Form **990-PF**

Department of the Treasury
Internal Revenue Service

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

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

OMB No. 1545-0052

**2012**

**For calendar year 2012, or tax year beginning** Jul 1 , 2012, and ending Jun 30 , 2013

Name of foundation: Donald D. Lynch Family Foundation

A Employer identification number: 56-2053851

Number and street (or P.O. box number if mail is not delivered to street address): 108 Artillery Lane

Room/suite:

B Telephone number (see the instructions): (919) 846-0830

City or town: Raleigh State: NC ZIP code: 27615

C If exemption application is pending, check here ☐

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

D 1 Foreign organizations, check here ☐

2 Foreign organizations meeting the 85% test, check here and attach computation ☐

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

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

I Fair market value of all assets at end of year (from Part II, column (c), line 16) ► $ 18,315,866.

J Accounting method: ☐ Cash ☒ Accrual ☐ Other (specify) (Part I, column (d) must be on cash basis.)

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

| **Part I** Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions).) | (a) Revenue and expenses per books | (b) Net investment income | (c) Adjusted net income | (d) Disbursements for charitable purposes (cash basis only) |
|---|---|---|---|---|
| **REVENUE** | | | | |
| 1 Contributions, gifts, grants, etc, received (att sch) | 700,018. | | | |
| 2 Ck ► ☐ if the foundn is not req to att Sch B | | | | |
| 3 Interest on savings and temporary cash investments | 1,253. | 1,253. | 1,253. | |
| 4 Dividends and interest from securities | 315,830. | 315,830. | 315,830. | |
| 5a Gross rents | | | | |
| b Net rental income or (loss) | | | | |
| 6a Net gain/(loss) from sale of assets not on line 10 | | | | |
| b Gross sales price for all assets on line 6a | | | | |
| 7 Capital gain net income (from Part IV, line 2) | | 452,310. | | |
| 8 Net short-term capital gain | | | 219,926. | |
| 9 Income modifications | | | | |
| 10a Gross sales less returns and allowances | | | | |
| b Less. Cost of goods sold | | | | |
| c Gross profit/(loss) (att sch) | | | | |
| 11 Other income (attach schedule) | | | | |
| 12 **Total.** Add lines 1 through 11 | 1,017,101. | 769,393. | 537,009. | |
| **OPERATING AND ADMINISTRATIVE EXPENSES** | | | | |
| 13 Compensation of officers, directors, trustees, etc | | | | |
| 14 Other employee salaries and wages | | | | |
| 15 Pension plans, employee benefits | | | | |
| 16a Legal fees (attach schedule) | | | | |
| b Accounting fees (attach sch) | | | | |
| c Other prof fees (attach sch) L-16c Stmt | 37,533. | | | 37,533. |
| 17 Interest | | | | |
| 18 Taxes (attach schedule)(see instrs) See Line 18 Stmt | 15,118. | | | |
| 19 Depreciation (attach sch) and depletion | | | | |
| 20 Occupancy | 1,244. | | | 1,244. |
| 21 Travel, conferences, and meetings | 3,832. | 1,139. | | 2,693. |
| 22 Printing and publications | | | | |
| 23 Other expenses (attach schedule) See Line 23 Stmt | 9,294. | 4,499. | | 4,859. |
| 24 **Total operating and administrative expenses.** Add lines 13 through 23 | 67,021. | 5,638. | | 46,329. |
| 25 Contributions, gifts, grants paid | 740,787. | | | 740,787. |
| 26 **Total expenses and disbursements.** Add lines 24 and 25 | 807,808. | 5,638. | | 787,116. |
| 27 Subtract line 26 from line 12: | | | | |
| a **Excess of revenue over expenses and disbursements** | 209,293. | | | |
| b **Net investment income** (if negative, enter -0-) | | 763,755. | | |
| c **Adjusted net income** (if negative, enter -0-) | | | 537,009. | |



ENVELOPE POSTMARK DATE SEP 16 2013

SCANNED OCT 21 2013

J17-19

9NE

**Part II Balance Sheets** Attached schedules and amounts in the description column should be for end-of-year amounts only. (See instructions.)

| | | Beginning of year (a) Book Value | End of year (b) Book Value | End of year (c) Fair Market Value |
|---|---|---|---|---|
| ASSETS | 1 Cash — non-interest-bearing | | | |
| | 2 Savings and temporary cash investments | 934,876. | 616,869. | 616,869. |
| | 3 Accounts receivable ▶ | | | |
| | Less: allowance for doubtful accounts ▶ | | | |
| | 4 Pledges receivable ▶ | | | |
| | Less: allowance for doubtful accounts ▶ | | | |
| | 5 Grants receivable | | | |
| | 6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions) | | | |
| | 7 Other notes and loans receivable (attach sch) ▶ | | | |
| | Less: allowance for doubtful accounts ▶ | | | |
| | 8 Inventories for sale or use | | | |
| | 9 Prepaid expenses and deferred charges | | | |
| | 10a Investments — U.S. and state government obligations (attach schedule) | | | |
| | b Investments — corporate stock (attach schedule) L-10b Stmt | 9,159,988. | 9,927,107. | 17,698,997. |
| | c Investments — corporate bonds (attach schedule) | | | |
| | 11 Investments — land, buildings, and equipment: basis ▶ | | | |
| | Less: accumulated depreciation (attach schedule) ▶ | | | |
| | 12 Investments — mortgage loans | | | |
| | 13 Investments — other (attach schedule) | | | |
| | 14 Land, buildings, and equipment: basis ▶ | | | |
| | Less: accumulated depreciation (attach schedule) ▶ | | | |
| | 15 Other assets (describe ▶ ) | | | |
| | 16 Total assets (to be completed by all filers — see the instructions. Also, see page 1, item I) | 10,094,864. | 10,543,976. | 18,315,866. |
| LIABILITIES | 17 Accounts payable and accrued expenses | | | |
| | 18 Grants payable | | | |
| | 19 Deferred revenue | | | |
| | 20 Loans from officers, directors, trustees, & other disqualified persons | | | |
| | 21 Mortgages and other notes payable (attach schedule) | | | |
| | 22 Other liabilities (describe ▶ ) | | | |
| | 23 Total liabilities (add lines 17 through 22) | | | |
| NET ASSETS OR FUND BALANCES | Foundations that follow SFAS 117, check here ▶ [X] and complete lines 24 through 26 and lines 30 and 31. | | | |
| | 24 Unrestricted | 10,094,864. | 10,543,976. | |
| | 25 Temporarily restricted | | | |
| | 26 Permanently restricted | | | |
| | Foundations that do not follow SFAS 117, check here ▶ [ ] and complete lines 27 through 31. | | | |
| | 27 Capital stock, trust principal, or current funds | | | |
| | 28 Paid-in or capital surplus, or land, building, and equipment fund | | | |
| | 29 Retained earnings, accumulated income, endowment, or other funds | | | |
| | 30 Total net assets or fund balances (see instructions) | 10,094,864. | 10,543,976. | |
| | 31 Total liabilities and net assets/fund balances (see instructions) | 10,094,864. | 10,543,976. | |

**Part III Analysis of Changes in Net Assets or Fund Balances**

| | | | |
|---|---|---|---|
| 1 | Total net assets or fund balances at beginning of year — Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return) | 1 | 10,094,864. |
| 2 | Enter amount from Part I, line 27a | 2 | 209,293. |
| 3 | Other increases not included in line 2 (itemize) ▶ See Other Increases Stmt | 3 | 572,602. |
| 4 | Add lines 1, 2, and 3 | 4 | 10,876,759. |
| 5 | Decreases not included in line 2 (itemize) ▶ | 5 | 283,890. |
| 6 | Total net assets or fund balances at end of year (line 4 minus line 5) — Part II, column (b), line 30 | 6 | 10,592,869. |

## 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 shares MLC Company) | (b) How acquired P — Purchase D — Donation | (c) Date acquired (month, day, year) | (d) Date sold (month, day, year) |
|---|---|---|---|---|
| 1a | 3000 CLIFFS NATURAL | P | 08/13/12 | 09/14/12 |
| b | 1500 BANKAMERICA PFDX | P | 10/08/96 | 07/31/12 |
| c | PENTAIR LTD (Cash In Lieu) | P | 10/04/12 | 10/04/12 |
| d | 7244 COOPER INDUSTRIES | D | Various | 12/03/12 |
| e | See Columns (a) thru (d) | | | |

| | (e) Gross sales price | (f) Depreciation allowed (or allowable) | (g) Cost or other basis plus expense of sale | (h) Gain or (loss) (e) plus (f) minus (g) |
|---|---|---|---|---|
| a | 138,887. | | 128,870. | 10,017. |
| b | 37,500. | | 37,504. | -4. |
| c | 8. | | 0. | 8. |
| d | 283,603. | | 73,246. | 210,357. |
| e | See Columns (e) thru (h) | | 1,172,267. | 231,932. |

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

| | (i) Fair Market Value as of 12/31/69 | (j) Adjusted basis as of 12/31/69 | (k) Excess of column (i) over column (j), if any | (l) Gains (Column (h) gain minus column (k), but not less than -0-) or Losses (from column (h)) |
|---|---|---|---|---|
| a | | | | 10,017. |
| b | | | | -4. |
| c | | | | 8. |
| d | | | | 210,357. |
| e | See Columns (i) thru (l) | | | 231,932. |

| | | | |
|---|---|---|---|
| 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 | 452,310. |
| 3 | Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c) (see instructions). If (loss), enter -0- in Part I, line 8 | 3 | 219,926. |

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

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

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

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

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

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

| (a) Base period years Calendar year (or tax year beginning in) | (b) Adjusted qualifying distributions | (c) Net value of noncharitable-use assets | (d) Distribution ratio (column (b) divided by column (c)) |
|---|---|---|---|
| 2011 | 727,151. | 14,502,461. | 0.050140 |
| 2010 | 754,392. | 15,560,071. | 0.048483 |
| 2009 | 599,994. | 12,257,151. | 0.048951 |
| 2008 | 373,691. | 7,517,675. | 0.049708 |
| 2007 | 322,640. | 5,946,433. | 0.054258 |

| | | | |
|---|---|---|---|
| 2 | **Total** of line 1, column (d) | 2 | 0.251540 |
| 3 | Average distribution ratio for the 5-year base period — divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years | 3 | 0.050308 |
| 4 | Enter the net value of noncharitable-use assets for 2012 from Part X, line 5 | 4 | 16,819,815. |
| 5 | Multiply line 4 by line 3 | 5 | 846,171. |
| 6 | Enter 1% of net investment income (1% of Part I, line 27b) | 6 | 7,638. |
| 7 | Add lines 5 and 6 | 7 | 853,809. |
| 8 | Enter qualifying distributions from Part XII, line 4 | 8 | 787,116. |

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)

| | | | |
|---|---|---|---|
| 1 a Exempt operating foundations described in section 4940(d)(2), check here ► ☐ and enter 'N/A' on line 1. Date of ruling or determination letter: _______ (attach copy of letter if necessary – see instrs) | | | |
| b Domestic foundations that meet the section 4940(e) requirements in Part V, check here . ► ☐ and enter 1% of Part I, line 27b | | 1 | 15,275. |
| c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, column (b) | | | |
| 2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) | | 2 | |
| 3 Add lines 1 and 2 | | 3 | 15,275. |
| 4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) | | 4 | |
| 5 **Tax based on investment income.** Subtract line 4 from line 3. If zero or less, enter -0- | | 5 | 15,275. |
| 6 Credits/Payments: | | | |
| a 2012 estimated tax pmts and 2011 overpayment credited to 2012 | 6a 14,000. | | |
| 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 | 14,000. |
| 8 Enter any **penalty** for underpayment of estimated tax. Check here ☒ if Form 2220 is attached | | 8 | 30. |
| 9 **Tax due.** If the total of lines 5 and 8 is more than line 7, enter **amount owed** ► | | 9 | 1,305. |
| 10 **Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ► | | 10 | 0. |
| 11 Enter the amount of line 10 to be: **Credited to 2013 estimated tax** ► | **Refunded** ► | 11 | |

**Part VII-A Statements Regarding Activities**

| | | Yes | No |
|---|---|---|---|
| 1 a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign? | 1a | | X |
| b Did it spend more than $100 during the year (either directly or indirectly) for political purposes (see the instructions for definition)? | 1b | | X |
| *If the answer is 'Yes' to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.* | | | |
| c Did the foundation file **Form 1120-POL** for this year? | 1c | | X |
| d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation ► $ ______ (2) On foundation managers ► $ ______ | | | |
| e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ► $ ______ | | | |
| 2 Has the foundation engaged in any activities that have not previously been reported to the IRS? *If 'Yes,' attach a detailed description of the activities.* | 2 | | X |
| 3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? *If 'Yes,' attach a conformed copy of the changes* | 3 | | X |
| 4 a Did the foundation have unrelated business gross income of $1,000 or more during the year? | 4a | X | |
| b If 'Yes,' has it filed a tax return on **Form 990-T** for this year? | 4b | X | |
| 5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? *If 'Yes,' attach the statement required by General Instruction T.* | 5 | | X |
| 6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument? | 6 | X | |
| 7 Did the foundation have at least $5,000 in assets at any time during the year? *If 'Yes,' complete Part II, column (c), and Part XV* | 7 | X | |
| 8 a Enter the states to which the foundation reports or with which it is registered (see instructions) ► NC - North Carolina | | | |
| b If the answer is 'Yes' to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by *General Instruction G? If 'No,' attach explanation* | 8b | X | |
| 9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2012 or the taxable year beginning in 2012 (see instructions for Part XIV)? *If 'Yes,' complete Part XIV* | 9 | | X |
| 10 Did any persons become substantial contributors during the tax year? *If 'Yes,' attach a schedule listing their names and addresses* | 10 | | X |

**Part VII-A Statements Regarding Activities** *(continued)*

| | | | Yes | No |
|---|---|---|---|---|
| 11 | At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If 'Yes', attach schedule (see instructions) | 11 | | X |
| 12 | Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If 'Yes,' attach statement (see instructions) | 12 | | X |
| 13 | Did the foundation comply with the public inspection requirements for its annual returns and exemption application? | 13 | X | |

Website address ► N/A

14 The books are in care of ► Donald D. Lynch Telephone no. ► (919) 846-0830

Located at ► 108 Artillery Lane, Raleigh, NC ZIP + 4 ► 27615

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of **Form 1041** – Check here ► ☐

and enter the amount of tax-exempt interest received or accrued during the year ► 15

| | | | Yes | No |
|---|---|---|---|---|
| 16 | At any time during calendar year 2012, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? | 16 | | X |
| | See the instructions for exceptions and filing requirements for Form TD F 90-22.1. If 'Yes,' enter the name of the foreign country ► | | | |

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

**File Form 4720 if any item is checked in the 'Yes' column, unless an exception applies.**

| | | | Yes | No |
|---|---|---|---|---|
| 1 a | During the year did the foundation (either directly or indirectly): | | | |
| | (1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☒ No | | | |
| | (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No | | | |
| | (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No | | | |
| | (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☒ No | | | |
| | (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☒ No | | | |
| | (6) Agree to pay money or property to a government official? (**Exception.** Check 'No' if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) ☐ Yes ☒ No | | | |
| b | If any answer is 'Yes' to 1a(1)-(6), did **any** of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? | 1 b | | |
| | Organizations relying on a current notice regarding disaster assistance check here ► ☐ | | | |
| c | Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2012? | 1 c | | 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? ☐ Yes ☒ No | | | |
| | If 'Yes,' list the years ► 20__ , 20__ , 20__ , 20__ | | | |
| b | Are there any years listed in 2a for which the foundation is **not** applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to **all** years listed, answer 'No' and attach statement – see instructions.) | 2 b | | |
| c | If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here. ► 20__ , 20__ , 20__ , 20__ | | | |
| 3 a | Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☒ No | | | |
| b | If 'Yes,' did it have excess business holdings in 2012 as a result of **(1)** any purchase by the foundation or disqualified persons after May 26, 1969; **(2)** the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or **(3)** the lapse of the 10-, 15-, or 20-year first phase holding period? *(Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2012.)* | 3 b | | |
| 4 a | Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? | 4 a | | 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? | 4 b | | X |

**Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required** *(continued)*

5a During the year did the foundation pay or incur any amount to:

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☒ No

(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☒ No

(3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☒ No

(4) Provide a grant to an organization other than a charitable, etc, organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see instructions) ☐ Yes ☒ No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☒ No

b If any answer is 'Yes' to 5a(1)-(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)? **5b**

Organizations relying on a current notice regarding disaster assistance check here ▶ ☐

c If the answer is 'Yes' to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? ☐ Yes ☐ No

*If 'Yes,' attach the statement required by Regulations section 53.4945-5(d).*

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? ☐ Yes ☒ No

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? **6b** No: X

*If 'Yes' to 6b, file Form 8870.*

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

b If 'Yes,' did the foundation receive any proceeds or have any net income attributable to the transaction? **7b**

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

**1 List all officers, directors, trustees, foundation managers and their compensation (see instructions).**

| (a) Name and address | (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 |
|---|---|---|---|---|
| Dow Campbell<br>120 Hancock Street<br>Findlay OH 45840 | Grants Officer<br>8.00 | 0. | 0. | 0. |
| Susan Campbell<br>120 Hancock Street<br>Findlay OH 45840 | Grants Officer<br>20.00 | 37,533. | 0. | 0. |
| Donald D. Lynch<br>108 Artillery Lane<br>Raleigh NC 27615 | Executive Director<br>30.00 | 0. | 0. | 2,017. |
| See Information about Officers, Directors, Trustees, Etc. | | | | |

**2 Compensation of five highest-paid employees (other than those included on line 1 — see instructions). If none, enter 'NONE.'**

| (a) Name and address of each employee paid more than $50,000 | (b) Title, and average hours per week devoted to position | (c) Compensation | (d) Contributions to employee benefit plans and deferred compensation | (e) Expense account, other allowances |
|---|---|---|---|---|
| NONE | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |

**Total** number of other employees paid over $50,000 ▶ None

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

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

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

**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 NONE | |
| 2 | |
| 3 | |
| 4 | |

**Part IX-B** **Summary of Program-Related Investments** (see instructions)

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

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

| | | |
|---|---|---|
| 1 Fair market value of assets not used (or held for use) directly in carrying out charitable, etc, purposes: | | |
| a Average monthly fair market value of securities | 1a | 17,075,954. |
| b Average of monthly cash balances | 1b | |
| c Fair market value of all other assets (see instructions) | 1c | |
| d **Total** (add lines 1a, b, and c) | 1d | 17,075,954. |
| e Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation) — 1e | | |
| 2 Acquisition indebtedness applicable to line 1 assets | 2 | |
| 3 Subtract line 2 from line 1d | 3 | 17,075,954. |
| 4 Cash deemed held for charitable activities. Enter 1-1/2% of line 3 (for greater amount, see instructions) | 4 | 256,139. |
| 5 **Net value of noncharitable-use assets.** Subtract line 4 from line 3. Enter here and on Part V, line 4 | 5 | 16,819,815. |
| 6 **Minimum investment return.** Enter 5% of line 5 | 6 | 840,991. |

**Part XI Distributable Amount** (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ► ☐ and do not complete this part.)

| | | | | |
|---|---|---|---|---|
| 1 Minimum investment return from Part X, line 6 | | | 1 | 840,991. |
| 2a Tax on investment income for 2012 from Part VI, line 5 | 2a | 15,275. | | |
| b Income tax for 2012. (This does not include the tax from Part VI.) | 2b | | | |
| c Add lines 2a and 2b | | | 2c | 15,275. |
| 3 Distributable amount before adjustments. Subtract line 2c from line 1 | | | 3 | 825,716. |
| 4 Recoveries of amounts treated as qualifying distributions | | | 4 | |
| 5 Add lines 3 and 4 | | | 5 | 825,716. |
| 6 Deduction from distributable amount (see instructions) | | | 6 | |
| 7 **Distributable amount** as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1 | | | 7 | 825,716. |

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

| | | |
|---|---|---|
| 1 Amounts paid (including administrative expenses) to accomplish charitable, etc, purposes: | | |
| a Expenses, contributions, gifts, etc – total from Part I, column (d), line 26 | 1a | 787,116. |
| b Program-related investments – total from Part IX-B | 1b | |
| 2 Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc, purposes | 2 | |
| 3 Amounts set aside for specific charitable projects that satisfy the: | | |
| a Suitability test (prior IRS approval required) | 3a | |
| b Cash distribution test (attach the required schedule) | 3b | |
| 4 **Qualifying distributions.** Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4 | 4 | 787,116. |
| 5 Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b (see instructions) | 5 | 0. |
| 6 **Adjusted qualifying distributions.** Subtract line 5 from line 4 | 6 | 787,116. |

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

**Part XIII Undistributed Income** (see instructions)

| | (a) Corpus | (b) Years prior to 2011 | (c) 2011 | (d) 2012 |
|---|---|---|---|---|
| 1 Distributable amount for 2012 from Part XI, line 7 | | | | 825,716. |
| 2 Undistributed income, if any, as of the end of 2012: | | | | |
| a Enter amount for 2011 only | | | 0. | |
| b Total for prior years: 20 __, 20 __, 20 __ | | | | |
| 3 Excess distributions carryover, if any, to 2012: | | | | |
| a From 2007 ... 38,294. | | | | |
| b From 2008 ... 6,069. | | | | |
| c From 2009 ... 1,394. | | | | |
| d From 2010 ... 0. | | | | |
| e From 2011 ... 0. | | | | |
| f Total of lines 3a through e | 45,757. | | | |
| 4 Qualifying distributions for 2012 from Part XII, line 4: ► $ 787,116. | | | | |
| a Applied to 2011, but not more than line 2a | | | | |
| b Applied to undistributed income of prior years (Election required – see instructions) | | | | |
| c Treated as distributions out of corpus (Election required – see instructions) | | | | |
| d Applied to 2012 distributable amount | | | | 787,116. |
| e Remaining amount distributed out of corpus | 0. | | | |
| 5 Excess distributions carryover applied to 2012 *(If an amount appears in column (d), the same amount must be shown in column (a).)* | 38,600. | | | 38,600. |
| 6 **Enter the net total of each column as indicated below:** | | | | |
| a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5 | 7,157. | | | |
| b Prior years' undistributed income. Subtract line 4b from line 2b | | 0. | | |
| c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed | | | | |
| d Subtract line 6c from line 6b. Taxable amount – see instructions | | 0. | | |
| e Undistributed income for 2011. Subtract line 4a from line 2a. Taxable amount – see instructions | | | 0. | |
| f Undistributed income for 2012. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2013 | | | | 0. |
| 7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions) | | | | |
| 8 Excess distributions carryover from 2007 not applied on line 5 or line 7 (see instructions) | 0. | | | |
| 9 **Excess distributions carryover to 2013.** Subtract lines 7 and 8 from line 6a | 7,157. | | | |
| 10 Analysis of line 9: | | | | |
| a Excess from 2008 ... 5,763. | | | | |
| b Excess from 2009 ... 1,394. | | | | |
| c Excess from 2010 ... 0. | | | | |
| d Excess from 2011 ... 0. | | | | |
| e Excess from 2012 ... 0. | | | | |

**Part XIV | Private Operating Foundations** (see instructions and Part VII-A, question 9) N/A

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2012, enter the date of the ruling ▶

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

| | Tax year | Prior 3 years | | | |
|---|---|---|---|---|---|
| | (a) 2012 | (b) 2011 | (c) 2010 | (d) 2009 | (e) Total |
| 2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed | | | | | |
| b 85% of line 2a | | | | | |
| c Qualifying distributions from Part XII, line 4 for each year listed | | | | | |
| d Amounts included in line 2c not used directly for active conduct of exempt activities | | | | | |
| e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c | | | | | |
| 3 Complete 3a, b, or c for the alternative test relied upon: | | | | | |
| a 'Assets' alternative test — enter: | | | | | |
| (1) Value of all assets | | | | | |
| (2) Value of assets qualifying under section 4942(j)(3)(B)(i) | | | | | |
| b 'Endowment' alternative test — enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed | | | | | |
| c 'Support' alternative test — enter: | | | | | |
| (1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties) | | | | | |
| (2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii) | | | | | |
| (3) Largest amount of support from an exempt organization | | | | | |
| (4) Gross investment income | | | | | |

**Part XV | Supplementary Information (Complete this part only if the foundation had $5,000 or more in assets at any time during the year — see instructions.)**

1 **Information Regarding Foundation Managers:**

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

Donald D. Lynch $5082355

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.

N/A

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:

Donald D. Lynch
108 Artillery Lane
Raleigh, NC 27615 (919) 846-0830

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

Grant Request Application

c Any submission deadlines:

Applications reviewed ~~quarterly~~ monthly

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

Awards range from $2500 to $20000. Limited to 501(C)(3) organizations that witness the gospel values of justice and spirituality, peace and

**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, show any relationship to any foundation manager or substantial contributor | Foundation status of recipient | Purpose of grant or contribution | Amount |
|---|---|---|---|---|
| *a Paid during the year* | | | | |
| all are 501(c)(3)s<br>see attached listings<br>Potential grantess request<br>grant applications which<br>are reviewed<br>each month | none | 501(c)(3) | Awards are limited to 501(C)(3)or-ganizations that witness the gospel values of justice,family life and the common good | 740,787. |
| **Total** ► 3a | | | | 740,787. |
| *b Approved for future payment* | | | | |
| NONE | n/a | n/a | n/a | |
| **Total** ► 3b | | | | 0. |

**Part XVI-A** **Analysis of Income-Producing Activities**

| Enter gross amounts unless otherwise indicated. | Unrelated business income | | Excluded by section 512, 513, or 514 | | (e) Related or exempt function income (See instructions.) |
|---|---|---|---|---|---|
| | (a) Business code | (b) Amount | (c) Exclusion code | (d) Amount | |
| 1 Program service revenue: | | | | | |
| a | | | | | |
| b | | | | | |
| c | | | | | |
| d | | | | | |
| e | | | | | |
| f | | | | | |
| g Fees and contracts from government agencies | | | | | |
| 2 Membership dues and assessments | | | | | |
| 3 Interest on savings and temporary cash investments | | | 14 | | |
| 4 Dividends and interest from securities | | 315,830. | 14 | | |
| 5 Net rental income or (loss) from real estate: | | | | | |
| a Debt-financed property | | | | | |
| b Not debt-financed property | | | | | |
| 6 Net rental income or (loss) from personal property | | | | | |
| 7 Other investment income | | | | | |
| 8 Gain or (loss) from sales of assets other than inventory | | | 18 | | |
| 9 Net income or (loss) from special events | | | | | |
| 10 Gross profit or (loss) from sales of inventory | | | | | |
| 11 Other revenue: | | | | | |
| a | | | | | |
| b | | | | | |
| c | | | | | |
| d | | | | | |
| e | | | | | |
| 12 Subtotal. Add columns (b), (d), and (e) | | 315,830. | | | |

13 **Total.** Add line 12, columns (b), (d), and (e) ........ 13 315,830.

(See worksheet in line 13 instructions to verify calculations.)

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

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

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

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

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

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

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

b If 'Yes,' complete the following schedule.

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

**Sign Here**

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

Signature of officer or trustee: [signature] Date: 8/30/13 Title: EXECUTIVE DIRECTOR

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

**Paid Preparer Use Only**

| Print/Type preparer's name | Preparer's signature | Date | Check ☐ if self-employed | PTIN |
|---|---|---|---|---|
| | | | | |

Firm's name ▶ none — Firm's EIN ▶

Firm's address ▶ 108 Artillery Lane, Raleigh NC 27615 — Phone no

**Schedule B** (Form 990, 990-EZ, or 990-PF)

Department of the Treasury Internal Revenue Service

# Schedule of Contributors

► Attach to Form 990, Form 990-EZ, or Form 990-PF

OMB No. 1545-0047

**2012**

| Name of the organization | Employer identification number |
|---|---|
| Donald D. Lynch Family Foundation | 56-2053851 |

**Organization type** (check one):

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

Check if your organization is covered by the **General Rule** or a **Special Rule**

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

**General Rule**

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

**Special Rules**

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

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

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

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

Name of organization: Donald D. Lynch Family Foundation

Employer identification number: 56-2053851

**Part I** **Contributors** (see instructions). Use duplicate copies of Part I if additional space is needed.

| (a) Number | (b) Name, address, and ZIP + 4 | (c) Total contributions | (d) Type of contribution |
|---|---|---|---|
| 1 | Donald D. Lynch<br>108 Artillery Lane<br>Raleigh NC 27615 | $ 52,000. | Person [X]<br>Payroll [ ]<br>Noncash [ ]<br>(Complete Part II if there is a noncash contribution.) |
| 2 | same as above | $ 28,738. | Person [ ]<br>Payroll [ ]<br>Noncash [X]<br>(Complete Part II if there is a noncash contribution.) |
| 3 | same as above | $ 121,380. | Person [ ]<br>Payroll [ ]<br>Noncash [X]<br>(Complete Part II if there is a noncash contribution.) |
| 4 | same as above | $ 89,760. | Person [ ]<br>Payroll [ ]<br>Noncash [X]<br>(Complete Part II if there is a noncash contribution.) |
| 5 | same as above | $ 155,600. | Person [ ]<br>Payroll [ ]<br>Noncash [X]<br>(Complete Part II if there is a noncash contribution.) |
| 6 | same as above | $ 252,540. | Person [ ]<br>Payroll [ ]<br>Noncash [X]<br>(Complete Part II if there is a noncash contribution.) |

Name of organization: Donald D. Lynch Family Foundation

Employer identification number: 56-2053851

**Part II** **Noncash Property** (see instructions). Use duplicate copies of Part II if additional space is needed.

| (a) No. from Part I | (b) Description of noncash property given | (c) FMV (or estimate) (see instructions) | (d) Date received |
|---|---|---|---|
| 2 | 908 shares BBT | $ 28,738. | 07/25/12 |
| 3 | 7000 shares Best Buy | $ 121,380. | 07/25/12 |
| 4 | 4224 shares Kroger | $ 89,760. | 07/25/12 |
| 5 | 5000 shares CBS | $ 155,600. | 07/25/12 |
| 6 | 6000 shares Timken | $ 252,540. | 07/25/12 |
| | | $ | |

Form 990-PF, Part IV, Capital Gains and Losses for Tax on Investment Income
**Columns (a) thru (d)**

| (a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shares MLC Company) | (b) How acquired P — Purchase D — Donation | (c) Date acquired (month, day, year) | (d) Date sold (month, day, year) |
|---|---|---|---|
| COOPER INDUSTRIES (Cash in lieu) | D | 12/03/12 | 12/03/12 |
| 1500 BANKAMERICA PRDB | P | 06/15/96 | 07/25/12 |
| 1500 BANKAMERICA CAP TRUST | P | various | 11/05/12 |
| 1000 GE CAPITAL NOTES | P | 07/08/97 | 01/18/13 |
| 4224 KROGER | D | 08/08/03 | 01/15/13 |
| 2500 VALERO ENERGY | D | 12/10/10 | 01/31/13 |
| 7000 SYMANTEC | P | 12/16/04 | 05/21/13 |
| 4000 VALERO ENERGY | D | 12/10/10 | 03/14/13 |
| 4000 BAKER HUGHES | P | 03/13/07 | 06/16/13 |
| AMERIPRISE MANAGED | P | 07/01/12 | 06/30/13 |
| JPM CHASE PFD | P | 12/04/09 | 05/08/13 |

Form 990-PF, Part IV, Capital Gains and Losses for Tax on Investment Income
**Columns (e) thru (h)**

| (e) Gross sales price | (f) Depreciation allowed (or allowable) | (g) Cost or other basis plus expense of sale | (h) Gain or (loss) (e) plus (f) minus (g) |
|---|---|---|---|
| 30. | | 0. | 30. |
| 37,500. | | 37,500. | 0. |
| 37,500. | | 37,500. | 0. |
| 25,000. | | 25,000. | 0. |
| 109,685. | | 54,827. | 54,858. |
| 108,845. | | 41,310. | 67,535. |
| 168,833. | | 144,532. | 24,301. |
| 180,756. | | 67,500. | 113,256. |
| 186,280. | | 213,452. | -27,172. |
| 512,270. | | 512,756. | -486. |
| 37,500. | | 37,890. | -390. |
| Total | | 1,172,267. | 231,932. |

Form 990-PF, Part IV, Capital Gains and Losses for Tax on Investment Income
**Columns (i) thru (l)**

| Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69 | | | (l) Gains (column (h) gain minus column (k), but not less than -0-) or losses (from column (h)) |
|---|---|---|---|
| (i) Fair Market Value as of 12/31/69 | (j) Adjusted basis as of 12/31/69 | (k) Excess of column (i) over column (j), if any | |
| | | | 30. |
| | | | 0. |
| | | | 0. |
| | | | 0. |
| | | | 54,858. |
| | | | 67,535. |
| | | | 24,301. |

Form 990-PF, Part IV, Capital Gains and Losses for Tax on Investment Income Continued
**Columns (i) thru (l)**

| Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69 | | | (l) Gains (column (h) gain minus column (k), but not less than -0-) or losses (from column (h)) |
|---|---|---|---|
| (i) Fair Market Value as of 12/31/69 | (j) Adjusted basis as of 12/31/69 | (k) Excess of column (i) over column (j), if any | |
| | | | 113,256. |
| | | | -27,172. |
| | | | -486. |
| | | | -390. |
| Total | | | 231,932. |

**Supporting Statement of:**

Form 990-PF, p3/Part IV, Line 1(g)-14

| Description | Amount |
|---|---|
| RECORDS MAINTAINED BY FOUNDATION | 512,270. |
| Total | 512,270. |

THE DONALD D. LYNCH FAMILY FOUNDATION

**FEDERAL STATEMENTS**
**2012**

PART II, LINE 10b
56-2053851

| | Book Value 7/1/2012 | #shares | Book Value End of Yr (6/30/13) | Basis of Valuation | 6/30/13 PX/SHR | Fair Mkt Value |
|---|---|---|---|---|---|---|
| AA-ALCOA-5000 SH | 53996 | 5000 | 53996 | COST | 7.82 | 39100 |
| AA-ALCOA-2500 SH | 25800 | 2500 | 25800 | COST | 7.82 | 19550 |
| AA-ALCOA-2500SH | 29535 | 2500 | 29535 | COST | 7.82 | 19550 |
| AA-ALCOA-5000 SH | 57606 | 5000 | 57606 | COST | 7.82 | 39100 |
| AB-ALLIANCE CAPITAL-1000 SH | 10506 | 1000 | 9156 | COST | 20.82 | 20820 |
| AB-ALLIANCE CAPITAL-1000 SH | 15000 | 1000 | 13650 | COST | 20.82 | 20820 |
| AB-ALLIANCE CAPITAL-1500 SH | 13027 | 1500 | 11002 | COST | 20.82 | 31230 |
| AB-ALLIANCE CAPITAL-2000SH | 26143 | 2000 | 23443 | COST | 20.82 | 41640 |
| AB ALLIANCE CAPITAL-2000 SH | 43795 | 2000 | 41095 | COST | 20.82 | 41640 |
| ABB-ABB INC-2000 SH | 33630 | 2000 | 33630 | COST | 21.66 | 43320 |
| ABB-ABB INC-2000 SH-PURCH | | 2000 | 34770 | COST | 21.66 | 43320 |
| ABB-ABB INC-2000 SH-PURCH | | 2000 | 42829 | COST | 21.66 | 43320 |
| ABB-ABB INC-3000 SH-PURCH | | 3000 | 51010 | COST | 21.66 | 64980 |
| ACI-ARCH COAL-2000 SH | 33419 | 2000 | 33419 | COST | 3.78 | 7560 |
| ACI-ARCH COAL-2000 SH | 76700 | 2000 | 76700 | COST | 3.78 | 7560 |
| ACI-ARCH COAL-7000 SH | 186983 | 7000 | 186983 | COST | 3.78 | 26460 |
| ADT-THE ADT CORP* | | 4762 | 22478 | COST | 39.85 | 189766 |
| AIG-50SH | 55655 | 50 | 55655 | COST | 44.7 | 2235 |
| AIG-50 SH | 54465 | 50 | 54465 | COST | 44.7 | 2235 |
| AIG-50 SH | 57244 | 50 | 57244 | COST | 44.7 | 2235 |
| AIG-50 SH | 51161 | 50 | 51161 | COST | 44.7 | 2235 |
| AMERIPRISE MANAGED SHARES | 250000 | | 250000 | COST | 1.00 | 296955 |
| AXL-AMERICAN AXLE-3000 SH-PURCI | 25510 | 3000 | 25510 | COST | 18.63 | 55890 |
| AXL-AMERICAN AXLE-3000 SH-PURCI | 36490 | 3000 | 36490 | COST | 18.63 | 55890 |
| BA-BOEING-1000 SH | 36055 | 1000 | 36055 | COST | 102.44 | 102440 |
| BA-BOEING-1000 SH | 38838 | 1000 | 38838 | COST | 102.44 | 102440 |
| BA-BOEING-1000 SH | 38838 | 1000 | 38838 | COST | 102.44 | 102440 |
| BA-BOEING-4000 SH | 145120 | 4000 | 145120 | COST | 102.44 | 409760 |
| BA-BOEING-1000 SH | 36055 | 1000 | 36055 | COST | 102.44 | 102440 |
| BAC-BANK OF AMERICA-20000 SH | 60000 | 20000 | 60000 | COST | 12 86 | 257200 |
| BAC-BANK OF AMERICA-1997 SH | 76430 | 1997 | 76430 | COST | 12.86 | 25681 |
| BAC-BANK OF AMERICA-2003 SH | 40300 | 2003 | 40300 | COST | 12.86 | 25759 |
| BAC-(1000 MER COM)-859 SH | 72942 | 859 | 72942 | COST | 12.86 | 11047 |
| BAC-BANK OF AMERICA-3000 SH | 105525 | 3000 | 105525 | COST | 12.86 | 38580 |
| BAC-BANK OF AMERICA-40000 SH | 240000 | 40000 | 240000 | COST | 12.86 | 514400 |
| BAC-BAC CAP TRUST-B-1500SH-SOLD | 37504 | 1500 | | | | |
| BAC-BAC CAP TRUST-C-1500SH-SOLD | 37500 | 1500 | | | | |
| BACPRZ-BAC CAP TRUST-Z-3000 SHx | 75000 | 3000 | 75000 | COST | 25.05 | 75150 |
| BMLPRI-BAC DEP PF I (MER)-1500 SHx | 37500 | 1500 | 37500 | COST | 24.55 | 36825 |
| BACPRJ-BAC CAP DEP SHR-J 2000 SHx | 50000 | 2000 | 50000 | COST | 25.45 | 50900 |
| BBT-BBT-2500SH | 61910 | 2500 | 61910 | COST | 33.88 | 84700 |
| BBT-BBT-908SH-CONT | | 908 | 22488 | COST | 33.88 | 30763 |
| BBY-BEST BUY 7000 SH-CONT | | 7000 | 52430 | COST | 27.33 | 191310 |
| BCO-BRINKS-2424 SH | 24240 | 2424 | 24240 | COST | 25.51 | 61836 |
| BCO-BRINKS-10000 SH | 49980 | 10000 | 49980 | COST | 25.51 | 255100 |
| BHI-BAKER HUGHES-3102SH-SOLD | 171692 | 3102 | | | | |
| BHI-BAKER HUGHES-898SH-SOLD | 39153 | 898 | | | | |

| | | | | | | |
|---|---|---|---|---|---|---|
| BMY-BRISTOL MYERS-2000 SH | 50855 | 2000 | 50855 | COST | 44.69 | 89380 |
| BMY-BRISTOL MYERS-2500 SH | 66282 | 2500 | 66282 | COST | 44.69 | 111725 |
| BMY-BRISTOL MYERS-3000 SH | 85870 | 3000 | 85870 | COST | 44.69 | 134070 |
| BMY-BRISTOL MYERS-2500 SH | 54300 | 2500 | 54300 | COST | 44.69 | 111725 |
| CAM-CAMERON INTL-1000 SH | 48400 | 1000 | 48400 | COST | 61.16 | 61160 |
| CAM-CAMERON INTL-1000 SH | 48070 | 1000 | 48070 | COST | 61.16 | 61160 |
| CAM-CAMERON INTL-3000 SH | 59070 | 3000 | 59070 | COST | 61.16 | 183480 |
| CBE-COOPER INDUSTRIES-2000 SH-SC | 36000 | 2000 | | | | |
| CBE-COOPER INDUSTRIES-2000 SH-SC | 36000 | 2000 | | | | |
| CBE-COOPER INDUSTRIES-3244 SH-SC | 77482 | 3244 | | | | |
| CLF-CLIFFS NATURAL-1000 SH-PURCH | | 1000 | 38259 | COST | 16.25 | 16250 |
| CLF-CLIFFS NATURAL-2000 SH-PURCH | | 2000 | 76090 | COST | 16.25 | 32500 |
| CLF-CLIFFS NATURAL-2000 SH-PURCH | | 2000 | 37066 | COST | 16.25 | 32500 |
| CLF-CLIFFS NATURAL-2000 SH-PURCH | | 2000 | 40935 | COST | 16.25 | 32500 |
| CLF-CLIFFS NATURAL-3000 SH-PURCH | | 3000 | 128870 | COST | 16.25 | 48750 |
| CBS-5000 SH-CONT | | 5000 | 57577 | COST | 48.87 | 244350 |
| CLGX-CORELOGIC-12000 SH | 20432 | 12000 | 20432 | COST | 23.17 | 278040 |
| CSCO-CISCO SYSTEMS-2000 SH | 48945 | 2000 | 48945 | COST | 24.34 | 48670 |
| CSCO-CISCO SYSTEMS-2500 SH | 44280 | 2500 | 44280 | COST | 24.34 | 60850 |
| CSCO-CISCO SYSTEMS-4500 SH | 78215 | 4500 | 78215 | COST | 24.33 | 109485 |
| CST BRANDS-CST-1944 SH** | | 1944 | 61333 | COST | 30.81 | 59895 |
| CVRR REFINING-CVRR-1000 SH-PURCH | | 1000 | 30160 | COST | 30.06 | 30060 |
| CYH-COMMUNITY HEALTH-3000 SH | 56100 | 3000 | 56100 | COST | 46.88 | 140640 |
| CVS-6000 SH | 77532 | 6000 | 77532 | COST | 57.18 | 343080 |
| DD-DUPONT-1000 SH | 22650 | 1000 | 22650 | COST | 52 50 | 52500 |
| DD-DUPONT-1000 SH | 46435 | 1000 | 46435 | COST | 52 50 | 52500 |
| DD-DUPONT-2000 SH-PURCH | | 2000 | 92160 | COST | 52 50 | 105000 |
| DD-DUPONT-4000 SH | 127133 | 4000 | 127133 | COST | 52 50 | 210000 |
| DELL-2000 SH | 50378 | 2000 | 50378 | COST | 13.32 | 26640 |
| DELL-1000 SH | 23180 | 1000 | 23180 | COST | 13.32 | 13320 |
| DELL-2000 SH | 56458 | 2000 | 56458 | COST | 13.32 | 26640 |
| DELL-5000 SH-PURCH | | 5000 | 54700 | COST | 13.33 | 66650 |
| EMC-9000 SH | 134060 | 9000 | 134060 | COST | 23.62 | 212580 |
| EMR-EMERSON ELECTRIC-1500 SH | 40542 | 1500 | 40542 | COST | 54 54 | 81810 |
| ETN-5612 SH*** | | 5612 | 76236 | COST | 65.81 | 369326 |
| FAF-FIRST AMERICAN-12000 SH | 35846 | 12000 | 35846 | COST | 22.04 | 264480 |
| FLR-FLUOR-5000 SH | 33200 | 5000 | 33200 | COST | 59.31 | 296550 |
| FLR-FLUOR-2500 SH | 16600 | 2500 | 16600 | COST | 59 31 | 148275 |
| FLR-FLUOR-3000 SH | 19920 | 3000 | 19920 | COST | 59 31 | 177930 |
| FLR-FLUOR-3500 SH | 23240 | 3500 | 23240 | COST | 59 31 | 207585 |
| FNMPRN-FANNIE MAE PFD-1000 SH | 45774 | 1000 | 45774 | COST | 8.00 | 8000 |
| FNMPRN-FANNIE MAE PFD-500 SH | 21204 | 500 | 21204 | COST | 8.00 | 4000 |
| FNMPRN-FANNIE MAE-PFD-500 SH | 21454 | 500 | 21454 | COST | 8.00 | 4000 |
| FTI-FMC TECH-5000 SH-PURCH | | 5000 | 233818 | COST | 55.68 | 278400 |
| GE-GENERAL ELECTRIC-1000 SH | 27340 | 1000 | 27340 | COST | 23.19 | 23190 |
| GE-GENERAL ELECTRIC-1000 SH | 31095 | 1000 | 31095 | COST | 23.19 | 23190 |
| GE-GENERAL ELECTRIC-2000 SH | 57965 | 2000 | 57965 | COST | 23.19 | 46380 |
| GE-GENERAL ELECTRIC-3000 SH | 91105 | 3000 | 91105 | COST | 23.19 | 69570 |
| GE-GENERAL ELECTRIC-3000 SH | 30370 | 3000 | 30370 | COST | 23.19 | 69570 |
| GEG-GE CAPITAL PFD-1000-SOLD | 25000 | 1000 | | | | |
| GLW-CORNING-1000 SH | 16345 | 1000 | 16345 | COST | 14 23 | 14230 |
| GLW-CORNING-1000 SH | 16345 | 1000 | 16345 | COST | 14.23 | 14230 |
| GLW-CORNING-3000 SH | 26803 | 3000 | 26803 | COST | 14.23 | 42690 |
| GLW-CORNING-6000 SH | 77482 | 6000 | 77482 | COST | 14.23 | 85380 |
| GMA-GMAC PFD-2000 SH | 43820 | 2000 | 43820 | COST | 25.04 | 50080 |
| GMA-GMAC PFD-2000 SH | 39719 | 2000 | 39719 | COST | 25.04 | 50080 |

| | | | | | | |
|---|---|---|---|---|---|---|
| GSPRB-GOLD SACHS PFD-3000 SH | 75000 | 3000 | 75000 | COST | 24.99 | 74970 |
| HAL-HALIBURTON-4000 SH-PURCH | | 4000 | 173176 | COST | 41.72 | 166880 |
| HBCPRA-HSBC PFD-3000 SH | 75000 | 3000 | 75000 | COST | 24.88 | 74640 |
| HPQ-HEWLETT PACKARD-1000 SH | 39600 | 1000 | 39600 | COST | 24.80 | 24800 |
| HPQ-HEWLETT PACKARD-596 SH | 26445 | 596 | 26445 | COST | 24.80 | 14781 |
| HPQ-HEWLETT PACKARD-632 SH | 13355 | 632 | 13355 | COST | 24.80 | 15674 |
| HPQ-HEWLETT PACKARD-772 SH | 29886 | 772 | 29886 | COST | 24.80 | 19146 |
| HPQ-HEWLETT PACKARD-3000 SH-PURCH | | 3000 | 48210 | COST | 24.80 | 74400 |
| HPQ-HEWLETT PACKARD-3000 SH | 107980 | 3000 | 107980 | COST | 24.80 | 74400 |
| HXL-HEXCEL-3000 SH | 38826 | 3000 | 38826 | COST | 34.05 | 102150 |
| HXL-HEXCEL-2500 SH | 35245 | 2500 | 35245 | COST | 34.05 | 85125 |
| HXL-HEXCEL-3000 SH | 75939 | 3000 | 75939 | COST | 34.05 | 102150 |
| HXL-HEXCEL-5000 SH | 60416 | 5000 | 60416 | COST | 34.05 | 170250 |
| HXL-HEXCEL-1500 SH-PURCH | | 1500 | 38080 | COST | 34.05 | 51075 |
| IBM-4000-SH | 115000 | 4000 | 115000 | COST | 191.11 | 764440 |
| INTC-INTEL-2500 SH | 51274 | 2500 | 51274 | COST | 24.23 | 60575 |
| INTC-INTEL-5000 SH | 118955 | 5000 | 118955 | COST | 24.23 | 121150 |
| INTC-NTEL-2500 SH | 53250 | 2500 | 53250 | COST | 24.23 | 60575 |
| INTC-INTEL-2000 SH-PURCH | | 2000 | 43420 | COST | 24 23 | 48460 * |
| JNJ-JOHN&JOHN-1000 SH | 52025 | 1000 | 52025 | COST | 85.86 | 85860 |
| JNJ-JOHN&JOHN-1000 SH | 50585 | 1000 | 50585 | COST | 85.87 | 85870 |
| JNJ-JOHN&JOHN-2000 SH | 119735 | 2000 | 119735 | COST | 85.87 | 171740 |
| JNJ-JOHN&JOHN-2000 SH | 99980 | 2000 | 99980 | COST | 85.86 | 171720 |
| JCP-J C PENNEY-2000 SH-PURCH | | 2000 | 39840 | COST | 17.08 | 34160 |
| JPMPRP-JPM CHASE PFD-1500 SH-SOLI | 37890 | 1500 | | | | |
| KMX-CARMAX-5648 SH | 28240 | 5648 | 28240 | COST | 46.16 | 260712 |
| KR-KROGER-4224 SH-CONT/SOLD | | 4224 | | | | |
| KSS-KOHLS-3000 SH | 134167 | 3000 | 134167 | COST | 50.51 | 151530 |
| KSS-KOHLS-2000 SH | 107950 | 2000 | 107950 | COST | 50 51 | 101020 |
| KSS-KOHLS-3000 SH | 157399 | 3000 | 157399 | COST | 50 51 | 151530 |
| LRCX-3375 SH | 101950 | 3375 | 101950 | COST | 44.34 | 149648 |
| MRK-MERCK-3000 SH | 80610 | 3000 | 80610 | COST | 46.45 | 139350 |
| MRK-MERCK-6920 SH | 125657 | 6920 | 125657 | COST | 46.45 | 321434 |
| MSJ-MORGAN STAN-PF 3000 SH | 75000 | 3000 | 75000 | COST | 25.28 | 75840 |
| MXF-MEXICO FUND-6000 SH | 49500 | 6000 | 49500 | COST | 30 78 | 184680 |
| MXF-MEXICO FUND-7000 SH | 57750 | 7000 | 57750 | COST | 30.78 | 215460 |
| NOK-NOKIA-2000 SH | 34005 | 2000 | 34005 | COST | 3.74 | 7480 |
| NOK-NOKIA-4000 SH | 63649 | 4000 | 63649 | COST | 3.74 | 14960 |
| NVDA-NVDIA-10000 SH | 124819 | 10000 | 124819 | COST | 14.04 | 140400 |
| NVDA-NVIDIA-2500-SH | 18725 | 2500 | 18725 | COST | 14.04 | 35100 |
| NVDA-NVIDIA-2500-SH | 31675 | 2500 | 31675 | COST | 14 04 | 35100 |
| NWL-NEWELL RUBBER-2000 SH | 48845 | 2000 | 48845 | COST | 26.25 | 52500 |
| NWL-NEWELL RUBBER-2000 SH | 35026 | 2000 | 35026 | COST | 26.25 | 52500 |
| PAYX-PAYCHEX-2500 SH | 56074 | 2500 | 56074 | COST | 36.51 | 91275 |
| PAYX-PAYCHEX-2000 SH | 51958 | 2000 | 51958 | COST | 36.51 | 73020 |
| PAYX-PAYCHEX-2000 SH | 59228 | 2000 | 59228 | COST | 36.51 | 73020 |
| PAYX-PAYCHEX-2500 SH | 53023 | 2500 | 53023 | COST | 36 51 | 91275 |
| PEP-PEPSI-1038SH | 25575 | 1038 | 25575 | COST | 81.79 | 84898 |
| PFE-PFIZER-5000 SH | 117290 | 5000 | 117290 | COST | 28.01 | 140050 |
| PGR-PROGRESSIVE CORP-3000 SH | 63217 | 3000 | 63217 | COST | 25.42 | 76260 |
| PGR-PROGRESSIVE CORP-3000 SH | 63367 | 3000 | 63367 | COST | 25.42 | 76260 |
| PGR-PROGRESSIVE CORP-1000SH | 21000 | 1000 | 21000 | COST | 25 42 | 25420 |
| PGR-PROGRESSIVE CORP-3000 SH | 52102 | 3000 | 52102 | COST | 25 42 | 76260 |
| PNR-PENTAIR-2285 SH* | | 2285 | 11239 | COST | 57.69 | 131822 |
| RFC STRIPS$340000 | 117232 | 340000 | 117232 | COST | 0.6181 | 210137 |
| SCHW-SCHWAB & CO-3000 SH | 53710 | 3000 | 53710 | COST | 21.23 | 63690 |

| | | | | | | |
|---|---|---|---|---|---|---|
| SLB-SCHLUMBERGER-2000-SH | 96000 | 2000 | 96000 | COST | 71 66 | 143320 |
| 'SLB-SCHLUMBERGER-2000-SH | 48277 | 2000 | 48277 | COST | 71 66 | 143320 |
| SLB-SCHLUMBERGER-4000 SH | 91300 | 4000 | 91300 | COST | 71 66 | 286640 |
| SUNE-SUN EDISON(WFR)-3000 SH | 56780 | 3000 | 56780 | COST | 8.17 | 24510 |
| SUNE-SUN EDISON(WFR)-1000 SH | 17649 | 1000 | 17649 | COST | 8.17 | 8170 |
| SUNE-SUN EDISON(WFR)-3000 SH-PURCH | | 3000 | 12090 | COST | 8.17 | 24510 |
| SUNE-SUN EDISON(WFR)-1000 SH | 12848 | 1000 | 12848 | COST | 8 17 | 8170 |
| SYMC-SYMANTEC-2000 SH-SOLD | 50482 | 2000 | | | | |
| SYMC-SYMANTEC-2000 SH-SOLD | 34500 | 2000 | | | | |
| SYMC-SYMANTEC-3000 SH-SOLD | 59550 | 3000 | | | | |
| TKR-TIMKEN-6000 SH-CONT | | 6000 | 54720 | COST | 56.28 | 337680 |
| TYC-TYCO-1858SH | 18580 | 1858 | 12934 | COST | 32.95 | 61221 |
| TYC-TYCO-7666SH | 84666 | 7666 | 50725 | COST | 32 95 | 252595 |
| UNH-UNTD HEALTH-1000 SH | 49124 | 1000 | 49124 | COST | 65 48 | 65480 |
| UNH-UNTD HEALTH-1000 SH | 49470 | 1000 | 49470 | COST | 65.48 | 65480 |
| UNH-UNTD HEALTH-2000 SH | 49660 | 2000 | 49660 | COST | 65 48 | 130960 |
| UNH-UNTD HEALTH-7500 SH | 76238 | 7500 | 76238 | COST | 65.48 | 491100 |
| VLO-VALERO ENERGY-5000 SH | 50000 | 5000 | 50000 | COST | 34.77 | 173850 |
| VLO-VALERO ENERGY-10000 SH | 110000 | 10000 | 110000 | COST | 34.77 | 347700 |
| VLO-VALERO ENERGY-2000 SH | 34004 | 2000 | 34004 | COST | 34.77 | 69540 |
| VLO-VALERO ENERGY-1500 SH-SOLD | 24435 | 1500 | | | | |
| VLO-VALERO ENERGY-500 SH | 8145 | 500 | 8135 | COST | 34.77 | 17385 |
| VLO-VALERO ENERGY-5000 SH-SOLD | 84375 | 5000 | | COST | | |
| WELLS FARGO-$116000 | 31045 | 29482 | 25465 | COST | 0 97 | 28482 |
| XEC-CIMAREX-2125 SH | 37188 | 2125 | 37188 | COST | 64.99 | 138104 |
| AIG WS | | 106 | 0 | COST | 18.24 | 1933 |
| TOTALS | 9159988 | | 9927107 | COST | | 17698997 |
| | 934876 | | 616869 | | MF/CDS | 616869 |
| | 10094864 ✓ | | 10543976 ✓ | | | 18315866 ✓ |

***EXCHANGE 7244 SH COOPER INDUSTRIES
**VALERO SPINOFF
*TYCO SPINOFF

Form 990-PF, Page 2, Part III, Line 3
**Other Increases Stmt**

| | |
|---|---|
| Tax gain vs. book gain on donor contributed assets Total | 572,602. |
| Total | 572,602. |

Form 990-PF, Page 1, Part I, Line 18
**Line 18 Stmt**

| Taxes | Rev/Exp Book | Net Inv Inc | Adj Net Inc | Charity Disb |
|---|---|---|---|---|
| | | | | |
| SEE SUPPORTING | 15,118. | | | |
| Total | 15,118. | | | |

Form 990-PF, Page 1, Part I, Line 23
**Line 23 Stmt**

| Other expenses: | Rev/Exp Book | Net Inv Inc | Adj Net Inc | Charity Disb |
|---|---|---|---|---|
| Office Repairs/Supplies | 3,194. | | | 3,194. |
| Broker/Bank Charges | 360. | | | 360. |
| Investment Services | 1,414. | 1,414. | | |
| Administrative Material | 64. | 64. | | 64. |
| Grant Development | 183. | | | 183. |
| Tax Prep Software | 348. | 348. | | |
| Telephone | 1,058. | | | 1,058. |
| Portfolio Management | 2,673. | 2,673. | | |
| Total | 9,294. | 4,499. | | 4,859. |

**Supporting Statement of:**

Form 990-PF, p1/Line 18(a)-3

| Description | Amount |
|---|---|
| ESTIMATED FEDERAL 2012 TAX | 4,000. |
| NORTH CAROLINA | 200. |
| ESTIMATED FEDERAL 2012 TAX | 10,000. |
| UNRELATED BUSINESS INCOME TAX | 918. |
| Total | 15,118. |

**Supporting Statement of:**

Form 990-PF, p1/Line 25(d)

| Description | Amount |
|---|---|
| GRANTS DISTRIBUTED | 740,787. |
| Total | 740,787. |

**Supporting Statement of:**

Form 990-PF, p6/Line 1c, Compensation-2

| Description | Amount |
|---|---|
| Susan Campbell | 37,533. |
| Total | 37,533. |

**THE DONALD D. LYNCH FAMILY FOUNDATION**
**GRANT DISTRIBUTION-7/1/12-6/30/13**

**JUL**
FRANCISCAN MISSIONARY UNION
St. Louis, MO
$16000 To complete the budget for the repairs needed at the Bulongama Institute for the OFMs of the Order of St. Benedict the African-DR of the Congo
**(completes $16000 challenge grant)**
FAMILY MISSIONS COMPANY
Abbyville, LA
$0 To complete bathroom facilities at Our Lady of the Bayou Retreat Center ($5000 CHALLENGE GRANT)

SOCIETY OF ST THERESA OF JESUS
$3000 To provide religious training materials for these sisters to carry out their ministries

FRANCISCAN MISSIONARY UNION
St. Louis, MO
$7000 To support necessities to 100 school dropouts at the 15 mission stations of Our Lady of Purification Parish in India

FRANCISCAN MISSIONARY UNION
St. Louis, MO
$4000 To purchase a new Borehole Pump at the Hardenberg Catholic Mission in Kokstad, South Africa

FRANCISCAN MISSIONARY UNION
St. Louis, MO
$6000 To expand The Nativity Catholic Church in the Diocese of Eluru to accommodate the growing congregation

FRANCISCAN MISSIONARY UNION
St. Louis, MO
$6000 To complete the necessary funding to repair the electric fence for the Poor Clares of Kokstad, South Africa that is not only protection for their property but is a "life-preserving wall of security"
**(completes $6000 challenge grant)**

CATHOLIC COMMUNITY OF APPALACHIA
Lancaster, PA
$2500 To help fund a CCA Symposium to promote social justice
**(completes $2500 challenge grant)**

CONVENTUAL FRANCISCAN FRIARS
Carey, OH
$3600 Construct & Furnish Sacristy for Secondary School Assembly Hall-Zambia

IMMACULATA CATHOLIC SCHOOL
Durham, NC
$13536 To again renew three Memorial Scholarships for three needy students selected by the pastor and the principal for the 2012-13 school year

ST. RAPHAEL'S CATHOLIC SCHOOL
Raleigh, NC
$5095 To renew *The Donna O. Lynch Memorial Scholarship* for a needy student(s) to be selected by the principal and the pastor for the 2012-13 school year

ST. MARTIN OF TOURS CATHOLIC CHURCH
Gaithersburg, MD
$14588 To partner with other like-minded foundations and complete the budget for 10 Outdoor Market Hangars that will promote a new market economy for poor farmers in Atchanve, Togo by giving them a practical way to sell the fruits of their labors (completes $14588 challenge grant)

**AUG**
MALANKARA CATHOLIC MISSION
New Hyde Park, NY
$25000 To update a dilapidated school building-renovate three classrooms, uniforms, noon meals and special teachers for moral teaching- in a rural area of the newborn Diocese of Pathanamthitta

MISSIONARIES OF OUR LADY OF LASALETTE
St. Louis, MO
$2500 To purchase office supplies needed to conduct English classes for missionaries in training at the La Salette Mission Center in Mandalay, Myanmar

ST. LUKE'S MISSION OF MERCY
Buffalo, NY
$6000 To provide materials needed for the Generations of Faith Program in one of the worst areas in Buffalo, NY

ARCHDIOCESE OF CHICAGO
Chicago, IL
$5960 To provide 23 bikes and 46 albs to Fr. Max and his Our Lady of Assumption Parish, Buyambi, Uganda for the catechists who service the 23 Mission Stations in the community

FRANCISCAN MISSIONARY UNION
St. Louis, MO
$6000 To assist with the formation program of young friars preparing for missionary work in India and other mission areas

MISSIONARIES OF ST FRANCIS DE SALES
Whitehouse, TX
$0 To help The Assisi Sisters and their Catholic Institute-Jeevoday Special School for the Handicapped with a project to provide adequate water and a sanitary facility ($5000 CHALLENGE GRANT)

FRANCISCAN MISSIONARY UNION
St. Louis, MO
$6000 To fund the 2012-13 Computer Skills Program at the Good Shepherd Mission-St. Elizabeth Adult Center in a rural village north of Pretoria, South Africa

SULPICIAN SOCIETY-USA
Baltimore, MD
$6500 To provide funding for a new borehole that will meet the demand for more clean drinking water at the only clinic and the people around it in Chilantambo Parish in the Diocese of Monze, Zambia

DISCIPLES OF THE LORD JESUS CHRST
Amarillo, TX
$5000 To complete the funding for an evangelization booth at the Tri-State Fair-an outreach program that the Diocese of Amarillo is no longer able to fund

MISSIONARIES OF ST FRANCIS DE SALES
Whitehouse, TX
$5000 To help The Assisi Sisters and their Catholic Institute-Jeevoday Special School for the Handicapped with a project to provide adequate water and a sanitary facility **(completes $5000 challenge grant)**

**SEPT**
THE FRANCISCAN SCHOOL
Raleigh, NC
$5897 To renew *The Father David McBriar O.F.M. Scholarship* for a needy student(s) to be selected by the principal and Fr. David for the 2012-2013 school year

CARMELITE FRIARS
Middletown, NY
$3000 For repairs caused by flooding in 2009 to the St. Anthony Mission Chapel at Our Lady of Mt. Carmel Parish in the Diocese of Kurnool, Andhra Pradesh, India

DAUGHTERS OF CHARITY
Southfield, MI
$5000 To purchase a new generator for the St. Louise Marillac House in the Democratic Republic of the Congo

ST. MICHAEL ROMAN CATHOLIC CHURCH
Wauchula, FL
$6860 For catechetical materials for this extremely needy parish school

DOMINCAN SISTERS OF AMITYVILLE
Amityville, NY
$10000 For revitalization of the lower ninth ward in New Orleans which still looks pretty much like it did a few months after the waters of Katrina receded

SOCIETY OF ST THERESA OF JESUS
Covington, LA
$3000 To support travel expenses for the sisters to attend the 3rd conference

COMMUNITY OF CHARITY AND SCIAL SERVICES (SISTERS)
Biloxi, MS
$1540 To provide wardrobes and beds for the 19 novices

FRANCISCAN SISTERS OF LITTLE FALLS
Little Falls, MN
$2235 To fund modest updates to the Casa Misionera Franciscana in Managua Nicaragua

COMMUNITY OF CHARITY AND SOCIAL SERVICES (PRIESTS)
Biloxi, MS
$5000 To provide 3 motor bikes and laptops needed by the 5 seminarians

HOME OF HOPE
Wilmington, NC
$7000 To complete the funding needed to purchase a new generator for the Salesian Sisters at the Kunnamangalam School(1600 students) in a poor area of Kerala, India

SISTERS OF MERCY OF THE AMERICAS
Philadelphia, PA
$4000 To purchase books and supplies for the Casa Corazon de la Misericordia in Honduras

DOMINICAN SISTERS OF PEACE
Columbus, OH
$7000 To again fund this organization and its evangelization work in the northern and central parts of Vietnam

AUGUSTINIAN DEFENDERS OF THE RIGHTS OF THE POOR
$8000 To fund *Expanding Our Reach* a new outreach ministry to rehabilitate offenders and educate the population

COMMUNITY OF ST PAUL
Racine, WI
$0 To fund structural repairs at the parish center in Los Negros, Dominican Republic for new Nutritional Center for 25 children ages 2-5
**($4500 CHALLENGE GRANT)**

**OCT**

MERCIFUL LOVE CONNECTION
Bothell, WA
$10000 To fund needed repairs at the Refuge of Mercy, the only home of its kind in Chile, to help adolescent mothers accept motherhood and embrace life with their children

DAUGHTERS OF MARY AND JOSEPH
$5500 To complete funding for a literacy project for mothers in an area of Uganda where illiteracy is above 90%

VERNON AVENUE PROJECT
Brooklyn, NY
$0 To provide seed money to open a catering business to attempt to break the cycle of poverty for at-risk youths by developing their potential to be positive citizens through a combination of academic success and work
**($5000 CHALLENGE GRANT)**

ST JOHN NEUMANN CATHOLIC CHURCH
Warfield, KY
$0 To establish a monthly bible school program for the academic year for these children in Appalachia in hopes of maintaining contact with their families
**($5000 CHALLENGE GRANT)**

**NOV**

FRANCISCAN MISSIONARY UNION
St. Louis, MO
$4000 To fund the purchase of livestock and spiritual formation material for this new foundation of Poor Clare cloistered sisters in Vietnam

ST GIANNA'S MATERNITY HOME
Minto, ND
$0 To provide funding for several different formation opportunity projects for this pro-life residential home for pregnant women and their children
($7600 CHALLENGE GRANT)

FRANCISCAN MISSIONARY UNION
St. Louis, MO
$10000 To complete the funding needed to rebuild the church for the very poor in the Diocese of Eluru in Andhra Pradesh, India

APOSTOLATE FOR FAMILY CONSECRATION
Bloomingdale, OH
$12228 To complete funding for expenses to the first annual International Missionary Training Seminar for this Pontifically-recognized organization

SISTERS OF THE RESURRECTION
Chicago, IL
$0 To provide funding to purchase tanks to collect much-needed rainwater for Chief Wanzagi School-Tanzania, East Africa
($20000 CHALLENGE GRANT)

A SIMPLE HOUSE OF STS FRANCIS AND ALPHONSUS
Kansas City, MO
$3500 For the renovation of new ministry houses for this organization serving the poor that believes "material help is only useful to the person who helps himself"

SACRED HEART RETREAT HOUSE-ST JOSEPH CAMPUS
Alhambra, Ca
$0 To fund a new *Program for Fostering the Spiritual Life of Families-Year of Faith Outreach* for the youth of LA who can't afford fees or transportation
($10000 CHALLENGE GRANT)

AUGUSTINIAN MISSIONS
Chicago, IL
$9300 To make possible a year of education for 31 needy students at Parroquia San Jose Obrero, Chulucanas, Peru

**DEC**

ACTON INSTITUTE
Grand Rapids, MI
$20000 To again underwrite the "Lynch Fellowships" at this important Center for promoting religious freedom and capitalism

FAMILY MISSIONS COMPANY
Abbyville, LA
$5000 To complete bathroom facilities at Our Lady of the Bayou Retreat Center **(completes $5000 challenge grant)**
$299839/$152988-DDL

MILES CHRISTI RELIGIOUS ORDER
Northville, MI
$6950 To purchase a printer for their evangelization efforts as it is crucial to their apostolate

FRANCISCAN FRIARS
Raleigh, NC
$4000 To cover expenses for an American friar to attend an important conference of other friars in Auckland, New Zealand and Sydney, Australia

APOSTLES OF JESUS
North Hampton, PA
$0 To help fund a needed expansion of three rooms at the convent in Uganda for nuns who have come to staff the Queen of Apostles Medical Center
($10000 CHALLENGE GRANT)

HEART TO HEART COMMUNICATION
Akron, Ohio
$7500 To fund a pilot program emphasizing spirituality in the work place
**(completes $7500 challenge grant)**

FRANCISCAN MISSIONARY UNION
St. Louis, MO
$5000 For the Franciscan Missionary Brothers to purchase 80 cots and beds for the St. John's Orphanage, Khera Khurd, Delhi

COLORADO VINCENTIAN VOLUNTEERS
Denver, CO
$2800 To cover expenses for the Spring contemplative retreat at St. Benedict's Monastery which is integral to the volunteers' year-of-service experiences

PASSIONATE MISSIONARIES
Rye Brook, NY
$7000 To add a small exam room at St. Benedict's Clinic in Honduras which serve 45,000 low income people with an annual operating budget of $50000

**JAN**

LAMP MINISTRIES
Bronx, NY
$10000 To support their ministries in poor parishes in the New York and Newark archdioceses

COAR PEACE MISSION
Wickliffe, OH
$5000 To support the Soy Nutrition Initiative for the COAR Children's Village in Zaragoza, El Salvador

FRANCISCAN MISSIONARY UNION
St. Louis, MO
$0 To help fund 50% of Bro Michael Perry's project- *Franciscan-Supervised Educational Programs* at two very large schools in Omdurman (Khartoum), North Sudan ($13150 CHALLENGE GRANT)

FRANCISCAN MISSIONARY UNION
St. Louis, MO
$7000 To provide funding to dig a well on the property occupied by the Poor Clares at their new foundation in Burkino-Faso, West Africa

ST PAUL'S OUTREACH-OHIO
$0 To partially fund three small community-building retreats to help support the expansion efforts of this rapidly growing organization
($4685 CHALLENGE GRANT)

DOMINICAN FOUNDATION OF DOMINICAN FRIARS
New York, NY
$10883 To fund two needed projects: Tables and chairs for the cafeteria at Our Lady of Grace School ($8448) and to begin a pig-rearing project ($2435)

MISSIONARIES OF THE SACRED HEARTS OF JESUS AND MARY
Linwood, NJ
$10000 To complete the funding for a project to purchase solar panels for community drinking water near Sacred Hearts' Catholic Formation House in Ullakwu Village, Imo State, Nigeria

NOTRE DAME ACADEMY
Toledo, OH
$5000 For our annual payment for the Donna O. Lynch Memorial Scholarship which was established in October, 2000

ST FRANCIS de SALES HIGH SCHOOL
Toledo, OHO
$5000 To renew the Donna O. Lynch Memorial Scholarship for the academic year 2013-14 to a student with a demonstrated need and who complies with the other requirements

**FEB**

FRANCISCAN SISTERS OF ST JOSEPH
Virginia Beach, VA
$10000 To provide needed funding for the purchase of furnishings for the kitchen and dining room at St. Theresa's Education Complex in Asumbi, Kenya

FOLLOWING IN THE FOOTSTEPS OF JESUS
El Paso, TX
$10752 To complete funding for the playground at the San Mateo Church/Community Center in Juarez, Mexico

SISTERS OF ST FRANCIS OF THE NEUMANN COMMUNITIES
Pittsburg, PA
$0 To fund the SOSF Vocation and Formation office to create training opportunities for young women who are discerning a religious vocation

ST. JOSEPH'S MISSION FUND
Fairfax, VA
$7000 To provide funding for Evangelization efforts to the people of the Assam District in India

ST. WENDELIN CATHOLIC HIGH SCHOOL
Fostoria, OH
$5000 To renew this scholarship for the 2013-14 academic year in recognition of the positive role SWCHS has played in the lives and formation of the Campbell children

CAPUCHNINS-PROVINCE OF ST JOSEPH
Detroit, MI
$0 To help fund the Earthworks Urban Farm Food Waste Compost Feasibility Study ($2500 CHALLENGE GRANT)

PASSIONATE VOLUNTEERS
Pineville, WV
$8750 To support five free summer camps for 100 low-income WV elementary and middle school students

**MAR**
SALESIAN MISSIONS
$0 To purchase textbooks for seven high schools in the Diocese of Miao-a new missionary diocese-in the Himalayas in North Eastern India in a region bordering China and Myanmar (Burma) ($5000 CHALLENGE GRANT)

FRANCISCAN MISSIONARY UNION
St. Louis, MO
$0 To provide initial and on-going catechist training in the rural areas of the Diocese of Oudtshoorn, South Africa ($9000 CHALLENGE GRANT)

FAMILY LIFE MINISTRIES OF NW FLORIDA
Naples, FL
$0 To expand the various elements of the *Raise the Standard Project* that saves lives, preserves the family and promotes sexual integrity for all ages
($5000 CHALLENGE GRANT)

JMJ LIFE CENTER
Orlando, FL
$2751 To purchase the new technology needed for the May expnsion to a larger facility

FRANCISCAN MISSIONARY UNION
St. Louis, MO
$0 To purchase a generator to be used for pumping water for the Agricultural Program at the St Clare Monastery of Ogun State, Nigeria
$430225/179239 ($7000 CHALLENGE GRANT)

FRANCISCAN MISSIONARY UNION
St. Louis, MO
$9000 To provide initial and on-going catechist training in the rural areas of the Diocese of Oudtshoorn, South Africa
**(completes $9000 challenge grant)**

FRANCISCAN MISSIONARY UNION
St. Louis, MO
$7000 To purchase a generator to be used for pumping water for the Agricultural Program at the St Clare Monastery of Ogun State, Nigeria
**(completes $7000 challenge grant)**

VERNON AVENUE PROJECT
Brooklyn, NY
$5000 To provide seed money to open a catering business to attempt to break the cycle of poverty for at-risk youths by developing their potential to be positive citizens through a combination of academic success and work
**(completes $5000 challenge grant)**

ST GIANNA'S MATERNITY HOME
Minto, ND
$7600 To provide funding for several different formation opportunity projects for this pro-life residential home for pregnant women and their children
**(completes $7600 challenge grant)**

SISTERS OF THE RESURRECTION
Chicago, IL
$20000 To provide funding to purchase tanks to collect much-needed rainwater for Chief Wanzagi School-Tanzania, East Africa
**(completes $20000 challenge grant)**

SACRED HEART RETREAT HOUSE-ST JOSEPH CAMPUS
Alhambra, Ca
$10000 To fund a new *Program for Fostering the Spiritual Life of Families-Year of Faith Outreach* for the youth of LA who can't afford fees or transportation
**(completes $10000 challenge grant)**

ST JOHN NEUMANN CATHOLIC CHURCH
$5000 To establish a monthly bible school program for the academic year for these children in Appalachia in hopes of maintaining contact with their families
**(completes $5000 challenge grant)**

CAPUCHINS-PROVINCE OF ST JOSEPH
Detroit, MI
$2500 To help fund the Earthworks Urban Farm Food Waste Compost Feasibility Study **(completes $2500 challenge grant)**

**APR**

FRANCISCAN MISSIONARY UNION
St. Louis, MO
$5000 Support for the Sisters of Phillip Neri's Formation Program for Candidates, Postulants and Novices in Kerala, India

THE PASSIONIST MISSIONARIES
Union City, NJ
$8000 For the PV International Program in Jamaica, West Indies

COMMUNITY OF CHARITY AND SOCIAL SERVICES
Biloxi, MS
$3300 To purchase furniture and chapel furnishings for a structure being used to house priests and seminarians

DAUGHTERS OF MARY AND JOSEPH
Rancho Palos Verdes, CA
$10000 To partially fund the budget for the AIDS palliative care outreach program in Bisheshe, Uganda

MISSIONARY SISTERS OF THE SOCIETY OF MARY (MARISTS)
Waltham, MA
$15000 Funding for the continuation of the lay ministry program for the sick and homebound inn Tanzania

ST JOSEPH'S MISSION FUND
Fairfax, VA
$4650 The eleventh grant since 2001 and this one will support orphanage and leper needs in Southern India

FAMILY LIFE MINISTRIES OF NW FLORIDA
Naples, FL
$5000 To expand the various elements of the *Raise the Standard Project* that saves lives, preserves the family and promotes sexual integrity for all ages
$557275 **(completes $5000 challenge grant)**

**FRANCISCAN MISSIONARY UNION**
**St. Louis, MO**
$13150 To help fund 50% of Bro Michael Perry's project- *Franciscan-Supervised Educational Programs* at two very large schools in Omdurman (Khartoum), North Sudan **(completes $13150 challenge grant)**

**JUNE**
**FRANCISCAN MISSIONARY UNION**
**St. Louis, Mr**
$4000 To purchase tanks to collect rainwater and needed office equipment for the Poor Clare Sisters in Namibia, Africa

SISTERS OF ST FRANCIS OF TIFFIN
Tiffin, OH
$20000 For the expansion of Project Hope which assists immigrant families in rural northwest Ohio to obtain legan immigration documents and to give them information about their rights and responsibilities

MARY MOTHER OF GOD SOCIETY
Los Angeles, CA
$7209 To complete funding for the 17th annual Far Eastern Youth Conference in Nakhodka, Russia to be held summer, 2013

HOMES OF HOPE
Wilmington, NC
$7000 For a solar-powered electricity-generating unit for the Salesian Sisters of Don Bosco and their new orphanage (150 girls) in Secunderabad, India

DISCIPLES OF OUR LORD JESUS CHRIST
Prayer Town, TX
$10000 For the *Security Fence Project* which is critically needed, after a recent incident, for the safely of their sisters and their retreat center

DOMINICAN SISTERS Of MARY IMMACULATE (VIETNAMESE DOMINICANS)
Houston, TX
$9100 To fund education expenses for 140 elementary and 32 college students from poverty-stricken homes who do not have the means to pay tuition at the village school

OPENING WORD
Wyandanch, NY
$4000 To provide 4 laptopsfor use at this literacy and job readiness program for adult immigrant women participants

DOMINICAN SISTER OF AMITYVILLE
AMITYVILLE, NY
$10000 For Sister Joan's *Emergency Hurricane Sandy Relief Project* which involves making home visits, assisting with basic needs, rebuilding and helping people access spiritual and emotional support

**$740787**