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Form **990-PF**

Return of Private Foundation

or Section 4947(a)(1) Trust Treated as Private Foundation

OMB No 1545-0052

2013Department of the Treasury
Internal Revenue Service

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▶ Information about Form 990-PF and its separate instructions is at www.irs.gov/form990pf.

Open to Public Inspection

For calendar year 2013 or tax year beginning , and ending

| | | |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Name of foundation ARTHUR AND LINDEE LUCAS FAMILY FOUNDATION, INC. | | A Employer identification number 26-1591821 |
| Number and street (or P.O. box number if mail is not delivered to street address) 301 SEA ISLAND ROAD, SUITE I | Room/suite | B Telephone number (see instructions) 912-634-9877 |
| City or town, state or province, country, and ZIP or foreign postal code ST. SIMONS ISLAND GA 31522 | | C If exemption application is pending, check here <input type="checkbox"/> |
| G Check all that apply <input type="checkbox"/> Initial return <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Final return <input type="checkbox"/> Amended return <input type="checkbox"/> Address change <input type="checkbox"/> Name change | | D 1 Foreign organizations, check here <input type="checkbox"/> 2 Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/> |
| H Check type of organization <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation | | E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/> |
| I Fair market value of all assets at end of year (from Part II, col (c), line 16) ▶ \$ 1,936,623 | J Accounting method <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) | F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/> |

| Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions)) | | (a) Revenue and expenses per books | (b) Net investment income | (c) Adjusted net income | (d) Disbursements for charitable purposes (cash basis only) |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------|------------------------------------|---------------------------|-------------------------|-------------------------------------------------------------|
| Revenue | 1 Contributions, gifts, grants, etc., received (attach schedule) | 119,979 | | | |
| | 2 Check <input type="checkbox"/> if the foundation is not required to attach Sch B | | | | |
| | 3 Interest on savings and temporary cash investments | 1,978 | 1,978 | | |
| | 4 Dividends and interest from securities | 53,856 | 53,856 | | |
| | 5a Gross rents | | | | |
| | b Net rental income or (loss) | | | | |
| | 6a Net gain or (loss) from sale of assets not on line 10 | 52,415 | | | |
| | b Gross sales price for all assets on line 6a 487,011 | | | | |
| | 7 Capital gain net income (from Part IV, line 2) | | 52,415 | | |
| | 8 Net short-term capital gain | | | 0 | |
| | 9 Income modifications | | | | |
| | 10a Gross sales less returns and allowances | | | | |
| b Less Cost of goods sold | | | | | |
| c Gross profit or (loss) (attach schedule) | | | | | |
| 11 Other income (attach schedule) | | | | | |
| 12 Total. Add lines 1 through 11 | 228,228 | 108,249 | 0 | | |
| Operating and Administrative Expenses | 13 Compensation of officers, directors, trustees, etc | 0 | | | |
| | 14 Other employee salaries and wages | | | | |
| | 15 Pension plans, employee benefits | | | | |
| | 16a Legal fees (attach schedule) | | | | |
| | b Accounting fees (attach schedule) STMT 1 | 2,550 | | | |
| | c Other professional fees (attach schedule) STMT 2 | 12,878 | 12,728 | | 150 |
| | 17 Interest | | | | |
| | 18 Taxes (attach schedule) (see instructions) STMT 3 | 505 | | | |
| | 19 Depreciation (attach schedule) and depletion | | | | |
| | 20 Occupancy | | | | |
| | 21 Travel, conferences, and meetings | | | | |
| | 22 Printing and publications | | | | |
| | 23 Other expenses (att. sch) STMT 4 | 22 | | | |
| | 24 Total operating and administrative expenses. Add lines 13 through 23 | 15,955 | 12,728 | 0 | 150 |
| 25 Contributions, gifts, grants paid | 59,850 | | | 59,850 | |
| 26 Total expenses and disbursements. Add lines 24 and 25 | 75,805 | 12,728 | 0 | 60,000 | |
| 27 Subtract line 26 from line 12 | | | | | |
| a Excess of revenue over expenses and disbursements | 152,423 | | | | |
| b Net investment income (if negative, enter -0-) | | 95,521 | | | |
| c Adjusted net income (if negative, enter -0-) | | | 0 | | |

For Paperwork Reduction Act Notice, see instructions.

Form **990-PF** (2013)

| Part II Balance Sheets | | Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions) | Beginning of year | End of year | |
|-----------------------------|-----|--------------------------------------------------------------------------------------------------------------------------------------|-------------------|----------------|-----------------------|
| | | | (a) Book Value | (b) Book Value | (c) Fair Market Value |
| Assets | 1 | Cash – non-interest-bearing | 62,547 | 204,893 | 204,893 |
| | 2 | Savings and temporary cash investments | | | |
| | 3 | Accounts receivable ▶ | | | |
| | | Less: allowance for doubtful accounts ▶ | 400 | 400 | 400 |
| | 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 (att. schedule) ▶ | | | |
| | | Less: allowance for doubtful accounts ▶ | 0 | | |
| | 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) SEE STMT 5 | 1,152,625 | 1,162,702 | 1,731,330 |
| | c | Investments – corporate bonds (attach schedule) | | | |
| | 11 | Investments – land, buildings, and equipment basis ▶ | | | |
| Liabilities | | Less: accumulated depreciation (attach sch.) ▶ | | | |
| | 12 | Investments – mortgage loans | | | |
| | 13 | Investments – other (attach schedule) | | | |
| | 14 | Land, buildings, and equipment basis ▶ | | | |
| | | Less: accumulated depreciation (attach sch.) ▶ | | | |
| | 15 | Other assets (describe ▶) | | | |
| | 16 | Total assets (to be completed by all filers – see the instructions. Also, see page 1, item I) | 1,215,572 | 1,367,995 | 1,936,623 |
| | 17 | Accounts payable and accrued expenses | | | |
| | 18 | Grants payable | | | |
| | 19 | Deferred revenue | | | |
| Net Assets or Fund Balances | 20 | Loans from officers, directors, trustees, and other disqualified persons | | | |
| | 21 | Mortgages and other notes payable (attach schedule) | | | |
| | 22 | Other liabilities (describe ▶) | | | |
| | 23 | Total liabilities (add lines 17 through 22) | 0 | 0 | |
| | | Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31. ▶ <input type="checkbox"/> | | | |
| | 24 | Unrestricted | | | |
| | 25 | Temporarily restricted | | | |
| | 26 | Permanently restricted | | | |
| | | Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. ▶ <input checked="" 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 | 1,215,572 | 1,367,995 | |
| | 30 | Total net assets or fund balances (see instructions) | 1,215,572 | 1,367,995 | |
| | 31 | Total liabilities and net assets/fund balances (see instructions) | 1,215,572 | 1,367,995 | |

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 | 1,215,572 |
| 2 | Enter amount from Part I, line 27a | 2 | 152,423 |
| 3 | Other increases not included in line 2 (itemize) ▶ | 3 | |
| 4 | Add lines 1, 2, and 3 | 4 | 1,367,995 |
| 5 | Decreases not included in line 2 (itemize) ▶ | 5 | |
| 6 | Total net assets or fund balances at end of year (line 4 minus line 5) – Part II, column (b), line 30 | 6 | 1,367,995 |

Part IV Capital Gains and Losses for Tax on Investment Income

| (a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse, or common stock, 200 shs. MLC Co.) | (b) How acquired P – Purchase D – Donation | (c) Date acquired (mo., day, yr.) | (d) Date sold (mo., day, yr.) |
|------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------|--------------------------------------|----------------------------------|
| 1a SEE ATTACHED-MERRILL LYNCH | P | VARIOUS | VARIOUS |
| b SEE ATTACHED-MERRILL LYNCH | P | VARIOUS | VARIOUS |
| c MERRILL LYNCH | | | |
| d | | | |
| e | | | |

| (e) Gross sales price | (f) Depreciation allowed (or allowable) | (g) Cost or other basis plus expense of sale | (h) Gain or (loss) (e) plus (f) minus (g) |
|-----------------------|--------------------------------------------|-------------------------------------------------|----------------------------------------------|
| a 253,534 | | 194,986 | 58,548 |
| b 232,286 | | 239,610 | -7,324 |
| c 1,191 | | | 1,191 |
| d | | | |
| e | | | |

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

| (i) F M V as of 12/31/69 | (j) Adjusted basis as of 12/31/69 | (k) Excess of col. (i) over col. (j), if any | (l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h)) |
|--------------------------|--------------------------------------|-------------------------------------------------|-------------------------------------------------------------------------------------------------|
| a | | | 58,548 |
| b | | | -7,324 |
| c | | | 1,191 |
| d | | | |
| e | | | |

| | | | |
|---------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|---------------|
| 2 Capital gain net income or (net capital loss) | <div style="border: 1px solid black; padding: 2px;"> If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 </div> | 2 | 52,415 |
| 3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) | <div style="border: 1px solid black; padding: 2px;"> If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8 </div> | 3 | |

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 (col. (b) divided by col. (c)) |
|----------------------------------------------------------------------|------------------------------------------|----------------------------------------------|-------------------------------------------------------------|
| 2012 | 49,887 | 1,420,664 | 0.035115 |
| 2011 | 60,069 | 1,234,442 | 0.048661 |
| 2010 | 43,271 | 1,061,143 | 0.040778 |
| 2009 | 23,903 | 885,986 | 0.026979 |
| 2008 | 18,765 | 888,044 | 0.021131 |

| | | |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|------------------|
| 2 Total of line 1, column (d) | 2 | 0.172664 |
| 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 | 0.034533 |
| 4 Enter the net value of noncharitable-use assets for 2013 from Part X, line 5 | 4 | 1,708,915 |
| 5 Multiply line 4 by line 3 | 5 | 59,014 |
| 6 Enter 1% of net investment income (1% of Part I, line 27b) | 6 | 955 |
| 7 Add lines 5 and 6 | 7 | 59,969 |
| 8 Enter qualifying distributions from Part XII, line 4 | 8 | 60,000 |

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 Date of ruling or determination letter (attach copy of letter if necessary—see instructions) | | |
| b | Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b | 1 | 955 |
| c | All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col (b) | | |
| 2 | Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) | 2 | 0 |
| 3 | Add lines 1 and 2 | 3 | 955 |
| 4 | Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) | 4 | 0 |
| 5 | Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0- | 5 | 955 |
| 6 | Credits/Payments | | |
| a | 2013 estimated tax payments and 2012 overpayment credited to 2013 | 6a | 748 |
| 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 | 748 |
| 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 | 207 |
| 10 | Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid | 10 | |
| 11 | Enter the amount of line 10 to be Credited to 2014 estimated tax <input type="checkbox"/> Refunded <input type="checkbox"/> | 11 | |

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 the definition)? If the answer is "Yes" to 1a or 1b , attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities | | 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: (1) On the foundation <input type="checkbox"/> \$ _____ (2) On foundation managers <input type="checkbox"/> \$ _____ | | |
| e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input type="checkbox"/> \$ _____ | | |
| 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 | | 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? 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: • 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? | X | |
| 7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), and Part XV | X | |
| 8a Enter the states to which the foundation reports or with which it is registered (see instructions) <input type="checkbox"/> GA | | |
| 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 2013 or the taxable year beginning in 2013 (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 |

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) | | | 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) | | | X |
| 13 | Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ▶ N/A | | X | |
| 14 | The books are in care of ▶ JOHN B. WARREN, JR. 3715 NORTHSIDE PARKWAY 4-575 Located at ▶ ATLANTA | GA | Telephone no ▶ 404-816-1436 ZIP+4 ▶ 30327 | |
| 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 | | <input type="checkbox"/> |
| 16 | At any time during calendar year 2013, 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? See the instructions for exceptions and filing requirements for Form TD F 90-22.1 If "Yes," enter the name of the foreign country ▶ | | 16 | Yes <input type="checkbox"/> No 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 | N/A | 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 2013? | N/A | 1c |
| 2 | Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)) | | |
| a | At the end of tax year 2013, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2013? If "Yes," list the years ▶ 20 12 , 20 , 20 , 20 | <input checked="" type="checkbox"/> Yes | <input type="checkbox"/> No |
| b | Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement – see instructions.) | | 2b X |
| c | If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ▶ 20 , 20 , 20 , 20 | | |
| 3a | Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? | <input type="checkbox"/> Yes | <input checked="" type="checkbox"/> No |
| b | If "Yes," did it have excess business holdings in 2013 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 2013.) | N/A | 3b |
| 4a | Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? | | 4a X |
| b | Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2013? | | 4b X |

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

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

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

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

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

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (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)? **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** ☒

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 (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 |
|------------------------------------------------|-----------------------------------------------------------|-------------------------------------------|-----------------------------------------------------------------------|---------------------------------------|
| ARTHUR M. LUCAS 301 SEA ISLAND ROAD SUITE 1 | ST. SIMONS ISLAND GA 31522 TRUSTEE 1.00 | 0 | 0 | 0 |
| LINDA H. LUCAS 1756 WEST PACES FERRY ROAD | ATLANTA GA 30327 TRUSTEE 1.00 | 0 | 0 | 0 |
| | | | | |
| | | | | |

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

0

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)**3 Five highest-paid independent contractors for professional services (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 ▶**Part IX-A Summary of Direct Charitable Activities**

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.

| | Expenses |
|--------------|----------|
| 1 N/A | |
| 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 | |
| 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 | 1,655,398 |
| b | Average of monthly cash balances | 1b | 79,541 |
| c | Fair market value of all other assets (see instructions) | 1c | 0 |
| d | Total (add lines 1a, b, and c) | 1d | 1,734,939 |
| e | Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation) | 1e | 0 |
| 2 | Acquisition indebtedness applicable to line 1 assets | 2 | 0 |
| 3 | Subtract line 2 from line 1d | 3 | 1,734,939 |
| 4 | Cash deemed held for charitable activities. Enter 1½% of line 3 (for greater amount, see instructions) | 4 | 26,024 |
| 5 | Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4 | 5 | 1,708,915 |
| 6 | Minimum investment return. Enter 5% of line 5 | 6 | 85,446 |

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 | 85,446 |
| 2a | Tax on investment income for 2013 from Part VI, line 5 | 2a | 955 |
| b | Income tax for 2013 (This does not include the tax from Part VI.) | 2b | |
| c | Add lines 2a and 2b | 2c | 955 |
| 3 | Distributable amount before adjustments. Subtract line 2c from line 1 | 3 | 84,491 |
| 4 | Recoveries of amounts treated as qualifying distributions | 4 | |
| 5 | Add lines 3 and 4 | 5 | 84,491 |
| 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 | 84,491 |

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 | 60,000 |
| 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 | 60,000 |
| 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 | 955 |
| 6 | Adjusted qualifying distributions. Subtract line 5 from line 4 | 6 | 59,045 |

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 2012 | (c) 2012 | (d) 2013 |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------|----------------------------|---------------|---------------|
| 1 Distributable amount for 2013 from Part XI, line 7 | | | | 84,491 |
| 2 Undistributed income, if any, as of the end of 2013 | | | | |
| a Enter amount for 2012 only | | | 69,321 | |
| b Total for prior years: 20____, 20____, 20____ | | | | |
| 3 Excess distributions carryover, if any, to 2013 | | | | |
| a From 2008 | | | | |
| b From 2009 | | | | |
| c From 2010 | | | | |
| d From 2011 | | | | |
| e From 2012 | | | | |
| f Total of lines 3a through e | | | | |
| 4 Qualifying distributions for 2013 from Part XII, line 4 ▶ \$ 60,000 | | | | |
| a Applied to 2012, but not more than line 2a | | | 60,000 | |
| 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 2013 distributable amount | | | | |
| e Remaining amount distributed out of corpus | | | | |
| 5 Excess distributions carryover applied to 2013 (If an amount appears in column (d), the same amount must be shown in column (a)) | | | | |
| 6 Enter the net total of each column as indicated below: | | | | |
| a Corpus Add lines 3f, 4c, and 4e Subtract line 5 | | | | |
| b Prior years' undistributed income Subtract line 4b from line 2b | | | | |
| c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed | | | | |
| d Subtract line 6c from line 6b Taxable amount – see instructions | | | | |
| e Undistributed income for 2012 Subtract line 4a from line 2a Taxable amount – see instructions | | | 9,321 | |
| f Undistributed income for 2013 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2014 | | | | 84,491 |
| 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 2008 not applied on line 5 or line 7 (see instructions) | | | | |
| 9 Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a | | | | |
| 10 Analysis of line 9 | | | | |
| a Excess from 2009 | | | | |
| b Excess from 2010 | | | | |
| c Excess from 2011 | | | | |
| d Excess from 2012 | | | | |
| e Excess from 2013 | | | | |

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

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2013, 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 | | | (e) Total |
|----------------------------------------------------------------------------------------------------------------------------------------------------------|----------|---------------|----------|----------|-----------|
| | (a) 2013 | (b) 2012 | (c) 2011 | (d) 2010 | |
| 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))
N/A

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 address of the person to whom applications should be addressed
N/A

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

c Any submission deadlines
N/A

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

Part XV Supplementary Information (continued)**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

| Recipient | If recipient is an individual, show any relationship to any foundation manager or substantial contributor | Foundation status of recipient | Purpose of grant or contribution | Amount |
|---------------------------------------------------------|-----------------------------------------------------------------------------------------------------------|--------------------------------|----------------------------------|--------|
| Name and address (home or business) | | | | |
| a Paid during the year SEE STATEMENT 6 | | | | 59,850 |
| Total | | | 3a | 59,850 |
| b Approved for future payment N/A | | | | |
| Total | | | 3b | |

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

Department of the Treasury
Internal Revenue Service

Schedule of Contributors

OMB No 1545-0047

2013

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

► Information about Schedule B (Form 990, 990-EZ, 990-PF) and its instructions is at www.irs.gov/form990.

Name of the organization

**ARTHUR AND LINDEE LUCAS FAMILY
FOUNDATION, INC.**

Employer identification number

26-1591821

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 $\frac{1}{3}$ % 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 its Form 990-PF, Part I, line 2, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

For Paperwork Reduction Act Notice, see the Instructions for Form 990, 990-EZ, or 990-PF.

Schedule B (Form 990, 990-EZ, or 990-PF) (2013)

Name of organization

ARTHUR AND LINDEE LUCAS FAMILY

Employer identification number

26-1591821

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

| (a) No. | (b) Name, address, and ZIP + 4 | (c) Total contributions | (d) Type of contribution |
|------------|-------------------------------------------------------------------------------------------------|----------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1 | ART LUCAS 2012 NONGRANTOR CHARITABLE LEAD TRUST 802 WOODLEY DRIVE ATLANTA GA 30305 | \$ 119,979 | Person <input checked="checked" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions) |
| (a) No. | (b) Name, address, and ZIP + 4 | (c) Total contributions | (d) Type of contribution |
| | | \$ | Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions) |
| (a) No. | (b) Name, address, and ZIP + 4 | (c) Total contributions | (d) Type of contribution |
| | | \$ | Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions) |
| (a) No. | (b) Name, address, and ZIP + 4 | (c) Total contributions | (d) Type of contribution |
| | | \$ | Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions) |
| (a) No. | (b) Name, address, and ZIP + 4 | (c) Total contributions | (d) Type of contribution |
| | | \$ | Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions) |
| (a) No. | (b) Name, address, and ZIP + 4 | (c) Total contributions | (d) Type of contribution |
| | | \$ | Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions) |
| (a) No. | (b) Name, address, and ZIP + 4 | (c) Total contributions | (d) Type of contribution |
| | | \$ | Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions) |



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ARTHUR AND LINDEE LUCAS FAMILY

2013 ANNUAL STATEMENT SUMMARY

The following sections are provided to facilitate your review and the preparation of your tax return.

The 2013 Proceeds from Broker and Barter Exchange Transactions section includes both sales of positions for "covered securities" and "noncovered securities." A covered security includes those with a purchase date within the following timeline: Equities acquired on or after January 1, 2011 and Mutual Funds acquired on or after January 1, 2012. Legislation requires reporting the gross proceeds of the sales of "covered" and "noncovered" securities and the adjusted cost basis for "covered securities." Any sale of a security that is considered a "noncovered security" will still be included in this section with the adjusted cost basis (where available).

In calculating gain (loss), unless otherwise noted, it was assumed that the oldest position was liquidated first, and that you have made an election to amortize the premium paid on the purchase of taxable bonds. Under the Cost Basis Reporting Regulations, brokers need not track wash sale activity for substantially identical securities, transactions across accounts, or between covered and non-covered securities. However, you as a taxpayer still have to track and report wash sales as you have in the past which would include all of the aforementioned transaction types. Securities distributed from a retirement account reflect the tax basis on the date of distribution. Other methods for calculating gain (loss) are available. The cost basis for most Original Issue Discount ("OID") obligations includes the accretion of OID. For purposes of allocating original purchase price to the components of an equity unit consisting of a purchase contract and a debt security subject to a remarketing event, we assumed that the fair market value of the debt security on purchase date was equal to its adjusted issue price. The difference between your original cost and the amount allocable to the debt component was allocated to the purchase contract. In making adjustments to the cost basis of the purchase contract, it was assumed that the unit holder included contract adjustment payments in income when received.

This is important tax information and is being furnished to the Internal Revenue Service. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported.

1099-B

2013 PROCEEDS FROM BROKER & BARTER EXCHANGE TRANSACTIONS

| 1e Quantity | Transaction Description | 1b Date of Acquisition | 1a Date of Sale or Exchange | 2a Amount | 3 Cost Basis | 5 Wash Sale Loss Disallowed | Gain or (Loss) | Remarks |
|--------------------------------------------------------------------------------|--------------------------|------------------------|-----------------------------|------------------|------------------|-----------------------------|-------------------|---------|
| SHORT TERM CAPITAL GAINS AND LOSSES - 1099-B Line 1c: | | | | | | | | |
| COVERED TRANSACTIONS - 1099-B Line 6b. (cost basis reported to the IRS) | | | | | | | | |
| BLACKROCK INC. | | | | | | | | |
| 15 0000 | Sale | 12/10/12 | 09247X101 | 4,359.84 | 2,932.21 | 0.00 | 1,427.63 | |
| 28 0000 | Sale | 12/11/12 | 05/21/13 | 8,138.37 | 5,548.42 | 0.00 | 2,589.95 | |
| | Security Subtotal | | | 12,498.21 | 8,480.63 | 0.00 | 4,017.58 | |
| BERKSHIRE HATHAWAY INC | | | | | | | | |
| DEL CL B NEW | | | | | | | | |
| 11 0000 | Sale | 02/21/13 | 084670702 | 1,166.43 | 1,099.79 | 0.00 | 66.64 | |
| CARNIVAL CORP PAIRED SHS | | | | | | | | |
| 202 0000 | Sale | 07/24/13 | 143658300 | 7,102.06 | 7,458.65 | 0.00 | (356.59) | |
| 191 0000 | Sale | 07/25/13 | 12/06/13 | 6,715.31 | 7,050.92 | 0.00 | (335.61) | |
| 191 0000 | Sale | 07/26/13 | 12/06/13 | 6,715.31 | 7,106.86 | 0.00 | (391.55) | |
| 166 0000 | Sale | 07/29/13 | 12/06/13 | 5,836.34 | 6,162.83 | 0.00 | (326.49) | |
| 251 0000 | Sale | 07/30/13 | 12/06/13 | 8,824.83 | 9,297.49 | 0.00 | (472.66) | |
| 244 0000 | Sale | 07/31/13 | 12/06/13 | 8,578.72 | 9,047.59 | 0.00 | (468.87) | |
| 182 0000 | Sale | 08/01/13 | 12/06/13 | 6,398.88 | 6,822.52 | 0.00 | (423.64) | |
| 58 0000 | Sale | 08/02/13 | 12/06/13 | 2,039.20 | 2,186.23 | 0.00 | (147.03) | |
| | Security Subtotal | | | 52,210.65 | 55,133.09 | 0.00 | (2,922.44) | |



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1099-B
2013 PROCEEDS FROM BROKER & BARTER EXCHANGE TRANSACTIONS
2013 ANNUAL STATEMENT SUMMARY

| 1e Quantity | Transaction Description | 1b Date of Acquisition | 1a Date of Sale or Exchange | 2a Amount | 3 Cost Basis | 5 Wash Sale Loss Disallowed | Gain or (Loss) | Remarks |
|------------------------------------------------------|-------------------------|------------------------|-----------------------------|------------|--------------|-----------------------------|----------------|---------|
| CORRECTIONS CORP OF AMER | | | | | | | | |
| 155 0000 | Sale | CUSIP Number 04/26/13 | 22025Y407 12/06/13 | 5,304.10 | 5,498.98 | 0.00 | (194.88) | |
| 91 0000 | Sale | 04/29/13 | 12/06/13 | 3,114.02 | 3,244.41 | 0.00 | (130.39) | |
| 86 0000 | Sale | 04/30/13 | 12/06/13 | 2,942.92 | 3,081.15 | 0.00 | (138.23) | |
| 216 0000 | Sale | 05/09/13 | 12/06/13 | 7,391.52 | 8,185.89 | 0.00 | (794.37) | |
| 200 0000 | Sale | 05/10/13 | 12/06/13 | 6,844.00 | 7,684.90 | 0.00 | (840.90) | |
| 151 0000 | Sale | 05/13/13 | 12/06/13 | 5,167.22 | 5,786.61 | 0.00 | (619.39) | |
| 154 0000 | Sale | 05/14/13 | 12/06/13 | 5,269.88 | 5,980.08 | 0.00 | (710.20) | |
| 242 0000 | Sale | 05/15/13 | 12/06/13 | 8,281.25 | 9,356.46 | 0.00 | (1,075.21) | |
| 179 0000 | Sale | 05/16/13 | 12/06/13 | 6,125.38 | 6,941.09 | 0.00 | (815.71) | |
| Security Subtotal | | | | 50,440.29 | 55,759.57 | 0.00 | (5,319.28) | |
| SPDR S P DIVID ETF | | | | | | | | |
| 1440 0000 | Sale | CUSIP Number 12/06/13 | 78464A763 12/20/13 | 103,454.57 | 104,688.00 | 0.00 | (1,233.43) | |
| HATTERAS FINL CORP | | | | | | | | |
| 352 0000 | Sale | CUSIP Number 12/31/12 | 41902R103 11/19/13 | 5,962.85 | 8,676.76 | 0.00 | (2,713.91) | |
| HERSHEY COMPANY | | | | | | | | |
| 16 0000 | Sale | CUSIP Number 09/17/12 | 427866108 05/21/13 | 1,416.60 | 1,123.84 | 0.00 | 292.76 | |
| 42 0000 | Sale | 09/18/12 | 05/21/13 | 3,718.60 | 2,983.67 | 0.00 | 734.93 | |
| Security Subtotal | | | | 5,135.20 | 4,107.51 | 0.00 | 1,027.69 | |
| INTL BUSINESS MACHINES CORP IBM | | | | | | | | |
| 8 0000 | Sale | CUSIP Number 04/08/13 | 459200101 12/06/13 | 1,417.56 | 1,664.24 | 0.00 | (246.68) | |
| Covered Short Term Capital Gains and Losses Subtotal | | | | 232,285.76 | 239,609.59 | 0.00 | (7,323.83) | |
| NET SHORT TERM CAPITAL GAINS AND LOSSES | | | | | | | | |
| | | | | 232,285.76 | 239,609.59 | 0.00 | (7,323.83) | |



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ARTHUR AND LINDEE LUCAS FAMILY

2013 ANNUAL STATEMENT SUMMARY

1099-B

2013 PROCEEDS FROM BROKER & BARTER EXCHANGE TRANSACTIONS

| 1e. Quantity | Transaction Description | 1b. Date of Acquisition | 1a. Date of Sale or Exchange | 2a. Amount | 3. Cost Basis | 5. Wash Sale Loss Disallowed | Gain or (Loss) | Remarks |
|--------------|-------------------------|-------------------------|------------------------------|------------|---------------|------------------------------|----------------|---------|
|--------------|-------------------------|-------------------------|------------------------------|------------|---------------|------------------------------|----------------|---------|

LONG TERM CAPITAL GAINS AND LOSSES - 1099-B Line 1c.

COVERED TRANSACTIONS - 1099-B Line 6b. (cost basis reported to the IRS)

| | | | | | | | | |
|----------------------------------------|--------------|-----------|-----------|-----------|------|----------|--|--|
| BERKSHIRE HATHAWAY INC DEL CL B NEW | CUSIP Number | 084670702 | | | | | | |
| 69,000 Sale | 09/29/11 | 04/26/13 | 7,400 21 | 4,998.68 | 0.00 | 2,401 53 | | |
| 137,000 Sale | 09/29/11 | 04/29/13 | 14,636 72 | 9,924.93 | 0.00 | 4,711.79 | | |
| 52,000 Sale | 09/29/11 | 04/30/13 | 5,514 02 | 3,767 12 | 0.00 | 1,746 90 | | |
| Security Subtotal | | | 27,550.95 | 18,690.73 | 0.00 | 8,860.22 | | |

| | | | | | | | | |
|---------------------------------------|--------------|-----------|-----------|-----------|------|------------|--|--|
| CISCO SYSTEMS INC COM 430,000 Sale | CUSIP Number | 17275R102 | | | | | | |
| | 07/21/11 | 01/31/13 | 8,856.94 | 7,025 64 | 0.00 | 1,831 30 | | |
| HATTERAS FINL CORP 304,000 Sale | CUSIP Number | 41902R103 | | | | | | |
| | 11/02/11 | 11/19/13 | 5,149 73 | 7,851 32 | 0.00 | (2,701 59) | | |
| 304,000 Sale | 11/03/11 | 11/19/13 | 5,149 73 | 7,902 69 | 0.00 | (2,752 96) | | |
| 93,000 Sale | 11/04/11 | 12/06/13 | 1,523 06 | 2,420 28 | 0.00 | (897 22) | | |
| Security Subtotal | | | 11,822.52 | 18,174.29 | 0.00 | (6,351.77) | | |

| | | | | | | | | |
|--------------------------------|--------------|-----------|----------|----------|------|----------|--|--|
| HASBRO INC COM 132,000 Sale | CUSIP Number | 418056107 | | | | | | |
| | 02/10/12 | 04/30/13 | 6,246 76 | 4,847 29 | 0.00 | 1,399 47 | | |
| 54,000 Sale | 02/10/12 | 05/01/13 | 2,537 03 | 1,982 98 | 0.00 | 554 05 | | |
| Security Subtotal | | | 8,783.79 | 6,830.27 | 0.00 | 1,953.52 | | |

| | | | | | | | | |
|-----------------------------|--------------|-----------|----------|----------|------|--------|--|--|
| PAYCHEX INC 106,000 Sale | CUSIP Number | 704326107 | | | | | | |
| | 01/07/11 | 04/26/13 | 3,816 51 | 3,371 76 | 0.00 | 444 75 | | |
| 5,000 Sale | 01/07/11 | 04/29/13 | 179 57 | 159 05 | 0.00 | 20 52 | | |
| Security Subtotal | | | 3,996.08 | 3,530.81 | 0.00 | 465.27 | | |

Covered Long Term Capital Gains and Losses Subtotal

61,010.28 54,251.74 0.00 6,758.54

NONCOVERED TRANSACTIONS - 1099-B Line 6a. (cost basis not reported to the IRS)

| | | | | | | | | |
|----------------------------------------|--------------|-----------|-----------|-----------|------|----------|--|--|
| BERKSHIRE HATHAWAY INC DEL CL B NEW | CUSIP Number | 084670702 | | | | | | |
| 155,000 Sale | 04/28/10 | 04/26/13 | 16,623 63 | 11,967 55 | 0.00 | 4,656 08 | | |



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2013 ANNUAL STATEMENT SUMMARY

1099-B 2013 PROCEEDS FROM BROKER & BARTER EXCHANGE TRANSACTIONS

| 1e. Quantity | Transaction Description | 1b. Date of Acquisition | 1a. Date of Sale or Exchange | 2a. Amount | 3. Cost Basis | 5. Wash Sale Loss Disallowed | Gain or (Loss) | Remarks |
|--------------------------------|-------------------------|-------------------------|------------------------------|------------------|------------------|------------------------------|-------------------|---------|
| DOMINION RES INC NEW VA | | | | | | | | |
| | | CUSIP Number | 25746U109 | | | | | |
| 13 0000 | Sale | 04/28/10 | 07/23/13 | 778.47 | 536.37 | 0.00 | 242.10 | |
| 116 0000 | Sale | 04/28/10 | 07/24/13 | 6,835.77 | 4,786.07 | 0.00 | 2,049.70 | |
| 111 0000 | Sale | 04/28/10 | 07/25/13 | 6,575.51 | 4,579.77 | 0.00 | 1,995.74 | |
| 77 0000 | Sale | 04/28/10 | 07/26/13 | 4,539.34 | 3,176.96 | 0.00 | 1,362.38 | |
| Security Subtotal | | | | 18,729.09 | 13,079.17 | 0.00 | 5,649.92 | |
| HATTERAS FINL CORP | | | | | | | | |
| | | CUSIP Number | 41902R103 | | | | | |
| 49 0000 | Sale | 04/28/10 | 04/26/13 | 1,302.90 | 1,310.66 | 0.00 | (7.76) | |
| 1 0000 | Sale | 04/28/10 | 04/29/13 | 26.66 | 26.75 | 0.00 | (0.09) | |
| 74 0000 | Sale | 04/28/10 | 05/17/13 | 1,973.69 | 1,979.37 | 0.00 | (5.68) | |
| 93 0000 | Sale | 04/28/10 | 05/20/13 | 2,456.65 | 2,487.58 | 0.00 | (30.93) | |
| 16 0000 | Sale | 04/28/10 | 07/23/13 | 365.01 | 427.97 | 0.00 | (62.96) | |
| 180 0000 | Sale | 04/28/10 | 07/24/13 | 3,673.92 | 4,814.68 | 0.00 | (1,140.76) | |
| 65 0000 | Sale | 04/28/10 | 08/02/13 | 1,286.04 | 1,738.63 | 0.00 | (452.59) | |
| 148 0000 | Sale | 04/28/10 | 08/05/13 | 2,833.32 | 3,958.73 | 0.00 | (1,125.41) | |
| 3 0000 | Sale | 04/28/10 | 08/07/13 | 57.75 | 80.24 | 0.00 | (22.49) | |
| 34 0000 | Sale | 04/28/10 | 08/08/13 | 654.24 | 909.44 | 0.00 | (255.20) | |
| 16 0000 | Sale | 04/28/10 | 08/09/13 | 307.26 | 427.97 | 0.00 | (120.71) | |
| 68 0000 | Sale | 04/28/10 | 08/12/13 | 1,307.18 | 1,818.88 | 0.00 | (511.70) | |
| 111 0000 | Sale | 04/28/10 | 09/18/13 | 2,144.86 | 2,969.05 | 0.00 | (824.19) | |
| 364 0000 | Sale | 04/28/10 | 11/19/13 | 6,166.12 | 9,736.35 | 0.00 | (3,570.23) | |
| Security Subtotal | | | | 24,555.60 | 32,686.30 | 0.00 | (8,130.70) | |
| HERSHEY COMPANY | | | | | | | | |
| | | CUSIP Number | 427866108 | | | | | |
| 99 0000 | Sale | 04/28/10 | 02/20/13 | 8,049.87 | 4,662.77 | 0.00 | 3,387.10 | |
| 163 0000 | Sale | 04/28/10 | 02/21/13 | 13,090.40 | 7,677.09 | 0.00 | 5,413.31 | |
| 8 0000 | Sale | 04/28/10 | 02/22/13 | 642.88 | 376.79 | 0.00 | 266.09 | |
| 85 0000 | Sale | 04/28/10 | 05/17/13 | 7,621.07 | 4,003.39 | 0.00 | 3,617.68 | |
| 84 0000 | Sale | 04/28/10 | 05/20/13 | 7,499.76 | 3,956.29 | 0.00 | 3,543.47 | |
| 25 0000 | Sale | 04/28/10 | 05/21/13 | 2,213.44 | 1,177.47 | 0.00 | 1,035.97 | |
| Security Subtotal | | | | 39,117.42 | 21,853.80 | 0.00 | 17,263.62 | |
| LORILLARD INC | | | | | | | | |
| | | CUSIP Number | 544147101 | | | | | |
| 36 0000 | Sale | 04/28/10 | 07/23/13 | 1,589.87 | 935.98 | 0.00 | 653.89 | |
| 22 0000 | Sale | 04/28/10 | 07/24/13 | 968.90 | 571.99 | 0.00 | 396.91 | |
| Security Subtotal | | | | 2,558.77 | 1,507.97 | 0.00 | 1,050.80 | |
| LOWE'S COMPANIES INC | | | | | | | | |
| | | CUSIP Number | 548661107 | | | | | |
| 489 0000 | Sale | 04/28/10 | 02/21/13 | 18,350.93 | 13,177.92 | 0.00 | 5,173.01 | |

ARTHUR AND LINDEE LUCAS FAMILY

2013 ANNUAL STATEMENT SUMMARY
2013 PROCEEDS FROM BROKER & BARTER EXCHANGE TRANSACTIONS

1099-B

| 1e Quantity | Transaction Description | 1b Date of Acquisition | 1a Date of Sale or Exchange | 2a Amount | 3 Cost Basis | 5 Wash Sale Loss Disallowed | Gain or (Loss) | Remarks |
|---------------------|-------------------------|------------------------|-----------------------------|-----------|--------------|-----------------------------|----------------|---------|
| MICROSOFT CORP | | | | | | | | |
| 8 0000 | Sale | CUSIP Number 11/03/08 | 594918104 01/31/13 | 219.95 | 182.91 | 0.00 | 37.04 | |
| 3 0000 | Sale | 12/12/08 | 01/31/13 | 82.48 | 57.51 | 0.00 | 24.97 | |
| 160 0000 | Sale | 01/06/09 | 01/31/13 | 4,399.03 | 3,353.58 | 0.00 | 1,045.45 | |
| 40 0000 | Sale | 03/06/09 | 01/31/13 | 1,099.76 | 603.73 | 0.00 | 496.03 | |
| 4 0000 | Sale | 03/13/09 | 01/31/13 | 109.97 | 68.16 | 0.00 | 41.81 | |
| 35 0000 | Sale | 06/17/09 | 01/31/13 | 962.29 | 820.58 | 0.00 | 141.71 | |
| 3 0000 | Sale | 06/19/09 | 01/31/13 | 82.48 | 72.18 | 0.00 | 10.30 | |
| 40 0000 | Sale | 07/06/09 | 01/31/13 | 1,099.76 | 926.96 | 0.00 | 172.80 | |
| 3 0000 | Sale | 09/14/09 | 01/31/13 | 82.48 | 74.76 | 0.00 | 7.72 | |
| 3 0000 | Sale | 12/11/09 | 01/31/13 | 82.48 | 89.85 | 0.00 | (7.37) | |
| 2 0000 | Sale | 03/12/10 | 01/31/13 | 54.98 | 58.64 | 0.00 | (3.66) | |
| 99 0000 | Sale | 04/28/10 | 01/31/13 | 2,721.93 | 3,053.16 | 0.00 | (331.23) | |
| Security Subtotal | | | | 10,997.59 | 9,362.02 | 0.00 | 1,635.57 | |
| NEWMARKET CORP | | | | | | | | |
| 1 0000 | Sale | CUSIP Number 04/28/10 | 651587107 07/23/13 | 278.79 | 109.94 | 0.00 | 168.85 | |
| 4 0000 | Sale | 04/28/10 | 07/24/13 | 1,101.73 | 439.75 | 0.00 | 661.98 | |
| 3 0000 | Sale | 04/28/10 | 07/25/13 | 829.46 | 329.81 | 0.00 | 499.65 | |
| 5 0000 | Sale | 04/28/10 | 07/26/13 | 1,373.50 | 549.69 | 0.00 | 823.81 | |
| 9 0000 | Sale | 04/28/10 | 07/29/13 | 2,436.48 | 989.44 | 0.00 | 1,447.04 | |
| 6 0000 | Sale | 04/28/10 | 07/30/13 | 1,629.06 | 659.63 | 0.00 | 969.43 | |
| 18 0000 | Sale | 04/28/10 | 07/31/13 | 4,834.64 | 1,978.88 | 0.00 | 2,855.76 | |
| 13 0000 | Sale | 04/28/10 | 08/01/13 | 3,641.04 | 1,429.19 | 0.00 | 2,211.85 | |
| 4 0000 | Sale | 04/28/10 | 08/02/13 | 1,124.09 | 439.75 | 0.00 | 684.34 | |
| 3 0000 | Sale | 04/28/10 | 08/05/13 | 832.03 | 329.81 | 0.00 | 502.22 | |
| 5 0000 | Sale | 04/28/10 | 08/06/13 | 1,366.41 | 549.69 | 0.00 | 816.72 | |
| 6 0000 | Sale | 04/28/10 | 08/07/13 | 1,627.79 | 659.63 | 0.00 | 968.16 | |
| 6 0000 | Sale | 04/28/10 | 08/08/13 | 1,652.36 | 659.63 | 0.00 | 992.73 | |
| 4 0000 | Sale | 04/28/10 | 08/09/13 | 1,089.97 | 439.75 | 0.00 | 650.22 | |
| Security Subtotal | | | | 23,817.35 | 9,564.59 | 0.00 | 14,252.76 | |
| WAL-MART STORES INC | | | | | | | | |
| 5 0000 | Sale | CUSIP Number 06/27/08 | 931142103 02/20/13 | 346.78 | 284.87 | 0.00 | 61.91 | |
| 20 0000 | Sale | 07/09/08 | 02/20/13 | 1,387.15 | 1,168.71 | 0.00 | 218.44 | |
| 10 0000 | Sale | 09/11/08 | 02/20/13 | 693.57 | 624.59 | 0.00 | 68.98 | |
| 40 0000 | Sale | 01/06/09 | 02/20/13 | 2,774.30 | 2,249.58 | 0.00 | 524.72 | |
| 15 0000 | Sale | 07/06/09 | 02/20/13 | 1,040.36 | 718.12 | 0.00 | 322.24 | |
| 15 0000 | Sale | 01/27/10 | 02/20/13 | 1,040.36 | 799.44 | 0.00 | 240.92 | |
| 10 0000 | Sale | 02/18/10 | 02/20/13 | 693.57 | 532.33 | 0.00 | 161.24 | |



Account No.
6AL-02014

Taxpayer No.
26-1591821

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12 of 20

ARTHUR AND LINDEE LUCAS FAMILY

2013 ANNUAL STATEMENT SUMMARY

1099-B

2013 PROCEEDS FROM BROKER & BARTER EXCHANGE TRANSACTIONS

| 1e Quantity | Transaction Description | 1b Date of Acquisition | 1a Date of Sale or Exchange | 2a Amount | 3. Cost Basis | 5. Wash Sale Loss Disallowed | Gain or (Loss) | Remarks |
|-------------|--------------------------------------------------------|------------------------|-----------------------------|------------------|------------------|------------------------------|------------------|---------|
| | WAL-MART STORES INC | | | | | | | |
| 97 0000 | Sale | 04/28/10 | 02/20/13 | 6,727.73 | 5,208.73 | 0.00 | 1,519.00 | |
| 297 0000 | Sale | 04/28/10 | 05/17/13 | 23,069.28 | 15,948.40 | 0.00 | 7,120.88 | |
| | Security Subtotal | | | 37,773.10 | 27,534.77 | 0.00 | 10,238.33 | |
| | Noncovered Long Term Capital Gains and Losses Subtotal | | | 192,523.48 | 140,734.09 | 0.00 | 51,789.39 | |
| | NET LONG TERM CAPITAL GAINS AND LOSSES | | | 253,533.76 | 194,985.83 | 0.00 | 58,547.93 | |
| | TOTAL SALES PROCEEDS FOR CAPITAL GAINS AND LOSSES | | | 485,819.52 | | | | |
| | TOTAL REPORTED SALES PROCEEDS | | | 485,819.52 | | | | |

2013 REALIZED CAPITAL GAIN AND LOSS SUMMARY

| COVERED SHORT TERM GAINS/LOSSES | NONCOVERED SHORT TERM GAINS/LOSSES | COVERED LONG TERM GAINS/LOSSES | NONCOVERED LONG TERM GAINS/LOSSES |
|---------------------------------|------------------------------------|--------------------------------|-----------------------------------|
| (7,323.83) | 0.00 | 6,758.54 | 51,789.39 |

Federal Statements

Statement 1 - Form 990-PF, Part I, Line 16b - Accounting Fees

| Description | Total | Net Investment | Adjusted Net | Charitable Purpose |
|-----------------|----------|----------------|--------------|--------------------|
| ACCOUNTING FEES | \$ 2,550 | \$ | \$ | \$ |
| TOTAL | \$ 2,550 | \$ 0 | \$ 0 | \$ 0 |

Statement 2 - Form 990-PF, Part I, Line 16c - Other Professional Fees

| Description | Total | Net Investment | Adjusted Net | Charitable Purpose |
|--------------------------|-----------|----------------|--------------|--------------------|
| INVESTMENT ADVISORY FEES | \$ 12,728 | \$ 12,728 | \$ | \$ 150 |
| EMA ANNUAL FEE | 150 | | | |
| TOTAL | \$ 12,878 | \$ 12,728 | \$ 0 | \$ 150 |

Statement 3 - Form 990-PF, Part I, Line 18 - Taxes

| Description | Total | Net Investment | Adjusted Net | Charitable Purpose |
|--------------------------|--------|----------------|--------------|--------------------|
| INTERNAL REVENUE SERVICE | \$ 505 | \$ | \$ | \$ |
| TOTAL | \$ 505 | \$ 0 | \$ 0 | \$ 0 |

Statement 4 - Form 990-PF, Part I, Line 23 - Other Expenses

| Description | Total | Net Investment | Adjusted Net | Charitable Purpose |
|----------------|-------|----------------|--------------|--------------------|
| EXPENSES | | \$ | \$ | \$ |
| OFFICE EXPENSE | 22 | | | |
| TOTAL | \$ 22 | \$ 0 | \$ 0 | \$ 0 |

120203 Arthur and Lindee Lucas Family
26-1591821
FYE: 12/31/2013

Federal Statements

Statement 5 - Form 990-PF, Part II, Line 10b - Corporate Stock Investments

| Description | Beginning of Year | End of Year | Basis of Valuation | Fair Market Value |
|-----------------|----------------------|----------------|-----------------------|----------------------|
| CORPORATE STOCK | \$ 1,152,625 | \$ 1,162,702 | COST | \$ 1,731,330 |
| TOTAL | \$ 1,152,625 | \$ 1,162,702 | | \$ 1,731,330 |

Statement 6 - Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the Year

| Name | Address | Relationship | Status | Purpose | Amount |
|-------------------------------------|---------------------------|--------------|------------------------|-----------------|--------|
| BOYS AND GIRLS CLUBS | ATLANTA GA 30303 | NONE | 100 EDGEWOOD AVENUE | OPERATING FUNDS | 1,200 |
| PEACHTREE ROAD METHODIST CHURCH | ATLANTA GA 30326 | NONE | 3180 PEACHTREE ROAD | OPERATING FUNDS | 2,000 |
| ST. SIMONS PREBYTERIAN CHURCH | ST SIMONS ISLAND GA 31522 | NONE | 205 KINGS WAY | OPERATING FUNDS | 9,000 |
| TRINITY SCHOOL | ATLANTA GA 30327 | NONE | 4301 NORTHSIDE PARKWAY | OPERATING FUNDS | 6,000 |
| ST. SIMONS LAND TRUST | ST. SIMONS ISLAND GA 3152 | NONE | 1624 FREDERICA ROAD | OPERATING FUNDS | 6,000 |
| COLLEGE OF COASTAL GEORGIA | BRUNSWICK GA 31521 | NONE | 3700 ALTAMA STREET | OPERATING FUNDS | 22,500 |
| CHEROKEE GARDEN CLUB | ATLANTA GA 30305 | NONE | 2 WEST WESLEY ROAD | OPERATING FUNDS | 1,000 |
| COMMUNITIES OF COASTAL GA FOUNDATIO | ST. SIMONS ISLAND GA 3152 | NONE | 1626 FREDERICA ROAD | OPERATING FUNDS | 100 |
| WESTMINSTER SCHOOLS | ATLANTA GA 30327 | NONE | 1424 WEST PACES ROAD | OPERATING FUNDS | 1,000 |
| COASTAL GEORGIA HISTORICAL SOCIETY | ST. SIMONS ISLAND GA 3152 | NONE | 610 BEACHVIEW DRIVE | OPERATING FUNDS | 3,000 |
| SOUTHEAST GA HEALTHCARE SYSTEM | BRUNSWICK GA 31520 | NONE | 2415 PARKWOOD DRIVE | OPERATING FUNDS | 1,000 |
| ST. SIMONS CHRISTIAN SCHOOL | ST. SIMONS ISLAND GA 3152 | NONE | 1060 COQUINA CIRCLE | OPERATING FUNDS | 100 |
| ATLANTA SPEECH SCHOOL | ATLANTA GA 30327 | NONE | 3160 NORTHSIDE PARKWAY | OPERATING FUNDS | 1,000 |

120203 Arthur and Lindee Lucas Family
26-1591821
FYE: 12/31/2013

Federal Statements

Statement 6 - Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the Year (continued)

| Name | | Address | | Relationship | Status | Purpose | Amount |
|------------------------------------|---------------------------|---------|---------------------------|--------------|-----------------|---------|--------|
| OGLETHORPE POINT ELEMENTARY SCHOOL | ST. SIMONS ISLAND GA 3152 | NONE | 6200 FREDERICA ROAD | PUBLIC CHARI | OPERATING FUNDS | | 500 |
| CASA | SEATTLE WA 98119 | NONE | 100 WEST HARRISON STREET | PUBLIC CHAR | OPERATING FUNDS | | 250 |
| GEORGIA CONSERVANCY | ATLANTA GA 30308 | NONE | 817 WEST PEACHTREE STREET | PUBLIC CHARI | OPERATING FUNDS | | 1,000 |
| FAITHBRIDGE | MARIETTA GA 30067 | NONE | 401 LITTLE ROAD | PUBLIC CHARI | OPERATING FUNDS | | 1,000 |
| GLYNN ART ASSOCIATION | ST. SIMONS ISLAND GA 3152 | NONE | 529 BEACHVIEW DRIVE | PUBLIC CHARI | OPERATING FUNDS | | 100 |
| SKYLAND TRAIL | ATLANTA GA 30329 | NONE | 1961 NORTH DRUID HILLS RD | PUBLIC CHAR | OPERATING FUNDS | | 100 |
| COASTAL GEORGIA FOUNDATION | ST. SIMONS ISLAND GA 3152 | NONE | 1626 FREDERICA ROAD | PUBLIC CHAR | OPERATING FUNDS | | 2,000 |
| UNITED WAY OF COASTAL GEORGIA | BRUNSWICK GA 31521 | NONE | PO BOX 877 | PUBLIC CHARI | OPERATING FUNDS | | 1,000 |
| TOTAL | | | | | | | 59,850 |