14	158,085	
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).				187,385	
13 Total. Add line 12, columns (b), (d), and (e).			13		187,385

[illegible]

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. (2) Other assets. b Other transactions (1) Sales of assets to a noncharitable exempt organization. (2) Purchases of assets from a noncharitable exempt organization. (3) Rental of facilities, equipment, or other assets. (4) Reimbursement arrangements. (5) Loans or loan guarantees. (6) Performance of services or membership or fundraising solicitations. c Sharing of facilities, equipment, mailing lists, other assets, or paid employees. 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		Yes	No
	1a(1)		No
	1a(2)		No
	1b(1)		No
	1b(2)		No
	1b(3)		No
	1b(4)		No
	1b(5)		No
1b(6)		No	
1c		No	

[illegible]

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? ☐ Yes ☒ No

b If "Yes," complete the following schedule

(a) Name of organization	(b) Type of organization	(c) Description of relationship

**Sign
Here**

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer or fiduciary) is based on all information of which preparer has any knowledge.

* * * * *

2013-11-06

* * * * *

Signature of officer or trustee

Date

Title

May the IRS discuss this return with the preparer shown below (see instr. 2)? ☒ **Yes** ☐ **No**

**Paid
Preparer
Use Only**

Print/Type preparer's name	Preparer's Signature	Date	Check if self-employed ☒	PTIN
TODD DARROCH CPA	TODD DARROCH CPA	2013-11-06		
Firm's name	DARROCH AND HALCOMB PC		Firm's EIN	
	6 OFFICE PARK CIR STE 312			
Firm's address	BIRMINGHAM, AL 35223		Phone no (205) 423-9244	

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(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)
ALTRIA GROUP	P	2011-08-05	2012-01-11
FREEFORT MCMORAN COPPER AND GOLD	P	2011-11-28	2012-01-11
GLOBAL X SILVER MINERS	P	2012-06-05	2012-08-22
MARKET VECTORS JUNIOR GOLD MINERS	P	2012-06-05	2012-08-22
SILVER WHEATON CORP	P	2011-11-28	2012-02-29
SILVER WHEATON CORP	P	2012-06-05	2012-08-22
GLOBAL X SILVER MINERS CORP	P	2011-11-28	2012-01-11
MARKET VECTORS JUNIOR GOLD MINERS	P	2011-11-28	2012-02-29
KINDER MORGAN ELECTRIC PARTNERS	P	2007-12-03	2012-01-03
PETROCHINA COADR	P	2008-04-22	2012-01-11
SOUTHERN COPPER CORP	P	2008-08-20	2012-01-12
SUBURBAN PROPANE PARTNERS	P	2011-08-19	2012-09-17

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
57,580		51,578	6,002
56,490		50,397	6,093
109,517		102,054	7,463
103,594		101,689	1,905
57,196		48,611	8,585
124,491		100,899	23,592
51,207		50,255	952
50,075		50,904	-829
254,068		153,905	100,163
139,417		137,274	2,143
162,117		160,100	2,017
9		10	-1

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(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	
			6,002
			6,093
			7,463
			1,905
			8,585
			23,592
			952
			-829
			100,163
			2,143
			2,017
			-1

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	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
Name and address (home or business)				
a <i>Paid during the year</i>				
UNITED COMMUNITY SUPPORT 3918 MONTCLAIR ROAD BIRMINGHAM,AL 35213			UNRESTRICTED SUPPORT	5,000
KINGS HOME 221 KINGS HOME DRIVE CHELSEA,AL 35043			UNRESTRICTED SUPPORT	1,500
EASTER SEALS ALABAMA 5960 E SHIRLEY LANE MONTGOMERY,AL 36117			UNRESTRICTED SUPPORT	10,000
COMMUNITY GRIEF SUPPORT 1119 OXMOOR RD BIRMINGHAM,AL 35209			UNRESTRICTED SUPPORT	3,000
GRACE HOUSE 4923 FARRELL AVE FAIRFIELD,AL 35064			UNRESTRICTED SUPPORT	6,500
WOUNDED WARRIOR PROJECT 1120 G STREET NW WASHINGTON,DC 20005			UNRESTRICTED SUPPORT	3,000
AMERICAN NATIONAL 300 CHASE PARK SOUTH HOOVER,AL 35244			UNRESTRICTED SUPPORT	2,500
BETH HALLEL MESSIANIC 2230 SUMPTER ST BIRMINGHAM,AL 35226			UNRESTRICTED SUPPORT	6,000
JUVENILE DIABETES RESEARCH FOUNDATION 600 BEACON PARKWAY W BIRMINGHAM,AL 35209			UNRESTRICTED SUPPORT	3,000
THE FOUNDRY RESCUE 1804 6TH AVE N BESSEMER,AL 35020			UNRESTRICTED SUPPORT	7,000
SELMA AREA FOOD 521 BELL RD SELMA,AL 36701			UNRESTRICTED SUPPORT	2,500
CAMP SMILE A MILE 1510 5TH AVE S BIRMINGHAM,AL 35233			UNRESTRICTED SUPPORT	4,000
SPIRIT OF HOPE 194 KINGS RANCH DR WILSONVILLE,AL 35186			UNRESTRICTED SUPPORT	3,500
CHILDRENS DANCE FOUNDATION 1715 27TH COURT SOUTH HOMEWOOD,AL 35209			UNRESTRICTED SUPPORT	3,000
ANGEL FLIGHT 1515 E 71ST TULSA,OK 74136			UNRESTRICTED SUPPORT	5,000

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	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
Name and address (home or business)				
a <i>Paid during the year</i>				
THE WELLHOUSE PO BOX 320796 BIRMINGHAM,AL 35232			UNRESTRICTED SUPPORT	12,500
VINEYARD FAMILY SERVICES 4733 VALLEYDALE RD BIRMINGHAM,AL 35242			UNRESTRICTED SUPPORT	7,500
JEFFERSON ALCOHOLIC 2012 14TH AVE S BIRMINGHAM,AL 35205			UNRESTRICTED SUPPORT	7,500
THE VILLAGE 2409 WILDWOOD ST BIRMINGHAM,AL 35233			UNRESTRICTED SUPPORT	3,000
SAVE A LIFE INC 1835 EAST THREE NOTCH ST ANDALUSIA,AL 36421			UNRESTRICTED SUPPORT	5,000
JOUBERT SYNDROME 736 ANDERSON AVE ROCKVILLE,MD 20850			UNRESTRICTED SUPPORT	1,500
YMCA 2101 4TH AVE N BIRMINGHAM,AL 35223			UNRESTRICTED SUPPORT	6,720
MAN ADVENTURES INC ALABASTER ALABASTER,AL 35057			UNRESTRICTED SUPPORT	2,000
US ASSOCIATION OF BLIND 1 OLYMPIC PLAZA COLO SPGS,CO 80909			UNRESTRICTED SUPPORT	1,500
PAWS AND STRIPES 4041 BARBARA LOOK SE RIO RANCHO,NM 87124			UNRESTRICTED SUPPORT	2,000
RISE OF HUNTSVILLE 5050 TECHNOLOGY DRIVE HUNTSVILLE,AL 35805			UNRESTRICTED SUPPORT	5,000
INTERNATIONAL PENTECOSTAL PO BOX 12609 OKLAHOMA CITY,OK 73157			UNRESTRICTED SUPPORT	2,000
RACING FOR A CURE 1909 27TH AVENUE SOUTH BIRMINGHAM,AL 35209			UNRESTRICTED SUPPORT	1,000
ATLANTA UNION MISSION 2353 BOLTON RD ATLANTA,GA 30318			UNRESTRICTED SUPPORT	2,000
ONE ROOF 320-C TEMPLE AVENUE NEWNAN,GA 30263			UNRESTRICTED SUPPORT	2,500

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	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
Name and address (home or business)				
a <i>Paid during the year</i>				
NASHVILLE RESCUE MISSION 639 LAFAYETTE ST NASHVILLE,TN 37203			UNRESTRICTED SUPPORT	3,000
ALZHEIMERS DISEASE 225 N MICHIGAN AVE CHICAGO,IL 60601			UNRESTRICTED SUPPORT	2,500
FOCUS ON THE FAMILY 8605 EXPLORER DRIVE COLORADO SPRINGS,CO 80995			UNRESTRICTED SUPPORT	1,500
GENESIS SHELTER INC 173 BOULEVARD NE ATLANTA,GA 30312			UNRESTRICTED SUPPORT	5,000
DOTHAN RESCUE MISSION 216 E CRAWFORD ST DOTHAN,AL 36301			UNRESTRICTED SUPPORT	2,000
CHURCH OF GOD WORLD PO BOX 8016 CLEVELAND,TN 37320			UNRESTRICTED SUPPORT	5,000
ASSOCIATION OF GRADUATION 698 MILLS ROAD WEST POINT,NY 10996			UNRESTRICTED SUPPORT	8,000
CROSS AND CROWN 1008 N MCKINELY AVE OKLAHOMO CITY,OK 73106			UNRESTRICTED SUPPORT	2,000
DAVIS WRIGHT TREMAI 1201 THIRD AVE SEATTLE,WA 98101			UNRESTRICTED SUPPORT	5,000
ALABAMA JUNIOR HIGH 332 EAST SAMFORD AVE AUBURN,AL 36830			UNRESTRICTED SUPPORT	1,000
BAY AREA FOOD BANK 5248 MOBILE SOUTH ST THEODORE,AL 36582			UNRESTRICTED SUPPORT	5,000
COALITION FOR THE HOMLESS 4092 SOUTH MEMORIAL PARKWAY HUNTSVILLE,AL 35802			UNRESTRICTED SUPPORT	5,000
DROPS OF HOPE INC PO BOX 970724 COCONUT CREEK,FL 33097			UNRESTRICTED SUPPORT	5,000
FLORIDA VISION QUEST 167 N INDUSTRIAL DR ORANGE CITY,FL 32763			UNRESTRICTED SUPPORT	3,000
WIREGRASS CHILDRENS HOME PO BOX 6813 DOTHAN,AL 36302			UNRESTRICTED SUPPORT	5,000

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	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
Name and address (home or business)				
a <i>Paid during the year</i>				
ADOPT A FAMILY 496 B STREET SAN RAFAEL, CA 94901			UNRESTRICTED SUPPORT	3,500
ABILITIES UNLIMITED 165 506 N SAM HOUSTON PARKWAY HOUSTON, TX 77060			UNRESTRICTED SUPPORT	5,000
Total  3a				193,720

Note: To capture the full content of this document, please select landscape mode (11" x 8.5") when printing.

TY 2012 Gain/Loss from Sale of Other Assets Schedule

Name: RICHARD M SCRUSHY CHARITABLE FOUNDATION INC

EIN: 72-1374013

Software ID: 12000057

Software Version: 12.19.1011.1

Name	Date Acquired	How Acquired	Date Sold	Purchaser Name	Gross Sales Price	Basis	Basis Method	Sales Expenses	Total (net)	Accumulated Depreciation
ALTRIA GROUP	2011-08	P	2012-01		57,580	51,578			6,002	
FREEFORT MCMORAN COPPER AND GOLD	2011-11	P	2012-01		56,490	50,397			6,093	
GLOBAL X SILVER MINERS	2012-06	P	2012-08		109,517	102,054			7,463	
MARKET VECTORS JUNIOR GOLD MINERS	2012-06	P	2012-08		103,594	101,689			1,905	
SILVER WHEATON CORP	2011-11	P	2012-02		57,196	48,611			8,585	
SILVER WHEATON CORP	2012-06	P	2012-08		124,491	100,899			23,592	
GLOBAL X SILVER MINERS CORP	2011-11	P	2012-01		51,207	50,255			952	
MARKET VECTORS JUNIOR GOLD MINERS	2011-11	P	2012-02		50,075	50,904			-829	
KINDER MORGAN ELECTRIC PARTNERS	2007-12	P	2012-01		254,068	153,905			100,163	
PETROCHINA COADR	2008-04	P	2012-01		139,417	137,274			2,143	
SOUTHERN COPPER CORP	2008-08	P	2012-01		162,117	160,100			2,017	
SUBURBAN PROPANE PARTNERS	2011-08	P	2012-09		9	10			-1	

TY 2012 General Explanation Attachment

Name: RICHARD M SCRUSHY CHARITABLE FOUNDATION INC

EIN: 72-1374013

Software ID: 12000057

Software Version: 12.19.1011.1

**TY 2012 Investments Corporate
Bonds Schedule****Name:** RICHARD M SCRUSHY CHARITABLE FOUNDATION INC**EIN:** 72-1374013**Software ID:** 12000057**Software Version:** 12.19.1011.1

Name of Bond	End of Year Book Value	End of Year Fair Market Value
ADVANCED MICRO DEVICES 6.00 2015-05-01	142,383	187,742

TY 2012 Investments Corporate Stock Schedule

Name: RICHARD M SCRUSHY CHARITABLE FOUNDATION INC

EIN: 72-1374013

Software ID: 12000057

Software Version: 12.19.1011.1

Name of Stock	End of Year Book Value	End of Year Fair Market Value
3000 shares of DISNEY WALT CO	100,260	149,370
700 shares of FIRST SOLAR INC	208,661	21,599
6200 shares of HEALTHSOUTH CORP	271,561	130,882
3000 shares of J.P. MORGAN CHASE CO	123,956	131,907
3000 shares of JAMES RIVER COAL	116,980	9,630
255 shares of MAGELLAN HEALTH SERVICES		12,495
2000 shares of MCDONALDS CORP	109,200	176,420
7000 shares of MICRON TECHNOLOGY INC	75,319	44,380
150 shares of PHH CORP	3,122	3,413
6000 shares of PATTERSON-UTI ENERGY	185,772	111,780
2100 shares of SUNTECH POWER	101,488	3,213
2000 shares of TRANSOCEAN LTD	279,481	89,320
4400 shares of EXCEL MARITIME	184,747	1,910
125000 shares of GENER8TION X ENTERTAINMENT	150,000	15,000
2500 shares of TELEFONICA DE ESPANA S A ADR	53,087	33,725
2100 shares of AFLAC CORPORATION 2/29/12	99,328	
200 shares of APPLE INC 11/13/12	109,304	106,434
2500 shares of CENTURYLINK INC. 2/29/12	100,725	97,800
1800 shares of SILVER WHEATON CORP	71,098	64,944

TY 2012 Investments - Other Schedule**Name:** RICHARD M SCRUSHY CHARITABLE FOUNDATION INC**EIN:** 72-1374013**Software ID:** 12000057**Software Version:** 12.19.1011.1

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
ATLAS PIPELINE LP	FMV	120,608	252,560
LINN ENERGY LLC	FMV	11,198	281,920
STAR GAS PARTNERS LP	FMV	112,032	127,285
HIGHLAND CREDIT STRATIGIES FUND	FMV	143,000	66,400
ENERGY TRANSFER PARTNERS LP	FMV	65,302	85,860
ENERGY TRANSFER EQUITY	FMV	35,044	59,124
INERGY LP	FMV	40,450	34,561
GLOBAL X SIVER MINERS	FMV	69,209	65,685
MARKET VECTORS JUNIOR GOLD MINERS	FMV	67,975	57,391
SUBURBAN PROPANE	FMV	1,319	7,966
EV ENERGY PARTNERS	FMV	108,493	105,767
DYNEGY INC	FMV		962

TY 2012 Legal Fees Schedule**Name:** RICHARD M SCRUSHY CHARITABLE FOUNDATION INC**EIN:** 72-1374013**Software ID:** 12000057**Software Version:** 12.19.1011.1

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LEITMAN, SIEGAL, PAYNE CAMPBELL, PC	21,333			
NATTER FULMER, PC	66,605			

TY 2012 Other Expenses Schedule**Name:** RICHARD M SCRUSHY CHARITABLE FOUNDATION INC**EIN:** 72-1374013**Software ID:** 12000057**Software Version:** 12.19.1011.1

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT MANAGEMENT FEES	17,321	17,321		
OTHER DEDUCTIONS FROM PTPS	97,426	97,426		
POSTAGE	137			

TY 2012 Other Income Schedule**Name:** RICHARD M SCRUSHY CHARITABLE FOUNDATION INC**EIN:** 72-1374013**Software ID:** 12000057**Software Version:** 12.19.1011.1

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
OTHER INCOME FROM INVESTEMENTS IS MLP	-28,488	-28,488	
LTCG FROM PTPS	-1,615	-1,615	
SECTION 1231 GAIN FROM PTPS	-4,378	-4,378	

TY 2012 Taxes Schedule

Name: RICHARD M SCRUSHY CHARITABLE FOUNDATION INC

EIN: 72-1374013

Software ID: 12000057

Software Version: 12.19.1011.1

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
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