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

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

2012

Open to public inspection

For calendar year 2012 or tax year beginning JUL 1, 2012, and ending JUN 30, 2013

Name of foundation  
**FLORENCE B. TRUUMAN EDUCATIONAL TRUST**

Number and street (or P O box number if mail is not delivered to street address)  
**401 FAIRLEIGH COURT**

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

**A** Employer identification number  
**52-1649301**

**B** Telephone number  
**410-741-5602**

**C** If exemption application is pending, check here ☐

**D** 1. Foreign organizations, check here ☐  
2. Foreign organizations meeting the 85% test, check here and attach computation ☐

**E** If private foundation status was terminated under section 507(b)(1)(A), check here ☐

**F** If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

**G** Check all that apply ☐ Initial return ☐ Initial return of a former public charity  
☐ Final return ☐ Amended return  
☐ Address change ☐ Name change

**H** Check type of organization ☒ Section 501(c)(3) exempt private foundation  
☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation

**I** Fair market value of all assets at end of year (from Part II, col. (c), line 16)  
**\$ 723,068.** (Part I, column (d) must be on cash basis)

**J** Accounting method ☒ Cash ☐ Accrual  
☐ Other (specify)

| Part I Analysis of Revenue and Expenses<br>(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) |
|----------------------------------------------------------------------------------------------------------------------------------------------------|--|------------------------------------|---------------------------|-------------------------|-------------------------------------------------------------|
| 1 Contributions, gifts, grants, etc., received                                                                                                     |  |                                    |                           | N/A                     |                                                             |
| 2 Check <input checked="" type="checkbox"/> 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                                                                                                           |  | 14,194.                            | 14,194.                   |                         |                                                             |
| 5a Gross rents                                                                                                                                     |  | 14,400.                            | 14,400.                   |                         | STATEMENT 2                                                 |
| b Net rental income or (loss) -4,899.                                                                                                              |  |                                    |                           |                         | STATEMENT 3                                                 |
| 6a Net gain or (loss) from sale of assets not on line 10                                                                                           |  | 26,213.                            |                           |                         |                                                             |
| b Gross sales price for all assets on line 6a 91,332.                                                                                              |  |                                    |                           |                         |                                                             |
| 7 Capital gain net income (from Part IV, line 2)                                                                                                   |  |                                    | 26,213.                   |                         |                                                             |
| 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                                                                                                                   |  | 54,808.                            | 54,808.                   |                         |                                                             |
| 13 Compensation of officers, directors, trustees, etc.                                                                                             |  | 5,578.                             | 1,116.                    |                         | 4,462.                                                      |
| 14 Other employee salaries and wages                                                                                                               |  |                                    |                           |                         |                                                             |
| 15 Pension plans, employee benefits                                                                                                                |  |                                    |                           |                         |                                                             |
| 16a Legal fees                                                                                                                                     |  |                                    |                           |                         |                                                             |
| b Accounting fees                                                                                                                                  |  | 4,705.                             | 4,705.                    |                         | 0.                                                          |
| c Other professional fees                                                                                                                          |  |                                    |                           |                         |                                                             |
| 17 Interest                                                                                                                                        |  |                                    |                           |                         |                                                             |
| 18 Taxes STMT 5                                                                                                                                    |  | 1,947.                             | 1,947.                    |                         | 0.                                                          |
| 19 Depreciation and depletion                                                                                                                      |  | 7,974.                             | 7,974.                    |                         |                                                             |
| 20 Occupancy                                                                                                                                       |  |                                    |                           |                         |                                                             |
| 21 Travel, conferences, and meetings                                                                                                               |  |                                    |                           |                         |                                                             |
| 22 Printing and publications                                                                                                                       |  |                                    |                           |                         |                                                             |
| 23 Other expenses STMT 6                                                                                                                           |  | 12,747.                            | 12,747.                   |                         | 0.                                                          |
| 24 Total operating and administrative expenses Add lines 13 through 23                                                                             |  | 32,951.                            | 28,489.                   |                         | 4,462.                                                      |
| 25 Contributions, gifts, grants paid                                                                                                               |  | 49,150.                            |                           |                         | 49,150.                                                     |
| 26 Total expenses and disbursements. Add lines 24 and 25                                                                                           |  | 82,101.                            | 28,489.                   |                         | 53,612.                                                     |
| 27 Subtract line 26 from line 12                                                                                                                   |  | -27,293.                           |                           |                         |                                                             |
| a Excess of revenue over expenses and disbursements                                                                                                |  |                                    | 26,319.                   |                         |                                                             |
| b Net investment income (if negative, enter -0-)                                                                                                   |  |                                    |                           |                         |                                                             |
| c Adjusted net income (if negative, enter -0-)                                                                                                     |  |                                    |                           | N/A                     |                                                             |

P 20

| 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                                                        | 9,018.                                                                                          | 10,731.                              |  |
|                                                                             | 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                                                      |                                                                                                 |                                      |  |
| Assets                                                                      | 11 Investments - land, buildings, and equipment basis ▶ 218,587.                     |                                                                                                 |                                      |  |
|                                                                             | Less accumulated depreciation STMT 7 ▶ 187,263.                                      | 39,239.                                                                                         | 31,324.                              |  |
|                                                                             | 12 Investments - mortgage loans                                                      |                                                                                                 |                                      |  |
|                                                                             | 13 Investments - other STMT 8                                                        | 457,721.                                                                                        | 436,690.                             |  |
|                                                                             | 14 Land, buildings, and equipment basis ▶ 3,744.                                     |                                                                                                 |                                      |  |
|                                                                             | Less accumulated depreciation STMT 9 ▶ 3,744.                                        | 60.                                                                                             | 0.                                   |  |
|                                                                             | 15 Other assets (describe ▶ )                                                        |                                                                                                 |                                      |  |
|                                                                             | 16 Total assets (to be completed by all filers)                                      | 506,038.                                                                                        | 478,745.                             |  |
|                                                                             | 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 ▶ <input checked="" type="checkbox"/> X |                                                                                                 |                                      |  |
|                                                                             | 24 Unrestricted                                                                      | 504,838.                                                                                        | 477,545.                             |  |
|                                                                             | 25 Temporarily restricted                                                            |                                                                                                 |                                      |  |
|                                                                             | 26 Permanently restricted                                                            |                                                                                                 |                                      |  |
|                                                                             | Foundations that do not follow SFAS 117, check here ▶ <input type="checkbox"/>       |                                                                                                 |                                      |  |
|                                                                             | 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                                        | 504,838.                                                                             | 477,545.                                                                                        |                                      |  |
| 31 Total liabilities and net assets/fund balances                           | 506,038.                                                                             | 478,745.                                                                                        |                                      |  |

## 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<br>(must agree with end-of-year figure reported on prior year's return) | 1 | 504,838. |
| 2 Enter amount from Part I, line 27a                                                                                                                            | 2 | -27,293. |
| 3 Other increases not included in line 2 (itemize) ▶                                                                                                            | 3 | 0.       |
| 4 Add lines 1, 2, and 3                                                                                                                                         | 4 | 477,545. |
| 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 | 477,545. |

**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<br>P - Purchase<br>D - Donation | (c) Date acquired<br>(mo., day, yr.) | (d) Date sold<br>(mo., day, yr.) |
|-----------------------------------------------------------------------------------------------------------------------------------|--|--------------------------------------------------|--------------------------------------|----------------------------------|
| 1a                                                                                                                                |  |                                                  |                                      |                                  |
| b SEE ATTACHED STATEMENTS                                                                                                         |  |                                                  |                                      |                                  |
| c                                                                                                                                 |  |                                                  |                                      |                                  |
| d                                                                                                                                 |  |                                                  |                                      |                                  |
| e                                                                                                                                 |  |                                                  |                                      |                                  |

| (e) Gross sales price | (f) Depreciation allowed<br>(or allowable) | (g) Cost or other basis<br>plus expense of sale | (h) Gain or (loss)<br>(e) plus (f) minus (g) |
|-----------------------|--------------------------------------------|-------------------------------------------------|----------------------------------------------|
| a                     |                                            |                                                 |                                              |
| b                     |                                            |                                                 |                                              |
| c                     |                                            |                                                 |                                              |
| d                     |                                            |                                                 |                                              |
| e 91,332.             |                                            | 65,119.                                         | 26,213.                                      |

| Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69 |                                      |                                                 | (i) Gains (Col. (h) gain minus<br>col. (k), but not less than -0-) or<br>Losses (from col. (h)) |
|---------------------------------------------------------------------------------------------|--------------------------------------|-------------------------------------------------|-------------------------------------------------------------------------------------------------|
| (i) FMV as of 12/31/69                                                                      | (j) Adjusted basis<br>as of 12/31/69 | (k) Excess of col. (i)<br>over col. (j), if any |                                                                                                 |
| a                                                                                           |                                      |                                                 |                                                                                                 |
| b                                                                                           |                                      |                                                 |                                                                                                 |
| c                                                                                           |                                      |                                                 |                                                                                                 |
| d                                                                                           |                                      |                                                 |                                                                                                 |
| e                                                                                           |                                      |                                                 | 26,213.                                                                                         |

|                                                                                |                                                                                               |  |   |         |
|--------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------|--|---|---------|
| 2 Capital gain net income or (net capital loss)                                | { If gain, also enter in Part I, line 7<br>If (loss), enter -0- in Part I, line 7             |  | 2 | 26,213. |
| 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)<br>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 the instructions before making any entries.

| (a)<br>Base period years<br>Calendar year (or tax year beginning in) | (b)<br>Adjusted qualifying distributions | (c)<br>Net value of noncharitable-use assets | (d)<br>Distribution ratio<br>(col. (b) divided by col. (c)) |
|----------------------------------------------------------------------|------------------------------------------|----------------------------------------------|-------------------------------------------------------------|
| 2011                                                                 | 37,996.                                  | 735,275.                                     | .051676                                                     |
| 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                                                     |

|                                                                                                                                                                                |   |          |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---|----------|
| 2 Total of line 1, column (d)                                                                                                                                                  | 2 | .264357  |
| 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 | .052871  |
| 4 Enter the net value of noncharitable-use assets for 2012 from Part X, line 5                                                                                                 | 4 | 745,515. |
| 5 Multiply line 4 by line 3                                                                                                                                                    | 5 | 39,416.  |
| 6 Enter 1% of net investment income (1% of Part I, line 27b)                                                                                                                   | 6 | 263.     |
| 7 Add lines 5 and 6                                                                                                                                                            | 7 | 39,679.  |
| 8 Enter qualifying distributions from Part XII, line 4                                                                                                                         | 8 | 53,612.  |

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 <input type="checkbox"/> and enter "N/A" on line 1<br>Date of ruling or determination letter _____ (attach copy of letter if necessary-see instructions) | 1  | 263. |
| b  | Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b                                                                        |    |      |
| c  | All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col (b)                                                                                                            | 2  | 0.   |
| 2  | Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)                                                                                                                         | 3  | 263. |
| 3  | Add lines 1 and 2                                                                                                                                                                                                                 | 4  | 0.   |
| 4  | Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)                                                                                                                       | 5  | 263. |
| 5  | Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-                                                                                                                                           |    |      |
| 6  | Credits/Payments                                                                                                                                                                                                                  |    |      |
| a  | 2012 estimated tax payments and 2011 overpayment credited to 2012                                                                                                                                                                 | 6a | 419. |
| 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  | 419. |
| 8  | Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> 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 | 156. |
| 11 | Enter the amount of line 10 to be credited to 2013 estimated tax                                                                                                                                                                  | 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?                                                                                                                                                                   |     | X  |
| 1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)?<br>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 |     | X  |
| 1c Did the foundation file Form 1120-POL for this year?                                                                                                                                                                                                                                                                                   |     | X  |
| d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year:<br>(1) On the foundation <input type="checkbox"/> \$ 0. (2) On foundation managers <input type="checkbox"/> \$ 0.                                                                                                                    |     |    |
| e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input type="checkbox"/> \$ 0.                                                                                                                                                                     |     |    |
| 2 Has the foundation engaged in any activities that have not previously been reported to the IRS?<br>If "Yes," attach a detailed description of the activities.                                                                                                                                                                           |     | 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                                                                                                              |     | X  |
| 4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?                                                                                                                                                                                                                                            |     | X  |
| b If "Yes," has it filed a tax return on Form 990-T for this year?                                                                                                                                                                                                                                                                        |     |    |
| 5 Was there a liquidation, termination, dissolution, or substantial contraction during the year?<br>If "Yes," attach the statement required by General Instruction T.                                                                                                                                                                     |     | X  |
| 6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either:<br>• By language in the governing instrument, or<br>• 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?      |     | X  |
| 7 Did the foundation have at least \$5,000 in assets at any time during the year?<br>If "Yes," complete Part II, col (c), and Part XV                                                                                                                                                                                                     | X   |    |
| 8a Enter the states to which the foundation reports or with which it is registered (see instructions) <input type="checkbox"/> 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                                                                                                                             | 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 2012 or the taxable year beginning in 2012 (see instructions for Part XIV)? If "Yes," complete Part XIV                                                                                    |     | X  |
| 10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses                                                                                                                                                                                                     |     | X  |

N/A

**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 |     | 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?<br>Website address <b>N/A</b>                                                                                                                                                                                         | 13 | X   |         |
| 14 | The books are in care of <b>J. SCOTT WHITNEY</b> Telephone no <b>410-741-5602</b><br>Located at <b>401 FAIRLEIGH COURT, TRACY'S LANDING, MD</b> ZIP+4 <b>20779</b>                                                                                                                                                                        |    |     |         |
| 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 <b>15</b> <b>N/A</b>                                                                                                                                  |    |     |         |
| 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?<br>See the instructions for exceptions and filing requirements for Form TD F 90-22.1 If "Yes," enter the name of the foreign country <b>N/A</b> | 16 | Yes | No<br>X |

**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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No                                                                                                                                                                                                                                                                                                                                                    |     |    |
| (2) | Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No                                                                                                                                                                                                                                                                                                                            |     |    |
| (3) | Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No                                                                                                                                                                                                                                                                                                                                                |     |    |
| (4) | Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No                                                                                                                                                                                            |     |    |
| b   | If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here <b>N/A</b>                                                                                                                                                                                        | 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? <b>N/A</b>                                                                                                                                                                                                                                                                                                        | 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 2012, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2012? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No<br>If "Yes," list the years <b>N/A</b>                                                                                                                                                                                                                                              |     |    |
| 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) <b>N/A</b>                                                                                                                                                                                       | 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 <b>N/A</b>                                                                                                                                                                                                                                                                                                                                                                                |     |    |
| 3a  | Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2012) <b>N/A</b> | 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 2012?                                                                                                                                                                                                                                                                         | 4b  | X  |

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**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           | TRUSTEE                                                   |                                           |                                                                       |                                       |
| 401 FAIRLEIGH COURT        |                                                           |                                           |                                                                       |                                       |
| TRACYS LANDING, MD 20779   | 2.00                                                      | 3,293.                                    | 0.                                                                    | 0.                                    |
| LAURENCE CUMBERLAND        | TRUSTEE                                                   |                                           |                                                                       |                                       |
| MAIN STREET                |                                                           |                                           |                                                                       |                                       |
| PRINCE FREDERICK, MD 20678 | 2.00                                                      | 2,285.                                    | 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

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**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.                                                                                                                                                | 49,150.  |
| 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                                                                                                                |        |
| 3 All other program-related investments. See instructions                                                        |        |
|                                                                                                                  |        |
|                                                                                                                  |        |
| <b>Total.</b> Add lines 1 through 3                                                                              | 0.     |

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

|          |                                                                                                            |           |          |
|----------|------------------------------------------------------------------------------------------------------------|-----------|----------|
| <b>1</b> | Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes |           |          |
| <b>a</b> | Average monthly fair market value of securities                                                            | <b>1a</b> | 558,088. |
| <b>b</b> | Average of monthly cash balances                                                                           | <b>1b</b> | 16,280.  |
| <b>c</b> | Fair market value of all other assets                                                                      | <b>1c</b> | 182,500. |
| <b>d</b> | Total (add lines 1a, b, and c)                                                                             | <b>1d</b> | 756,868. |
| <b>e</b> | Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)  | <b>1e</b> | 0.       |
| <b>2</b> | Acquisition indebtedness applicable to line 1 assets                                                       | <b>2</b>  | 0.       |
| <b>3</b> | Subtract line 2 from line 1d                                                                               | <b>3</b>  | 756,868. |
| <b>4</b> | Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)  | <b>4</b>  | 11,353.  |
| <b>5</b> | Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4       | <b>5</b>  | 745,515. |
| <b>6</b> | Minimum investment return. Enter 5% of line 5                                                              | <b>6</b>  | 37,276.  |

**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)

|           |                                                                                                    |           |         |
|-----------|----------------------------------------------------------------------------------------------------|-----------|---------|
| <b>1</b>  | Minimum investment return from Part X, line 6                                                      | <b>1</b>  | 37,276. |
| <b>2a</b> | Tax on investment income for 2012 from Part VI, line 5                                             | <b>2a</b> | 263.    |
| <b>b</b>  | Income tax for 2012 (This does not include the tax from Part VI)                                   | <b>2b</b> |         |
| <b>c</b>  | Add lines 2a and 2b                                                                                | <b>2c</b> | 263.    |
| <b>3</b>  | Distributable amount before adjustments. Subtract line 2c from line 1                              | <b>3</b>  | 37,013. |
| <b>4</b>  | Recoveries of amounts treated as qualifying distributions                                          | <b>4</b>  | 0.      |
| <b>5</b>  | Add lines 3 and 4                                                                                  | <b>5</b>  | 37,013. |
| <b>6</b>  | Deduction from distributable amount (see instructions)                                             | <b>6</b>  | 0.      |
| <b>7</b>  | Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1 | <b>7</b>  | 37,013. |

**Part XII Qualifying Distributions** (see instructions)

|          |                                                                                                                                   |           |         |
|----------|-----------------------------------------------------------------------------------------------------------------------------------|-----------|---------|
| <b>1</b> | Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes                                         |           |         |
| <b>a</b> | Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26                                                     | <b>1a</b> | 53,612. |
| <b>b</b> | Program-related investments - total from Part IX-B                                                                                | <b>1b</b> | 0.      |
| <b>2</b> | Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes                         | <b>2</b>  |         |
| <b>3</b> | Amounts set aside for specific charitable projects that satisfy the                                                               |           |         |
| <b>a</b> | Suitability test (prior IRS approval required)                                                                                    | <b>3a</b> |         |
| <b>b</b> | Cash distribution test (attach the required schedule)                                                                             | <b>3b</b> |         |
| <b>4</b> | Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4                        | <b>4</b>  | 53,612. |
| <b>5</b> | Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b | <b>5</b>  | 263.    |
| <b>6</b> | Adjusted qualifying distributions. Subtract line 5 from line 4                                                                    | <b>6</b>  | 53,349. |

**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)<br>Corpus | (b)<br>Years prior to 2011 | (c)<br>2011 | (d)<br>2012 |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------|----------------------------|-------------|-------------|
| <b>1</b> Distributable amount for 2012 from Part XI, line 7                                                                                                                       |               |                            |             | 37,013.     |
| <b>2</b> Undistributed income, if any, as of the end of 2012                                                                                                                      |               |                            |             |             |
| <b>a</b> Enter amount for 2011 only                                                                                                                                               |               |                            | 33,604.     |             |
| <b>b</b> Total for prior years                                                                                                                                                    |               | 0.                         |             |             |
| <b>3</b> Excess distributions carryover, if any, to 2012                                                                                                                          |               |                            |             |             |
| <b>a</b> From 2007                                                                                                                                                                |               |                            |             |             |
| <b>b</b> From 2008                                                                                                                                                                |               |                            |             |             |
| <b>c</b> From 2009                                                                                                                                                                |               |                            |             |             |
| <b>d</b> From 2010                                                                                                                                                                |               |                            |             |             |
| <b>e</b> From 2011                                                                                                                                                                |               |                            |             |             |
| <b>f</b> Total of lines 3a through e                                                                                                                                              | 0.            |                            |             |             |
| <b>4</b> Qualifying distributions for 2012 from Part XII, line 4 ▶ \$ 53,612.                                                                                                     |               |                            |             |             |
| <b>a</b> Applied to 2011, but not more than line 2a                                                                                                                               |               |                            | 33,604.     |             |
| <b>b</b> Applied to undistributed income of prior years (Election required - see instructions)                                                                                    |               | 0.                         |             |             |
| <b>c</b> Treated as distributions out of corpus (Election required - see instructions)                                                                                            | 0.            |                            |             |             |
| <b>d</b> Applied to 2012 distributable amount                                                                                                                                     | 0.            |                            |             | 20,008.     |
| <b>e</b> Remaining amount distributed out of corpus                                                                                                                               | 0.            |                            |             |             |
| <b>5</b> Excess distributions carryover applied to 2012 (If an amount appears in column (d), the same amount must be shown in column (a) )                                        | 0.            |                            |             | 0.          |
| <b>6</b> Enter the net total of each column as indicated below:                                                                                                                   |               |                            |             |             |
| <b>a</b> Corpus Add lines 3f, 4c, and 4e Subtract line 5                                                                                                                          | 0.            |                            |             |             |
| <b>b</b> Prior years' undistributed income Subtract line 4b from line 2b                                                                                                          |               | 0.                         |             |             |
| <b>c</b> 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.                         |             |             |
| <b>d</b> Subtract line 6c from line 6b Taxable amount - see instructions                                                                                                          |               | 0.                         |             |             |
| <b>e</b> Undistributed income for 2011 Subtract line 4a from line 2a Taxable amount - see instr                                                                                   |               |                            | 0.          |             |
| <b>f</b> Undistributed income for 2012 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2013                                                                |               |                            |             | 17,005.     |
| <b>7</b> Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)                                                     | 0.            |                            |             |             |
| <b>8</b> Excess distributions carryover from 2007 not applied on line 5 or line 7                                                                                                 | 0.            |                            |             |             |
| <b>9</b> Excess distributions carryover to 2013. Subtract lines 7 and 8 from line 6a                                                                                              | 0.            |                            |             |             |
| <b>10</b> Analysis of line 9                                                                                                                                                      |               |                            |             |             |
| <b>a</b> Excess from 2008                                                                                                                                                         |               |                            |             |             |
| <b>b</b> Excess from 2009                                                                                                                                                         |               |                            |             |             |
| <b>c</b> Excess from 2010                                                                                                                                                         |               |                            |             |             |
| <b>d</b> Excess from 2011                                                                                                                                                         |               |                            |             |             |
| <b>e</b> Excess from 2012                                                                                                                                                         |               |                            |             |             |

N/A

▶

☐ 4942(I)(3) or ☐ 4942(I)(5)

**(4) Gross investment income**

[illegible]

### 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 or e-mail 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<br>Name and address (home or business)              | If recipient is an individual,<br>show any relationship to<br>any foundation manager<br>or substantial contributor | Foundation<br>status of<br>recipient | Purpose of grant or<br>contribution                                                  | Amount  |
|---------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------|--------------------------------------|--------------------------------------------------------------------------------------|---------|
| <b>a Paid during the year</b>                                 |                                                                                                                    |                                      |                                                                                      |         |
| VARIOUS - SEE ATTACHED SCHEDULE                               |                                                                                                                    |                                      | TO HELP PAY FOR<br>COLLEGE EDUCATION FOR<br>STUDENTS IN CALVERT<br>COUNTY, MARYLAND. | 48,000. |
| NICHOLAS GREGORY<br>6005 QUARLES ROAD<br>ST LEONARD, MD 20685 |                                                                                                                    |                                      | TO HELP PAY FOR<br>COLLEGE EDUCATION FOR<br>STUDENTS IN CALVERT<br>COUNTY, MARYLAND. | 500.    |
| CHARLES COX<br>1590 SIXES ROAD<br>FREDERICK, MD 20678         |                                                                                                                    |                                      | TO HELP PAY FOR<br>COLLEGE EDUCATION FOR<br>STUDENTS IN CALVERT<br>COUNTY, MARYLAND. | 650.    |
|                                                               |                                                                                                                    |                                      |                                                                                      |         |
|                                                               |                                                                                                                    |                                      |                                                                                      |         |
| <b>Total</b>                                                  |                                                                                                                    |                                      | <b>3a</b>                                                                            | 49,150. |
| <b>b Approved for future payment</b>                          |                                                                                                                    |                                      |                                                                                      |         |
| NONE                                                          |                                                                                                                    |                                      |                                                                                      |         |
|                                                               |                                                                                                                    |                                      |                                                                                      |         |
|                                                               |                                                                                                                    |                                      |                                                                                      |         |
| <b>Total</b>                                                  |                                                                                                                    |                                      | <b>3b</b>                                                                            | 0.      |



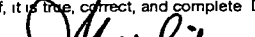
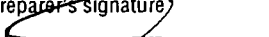
**Part XVII Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations**

|          |                                                                                                                                                                                                                                                                                                                                                                                              | Yes | No |
|----------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----|----|
| <b>1</b> | 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?                                                                                                                                          |     |    |
| <b>a</b> | Transfers from the reporting foundation to a noncharitable exempt organization of                                                                                                                                                                                                                                                                                                            |     |    |
|          | (1) Cash                                                                                                                                                                                                                                                                                                                                                                                     |     | X  |
|          | (2) Other assets                                                                                                                                                                                                                                                                                                                                                                             |     | X  |
| <b>b</b> | Other transactions                                                                                                                                                                                                                                                                                                                                                                           |     |    |
|          | (1) Sales of assets to a noncharitable exempt organization                                                                                                                                                                                                                                                                                                                                   |     | X  |
|          | (2) Purchases of assets from a noncharitable exempt organization                                                                                                                                                                                                                                                                                                                             |     | X  |
|          | (3) Rental of facilities, equipment, or other assets                                                                                                                                                                                                                                                                                                                                         |     | X  |
|          | (4) Reimbursement arrangements                                                                                                                                                                                                                                                                                                                                                               |     | X  |
|          | (5) Loans or loan guarantees                                                                                                                                                                                                                                                                                                                                                                 |     | X  |
|          | (6) Performance of services or membership or fundraising solicitations                                                                                                                                                                                                                                                                                                                       |     | X  |
| <b>c</b> | Sharing of facilities, equipment, mailing lists, other assets, or paid employees                                                                                                                                                                                                                                                                                                             |     | X  |
| <b>d</b> | If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received. |     |    |

[illegible]

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

| b If "Yes," complete the following schedule |                          |                                 |
|---------------------------------------------|--------------------------|---------------------------------|
| (a) Name of organization                    | (b) Type of organization | (c) Description of relationship |
| N/A                                         |                          |                                 |
|                                             |                          |                                 |
|                                             |                          |                                 |
|                                             |                          |                                 |
|                                             |                          |                                 |

|                                                                                                                                            |                                                                                                                                                                                                                                                                                                                        |                                                                                                             |                     |                                                 |                                                                                                                                                     |
|--------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------|---------------------|-------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Sign Here</b><br><br>Signature of officer or trustee | 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 1)?<br><input checked="" type="checkbox"/> Yes <input type="checkbox"/> No |
|                                                                                                                                            | Date <u>2/12/14</u><br>Title <b>TRUSTEE</b>                                                                                                                                                                                                                                                                            |                                                                                                             |                     |                                                 |                                                                                                                                                     |
| <b>Paid Preparer Use Only</b>                                                                                                              | Print type preparer's name<br><b>BART LANMAN</b>                                                                                                                                                                                                                                                                       | Preparer's signature<br> | Date <u>2/11/14</u> | Check <input type="checkbox"/> if self-employed | PTIN<br><b>P00064378</b>                                                                                                                            |
|                                                                                                                                            | Firm's name ▶ <b>SQUIRE, LEMKIN + COMPANY LLP</b>                                                                                                                                                                                                                                                                      |                                                                                                             |                     | Firm's EIN ▶ <b>52-2041603</b>                  |                                                                                                                                                     |
| Firm's address ▶ <b>111 ROCKVILLE PIKE, SUITE 475<br/>ROCKVILLE, MD 20850</b>                                                              |                                                                                                                                                                                                                                                                                                                        |                                                                                                             |                     | Phone no <b>301-424-6800</b>                    |                                                                                                                                                     |

**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,<br>2-story brick warehouse, or common stock, 200 shs MLC Co |                              | (b) How acquired<br>P - Purchase<br>D - Donation | (c) Date acquired<br>(mo., day, yr.) | (d) Date sold<br>(mo., day, yr.) |
|------------------------------------------------------------------------------------------------------------------------------------|------------------------------|--------------------------------------------------|--------------------------------------|----------------------------------|
| 1a                                                                                                                                 | FIRST EAGLE GLOBAL FUND      |                                                  | 12/23/98                             | 12/14/12                         |
| b                                                                                                                                  | FIRST EAGLE GLOBAL FUND      | P                                                | 12/23/98                             | 05/29/13                         |
| c                                                                                                                                  | THE INCOME FUND OF A S S A   | P                                                | 09/22/98                             | 05/29/13                         |
| d                                                                                                                                  | PIMCO LONG TERM US           | P                                                | VARIOUS                              | 08/17/12                         |
| e                                                                                                                                  | PRUDENTIAL JENSON VALUE CL Z | P                                                | VARIOUS                              | 10/09/12                         |
| f                                                                                                                                  | WELLS FARO ADV SLL CP AD     | P                                                | 03/07/11                             | 10/09/12                         |
| g                                                                                                                                  | PIONEER STRAT INCO CL Y      | P                                                | 10/12/10                             | 10/09/12                         |
| h                                                                                                                                  | MAINSTAY LG CP GRTH CL I     | P                                                | 03/07/11                             | 10/09/12                         |
| i                                                                                                                                  | MAINSTAY LG CAP              | P                                                | 03/07/11                             | 10/09/12                         |
| j                                                                                                                                  | PRUDENTIAL JENSON VALUE CL Z | P                                                | VARIOUS                              | 10/09/12                         |
| k                                                                                                                                  | WELLS FARO ADV SLL CP AD     | P                                                | 12/16/11                             | 10/09/12                         |
| l                                                                                                                                  | PIONEER LG CAP GRTH          | P                                                | 10/09/12                             | 10/09/12                         |
| m                                                                                                                                  | MAINSTAY LG CAP              | P                                                | 06/08/12                             | 10/09/12                         |
| n                                                                                                                                  | AMER CNT INFL ADJ BD INV     | P                                                | 05/12/10                             | 02/19/13                         |
| o                                                                                                                                  | AMERICAN CENTURY             | P                                                | 05/12/10                             | 02/19/13                         |

| (e) Gross sales price | (f) Depreciation allowed<br>(or allowable) | (g) Cost or other basis<br>plus expense of sale | (h) Gain or (loss)<br>(e) plus (f) minus (g) |
|-----------------------|--------------------------------------------|-------------------------------------------------|----------------------------------------------|
| a                     | 1,200.                                     | 692.                                            | 508.                                         |
| b                     | 26,000.                                    | 13,778.                                         | 12,222.                                      |
| c                     | 25,000.                                    | 22,097.                                         | 2,903.                                       |
| d                     | 5,648.                                     | 5,265.                                          | 383.                                         |
| e                     | 5,852.                                     | 5,273.                                          | 579.                                         |
| f                     | 344.                                       | 331.                                            | 13.                                          |
| g                     | 11.                                        | 11.                                             | 0.                                           |
| h                     | 1,486.                                     | 1,406.                                          | 80.                                          |
| i                     | 5.                                         | 4.                                              | 1.                                           |
| j                     | 427.                                       | 383.                                            | 44.                                          |
| k                     | 31.                                        | 27.                                             | 4.                                           |
| l                     | 3.                                         | 3.                                              | 0.                                           |
| m                     | 1.                                         | 1.                                              | 0.                                           |
| n                     | 1,845.                                     | 1,680.                                          | 165.                                         |
| o                     | 1.                                         | 1.                                              | 0.                                           |

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

| (i) FMV as of 12/31/69 | (j) Adjusted basis<br>as of 12/31/69 | (k) Excess of col (i)<br>over col (j), if any | (l) Losses (from col (h))<br>Gains (excess of col (h) gain over col (k),<br>but not less than "-0-") |
|------------------------|--------------------------------------|-----------------------------------------------|------------------------------------------------------------------------------------------------------|
| a                      |                                      |                                               | 508.                                                                                                 |
| b                      |                                      |                                               | 12,222.                                                                                              |
| c                      |                                      |                                               | 2,903.                                                                                               |
| d                      |                                      |                                               | 383.                                                                                                 |
| e                      |                                      |                                               | 579.                                                                                                 |
| f                      |                                      |                                               | 13.                                                                                                  |
| g                      |                                      |                                               | 0.                                                                                                   |
| h                      |                                      |                                               | 80.                                                                                                  |
| i                      |                                      |                                               | 1.                                                                                                   |
| j                      |                                      |                                               | 44.                                                                                                  |
| k                      |                                      |                                               | 4.                                                                                                   |
| l                      |                                      |                                               | 0.                                                                                                   |
| m                      |                                      |                                               | 0.                                                                                                   |
| n                      |                                      |                                               | 165.                                                                                                 |
| 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

**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,<br>2-story brick warehouse, or common stock, 200 shs MLC Co |                                 | (b) How acquired<br>P - Purchase<br>D - Donation | (c) Date acquired<br>(mo., day, yr.) | (d) Date sold<br>(mo., day, yr.) |
|------------------------------------------------------------------------------------------------------------------------------------|---------------------------------|--------------------------------------------------|--------------------------------------|----------------------------------|
| 1a                                                                                                                                 | PRUDENTIAL SHORT TERM CORP BD Z | P                                                | 09/16/11                             | 02/19/13                         |
| b                                                                                                                                  | PRUDENTIAL SHORT TERM           | P                                                | 09/16/11                             | 02/09/13                         |
| c                                                                                                                                  | FEDERATED STRG VL DV FD INS     | P                                                | VARIOUS                              | 02/19/13                         |
| d                                                                                                                                  | PIONEER STRAT INCO CL Y         | P                                                | 10/12/10                             | 02/19/13                         |
| e                                                                                                                                  | PIONEER STRATEGIC               | P                                                | 10/12/10                             | 02/19/13                         |
| f                                                                                                                                  | MAINSTAY LG CAP GROWTH          | P                                                | 03/07/11                             | 02/19/13                         |
| g                                                                                                                                  | DREYFUS APPRECIATION FD         | P                                                | VARIOUS                              | 02/19/13                         |
| h                                                                                                                                  | TCW TOTAL RETURN BOND           | P                                                | VARIOUS                              | 02/19/13                         |
| i                                                                                                                                  | AMER CNT INFL ADJ BD INV        | P                                                | 12/26/12                             | 02/19/13                         |
| j                                                                                                                                  | FEDERATED STRG VL DV FD INS     | P                                                | VARIOUS                              | 02/19/13                         |
| k                                                                                                                                  | PIONEER STRAT INCO CL Y         | P                                                | 01/31/13                             | 02/19/13                         |
| l                                                                                                                                  | MAINSTAY LG CAP                 | P                                                | 12/28/12                             | 02/19/13                         |
| m                                                                                                                                  | DREYFUS APPRECIATION FD         | P                                                | 12/21/12                             | 02/19/13                         |
| n                                                                                                                                  | CAPITAL GAINS DIVIDENDS         |                                                  |                                      |                                  |
| o                                                                                                                                  |                                 |                                                  |                                      |                                  |

| (e) Gross sales price | (f) Depreciation allowed<br>(or allowable) | (g) Cost or other basis<br>plus expense of sale | (h) Gain or (loss)<br>(e) plus (f) minus (g) |
|-----------------------|--------------------------------------------|-------------------------------------------------|----------------------------------------------|
| a 3,500.              |                                            | 3,469.                                          | 31.                                          |
| b 1.                  |                                            | 1.                                              | 0.                                           |
| c 6,106.              |                                            | 4,800.                                          | 1,306.                                       |
| d 1,214.              |                                            | 1,186.                                          | 28.                                          |
| e 1.                  |                                            | 1.                                              | 0.                                           |
| f 290.                |                                            | 258.                                            | 32.                                          |
| g 1,310.              |                                            | 1,028.                                          | 282.                                         |
| h 2,333.              |                                            | 2,232.                                          | 101.                                         |
| i 10.                 |                                            | 10.                                             | 0.                                           |
| j 1,181.              |                                            | 1,160.                                          | 21.                                          |
| k 2.                  |                                            | 2.                                              | 0.                                           |
| l 6.                  |                                            | 6.                                              | 0.                                           |
| m 14.                 |                                            | 14.                                             | 0.                                           |
| n 7,510.              |                                            |                                                 | 7,510.                                       |
| 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<br>as of 12/31/69 | (k) Excess of col (i)<br>over col (j), if any | (l) Losses (from col (h))<br>Gains (excess of col (h) gain over col (k),<br>but not less than "-0-") |
|--------------------------|--------------------------------------|-----------------------------------------------|------------------------------------------------------------------------------------------------------|
| a                        |                                      |                                               | 31.                                                                                                  |
| b                        |                                      |                                               | 0.                                                                                                   |
| c                        |                                      |                                               | 1,306.                                                                                               |
| d                        |                                      |                                               | 28.                                                                                                  |
| e                        |                                      |                                               | 0.                                                                                                   |
| f                        |                                      |                                               | 32.                                                                                                  |
| g                        |                                      |                                               | 282.                                                                                                 |
| h                        |                                      |                                               | 101.                                                                                                 |
| i                        |                                      |                                               | 0.                                                                                                   |
| j                        |                                      |                                               | 21.                                                                                                  |
| k                        |                                      |                                               | 0.                                                                                                   |
| l                        |                                      |                                               | 0.                                                                                                   |
| m                        |                                      |                                               | 0.                                                                                                   |
| n                        |                                      |                                               | 7,510.                                                                                               |
| o                        |                                      |                                               |                                                                                                      |

|                                                                                                                                                                                   |   |         |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---|---------|
| 2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7<br>If (loss), enter "-0-" in Part I, line 7 }                                             | 2 | 26,213. |
| 3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6)<br>If gain, also enter in Part I, line 8, column (c)<br>If (loss), enter "-0-" in Part I, line 8 } | 3 | N/A     |



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

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

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FORM 990-PF RENTAL INCOME STATEMENT 2

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| KIND AND LOCATION OF PROPERTY         | ACTIVITY<br>NUMBER | GROSS<br>RENTAL INCOME |
|---------------------------------------|--------------------|------------------------|
| CONDOMINIUM - SOLOMONS ISLAND         | 1                  | 14,400.                |
| TOTAL TO FORM 990-PF, PART I, LINE 5A |                    | 14,400.                |

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FORM 990-PF RENTAL EXPENSES STATEMENT 3

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| DESCRIPTION                                       | ACTIVITY<br>NUMBER | AMOUNT | TOTAL   |
|---------------------------------------------------|--------------------|--------|---------|
| DEPRECIATION                                      |                    | 7,915. |         |
| TAXES                                             |                    | 1,947. |         |
| MAINTENANCE FEES                                  |                    | 6,300. |         |
| MISCELLANEOUS CONDO EXPENSE                       |                    | 3,137. |         |
| - SUBTOTAL -                                      | 1                  |        | 19,299. |
| TOTAL RENTAL EXPENSES                             |                    |        | 19,299. |
| NET RENTAL INCOME TO FORM 990-PF, PART I, LINE 5B |                    |        | -4,899. |

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FORM 990-PF ACCOUNTING FEES STATEMENT 4

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| DESCRIPTION                  | (A)<br>EXPENSES<br>PER BOOKS | (B)<br>NET INVEST-<br>MENT INCOME | (C)<br>ADJUSTED<br>NET INCOME | (D)<br>CHARITABLE<br>PURPOSES |
|------------------------------|------------------------------|-----------------------------------|-------------------------------|-------------------------------|
| ACCOUNTING                   | 4,705.                       | 4,705.                            |                               | 0.                            |
| TO FORM 990-PF, PG 1, LN 16B | 4,705.                       | 4,705.                            |                               | 0.                            |

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## FORM 990-PF

## TAXES

## STATEMENT

5

| DESCRIPTION                 | (A)<br>EXPENSES<br>PER BOOKS | (B)<br>NET INVEST-<br>MENT INCOME | (C)<br>ADJUSTED<br>NET INCOME | (D)<br>CHARITABLE<br>PURPOSES |
|-----------------------------|------------------------------|-----------------------------------|-------------------------------|-------------------------------|
| TAXES                       | 1,947.                       | 1,947.                            |                               | 0.                            |
| TO FORM 990-PF, PG 1, LN 18 | 1,947.                       | 1,947.                            |                               | 0.                            |

## FORM 990-PF

## OTHER EXPENSES

## STATEMENT

6

| DESCRIPTION                 | (A)<br>EXPENSES<br>PER BOOKS | (B)<br>NET INVEST-<br>MENT INCOME | (C)<br>ADJUSTED<br>NET INCOME | (D)<br>CHARITABLE<br>PURPOSES |
|-----------------------------|------------------------------|-----------------------------------|-------------------------------|-------------------------------|
| BANK FEES                   | 39.                          | 39.                               |                               | 0.                            |
| MISCELLANEOUS               | 913.                         | 913.                              |                               | 0.                            |
| SECURITIES FEES             | 2,358.                       | 2,358.                            |                               | 0.                            |
| MAINTENANCE FEES            | 6,300.                       | 6,300.                            |                               | 0.                            |
| MISCELLANEOUS CONDO EXPENSE | 3,137.                       | 3,137.                            |                               | 0.                            |
| TO FORM 990-PF, PG 1, LN 23 | 12,747.                      | 12,747.                           |                               | 0.                            |

## FORM 990-PF

## DEPRECIATION OF ASSETS HELD FOR INVESTMENT

## STATEMENT

7

| DESCRIPTION                        | COST OR<br>OTHER BASIS | ACCUMULATED<br>DEPRECIATION | BOOK VALUE |
|------------------------------------|------------------------|-----------------------------|------------|
| SOLOMONS CONDO                     | 217,655.               | 186,331.                    | 31,324.    |
| WASHER/DRYER CONDO                 | 932.                   | 932.                        | 0.         |
| TOTAL TO FM 990-PF, PART II, LN 11 | 218,587.               | 187,263.                    | 31,324.    |

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|             |                   |           |   |
|-------------|-------------------|-----------|---|
| FORM 990-PF | OTHER INVESTMENTS | STATEMENT | 8 |
|-------------|-------------------|-----------|---|

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| DESCRIPTION                            | VALUATION<br>METHOD | BOOK VALUE | FAIR MARKET<br>VALUE |
|----------------------------------------|---------------------|------------|----------------------|
| FIRST EAGLE GLOBAL FUND                | COST                | 142,846.   | 220,316.             |
| INCOME FUND OF AMERICA                 | COST                | 178,364.   | 189,022.             |
| MUTUAL FUNDS                           | COST                | 115,480.   | 120,499.             |
| TOTAL TO FORM 990-PF, PART II, LINE 13 |                     | 436,690.   | 529,837.             |

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|             |                                                |           |   |
|-------------|------------------------------------------------|-----------|---|
| FORM 990-PF | DEPRECIATION OF ASSETS NOT HELD FOR INVESTMENT | STATEMENT | 9 |
|-------------|------------------------------------------------|-----------|---|

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| DESCRIPTION                        | COST OR<br>OTHER BASIS | ACCUMULATED<br>DEPRECIATION | BOOK VALUE |
|------------------------------------|------------------------|-----------------------------|------------|
| COMPUTER                           | 1,944.                 | 1,944.                      | 0.         |
| COMPUTER                           | 1,799.                 | 1,799.                      | 0.         |
| TOTAL TO FM 990-PF, PART II, LN 14 | 3,743.                 | 3,743.                      | 0.         |

# 2012 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.                 | 1,740.                             |                         | 59.                    | 1,799.                          |
|          | * TOTAL 990-PF PG 1 DEPR |               |        |      |      |         | 3,743.                   |            |                     |                      | 3,743.                 | 3,684.                             |                         | 59.                    | 3,743.                          |

| <u>Last Name</u> | <u>First Name</u> | <u>Address</u>       | <u>City</u>      | <u>State</u> | <u>Zip Code</u> | <u>Phone Number</u> | <u>Email</u>               | <u>SSN</u> | <u>School</u>                  | <u>11-12</u> | <u>12-13</u> | <u>13-14</u> | <u>Check #</u> |
|------------------|-------------------|----------------------|------------------|--------------|-----------------|---------------------|----------------------------|------------|--------------------------------|--------------|--------------|--------------|----------------|
| Bee              | Richard           | 230 Dresser Avenue   | Prince Frederick | MD           | 20678           | (410) 414-3686      | alexbee14@gmail.com        | [REDACTED] | University of Maryland         |              |              | \$1,000      |                |
| Bennett          | Leanna            | 3320 Smithville Dr   | Dunkirk          | MD           | 20754           | (301) 855-0160      | ltbennett2@comcast.net     | [REDACTED] | James Madison University       |              |              | \$1,000      |                |
| Berkley          | Grant             | 9615 Covenant Court  | Owings           | MD           | 20736           | (301) 855-4108      | cincoberkleys2@comcast.net | [REDACTED] | Anne Arundel Community College |              |              | \$1,000      |                |
| Bland            | Caroline          | 3260 Channel Court   | Huntingtown      | MD           | 20639           | (443) 975-7437      | carolinebland94@yahoo.com  | [REDACTED] | College of Charleston          |              |              | \$1,000      |                |
| Brown            | Kiana             | 7529 H Street        | Chesapeake Beach | MD           | 20732           | (410) 257-6278      | kianabrown12@aol.com       | [REDACTED] | Concord University             |              |              | \$1,000      |                |
| Call             | Zachary           | 1680 Clay Hammond Rd | Prince Frederick | MD           | 20678           | (240) 299-0624      | zach_call@yahoo.com        | [REDACTED] | Mount Saint Mary's University  |              |              | \$1,000      |                |
| Cannon           | Francis           | 2781 Holland Drive   | Huntingtown      | MD           | 20639           | (443) 295-7040      | cannon.riley@comcast.net   | [REDACTED] | Salisbury University           |              |              | \$1,000      |                |
| Capers           | Keshia            | 652 Sailors Court    | Lusby            | MD           | 20657           | (410) 586-9429      | kikicaperss@comcast.net    | [REDACTED] | Hampton University             |              |              | \$1,000      |                |
| Caradine-Taber   | Sophia            | 1020 Gringo Court    | Lusby            | MD           | 20657           | (410) 326-1403      | sctaber@verizon.net        | [REDACTED] | St Mary's College of Maryland  |              |              | \$1,000      |                |

| <u>Last Name</u> | <u>First Name</u> | <u>Address</u>           | <u>City</u>      | <u>State</u> | <u>Zip Code</u> | <u>Phone Number</u> | <u>Email</u>                | <u>SSN</u> | <u>School</u>                       | <u>11-12</u> | <u>12-13</u> | <u>13-14</u> | <u>Check #</u> |
|------------------|-------------------|--------------------------|------------------|--------------|-----------------|---------------------|-----------------------------|------------|-------------------------------------|--------------|--------------|--------------|----------------|
| Claggett         | Javin             | 6890 Broomes Island Road | Saint Leonard    | MD           | 20685           | (410) 586-2422      | Javin_Claggett@yahoo.com    | [REDACTED] | Anne Arundel Community College      |              |              | \$1,000      |                |
| Cleary           | Colin             | 3402 Bristol Court       | Chesapeake Beach | MD           | 20732           | (410) 257-3771      | colin_clearly@yahoo.com     | [REDACTED] | University of Maryland College Park |              | \$1,500      | \$1,000      |                |
| Cooke            | Tierra            | 8518 Stock Drive         | Lusby            | MD           | 20657           | 443-968-2089        |                             | [REDACTED] | Husson University                   | \$1,000      | \$1,500      | \$1,000      |                |
| Cooke            | Torez             | 8518 Stock Drive         | Lusby            | MD           | 20657           | (443) 968-2089      | torezcooke@yahoo.com        |            | Salisbury University                |              | \$1,500      | \$1,000      |                |
| Cooper           | Ruth              | 11125 Hatteras Court     | Lusby            | MD           | 20657           | (443) 975-8007      | ruthcooper95@gmail.com      |            | University of Notre Dame            |              |              | \$1,000      |                |
| Deville          | Danielle          | 12643 Catalina Drive     | Lusby            | MD           | 20657           | (410) 394-6165      | danielledeville11@gmail.com |            | College of Southern Maryland        |              |              | \$1,000      |                |
| Eaton            | Nicole            | 7336 C Street            | Chesapeake Beach | MD           | 20732           | (410) 257-4397      | nicoletta818@gmail.com      |            | College of Southern Maryland        |              |              | \$1,000      |                |
| Embrey           | Zachary           | 1014 Secret Court        | Lusby            | MD           | 20657           | (410) 394-0814      | zbuddy50@yahoo.com          |            | Frostburg University                |              |              | \$1,000      |                |
| Endrusick        | Ashley            | 2046 Chestnut Street     | Port Republic    | MD           | 20676           | (443) 968-2118      | aendrusick@comcast.net      |            | Coastal Carolina University         |              |              | \$1,000      |                |

| <u>Last Name</u> | <u>First Name</u> | <u>Address</u>          | <u>City</u>      | <u>State</u> | <u>Zip Code</u> | <u>Phone Number</u> | <u>Email</u>                   | <u>SSN</u> | <u>School</u>                       | <u>11-12</u> | <u>12-13</u> | <u>13-14</u> | <u>Check #</u> |
|------------------|-------------------|-------------------------|------------------|--------------|-----------------|---------------------|--------------------------------|------------|-------------------------------------|--------------|--------------|--------------|----------------|
| Fowler           | Hannah            | 3906 Dogwood Road       | Chesapeake Beach | MD           | 20732           | (410) 414-5553      | hannahfowler95@yahoo.com       | [REDACTED] | University of Maryland College Park |              |              | \$1,000      |                |
| Gallodoro        | Julia             | 1225 Turner Road        | Lusby            | MD           | 20657           | (410) 610-8011      | jagleggs@hotmail.com           | [REDACTED] | College of Southern Maryland        |              |              | \$1,000      |                |
| Godfrey          | Kendal            | 2710 Hatteras Lane      | Lusby            | MD           | 20657           | (410) 394-0875      | godfrey chrystal@gmail.com     | [REDACTED] | College of Southern Maryland        |              |              | \$1,000      |                |
| Grover           | Tyler             | 4740 St Leonard Road    | St. Leonard      | MD           | 20685           | (410) 586-9819      | tylergrover@comcast.net        | [REDACTED] | University of Maryland College Park |              | \$1,500      | \$1,000      |                |
| Harris           | Kelsey            | 121 Lorins Drive        | Huntingtown      | MD           | 20639           | (443) 532-6724      | kelseycharris30@gmail.com      | [REDACTED] | Auburn University                   |              |              | \$1,000      |                |
| Harrison         | Emily             | 810 Noble Court         | Prince Frederick | MD           | 20678           | (410) 535-4183      | eharrison1@gulls.salisbury.edu | [REDACTED] | Salisbury University                |              | \$1,000      | \$1,000      |                |
| Hause            | Julia             | 9515 Howes Road         | Dunkirk          | MD           | 20754           | 410-286-7476        | jfhause@eckerd.edu             | [REDACTED] | Eckerd                              | \$1,000      | \$1,000      | \$1,000      |                |
| Henrichsen       | Richard           | 11619 Shoshone Trail    | Lusby            | MD           | 20657           | (410) 326-1308      | treymenrichsen@gmail.com       | [REDACTED] | Brigham Young University            |              |              | \$1,000      |                |
| Horn             | Jacob             | 3045 Hickory Ridge Road | Dunkirk          | MD           | 20754           | (443) 964-5285      | hornjacob@ymail.com            | [REDACTED] | University of Maryland College Park |              |              | \$1,000      |                |

| <u>Last Name</u> | <u>First Name</u> | <u>Address</u>           | <u>City</u> | <u>State</u> | <u>Zip Code</u> | <u>Phone Number</u> | <u>Email</u>             | <u>SSN</u> | <u>School</u>                           | <u>11-12</u> | <u>12-13</u> | <u>13-14</u> | <u>Check #</u> |
|------------------|-------------------|--------------------------|-------------|--------------|-----------------|---------------------|--------------------------|------------|-----------------------------------------|--------------|--------------|--------------|----------------|
| Johnson          | Zachary           | 3000 Mayberry Avenue     | Huntingtown | MD           | 20639           | (443) 975-7047      | zachjj4@gmail.com        | [REDACTED] | Yale University                         |              |              | \$1,000      |                |
| Kinneer          | Tyler             | 8120 Tucker's Trail      | Owings      | MD           | 20736           | (443) 550-3178      | tkinneer 3@gmail.com     | [REDACTED] | Stetson University                      |              |              | \$1,000      |                |
| Kmett' Pendry    | Casey             | 1050 Tiffany Park        | Owings      | MD           | 20736           | 301-855-0749        | ckmettpendry@liberty.edu | [REDACTED] | Liberty University                      |              | \$1,500      | \$1,000      |                |
| Leap             | Allison           | 600 Peace Pipe Court     | Lusby       | MD           | 20657           | (410) 929-9882      | allie leap@gmail.com     | [REDACTED] | University of Maryland College Park     |              |              | \$1,000      |                |
| Lellis-Petrie    | Sophie            | 13004 Sky View Lane      | Lusby       | MD           | 20657           | (410) 326-1493      | sophie lp@comcast.net    | [REDACTED] | University of California Los Angeles    |              |              | \$1,000      |                |
| Long             | Travon            | 5420 Laurel Trail        | St Leonard  | MD           | 20685           | 410-586-0938        | tra1993@comcast.net      | [REDACTED] | University of Maryland Baltimore Campus | \$500        | \$1,500      | \$1,000      |                |
| Love             | Symphony          | 12040 Susan Lane         | Lusby       | MD           | 20657           | (410) 326-2620      | lachele love@comcast.net | [REDACTED] | College of Southern Maryland            |              |              | \$1,000      |                |
| Manning          | Sarah             | 2421 Huntingfields Drive | Huntingtown | MD           | 20639           | (410) 535-4241      | sevmanning@yahoo.com     | [REDACTED] | College of Southern Maryland            |              |              | \$1,000      |                |
| Moore            | Kortina           | 12330 Rousby Hall Road   | Lusby       | MD           | 20657           | (410) 326-3371      | kortina bratz@gmail.com  | [REDACTED] | University of Maryland Eastern Shore    |              |              | \$1,000      |                |



| <u>Last Name</u> | <u>First Name</u> | <u>Address</u>          | <u>City</u>      | <u>State</u> | <u>Zip Code</u> | <u>Phone Number</u> | <u>Email</u>              | <u>SSN</u> | <u>School</u>                       | <u>11-12</u> | <u>12-13</u> | <u>13-14</u> | <u>Check #</u> |
|------------------|-------------------|-------------------------|------------------|--------------|-----------------|---------------------|---------------------------|------------|-------------------------------------|--------------|--------------|--------------|----------------|
| O'Brien          | Taylor            | 3609 Foxglove Drive     | Huntingtown      | MD           | 20639           | (410) 535-3685      | taylor_obrien@yahoo.com   | [REDACTED] | Christopher Newport University      |              |              | \$1,000      |                |
| Oldham           | Bethany           | 4221 Landing Lane       | Dunkirk          | MD           | 20754           | (410) 286-8354      | bethany325@comcast.net    | [REDACTED] | University of Maryland College Park |              |              | \$1,000      |                |
| Parran           | Sydney            | 4320 Pleasant Court     | Huntingtown      | MD           | 20639           | (410) 535-3751      | syd.c.parran@gmail.com    | [REDACTED] | Morgan State University             |              |              | \$1,000      |                |
| Race             | Haley             | 1830 Foggy Bottom Court | Sunderland       | MD           | 20689           | (443) 550-3427      | hrace@comcast.net         | [REDACTED] | Radford                             |              | \$1,000      | \$1,000      |                |
| Tedtsen          | Merridith         | 6321 Deerbrook Court    | Chesapeake Beach | MD           | 20732           | (443) 550-3091      | merriditht@yahoo.com      | [REDACTED] | Illinois Institute of Technology    |              |              | \$1,000      |                |
| Tomey            | Kaitlyn           | 12023 Michael Drive     | Lusby            | MD           | 20657           | (410) 326-6984      |                           |            | University of Maryland College Park |              |              | \$1,000      |                |
| Truitt           | Tara              | 3047 Morris Court       | Owings           | MD           | 20736           | (410) 286-7006      | tet0518@hotmail.com       |            | Towson University                   |              |              | \$1,000      |                |
| Whitney          | Brooke            | 3173 Mallory Square     | Port Republic    | MD           | 20676           | (410) 586-3558      | brookewhitney15@yahoo.com |            | Towson University                   |              |              | \$1,000      |                |
| Whitney          | James             | 171 MF Bowen Road       | Huntingtown      | MD           | 20639           | 410-474-6231        |                           |            | University of Maryland College Park |              | \$1,500      | \$1,000      |                |

[illegible]

**SECTION I: STUDENT APPLICANT**

Student's Last Name      Student's First Name      MI      Date of Birth      Age      Gender      SSN Last 4 Digits

Home Phone      Cell Phone      Email Address

Mailing Address      City      State      ZIP      County Residence      Military Dependent?      Ethnicity - Required

Father's Name Last, First      Parent's Marital Status      Employer/Occupation

Mother's Name Last, First      Parent's Marital Status      Employer/Occupation

**SECTION II: STUDENT'S EDUCATION INFORMATION**

Please indicate the Elementary, Middle, and High School attended in the SoMD Tri-County Area (Calvert, Charles, St. Mary's), or if you are an Anne Arundel resident indicate Southern High School

Elementary      Middle      High School

H S Grad Date      GPA      GPA      ClassRank      Community  
mm/yyyy      (%)      (4.0 scale)      # of Grads      Service Hrs

- ☐ II a. TRANSCRIPT ☐ I am currently a high school senior, and have attached one (1) sealed, official High School Transcript
- ☐ I am currently enrolled in college, and have attached my latest official College Transcript
- ☐ II b. SAT/ACT SCORES Please answer one of the following questions regarding your SAT/ACT status
- ☐ I have attached an official copy of my SAT/ACT scores ☐ I have taken only the ACT My composite score is ☐ I have NOT taken either SAT or ACT

**SECTION III: STUDENT'S HIGHER EDUCATION INFORMATION**

Are you currently enrolled in college/tech school? ☐ Yes ☐ No If Yes, please name institution

In order of preference, please list the institutions to which you have applied If you have been accepted, please indicate any Merit Aid or Institutional Scholarships you have been offered

Colleges Applied To, In order of Preference      College Location City, ST      Institution Type      Acceptance Status      Merit Aid Offered

Please indicate your chosen Major of Study

Please indicate your chosen Minor

Career Choice(s) after College?

What were the deciding factors for your college choice? (Location, Size, Major, Athletics, Cost, etc.)

What do you consider your academic strengths?

Please continue the Calvert LSA on Page 2

## SECTION IV: STUDENT'S FINANCIAL INFORMATION

☐ COPY OF SAR (Student Aid Report) from the FAFSA (Free Application for Federal Student Aid) The SAR is a one to two page report generated from filing the FAFSA. Retrieve a copy of your SAR from [www.fafsa.gov](http://www.fafsa.gov). Click in 3rd column "Copy of SAR", use Student's PIN to retrieve, request the 'pdf' version. Print most recent version. Describe any extraordinary circumstances in your home or family that may affect your finances and/or future ability to pay for your educational plans.

## SECTION V: STUDENT'S RESUME

☐ Student Resume is no more than two (2), typed, single-sided pages. Resume will show the information below along with any relevant personal information. Include the Student Resume in the Calvert LSA Mail-In Packet. The portion below is not fillable, but to be used as a guide to build your Student Resume.

|                                       |                            |                           |                            |
|---------------------------------------|----------------------------|---------------------------|----------------------------|
| Extra-Curricular Activities           | Describe the Activity(ies) | Include Dates (start end) | Describe Leadership Role   |
| List Community Service/Volunteer Work | Describe the Activity(ies) | Include Dates (start end) | Describe Leadership Role   |
| List Awards/Honors/Letters            | Give the Award Name        | Date of Award             | Awarded by                 |
| Employment                            | Employer Name              | Dates (start end)         | Job Title/Responsibilities |

☐ I am currently employed at \_\_\_\_\_ Hours Per Week \_\_\_\_\_

## SECTION VI: STUDENT'S LETTERS OF RECOMMENDATION

☐ Letters of Recommendation must be sealed and signed across seal by recommender. Please read Guidelines for Completing Your Calvert LSA for complete details.

|                                                  |                          |                          |                          |
|--------------------------------------------------|--------------------------|--------------------------|--------------------------|
| <input type="checkbox"/> Academic Reference Name | Academic Reference Title | Academic Reference Email | Academic Reference Phone |
|--------------------------------------------------|--------------------------|--------------------------|--------------------------|

|                                                   |                           |                           |                           |
|---------------------------------------------------|---------------------------|---------------------------|---------------------------|
| <input type="checkbox"/> Community Reference Name | Community Reference Title | Community Reference Email | Community Reference Phone |
|---------------------------------------------------|---------------------------|---------------------------|---------------------------|

## SECTION VII: STUDENT'S ESSAY/PERSONAL STATEMENT

☐ Please prepare and attach a 500 word essay/personal statement which completes the theme "I would have my contribution to society be \_\_\_\_". Indicate what you think you will contribute after your years of higher education study, what might affect you most, how growing up in Southern Maryland shaped the person you hope to become, who your influencers were/are, how your experiences to date have shaped you and where that might lead you in the future. Your essay should be typed and on single-sided pages.

Attention: Several Scholarship Providers listed on the Calvert LSA require a separate essay, in addition to the essay required for the Calvert LSA Mail-In Packet. Please find those offerings listed on the Calvert Local Scholarships Providers Information Sheet.

## SECTION VIII:a: SCHOLARSHIP DESIGNATION

☐ Carefully review the Local Scholarships Providers' Information Sheet (separate file on [www.somdcan.org](http://www.somdcan.org) "Calvert LSA" tab) to determine your eligibility for the local scholarships listed below. Consideration will be given by individual providers regarding the student applicant's attention to detail and eligibility requirements. Individual providers reserve the right to eliminate an applicant who indicates eligibility to ALL listed scholarships. The list below is continued on Page 3 of the Calvert LSA - an additional essay is required to compete for the scholarships listed on Page 3.

☐ Alpha Beta Chapter, Delta Kappa Gamma /  
Frances Lancaster Grant for Teacher Education

☐ American Legion Post #206 /  
Austin H. Stanley Scholarship  
☐ Military Descendant

☐ American Legion Auxiliary Unit 206 - General Scholarship  
☐ Military Descendant

☐ Calvert County 4-H Livestock Auction Scholarship  
☐ 4H Member

☐ Calvert County Bar Association Scholarship

☐ Calvert County Council of PTA's Scholarship

☐ Calvert High School PTSA Scholarship  
☐ CHS PTSA Member

☐ Calvert Manne Museum / Betty (Sandy) Roberts  
Scholarship for Natural Sciences

☐ Calvert Retired School Personnel Association Scholarship

☐ Cedar Point Federal Credit Union /  
GEICO Scholarship

☐ Cedar Point Federal Credit Union /  
Frank E. Gorley Scholarship  
☐ Cedar Point Financial Services, Inc. Scholarship

☐ Florence B. Trueman Scholarship Trust

☐ Huntingtown High School PTSA Scholarship  
☐ HHS PTSA Member

☐ Kimberly Ann Stone Memorial Scholarship

☐ Kiwanis Club of Calvert County

☐ Key Club Member

☐ LEAP Forward, Inc. /

☐ The Clifton Morsell-Randolph Adams Memorial Scholarship

☐ The Charles H. Lee, Sr. Memorial Scholarship

☐ The Wallace Lorenzo Leeper Memorial Scholarship

☐ The Violet Parker Memorial Scholarship

☐ The Patuxent Partnership "Pathways to Engineering"  
Scholarship to College of Southern Maryland

☐ Saint Leonard Maryland Heritage Scholarship  
☐ Reside in Zip Code 20685

☐ Solomon's Optimist Club Scholarship  
☐ PHS Senior

☐ SoMD CAN / College Access Network  
Educational Grant  
☐ SoMD CAN Participant

## SECTION VIII:b: SCHOLARSHIP DESIGNATION - Additional Information Required

- ☐ Carefully review the Local Scholarships Providers' Information Sheet (separate file on [www.somdcn.org](http://www.somdcn.org) "Calvert LSA" tab) to determine your eligibility for the local scholarships listed below. Consideration will be given by individual providers regarding the student applicant's attention to detail and eligibility requirements. Individual providers reserve the right to eliminate an applicant who indicates eligibility to ALL listed scholarships. NOTE: The list below requires essays in addition to the Calvert LSA Student's Essay/Personal Statement.
- |                                                                                                                                                            |                                                                                                            |                                                                                                                                              |
|------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------|
| <input type="checkbox"/> Patsy Keyser Memorial Nursing Scholarship / Stallings Williams American Legion<br>Legion Auxiliary Unit 206 Past President Parley | <input type="checkbox"/> National Society of Black Engineers<br>Patuxent River Chapter STEM Future Leaders | <input type="checkbox"/> Rotary Club of Prince Frederick<br>(check all that you have eligibility for, Essay counts for all Rotary PF)        |
| <input type="checkbox"/> Calvert Association of Supervisors and Administrators Scholarship                                                                 | <input type="checkbox"/> Northern High School PTSO Scholarship                                             | <input type="checkbox"/> Academic Scholarship                                                                                                |
| <input type="checkbox"/> Calvert Cliffs Women In Nuclear Scholarship                                                                                       | <input type="checkbox"/> NHS PTSO Member                                                                   | <input type="checkbox"/> Calvert Career and Technology Academy Scholarship                                                                   |
| <input type="checkbox"/> Calvert County Women's Democratic Club                                                                                            | <input type="checkbox"/> Prime Time Children's & Youth Activity<br>Center Scholarship                      | <input type="checkbox"/> The Brian Albright Scholarship                                                                                      |
| <input type="checkbox"/> Delta Sigma Theta Sorority, Inc. / Tr-County Maryland Alumnae Chapter                                                             | <input type="checkbox"/> Prime Time Past Attendee                                                          |                                                                                                                                              |
| <input type="checkbox"/> Eric and Cara Thom Memorial Scholarship                                                                                           | <input type="checkbox"/> Republican Women Leaders of Calvert /<br>Joyce Lyons Terhes Scholarship           | <input type="checkbox"/> Tau Lambda Lambda Chapter of Omega Psi Phi Fraternity<br>and the John Lancaster & W. Cecil Short Charity Foundation |
| <input type="checkbox"/> The John E. Harms, Jr. Scholarship Foundation                                                                                     |                                                                                                            |                                                                                                                                              |

## CALVERT LOCAL SCHOLARSHIPS APPLICATION MAIL-IN PACKET CHECKLIST

- ☐ Calvert LSA form - Save, Print 2 copies - one signed for mail in, one to file. Include in Calvert LSA Mail-In Packet by deadline of March 14, 2014.
- ☐ Transcript: Please attach one (1) sealed, official High School Transcript if you are a Senior in High School or Dual Enrolled.  
Please attach one (1) College Transcript if you are currently enrolled in College, or if you are Dual Enrolled H.S. and College.
- ☐ SAT / ACT Scores: Please attach a copy of your official SAT and/or ACT test score report. Your copy may be downloaded from the SAT/ACT website.
- ☐ Copy of SAR: FAFSA Student Aid Report (SAR) - received after filing the FAFSA (Free Application for Federal Student Aid) [www.fafsa.gov](http://www.fafsa.gov). Print and attach the PDF version showing the EFC (Expected Family Contribution).
- ☐ Student Resume: Please attach a one (1) or two (2) page, one-sided student resume/curriculum vitae.
- ☐ Letters of Recommendation: Must be sealed and signed across seal by Recommender.
- ☐ Student Essay / Personal Statement: Please attach the 500 word essay/personal statement as requested in Section VII of the Calvert LSA.  
Pay special attention to Local Providers requesting additional essays for their eligibility requirements.
- ☐ Required additional documents for Local Providers.

## SIGNATURES AND DISCLAIMERS

- ☐ I give permission to the Calvert Local Scholarships Application Clearinghouse to forward my application materials to the Local Providers for whom I have indicated eligibility.
- ☐ I give permission to the Calvert Local Scholarships Application Clearinghouse to forward my application materials to Providers who may request to join the Calvert LSA after publication date. You will be notified via email if your Calvert LSA is forwarded to a new Local Scholarship Provider joining the Calvert LSA after publication date.
- ☐ I certify that the information provided in the Calvert Local Scholarships Application (Calvert LSA) is true and complete to the best of my knowledge. I have read the instructions thoroughly and I am providing all information, documents, attachments and essays as required for the individual scholarships to which I am applying. I understand that the Calvert LSA Clearinghouse will make copies (electronically or print) of my Calvert LSA Mail-In Packet as submitted and distribute copies to the scholarship providers which I have indicated. I am aware that the Calvert LSA Clearinghouse is not able to notify me of missing information, and therefore I take full responsibility for the completeness of this application. I understand that only required documents will be copied/scanned and distributed.

Student's Signature: Sign, then print below

Parent's Signature: Sign, then print below

Current Date: \_\_\_\_\_

Official Use Only

Date Rec'd:

Missing Docs:

Processed:

# of Schol:

# Application for Extension of Time To File an Exempt Organization Return

OMB No. 1545-1709

► **File a separate application for each return.**

- If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** and check this box ☒
- If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only **Part II** (on page 2 of this form)

*Do not complete Part II unless you have already been granted an automatic 3-month extension on a previously filed Form 8868.*

**Electronic filing (e-file).** You can electronically file Form 8868 if you need a 3-month automatic extension of time to file (6 months for a corporation required to file Form 990-T), or an additional (not automatic) 3-month extension of time. You can electronically file Form 8868 to request an extension of time to file any of the forms listed in Part I or Part II with the exception of Form 8870, Information Return for Transfers Associated With Certain Personal Benefit Contracts, which must be sent to the IRS in paper format (see instructions). For more details on the electronic filing of this form, visit [www.irs.gov/efile](http://www.irs.gov/efile) and click on *e-file for Charities & Nonprofits*.

## **Part I Automatic 3-Month Extension of Time. Only submit original (no copies needed).**

A corporation required to file Form 990-T and requesting an automatic 6-month extension - check this box and complete

Part I only

*All other corporations (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns.*

|                                                                                            |                                                                                                                              |                                                                  |
|--------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------|
| <b>Type or print</b><br><br>File by the due date for filing your return. See instructions. | Name of exempt organization or other filer, see instructions.<br><br><b>FLORENCE B. TRUEMAN EDUCATIONAL TRUST</b>            | Employer identification number (EIN) or<br><br><b>52-1649301</b> |
|                                                                                            | Number, street, and room or suite no. If a P.O. box, see instructions.<br><b>401 FAIRLEIGH COURT</b>                         | Social security number (SSN)                                     |
|                                                                                            | City, town or post office, state, and ZIP code. For a foreign address, see instructions.<br><b>TRACY'S LANDING, MD 20779</b> |                                                                  |

Enter the Return code for the return that this application is for (file a separate application for each return)

**04**

| Application Is For                       | Return Code | Application Is For       | Return Code |
|------------------------------------------|-------------|--------------------------|-------------|
| Form 990 or Form 990-EZ                  | 01          | Form 990-T (corporation) | 07          |
| Form 990-BL                              | 02          | Form 1041-A              | 08          |
| Form 4720 (individual)                   | 03          | Form 4720                | 09          |
| Form 990-PF                              | 04          | Form 5227                | 10          |
| Form 990-T (sec. 401(a) or 408(a) trust) | 05          | Form 6069                | 11          |
| Form 990-T (trust other than above)      | 06          | Form 8870                | 12          |

**J. SCOTT WHITNEY**

- The books are in the care of ► **401 FAIRLEIGH COURT - TRACY'S LANDING, MD 20779**  
Telephone No. ► **410-741-5602** FAX No. ►

- If the organization does not have an office or place of business in the United States, check this box ☐
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) . If this is for the whole group, check this box ☐ . If it is for part of the group, check this box ☐ and attach a list with the names and EINs of all members the extension is for

- 1** I request an automatic 3-month (6 months for a corporation required to file Form 990-T) extension of time until **FEBRUARY 15, 2014**, to file the exempt organization return for the organization named above. The extension is for the organization's return for:
- ☐ calendar year \_\_\_\_\_ or
- ☒ tax year beginning **JUL 1, 2012**, and ending **JUN 30, 2013**

- 2** If the tax year entered in line 1 is for less than 12 months, check reason: ☐ Initial return ☐ Final return
- ☐ Change in accounting period

|                                                                                                                                                                                              |           |    |             |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------|----|-------------|
| <b>3a</b> If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.                                   | <b>3a</b> | \$ | <b>0.</b>   |
| <b>b</b> If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit. | <b>3b</b> | \$ | <b>419.</b> |
| <b>c</b> <b>Balance due.</b> Subtract line 3b from line 3a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.      | <b>3c</b> | \$ | <b>0.</b>   |

**Caution.** If you are going to make an electronic fund withdrawal with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions

LHA **For Privacy Act and Paperwork Reduction Act Notice, see instructions.**

Form **8868** (Rev. 1-2013)