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Return of Private Foundation

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

Department 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.

OMB No. 1545-005

2013

Open to Public Inspection

For calendar year 2013 or tax year beginning

, and ending

Name of foundation ANONYMOUS TRUST U/A DATED 2-4-2008		A Employer identification number 26-6220561
Number and street (or P.O. box number if mail is not delivered to street address) PO BOX 31143	Room/suite	B Telephone number (919) 571-3332
City or town, state or province, country, and ZIP or foreign postal code RALEIGH, NC 27622		C If exemption application is pending, check here <input type="checkbox"/>
G Check all that apply: <input type="checkbox"/> Initial return <input type="checkbox"/> Final return <input type="checkbox"/> Address change <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Amended return <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) \$ 181,220,681. (Part I, column (d) must be on cash basis)	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))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received				N/A	
2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities		5,096,684.	3,067,655.		STATEMENT 1
5a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10		24,609,139.			
b Gross sales price for all assets on line 6a 33,026,520.					
7 Capital gain net income (from Part IV, line 2)			24,609,139.		
8 Net short-term capital gain					
9 Income modifications					
10a Gross sales less returns and allowances					
b Less Cost of goods sold					
c Gross profit or (loss)					
11 Other income					
12 Total. Add lines 1 through 11		29,705,823.	27,676,794.		
13 Compensation of officers, directors, trustees, etc		43,072.	0.		43,072.
14 Other employee salaries and wages					
15 Pension plans, employee benefits					
16a Legal fees STMT 2		6,474.	0.		6,474.
b Accounting fees STMT 3		12,950.	0.		12,950.
c Other professional fees STMT 4		129,608.	91,715.		0.
17 Other fees					
18 Taxes STMT 5		320,218.	0.		0.
19 Depreciation and depletion					
20 Occupancy					
21 Travel, conferences, and meetings					
22 Printing and publications					
23 Other expenses STMT 6		1,991.	0.		1,991.
24 Total operating and administrative expenses. Add lines 13 through 23		514,313.	91,715.		64,487.
25 Contributions, gifts, grants paid		8,351,962.			8,351,962.
26 Total expenses and disbursements. Add lines 24 and 25		8,866,275.	91,715.		8,416,449.
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements		20,839,548.			
b Net investment income (if negative, enter -0-)			27,585,079.		
c Adjusted net income (if negative, enter -0-)				N/A	

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only		Beginning of year	End of year	
				(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing					
	2 Savings and temporary cash investments			14,529,158.	11,373,123.	11,373,123.
	3 Accounts receivable ▶					
	Less: allowance for doubtful accounts ▶					
	4 Pledges receivable ▶					
	Less: allowance for doubtful accounts ▶					
	5 Grants receivable					
	6 Receivables due from officers, directors, trustees, and other disqualified persons					
	7 Other notes and loans receivable ▶					
	Less: allowance for doubtful accounts ▶			500,000.	0.	0.
	8 Inventories for sale or use					
	9 Prepaid expenses and deferred charges					
	10a Investments - U.S. and state government obligations STMT 9			39,630,749.	38,965,854.	42,216,539.
	b Investments - corporate stock STMT 10			37,500,889.	63,854,524.	111,385,803.
	c Investments - corporate bonds STMT 11			13,298,773.	10,192,206.	10,708,616.
Liabilities	11 Investments - land, buildings, and equipment basis ▶					
	Less: accumulated depreciation ▶					
	12 Investments - mortgage loans					
	13 Investments - other STMT 12			6,524,521.	6,524,521.	5,536,600.
	14 Land, buildings, and equipment: basis ▶					
	Less: accumulated depreciation ▶					
	15 Other assets (describe ▶)					
	16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item 1)			111,984,090.	130,910,228.	181,220,681.
	17 Accounts payable and accrued expenses					
	18 Grants payable					
Net Assets or Fund Balances	19 Deferred revenue					
	20 Loans from officers, directors, trustees, and other disqualified persons					
	21 Mortgages and other notes payable					
	22 Other liabilities (describe ▶ STATEMENT 13)			1,901,297.	1,560.	
	23 Total liabilities (add lines 17 through 22)			1,901,297.	1,560.	
	Foundations that follow SFAS 117, check here <input type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.					
	24 Unrestricted					
	25 Temporarily restricted					
	26 Permanently restricted					
	Foundations that do not follow SFAS 117, check here <input checked="" type="checkbox"/> and complete lines 27 through 31.					
	27 Capital stock, trust principal, or current funds			110,082,793.	130,908,668.	
	28 Paid-in or capital surplus, or land, bldg., and equipment fund			0.	0.	
	29 Retained earnings, accumulated income, endowment, or other funds			0.	0.	
	30 Total net assets or fund balances			110,082,793.	130,908,668.	
	31 Total liabilities and net assets/fund balances			111,984,090.	130,910,228.	

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)	1 110,082,793.
2 Enter amount from Part I, line 27a	2 20,839,548.
3 Other increases not included in line 2 (itemize) ▶ SEE STATEMENT 7	3 144,148.
4 Add lines 1, 2, and 3	4 131,066,489.
5 Decreases not included in line 2 (itemize) ▶ SEE STATEMENT 8	5 157,821.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6 130,908,668.

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 PUBLICLY TRADED SECURITIES			
b			
c			
d			
e			

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 33,026,520.		8,417,381.	24,609,139.
b			
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a			24,609,139.
b			
c			
d			
e			

2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	24,609,139.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8 }	3	N/A

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☒ No
If "Yes," the foundation does not qualify under section 4940(e). Do not complete this part.

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

(a) 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	4,787,567.	151,015,215.	.031703
2011	3,916,985.	76,718,942.	.051056
2010	2,679,385.	78,656,155.	.034065
2009	1,320,607.	55,273,690.	.023892
2008	121,365.	39,073,863.	.003106

2 Total of line 1, column (d)	2	.143822
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	.028764
4 Enter the net value of noncharitable-use assets for 2013 from Part X, line 5	4	171,357,134.
5 Multiply line 4 by line 3	5	4,928,917.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	275,851.
7 Add lines 5 and 6	7	5,204,768.
8 Enter qualifying distributions from Part XII, line 4 If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions.	8	8,416,449.

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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	275,851.
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	275,851.
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	275,851.
6 Credits/Payments:			
a 2013 estimated tax payments and 2012 overpayment credited to 2013	6a	305,254.	
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	305,254.	
8 Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8		
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9		
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	29,403.	
11 Enter the amount of line 10 to be: Credited to 2014 estimated tax <input checked="" type="checkbox"/> 29,403. Refunded <input type="checkbox"/>	11	0.	

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for 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 checked="" type="checkbox"/> \$ 0. (2) On foundation managers. <input checked="" type="checkbox"/> \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. <input checked="" type="checkbox"/> \$ 0.		
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 checked="" type="checkbox"/> NC		
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

N/A

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Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	
Website address N/A				
14	The books are in care of THE NORTHERN TRUST COMPANY Telephone no. (312) 630-6000 Located at 50 SOUTH LASALLE STREET, CHICAGO, IL ZIP+4 60603			
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	N/A	
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	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?		1c X
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):		
a	At the end of tax year 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	<input type="checkbox"/> Yes <input checked="" 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.)	N/A	2b
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.		
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

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Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required (continued)**5a** During the year did the foundation pay or incur any amount to:

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?

☐ Yes ☒ No

(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?

☐ Yes ☒ No

(3) Provide a grant to an individual for travel, study, or other similar purposes?

☒ Yes ☐ No

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

☐ Yes ☒ No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?

☐ Yes ☒ No**b** If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?

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

6b

☒**b** Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

If "Yes" to 6b, file Form 8870

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

7b

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

N/A

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors**1** List all officers, directors, trustees, foundation managers and their compensation.

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
ANNE B. FAIRCLOTH 207 N. CHESTNUT STREET CLINTON, NC 28328	TRUSTEE	0.00	0.	0.
MARIA M. LYNCH PO BOX 30515 RALEIGH, NC 27622	TRUSTEE	0.00	0.	0.
MARGARET TURLINGTON P.O. BOX 2087 CLINTON, NC 28329	SCHOLARSHIP COORDINATOR	25.00	43,072.	0.

2 Compensation of five highest-paid employees (other than those included on line 1). If none, enter "NONE."

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

Total number of other employees paid over \$50,000

0

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Part VIII

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

3 Five highest-paid independent contractors for professional services. If none, enter "NONE."

[illegible]

Total number of others receiving over \$50,000 for professional services

0

Part IX-A	Summary of Direct Charitable Activities
------------------	--

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

Expenses

1	N/A	
2		
3		
4		

Part IX-B	Summary of Program-Related Investments
-----------	--

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.

Amount

1	N/A	
2		
All other program-related investments. See instructions.		
3		

Total. Add lines 1 through 3

0.

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	173,966,633.
b	Average of monthly cash balances	1b	
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	173,966,633.
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	173,966,633.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	2,609,499.
5	Net value of noncharitable-use assets Subtract line 4 from line 3. Enter here and on Part V, line 4	5	171,357,134.
6	Minimum investment return. Enter 5% of line 5	6	8,567,857.

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	8,567,857.
2a	Tax on investment income for 2013 from Part VI, line 5	2a	275,851.
b	Income tax for 2013. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	275,851.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	8,292,006.
4	Recoveries of amounts treated as qualifying distributions	4	3,000.
5	Add lines 3 and 4	5	8,295,006.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	8,295,006.

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	8,416,449.
b	Program-related investments - total from Part IX-B	1b	0.
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	8,416,449.
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	5	275,851.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	8,140,598.

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				8,295,006.
2 Undistributed income, if any, as of the end of 2013				
a Enter amount for 2012 only			5,950,340.	
b Total for prior years:		0.		
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	0.			
4 Qualifying distributions for 2013 from Part XII, line 4: ► \$ 8,416,449.				
a Applied to 2012, but not more than line 2a			5,950,340.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2013 distributable amount				2,466,109.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2013 (If an amount appears in column (d), the same amount must be shown in column (a).)	0.			0.
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	0.			
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		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 2012. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2013. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2014				5,828,897.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)	0.			
8 Excess distributions carryover from 2008 not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a	0.			
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				

N/A

- b** Check box to indicate whether the foundation is a private operating foundation described in section

☐ 4942(1)(3) or ☐ 4942(1)(5)

- 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.

3 Subtract line 2d from line 2c.
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.)
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1 Information Regarding Foundation Managers:

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

NONE

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

NONE

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

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

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

SEE STATEMENT 14

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

- c Any submission deadlines:**

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

ANONYMOUS TRUST

Form 990-PF (2013)

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Page 11

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

Recipient 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				
SEE ATTACHED STATEMENT 15				8,351,962.
Total			3a	8,351,962.
b Approved for future payment				
TEACH FOR AMERICA 324 BLACKWELL STREET, BAY 11, ST 1160 DURHAM, NC 27701		EDUCATIONAL	TO FUND THE EXPANSION OF TEACH FOR AMERICA TO SOUTHEASTERN NORTH CAROLINA	2,837,000.
THE MADEIRA SCHOOL 8328 GEORGETOWN PIKE MCLEAN, VA 22102		EDUCATIONAL	DORM MODERNIZATION CHALLENGE GRANT	1,374,536.
Total			3b	4,211,536.

FORM 990-PF	DIVIDENDS AND INTEREST FROM SECURITIES		STATEMENT	1
SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT	
MORGAN KEEGAN & COMPANY, INC.	91,556.	0.	91,556.	
RAYMOND JAMES	790,596.	0.	790,596.	
THE NORTHERN TRUST COMPANY	4,176,407.	0.	4,176,407.	
THE NORTHERN TRUST COMPANY				
ACCRUED MARKET DISCOUNT	38,125.	0.	38,125.	
TOTAL TO FM 990-PF, PART I, LN 4	5,096,684.	0.	5,096,684.	

FORM 990-PF	LEGAL FEES		STATEMENT	2
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
LEGAL FEES	6,474.	0.		6,474.
TO FM 990-PF, PG 1, LN 16A	6,474.	0.		6,474.

FORM 990-PF	ACCOUNTING FEES		STATEMENT	3
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING FEES	3,950.	0.		3,950.
BOOKKEEPING FEES	9,000.	0.		9,000.
TO FORM 990-PF, PG 1, LN 16B	12,950.	0.		12,950.

FORM 990-PF	OTHER PROFESSIONAL FEES			STATEMENT	4
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
FIDUCIARY FEES NORTHERN TRUST	77,019.	39,126.		0.	
FIDUCIARY FEES MORGAN KEEGAN/RAYMOND JAMES	52,589.	52,589.		0.	
TO FORM 990-PF, PG 1, LN 16C	129,608.	91,715.		0.	

FORM 990-PF	TAXES			STATEMENT	5
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
FOREIGN TAXES PAID ON DIVIDENDS	15,218.	0.		0.	
EXCISE TAX PAID	305,000.	0.		0.	
TO FORM 990-PF, PG 1, LN 18	320,218.	0.		0.	

FORM 990-PF	OTHER EXPENSES			STATEMENT	6
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
POSTAGE, MAILING SERVICE	265.	0.		265.	
DUES & SUBSCRIPTIONS	622.	0.		622.	
PRINTING	193.	0.		193.	
COMPUTER & WEBSITE EXPENSE	463.	0.		463.	
SCHOLARSHIP COMMITTEE EXPENSE	315.	0.		315.	
MISCELLANEOUS EXPENSE	133.	0.		133.	
TO FORM 990-PF, PG 1, LN 23	1,991.	0.		1,991.	

FORM 990-PF	OTHER INCREASES IN NET ASSETS OR FUND BALANCES	STATEMENT	7
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DESCRIPTION	AMOUNT
INTEREST AND DIVIDENDS RECEIVED IN 2013 FOR 2012	141,148.
RECOVERY OF AMOUNT PREVIOUSLY COUNTED AS QUALIFYING DISTRIBUTION	3,000.
TOTAL TO FORM 990-PF, PART III, LINE 3	144,148.

FORM 990-PF	OTHER DECREASES IN NET ASSETS OR FUND BALANCES	STATEMENT	8
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DESCRIPTION	AMOUNT
INTEREST AND DIVIDENDS RECEIVED IN 2014 FOR 2013	133,278.
ACCRUED INTEREST PURCHASED 2013	24,543.
TOTAL TO FORM 990-PF, PART III, LINE 5	157,821.

FORM 990-PF	U.S. AND STATE/CITY GOVERNMENT OBLIGATIONS	STATEMENT	9
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DESCRIPTION	U.S. GOV'T	OTHER GOV'T	BOOK VALUE	FAIR MARKET VALUE
SEE ATTACHED SCHEDULE		X	38,965,854.	42,216,539.
TOTAL U.S. GOVERNMENT OBLIGATIONS				
TOTAL STATE AND MUNICIPAL GOVERNMENT OBLIGATIONS			38,965,854.	42,216,539.
TOTAL TO FORM 990-PF, PART II, LINE 10A			38,965,854.	42,216,539.

FORM 990-PF	CORPORATE STOCK	STATEMENT	10
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
SEE ATTACHED SCHEDULE	63,854,524.	111,385,803.
TOTAL TO FORM 990-PF, PART II, LINE 10B	63,854,524.	111,385,803.

FORM 990-PF	CORPORATE BONDS	STATEMENT 11
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
SEE ATTACHED SCHEDULE	10,192,206.	10,708,616.
TOTAL TO FORM 990-PF, PART II, LINE 10C	10,192,206.	10,708,616.

FORM 990-PF	OTHER INVESTMENTS	STATEMENT 12
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DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
SEE ATTACHED SCHEDULE	COST	6,524,521.	5,536,600.
TOTAL TO FORM 990-PF, PART II, LINE 13		6,524,521.	5,536,600.

FORM 990-PF	OTHER LIABILITIES	STATEMENT 13
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DESCRIPTION	BOY AMOUNT	EOY AMOUNT
OUTSTANDING CHECKS	1,900,000.	200.
PAYROLL LIABILITIES	1,297.	1,360.
TOTAL TO FORM 990-PF, PART II, LINE 22	1,901,297.	1,560.

ANONYMOUS TRUST U/A DATED 2-4-2008

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FORM 990-PF

GRANT APPLICATION SUBMISSION INFORMATION
PART XV, LINES 2A THROUGH 2D

STATEMENT 14

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

MARGARET TURLINGTON, COORDINATOR
PO BOX 2087
CLINTON, NC 28329

TELEPHONE NUMBER

NAME OF GRANT PROGRAM

910-385-6716

THE SIMPLE GIFTS SCHOLARSHIP PROGRAM

FORM AND CONTENT OF APPLICATIONS

SIMPLE GIFTS SCHOLARSHIP APPLICATION (AVAILABLE AT THE WEBSITE [HTTP://WWW.SIMPLEGIFTSFUND.ORG](http://www.simplegiftsfund.org)), A CURRENT RESUME, THREE RECOMMENDATIONS (TEACHER, PEER, ADDITIONAL), TRANSCRIPTS OF ACADEMIC RECORDS, A COPY OF THE US DEPARTMENT OF EDUCATION/STUDENT AID REPORT, A COPY OF THE FINANCIAL AWARD LETTER FROM THE COLLEGE/UNIVERSITY TO BE ATTENDED, A COPY OF THE LETTER(S) NOTIFYING THE APPLICANT OF SCHOLARSHIPS OR FELLOWSHIPS GRANTED.

ANY SUBMISSION DEADLINES

DECEMBER 1 FOR THE FOLLOWING ACADEMIC YEAR.

RESTRICTIONS AND LIMITATIONS ON AWARDS

THE SIMPLE GIFTS SCHOLARSHIP IS WORTH UP TO \$50,000 PER YEAR TO EARN A FOUR YEAR DEGREE AT AN OUT OF STATE LIBERAL ARTS COLLEGE OR UNIVERSITY. ELIGIBLE STUDENTS MUST BE A UNITED STATES CITIZEN AND A RESIDENT OF NORTH CAROLINA; HAVE ATTENDED A HIGH SCHOOL LOCATED IN SAMPSON COUNTY, NORTH CAROLINA FOR A MINIMUM OF TWO SCHOOL YEARS OR BE SCHEDULED TO COMPLETE A MINIMUM OF TWO YEARS AT THE TIME OF GRADUATION; BE SCHEDULED TO BECOME A HIGH SCHOOL GRADUATE IN THE YEAR OF THE APPLICATION OR BE A GRADUATE OF SAMPSON COMMUNITY COLLEGE; HAVE BEEN ACCEPTED INTO AND BE PLANNING TO ATTEND AN ACCREDITED LIBERAL ARTS COLLEGE OR UNIVERSITY; RANK IN THE TOP TWENTY-FIVE PERCENT OF HIS OR HER HIGH SCHOOL GRADUATING CLASS; AND HAVE AN UNMET FINANCIAL NEED. \$145,185 IN SCHOLARSHIPS WERE PAID IN 2013.

ANONYMOUS TRUST U/A DATED 2-4-2008

26-6220561

FORM 990-PF

GRANT APPLICATION SUBMISSION INFORMATION
PART XV, LINES 2A THROUGH 2D

STATEMENT 14

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

MARGARET TURLINGTON, COORDINATOR
PO BOX 2087
CLINTON, NC 28329

TELEPHONE NUMBER

NAME OF GRANT PROGRAM

910-385-6716

THE SIMPLE GIFTS FUND SAMPSON COUNTY LOVE OF
LEARNING GRANT PROGRAM

FORM AND CONTENT OF APPLICATIONS

APPLICANTS SHOULD SUBMIT THE PERSONAL INFORMATION FORM (AVAILABLE AT THE WEBSITE [HTTP://WWW.SIMPLEGIFTSFUND.ORG](http://WWW.SIMPLEGIFTSFUND.ORG)), A DESCRIPTION OF THE PROPOSED PROJECT THAT MUST INCLUDE A TITLE AND SUMMARY OF 50 WORDS OR LESS, A NARRATIVE OF 500 WORDS OR LESS THAT EXPLAINS THE NUMBER OF STUDENTS SERVED, WHAT THE STUDENTS WILL LEARN, HOW AND WHERE THE STUDENTS WILL LEARN, WHY THE PROJECT IS NEEDED, WHEN THE STUDENTS WILL LEARN (A TIME LINE), HOW THE PROJECT'S SUCCESS WILL BE EVALUATED AND HOW THE PROJECT IMPROVES THE STUDENT'S KNOWLEDGE AND SKILLS. IN ADDITION, A LINE ITEM BUDGET FOR THE PROPOSED GRANT MUST BE SUBMITTED. IF EDUCATOR STIPENDS ARE INCLUDED IN THE GRANT, TWO SEPARATE AMOUNTS SHOULD BE INDICATED IN THE BUDGET AND TWO CHECKS WILL BE ISSUED (ONE TO THE GRANTEE AND ONE TO THE FISCAL AGENT). THE EDUCATOR WILL RECEIVE AN IRS INCOME REPORTING 1099MISC FOR THE STIPEND. ANY ADDITIONAL SUPPORT PROVIDED FOR THE PROJECT MUST BE IDENTIFIED.

ANY SUBMISSION DEADLINES

PUBLICIZED ON THE SIMPLE GIFTS WEBSITE AND FLYERS TO SAMPSON COUNTY AND CLINTON CITY SCHOOLS

ANONYMOUS TRUST U/A DATED 2-4-2008

26-6220561

FORM 990-PF

GRANT APPLICATION SUBMISSION INFORMATION
PART XV, LINES 2A THROUGH 2D

STATEMENT 14

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

MARGARET TURLINGTON, COORDINATOR
PO BOX 2087
CLINTON, NC 28329

TELEPHONE NUMBER

NAME OF GRANT PROGRAM

910-385-6716

THE SIMPLE GIFTS FUND SAMPSON COUNTY LOVE OF
LEARNING GRANT PROGRAM

RESTRICTIONS AND LIMITATIONS ON AWARDS

GRANTS FOR SCHOOLS UP TO \$3,000 AND INDIVIDUAL STIPENDS UP TO \$1,000 WILL BE AWARDED THREE TIMES ANNUALLY FOR THE ADVANCEMENT OF EDUCATORS AND THEIR STUDENTS, IN ORDER TO ENABLE TEACHERS TO PROVIDE ILLUMINATING PROGRAMS AND OPPORTUNITIES FOR STUDENTS IN THE CLASSROOM, AFTER SCHOOL, IN THE SUMMER OR ON WEEKENDS. THE GOAL IS TO INSPIRE THE IMPROVEMENT OF PUBLIC EDUCATION BY ENGAGING STUDENTS IN CRITICAL THINKING AND PROBLEM SOLVING THAT DEEPENS KNOWLEDGE OF SUBJECT MATTER. APPLICANTS MUST BE A TEN-MONTH TEACHER, GUIDANCE COUNSELOR OR MEDIA COORDINATOR IN A SAMPSON COUNTY OR CLINTON CITY PUBLIC K-12 SCHOOL; HAVE A MINIMUM OF TWO YEARS CLASSROOM TEACHING EXPERIENCE; BE A FULL TIME EDUCATOR SPENDING AT LEAST 50% OF THE TIME IN THE CLASSROOM OR A CLASSROOM-LIKE SETTING; HAVE THE INTENTION OF RETURNING TO TEACHING IN SAMPSON COUNTY IN THE CONSECUTIVE SCHOOL YEAR AND HAVE THE PROPOSAL REVIEWED AND APPROVED BY THE SCHOOL PRINCIPAL. GRANT FUNDS MAY BE USED FOR RESOURCE MATERIALS, SUPPLIES, EQUIPMENT, TRANSPORTATION, TECHNOLOGY OR STIPENDS. ALTHOUGH FUNDS MAY BE USED TO SUPPORT THE PROFESSIONAL DEVELOPMENT NECESSARY TO IMPLEMENT THE PROJECT, THE MAJORITY OF GRANT FUNDS MUST BE SPENT ON MATERIALS OR EDUCATIONAL EXPERIENCES FOR STUDENTS. EDUCATORS ARE ELIGIBLE TO APPLY OR REAPPLY FOR GRANTS IN SUBSEQUENT APPLICATION PERIODS. FUNDS MAY NOT BE USED FOR LOBBYING OR RELIGIOUS PURPOSES. \$76,813 TOTAL GRANTS WERE AWARDED IN 2013.

ANONYMOUS TRUST U/A DATED 2-4-2008

26-6220561

FORM 990-PF

GRANT APPLICATION SUBMISSION INFORMATION
PART XV, LINES 2A THROUGH 2D

STATEMENT 14

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

MARGARET TURLINGTON, COORDINATOR
PO BOX 2087
CLINTON, NC 28329

TELEPHONE NUMBER

NAME OF GRANT PROGRAM

910-385-6716

THE SIMPLE GIFTS FUND SAMPSON COUNTY TEACHERS
FELLOWSHIP GRANT PROGRAM

FORM AND CONTENT OF APPLICATIONS

APPLICANTS COMMITTING TO A SIX WEEK FULL TIME SUMMER PROJECT MUST SUBMIT A PERSONAL INFORMATION FORM WITH A DESCRIPTION OF THE PROJECT, A BUDGET AND A COPY OF A VALID NORTH CAROLINA TEACHING LICENSE ACCOMPANIED BY A RECOMMENDATION LETTER.

ANY SUBMISSION DEADLINES

PUBLICIZED ON THE SIMPLE GIFTS WEBSITE AND FLYERS TO SAMPSON COUNTY AND CLINTON CITY SCHOOLS.

RESTRICTIONS AND LIMITATIONS ON AWARDS

THE ONE TIME GRANTS ARE FOR \$8,000 EACH AND WILL NOT BE RENEWED. THE GRANTS ARE BASED SOLELY ON MERIT AND THE PROPOSALS WILL BE JUDGED ON SUBSTANCE, CLARITY, FEASIBILITY AND RESEARCH. THE SELECTION COMMITTEE WILL REVIEW THE EXPECTED DIRECT AND INDIRECT BENEFITS OF THE GRANT PROPOSAL TO THE TEACHER, HIS OR HER STUDENTS AND THE SCHOOL SYSTEM. THE GRANTS ARE AVAILABLE TO TEACHERS, GUIDANCE COUNSELORS AND LIBRARY MEDIA SPECIALISTS THAT HAVE BEEN EMPLOYED BY SAMPSON COUNTY OR CLINTON CITY SCHOOLS FOR AT LEAST ONE YEAR. THE APPLICANT MUST BE NORTH CAROLINA CERTIFIED IN GRADES K-12 AND BE EMPLOYED FULLTIME. THE GRANTS WILL BE TAXABLE TO THE RECIPIENT AND WILL STATE THAT THE RECIPIENT WILL REPAY THE TRUST IF THE PROJECT CANNOT BE COMPLETED. GRANTS TOTALING \$31,500 WERE PAID IN 2013.

GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

IF RECIPIENT IS AN
INDIVIDUAL, SHOW
ANY RELATIONSHIP
TO ANY FOUNDATION
MANAGER OR
SUBSTANTIAL
CONTRIBUTOR

RECIPIENT NAME AND ADDRESS (HOME OR BUSINESS)	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
CLINTON CITY SCHOOLS 300 WESTOVER ROAD CLINTON, NC 28328	EDUCATIONAL INSTITUTION	COLLEGE STREET SCHOOL RENOVATION	200,000
TEACH FOR AMERICA 324 BLACKWELL STREET, BAY 11, STE 1160 DURHAM, NC 27701	EDUCATIONAL	TO FUND THE EXPANSION OF TEACH FOR AMERICA TO SOUTHEASTERN NC	503,000
THE MADEIRA SCHOOL 8328 GEORGETOWN PIKE MCLEAN, VA 22102	EDUCATIONAL	DORM MODERNIZATION CHALLENGE GRANT	6,725,464
THE HISTORIC PRESERVATION FOUNDATION OF NC, INC. 220 FAYETTEVILLE STREET, SUITE 200 RALEIGH, NC 27611	PUBLIC CHARITY	GENERAL OPERATING SUPPORT	5,000
HEARTS & HANDS FOR HAITI 2013 MIDWOOD DRIVE RALEIGH, NC 27604	PUBLIC CHARITY	GENERAL OPERATING SUPPORT	100,000
IPAS 300 MARKET STREET, SUITE 200 CHAPEL HILL, NC 27516	PUBLIC CHARITY	GENERAL OPERATING SUPPORT	5,000
INTERFAITH PRISON MINISTRY FOR WOMEN	PUBLIC	JOB START PROGRAM	35,000

GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

IF RECIPIENT IS AN
INDIVIDUAL, SHOW
ANY RELATIONSHIP
TO ANY FOUNDATION

RECIPIENT 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	JOB START PROGRAM	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
INTERFAITH PRISON MINISTRY FOR WOMEN 112 SOUTH SALISBURY STREET RALEIGH, NC 27601		NONE	PUBLIC CHARITY			35,000
SAMPSON COUNTY ARTS COUNCIL 709 COLLEGE STREET CLINTON, NC 28328		NONE	PUBLIC CHARITY	GENERAL OPERATING SUPPORT		25,000
ALLIANCE MEDICAL MINISTRY 101 DONALD ROSS DRIVE RALEIGH, NC 27610		NONE	PUBLIC CHARITY	FORGIVENESS OF LOAN FOR FUNDS USED TO PURCHASE LAND		500,000
TOTAL AWARDS, GRANTS AND GIFTS						8,098,464
LOVE OF LEARNING GRANTS: RICHARD O. WARREN, III 307 FAYETTEVILLE STREET NEWTON GROVE, NC 28366		NONE	INDIVIDUAL		FUNDING TO COVER STEM KITS FOR AFTERSCHOOL ROBOTICS PROGRAM	1,000
NORTH CAROLINA SYMPHONY 3700 GLENWOOD AVENUE, SUITE 130 RALEIGH, NORTH CAROLINA 27612		NONE	PUBLIC CHARITY		TO BRING THE NC SYMPHONY TO SAMPSON COUNTY SCHOOLS FOR EDUCATIONAL CONCERTS IN THE SPRING OF 2013	7,000

ANONYMOUS TRUST U/A DATED 2-4-2008
TAX YEAR: 2013

26-6220561
STATEMENT 15

GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

IF RECIPIENT IS AN
INDIVIDUAL, SHOW
ANY RELATIONSHIP
TO ANY FOUNDATION

RECIPIENT		FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
NAME AND ADDRESS (HOME OR BUSINESS)	MANAGER OR SUBSTANTIAL CONTRIBUTOR			
HOBBDON HIGH SCHOOL 12201 HOBBDON HIGHWAY NEWTON GROVE, NC 28366	NONE	EDUCATIONAL INSTITUTION	C.A.R.E. CREATING ACCESS TO RESOURCES IN EDUCATION, AN AFTERSCHOOL PROGRAM TO HELP STUDENTS BECOME AWARE OF THEIR ACADEMIC CAPABILITIES AND LEARNING SKILLS	2,272
HOBBDON HIGH SCHOOL 12201 HOBBDON HIGHWAY NEWTON GROVE, NC 28366	NONE	EDUCATIONAL INSTITUTION	BEYOND THESE WALLS: GRANT TO INTRODUCE JOURNALISM STUDENTS TO CAREERS IN THE PRINT AND BROADCAST FIELDS TRAVEL TO BALTIMORE, MD, GETTYSBURG AND HERSHEY, PA TO EXPOSE STUDENTS TO CAREERS THAT THEY MAY NOT BE AWARE OF FROM STUDIES IN SAMPSON COUNTY	3,600
HOBBDON HIGH SCHOOL 12201 HOBBDON HIGHWAY NEWTON GROVE, NC 28366	NONE	EDUCATIONAL INSTITUTION	FCCLA "DISCOVER YOUR VOICE" IN NASHVILLE!! FAMILY, CAREER AND COMMUNITY LEADERS OF AMERICA MEMBERS WILL TRAVEL TO NASHVILLE TO PARTICIPATE IN THE NATIONAL LEADERSHIP AND COMPETITION CONFERENCE	3,000
HOBBDON HIGH SCHOOL 12201 HOBBDON HIGHWAY NEWTON GROVE, NC 28366	NONE	EDUCATIONAL INSTITUTION	FUNDING TO COVER ADDITIONAL STEM KITS FOR WILDCAT ROBOTS II AFTERSCHOOL ROBOTICS PROGRAM	1,560

ANONYMOUS TRUST U/A DATED 2-4-2008
TAX YEAR 2013

26-6220561
STATEMENT 15

GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

IF RECIPIENT IS AN
INDIVIDUAL, SHOW
ANY RELATIONSHIP
TO ANY FOUNDATION

RECIPIENT NAME AND ADDRESS (HOME OR BUSINESS)	MANAGER OR SUBSTANTIAL CONTRIBUTOR	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
STEPHANIE R. GOETHIE 590 SOUTH MCCULLEN ROAD CLINTON, NC 28328	NONE	INDIVIDUAL	C.A R.E. PROJECT: STIPEND TO COVER ADDITIONAL EXPENSES FOR EDUCATORS	500
MONIQUE SMITH 160 ELDON THORNTON ROAD FAISON, NC 28341	NONE	INDIVIDUAL	C.A R.E. PROJECT: STIPEND TO COVER ADDITIONAL EXPENSES FOR EDUCATORS	500
KAREN TYLER 3707 ROANOKE ROAD NEWTON GROVE, NC 28366	NONE	INDIVIDUAL	FCCLA "DISCOVER YOUR VOICE" IN NASHVILLE!! STIPEND TO COVER ADDITIONAL EXPENSES FOR EDUCATORS	1,000
AMY SMITH JOHNSON 3000 HOLLY GROVE ROAD BENSON, NC 27504	NONE	INDIVIDUAL	FCCLA "DISCOVER YOUR VOICE" IN NASHVILLE!! STIPEND TO COVER ADDITIONAL EXPENSES FOR EDUCATORS	1,000
APRIL LYNNE LEWIS 306 PAGE STREET KENANSVILLE, NC 28349	NONE	INDIVIDUAL	WE'RE OFF TO D.C.. AND BEYOND: STIPEND TO COVER ADDITIONAL FOOD, METRO AND SNACK EXPENSES FOR STUDENTS	1,000
SAMPSON MIDDLE SCHOOL 1201 W. ELIZABETH STREET CLINTON, NC 28328	NONE	EDUCATIONAL INSTITUTION	WE'RE OFF TO D.C..AND BEYOND: ESL 8TH GRADE STUDENTS WILL TRAVEL TO DC ON A JOURNEY OF LEARNING-AN OPPORTUNITY TO CELEBRATE THE STORY OF THEIR CULTURE AND TO EMBRACE THE HISTORY OF THIS NATION	3,000

ANONYMOUS TRUST U/A DATED 2-4-2008
TAX YEAR 2013

26-6220561
STATEMENT 15

GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

IF RECIPIENT IS AN
INDIVIDUAL, SHOW
ANY RELATIONSHIP
TO ANY FOUNDATION

RECIPIENT NAME AND ADDRESS (HOME OR BUSINESS)	IF RECIPIENT IS AN INDIVIDUAL, SHOW ANY RELATIONSHIP TO ANY FOUNDATION	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
SAMPSON MIDDLE SCHOOL 1201 W. ELIZABETH STREET CLINTON, NC 28328	MANAGER OR SUBSTANTIAL CONTRIBUTOR	EDUCATIONAL INSTITUTION	PROFESSORS IN THE CLASSROOM: THREE PROFESSORS FROM UNC-PEMBROKE WILL VISIT WITH THE BAND STUDENTS FOR FIVE FULL DAYS THROUGHOUT THE SCHOOL YEAR. THE PROFESSORS WILL PROVIDE PERFORMANCES, INSTRUMENT INSTRUCTION AND SHARE THEIR EXPERTISE WITH BAND STUDENTS IN CLASSROOM AND SMALL GROUP SETTINGS	3,000
SAMPSON MIDDLE SCHOOL 1201 W. ELIZABETH STREET CLINTON, NC 28328	NONE	EDUCATIONAL INSTITUTION	SOUL SURFER: LESSONS OF LIFE: INTEGRATED UNITS OF MATH, LA AND SCIENCE THROUGH SOUL SURFER UNIT. UNIT WILL END WITH AN EDUCATIONAL CRUISE OF THE NC COAST.	2,710
HOBBS HIGH SCHOOL 12201 HOBBS HIGHWAY NEWTON GROVE, NC 28366	NONE	EDUCATIONAL INSTITUTION	EXPLORE THE WONDERFUL WORLD OF ART: GRANT TO HELP INTRODUCE ART STUDENTS TO IMPORTANCE OF ART IN THE REAL WORLD THROUGH TWO FIELD TRIPS IN THE FALL AND SPRING.	2,052
SAMPSON EARLY COLLEGE HIGH SCHOOL PO BOX 318 CLINTON, NC 28329	NONE	EDUCATIONAL INSTITUTION	LIVING HISTORY: EXPLORING THE USS NORTH CAROLINA IN AMERICAN HISTORY II: STUDENTS WILL EXPLORE THE US BATTLESHIP IN WILMINGTON, MEET WITH EXPERT DOCENTS AND HELP MAKE HISTORY COME ALIVE FOR THE STUDENTS	1,117

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GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

IF RECIPIENT IS AN
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RECIPIENT NAME AND ADDRESS (HOME OR BUSINESS)	MANAGER OR SUBSTANTIAL CONTRIBUTOR	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
SAMPSON EARLY COLLEGE HIGH SCHOOL PO BOX 318 CLINTON, NC 28329	NONE	EDUCATIONAL INSTITUTION	TAKE ME OUT TO THE BALL GAME, PLEASE. STUDENTS WILL ATTEND A MINOR LEAGUE BASEBALL GAME IN A MATH CURRICULUM PROGRAM	500
CLINTON HIGH SCHOOL 340 INDIAN TOWN ROAD CLINTON, NC 28328	NONE	EDUCATIONAL INSTITUTION	DRUMMING UP A STORM: GRANT TO SUPPORT THE ATLANTIC INDOOR ASSOCIATION OF BANDS WINTER PERCUSSION COMPETITION SEASON	3,000
CLINTON HIGH SCHOOL 340 INDIAN TOWN ROAD CLINTON, NC 28328	NONE	EDUCATIONAL INSTITUTION	COLLEGE POWER UP: A HANDS-ON SEMINAR FOR RISING SENIORS IN CLINTON CITY AND SAMPSON COUNTY SCHOOLS SHARING INFORMATION ON THE COLLEGE APPLICATION, FINANCIAL AID AND SCHOLARSHIP PROCESS. STUDENTS WILL MEET WITH SCHOLARSHIP PROVIDERS, COLLEGE ADMISSIONS OFFICERS, CFNC AND COLLEGE BOARD EXPERTS AND RECEIVE SAMPLE ESSAYS AND RESUMES.	2,000
HOBBS HIGH SCHOOL 12201 HOBBS HIGHWAY NEWTON GROVE, NC 28366	NONE	EDUCATIONAL INSTITUTION	FUTURE FARMERS OF AMERICA NATIONAL CONVENTION- GRANT TO HELP FFA STUDENTS ATTEND NATIONAL CONVENTION IN LOUISVILLE, KY. OPPORTUNITIES TO LEARN ABOUT CAREERS AND AGRIBUSINESSES FROM AROUND THE COUNTRY.	3,000

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SAMPSON MIDDLE SCHOOL 1201 W. ELIZABETH STREET CLINTON, NC 28328	NONE	EDUCATIONAL INSTITUTION	SOUL SURFER. LESSONS OF LIFE. INTEGRATED UNITS OF MATH, LA AND SCIENCE. UNIT WILL END WITH AN EDUCATIONAL CRUISE OF THE NORTH CAROLINA COAST	3,000
SAMPSON MIDDLE SCHOOL 1201 W. ELIZABETH STREET CLINTON, NC 28328	NONE	EDUCATIONAL INSTITUTION	ENCORE! GRANT SUBSIDIZING A TRIP FOR ALL 8TH GRADE STUDENTS TO FAYETTEVILLE TO SEE CHAMBER THEATRE PRODUCTIONS OF BOSTON FIVE CLASSIC SHORT STORIES	3,000
UNION INTERMEDIATE SCHOOL 1190 EDMOND MATHIS ROAD CLINTON, NC 28328	NONE	EDUCATIONAL INSTITUTION	FULL STEM AHEAD. GRANT TO START SCIENCE CLUB WITH 4TH AND 5TH GRADERS WITH DIFFERENT SCIENCE KITS	2,965
BUTLER AVENUE SCHOOL 301 WEST BUTLER AVENUE CLINTON, NC 28328	NONE	EDUCATIONAL INSTITUTION	LEARNING WITH LEGO STORY STARTER. THE SCHOOL IS USING THESE CURRICULUM KITS IN ENGLISH LANGUAGE ARTS TO ENCOURAGE STUDENT COLLABORATION, HIGHER ORDER THINKING SKILLS AND INTEGRATION OF TECHNOLOGY WITH READING, WRITING, SPEAKING AND LISTENING	2,779
CAREN MAYNARD LONG 467 BELVIN MAYNARD ROAD HARRELLS, NC 28444	NONE	INDIVIDUAL	FULL STEM AHEAD: STIPEND TO COVER EXPENSES FOR EDUCATOR'S TRAINING	1,000

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JULIE KINER GILLISPIE PO BOX 1168 ROSEBORO, NC 28382		NONE	INDIVIDUAL	LEARNING WITH LEGO STORY STARTER: STIPEND TO COVER EXPENSES FOR EDUCATOR'S TRAINING	500
JESSICA MARIE ROYAL 535 RENFROW ROAD CLINTON, NC 28328		NONE	INDIVIDUAL	LEARNING WITH LEGO STORY STARTER: STIPEND TO COVER EXPENSES FOR EDUCATOR'S TRAINING	500
NORTH CAROLINA SYMPHONY 3700 GLENWOOD AVENUE, SUITE 130 RALEIGH, NORTH CAROLINA 27612		NONE	PUBLIC CHARITY	BRING SYMPHONY TO SAMPSON COUNTY	7,000
CLINTON CITY SCHOOLS 300 WESTOVER ROAD CLINTON, NC 28328		NONE	EDUCATIONAL INSTITUTION	COLLEGE POWER UP: FUNDS TO PRESENT AT THE COLLEGE BOARD REGIONAL MEETING	500
SAMPSON COUNTY SCHOOLS 437 ROWAN ROAD CLINTON, NC 28329		NONE	EDUCATIONAL INSTITUTION	COLLEGE POWER UP: FUNDS TO PRESENT AT THE COLLEGE BOARD REGIONAL MEETING	500
TONI B. BLOUNT 110 FOREST DRIVE CLINTON, NC 28328		NONE	INDIVIDUAL	COLLEGE POWER UP: REGIONAL MEETING STIPEND	100
ROSEMARY J. SIMPSON PO BOX 1801 ROSEBORO, NC 28385		NONE	INDIVIDUAL	COLLEGE POWER UP: REGIONAL MEETING STIPEND	100

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BAMBI G. DOVE 102 SMITH'S MILL POND ROAD GARLAND, NC 28441	NONE	INDIVIDUAL	COLLEGE POWER UP: REGIONAL MEETING STIPEND	100
STEVEN L. MILLER 101 DORIS AVENUE CLINTON, NC 28328	NONE	INDIVIDUAL	COLLEGE POWER UP: REGIONAL MEETING STIPEND	100
ZULMA DANITZA MARIN CORTES 344 NATHAN DUDLEY ROAD CLINTON, NC 28328	NONE	INDIVIDUAL	SOUL SURFER: LESSONS OF LIFE: STIPEND TO COVER ADDITIONAL EXPENSES FOR EDUCATOR TO BUY MORE BOOKS AND SUPPLIES	500
RONALD LYNN MONTGOMERY, JR. 412 LAFAYETTE STREET CLINTON, NC 28325	NONE	INDIVIDUAL	SOUL SURFER: LESSONS OF LIFE: STIPEND TO COVER ADDITIONAL EXPENSES FOR EDUCATOR TO BUY MORE BOOKS AND SUPPLIES	500
SAMPSON EARLY COLLEGE HIGH SCHOOL PO BOX 318 CLINTON, NC 28329	NONE	EDUCATIONAL INSTITUTION	LIVING HISTORY: EXPLORING THE USS NC IN AMERICAN HISTORY II. STUDENTS WILL EXPLORE THE US BATTLESHIP IN WILMINGTON, MEET WITH EXPERT DOCENTS AND HELP MAKE HISTORY COME ALIVE FOR THE STUDENTS	1,678

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RECIPIENT	IF RECIPIENT IS AN INDIVIDUAL, SHOW ANY RELATIONSHIP TO ANY FOUNDATION	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
NAME AND ADDRESS (HOME OR BUSINESS)	MANAGER OR SUBSTANTIAL CONTRIBUTOR			
SAMPSON EARLY COLLEGE HIGH SCHOOL PO BOX 318 CLINTON, NC 28329	NONE	EDUCATIONAL INSTITUTION	BRINGING PAINTING TO THE COMMUNITY: A STUDIO EXPERIENCE FOR EARLY COLLEGE STUDENTS. STUDENTS WILL EXPLORE DIFFERENT PAINTING MEDIA. ULTIMATELY, THEY WILL SHARE THEIR LEARNING WITH THE COMMUNITY THROUGH A MURAL AND AN ART SHOW.	1,955
HOBBDON HIGH SCHOOL 12201 HOBBDON HIGHWAY NEWTON GROVE, NC 28366	NONE	EDUCATIONAL INSTITUTION	GROWING A FUTURE WITH STEM: GRANT TO HELP TSA STUDENTS ATTEND NC TSA CONVENTION IN GREENSBORO.	3,000
HOBBDON HIGH SCHOOL 12201 HOBBDON HIGHWAY NEWTON GROVE, NC 28366	NONE	EDUCATIONAL INSTITUTION	BEYOND THESE WALLS PROJECT II: STIPEND TO COVER INCIDENTALS FOR STUDENTS ON THE TRIP	3,000
MIDWAY MIDDLE SCHOOL 1115 ROBERT'S GROVE ROAD DUNN, NC 28334	NONE	EDUCATION INSTITUTION	6TH GRADE CAMP HALF BLOOD DAY. INTEGRATED UNITS AND ACTIVITY STUDY OF ANCIENT GREEKS CIVILIZATION UNIT WILL END WITH SPECIAL DAY. BASED ON RICK RIORDAN'S BOOK: THE LIGHTNING THIEF	725
CARLA B. SUTTON 226 W. GROVE STREET NEWTON GROVE, NC 28366	NONE	INDIVIDUAL	BEYOND THESE WALLS II STIPEND	500

TOTAL LOVE OF LEARNING GRANTS

76,813

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NAME AND ADDRESS (HOME OR BUSINESS)					
SIMPLE GIFTS SCHOLARSHIPS:					
COLLEGE YEAR IN ATHENS, INC PO BOX 390890 CAMBRIDGE, MA 02139-0010		NONE	INDIVIDUAL	SCHOLARSHIP FOR LAURA PATLAN	5,875
UNC-CHAPEL HILL 209 SOUTH ROAD CHAPEL HILL, NC 27599		NONE	INDIVIDUAL	SCHOLARSHIP FOR MARCY MCLAMB	1,000
FAYETTEVILLE STATE UNIVERSITY 1200 MURCHISON ROAD FAYETTEVILLE, NC 28301		NONE	INDIVIDUAL	SCHOLARSHIP FOR DEBORAH JACOBS	1,000
WESTERN CAROLINA UNIVERSITY 119 KILLIAN ANNEX CULLOWHEE, NC 28723		NONE	INDIVIDUAL	SCHOLARSHIP FOR CAITLYN JOYNER	1,000
LAURA PATLAN 2564 CARROLL A BRITT ROAD FAISON, NC 28341		NONE	INDIVIDUAL	TRAVEL AND LIVING EXPENSES FOR COLLEGE ABROAD TO COLLEGE YEAR IN ATHENS, INC.	4,198
AGNES SCOTT COLLEGE 141 E. COLLEGE AVE DECATUR, GA 30030		NONE	INDIVIDUAL	SCHOLARSHIP FOR CONNOR DAY	26,323
EMORY & HENRY COLLEGE PO BOX 947 EMORY, VA 24327		NONE	INDIVIDUAL	SCHOLARSHIP FOR KELLY JOHNSON	13,000

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WOFFORD COLLEGE 429 NORTH CHURCH STREET SPARTANBURG, SC 29303		NONE	INDIVIDUAL	SCHOLARSHIP FOR HARRISON BUTLER	16,500
WASHINGTON & LEE UNIVERSITY 204 WEST WASHINGTON STREET LEXINGTON, VA 24450		NONE	INDIVIDUAL	SCHOLARSHIP FOR WILLIAM FESTUS TURLINGTON, JR.	7,500
KENYON COLLEGE OFFICE OF FINANCIAL AID, STEPHENS HALL GAMBIER, OH 43022		NONE	INDIVIDUAL	SCHOLARSHIP FOR HUGH BROOKS BARWICK, III	3,500
AGNES SCOTT COLLEGE 141 E. COLLEGE AVE DECATUR, GA 30030		NONE	INDIVIDUAL	SCHOLARSHIP FOR MADISON BRYANT	23,678
NEW YORK UNIVERSITY 105 EAST 17TH STREET, 3RD FLOOR NEW YORK, NY 10003		NONE	INDIVIDUAL	SCHOLARSHIP FOR CASEY H YANG	17,000
BRIDGEWATER COLLEGE 402 EAST COLLEGE STREET BRIDGEWATER, VA 22812		NONE	INDIVIDUAL	SCHOLARSHIP FOR RYAN E. WUESTER	14,000
DOSHISHA WOMEN'S COLLEGE IMADEGAWA CAMPUS IMADEGAWA TERAMACHI, KAMIGYO-KU KYOTO 602-0893 JAPAN		NONE	INDIVIDUAL	SCHOLARSHIP FOR LAURA PATLAN	3,830

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SWEET BRIAR COLLEGE PO BOX 1052 SWEET BRIAR, VA 24595	NONE	INDIVIDUAL	SCHOLARSHIP FOR LAURA PATLAN	6,781
TOTAL SIMPLE GIFTS SCHOLARSHIPS				
TEACHER GRANTS:				
MEGAN ELIZABETH SCRONCE 4020 FIVE BRIDGE ROAD CLINTON, NC 28328	NONE	INDIVIDUAL	TEACHER GRANT	8,000
KENNETH L. EICHBERG .3441 ISAAC WEEKS ROAD CLINTON, NC 28328	NONE	INDIVIDUAL	TEACHER GRANT	7,500
SUSAN ELIZABETH KENNEDY 2714 NC 41 & 50 CHINQUAPIN, NC 28521	NONE	INDIVIDUAL	TEACHER GRANT	8,000
STEPHANIE R. GOETHIE 590 SOUTH MCCULLEN ROAD CLINTON, NC 28328	NONE	INDIVIDUAL	TEACHER GRANT	8,000
TOTAL TEACHER GRANTS				31,500
TOTAL QUALIFYING GRANTS AND CONTRIBUTIONS				8,351,962

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LINE		BEGINNING OF YEAR		END OF YEAR	
		(a) BOOK VALUE	(b) BOOK VALUE	(c) FAIR MARKET VALUE	
10a	INVESTMENTS- U S AND				
	STATE GOVERNMENT OBLIGATIONS				
	ADMINISTRATORS OF THE TULANE EDL FD LA REV 5 0%	-	450,000	429,750	
	ALBEMARLE NC HOSP AUTH HEALTH CARE	1,565,681	1,565,681	1,726,134	
	CALIFORNIA ST 3 75% DUE 10-01-2013	500,000	-	-	
	CHICAGO ILL BRD ED 4.882%	200,000	200,000	203,748	
	CHICAGO ILL BRD ED 5.082%	600,000	600,000	616,230	
	CORPUS CHRISTI TEX REGL TRANSN AUTH SYS REV 6.1%	-	772,500	760,530	
	DUNDEE TWP ILL PK DIST 6.0%	132,707	132,707	157,459	
	FLORIDA ST BRD GOVERNORS FLA INTL UNIV	100,000	100,000	103,196	
	FORT LAUDERDALE FL SPL OBLIG 5.143%	-	745,005	729,907	
	HAGERSTOWN MD 5 2%	253,815	253,815	273,447	
	ILLINOIS ST 5.727%	514,595	514,595	539,555	
	MONTGOMERY CNTY NC CTFS PARTN PUB FACS	205,000	-	-	
	MONTGOMERY CNTY NC CTFS PARTN PUB FACS	439,061	439,061	475,375	
	MONTGOMERY CNTY NC CTFS PARTN PUB FACS	434,839	434,839	471,940	
	NC CAPS FACS FIN AGY EDL FACSREV	494,845	494,845	521,875	
	NC CAPS FACS FIN AGY EDL FACSREV	197,860	197,860	216,408	
	NC CAPS FACS FIN AGY FIN AGY STUDENT	53,951	53,951	60,426	
	NC EASTN MUN PWR AGY PWR SYS REV SER	243,238	-	-	
	NC EASTN MUN PWR AGY PWR SYS REV SER	443,489	443,489	487,819	
	NC EASTN MUN PWR AGY PWR SYS REV SER	509,850	509,850	548,552	
	NC MED CARE COMMN HEALTH CARE EXTRAS	694,715	694,715	676,046	
	NC MED CARE COMMN HEALTH CARE FACS	898,556	-	-	
	NC MED CARE COMMN HEALTH CARE FACS	310,000	-	-	
	NC MED CARE COMMN HEALTH CARE FACS	95,350	95,350	101,945	
	NC MED CARE COMMN HEALTH CARE FACS	200,000	200,000	208,892	
	NC MED CARE COMMN HEALTH CARE FACS	493,420	493,420	500,895	
	NC MED CARE COMMN HEALTH CARE FACS	978,110	978,110	1,000,000	
	NC MED CARE COMMN HEALTH CARE FACS	1,515,723	1,515,723	1,601,556	
	NC MED CARE COMMN HEALTH CARE FACS	512,300	512,300	544,509	
	NC MED CARE COMMN HEALTH CARE FACS	3,340,721	3,340,721	3,402,034	
	NC MED CARE COMMN HEALTH CARE FACS	3,229,301	3,229,301	3,318,009	
	NC MED CARE COMMN HEALTH CARE FACS	1,444,824	1,444,824	1,603,530	
	NC MED CARE COMMN HEALTH CARE FACS	900,000	900,000	933,020	

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LINE		BEGINNING OF YEAR		END OF YEAR	
		(a) BOOK VALUE	(b) BOOK VALUE	(c) FAIR MARKET VALUE	
	NC MED CARE COMMN HEALTH CARE FIRST	221,894	221,894	244,882	
	NC MED CARE COMMN HEALTH CARE FIRST	197,000	197,000	206,558	
	NC MED CARE COMMN HEALTH CARE FIRST	131,078	131,078	148,767	
	NC MED CARE COMMN HEALTH CARE FIRST	527,456	527,456	578,665	
	NC MED CARE COMMN HEALTH CARE FIRST	504,935	503,605	524,140	
	NC MED CARE COMMN HEALTH CARE FIRST	211,466	211,466	229,507	
	NC MED CARE COMMN HEALTH CARE FIRST	338,500	338,500	449,205	
	NC MED CARE COMMN HEALTH CARE FIRST	448,490	448,490	455,135	
	NC MED CARE COMMN HEALTH CARE FIRST	963,390	963,390	1,032,020	
	NC MED CARE COMMN RETIREMENT FACS	174,276	-	-	
	NC MED CARE COMMN RETIREMENT FACS	100,000	-	-	
	NC MED CARE COMMN RETIREMENT FACS	200,000	-	-	
	NC MED CARE COMMN RETIREMENT FACS	184,236	184,236	199,836	
	NC MED CARE COMMN RETIREMENT FACS	500,000	500,000	502,120	
	NC MED CARE COMMN RETIREMENT FACS	426,644	426,644	470,534	
	NC MED CARE COMMN RETIREMENT FACS	394,272	394,272	459,933	
	NC MED CARE COMMN RETIREMENT FACS	1,006,965	1,006,965	1,451,025	
	NC MED CARE COMMN RETIREMENT FACS	2,999,912	2,999,912	3,417,070	
	NC MED CARE COMMN RETIREMENT FIRST	700,360	700,360	869,103	
	NC MED CARE COMMN RETIREMENT FIRST	1,070,454	1,070,454	1,105,071	
	NC MED CARE COMMN RETIREMENT FIRST	453,000	453,000	600,396	
	NC MED CARE COMMN RETIREMENT FIRST	350,000	350,000	486,660	
	NC MED CARE COMMN RETIREMENT FIRST	2,126,396	2,126,396	2,445,090	
	NC MED CARE COMMN RETIREMENT FIRST	1,969,124	1,969,124	2,156,655	
	PEORIA CNTY ILL SCH DIST NO 150 5.35%	250,000	250,000	256,610	
	PEORIA CNTY ILL SCH DIST NO 150 5.45%	160,000	160,000	164,314	
	RALEIGH DURHAM NC ARPT AUTH ARPT REV	509,170	509,170	497,516	
	UNIVERSITY NC CHAPEL HILL REV 5.75%	509,780	509,780	518,640	
	UNIVERSITY NC CHARLOTTE REV TAXABLE	500,000	500,000	534,300	
	TOTAL LINE 10a (OTHER GOVERNMENT)	39,630,749	38,965,854	42,216,539	

END OF YEAR

SHARES HELD

10b

INVESTMENTS-CORPORATE STOCK

ABBOTT LABORATORIES

35,200

ANADARKO PETE CORPORATION

15,400

APPLE INCORPORATED

2,875

1,167,294

1,349,216

1,201,147

1,221,528

1,408,251

1,612,932

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LINE		BEGINNING OF YEAR		END OF YEAR	
		(a) BOOK VALUE	(b) BOOK VALUE	(c) FAIR MARKET VALUE	
21,200	CARDINAL HEALTH, INC	89,300	903,912	1,416,372	
15,050	CATEPILLAR INC DEL	103,380	1,396,527	1,366,690	
11,000	CHEVRON CORPORATION	148,650	1,242,174	1,374,010	
32,800	COCA-COLA COMPANY	82,579	1,232,344	1,354,968	
10,000	COSTCO WHOLESALE CORPORATION	-	1,019,321	1,190,200	
14,700	DEERE & COMPANY	85,219	1,310,903	1,342,551	
7,380	DISCOVER FINL SVCS COM	11,311	11,311	412,911	
23,500	DOLLAR GENERAL CORP	135,423	1,049,577	1,417,520	
194	EXPRESS SCRIPTS HLDG CO	982	982	13,627	
13,950	EXXON MOBIL CORPORATION	88,440	1,239,488	1,411,740	
75,516	FIRST CITIZENS BANCSHARES INC NC CL A	260,292	260,292	16,812,127	
40,000	FREEMPORT-MCMORAN COPPER & GOLD	-	1,296,700	1,509,600	
19,262	GENERAL ELECTRIC CO	163,679	163,679	539,914	
6,800	INTL BUSINESS MACHINES CORP	95,755	1,338,678	1,275,476	
5,000	JPMORGAN CHASE & COMPANY	-	264,528	292,400	
13,400	JOHNSON & JOHNSON	84,432	966,686	1,227,306	
11,000	KANSAS CITY SOUTHERN COM NEW	77,509	992,635	1,362,130	
23,600	KRAFT FOODS GROUP, INC	49,068	1,124,675	1,272,276	
288,500	LINCOLN NATIONAL CORP	50,228	12,516	14,892,370	
12,000	MCDONALDS CORP	105,264	1,099,845	1,164,360	
2,312	MERCK & CO INC NEW	64,324	64,324	115,716	
58,990	MFC ISHARES TR SELECT DIVID ETF FD	3,436,035	3,436,035	4,208,937	
63,453	MFC ISHARES TR MSCI EAFE ETF FD	3,428,958	3,428,958	4,255,158	
41,233	MFC ISHARES TR MSCI EMERGING MKTS INDEX FD ETF	1,721,698	1,721,698	1,722,302	
41,258	MFC ISHARES TR RUSSELL 2000 ETF FD	3,425,046	3,425,046	4,757,460	
37,972	MFC SPDR S&P MIDCAP 400 ETF TR UNIT SER	6,830,238	6,830,238	9,272,762	
20,000	MICROSOFT CORPORATION	66,145	-	-	
14,760	MORGAN STANLEY COM	57,276	57,276	462,874	
22,000	MOTOROLA SOLUTIONS, INC	109,363	1,253,029	1,485,000	
17,200	NORFOLK SOUTHERN CORP	60,390	1,146,754	1,596,676	
5,000	NUCOR CORP	163,786	163,786	266,900	
44,200	PFIZER INC	51,080	1,172,031	1,353,846	
100	PRINCIPAL FINL GROUP INC	-	-	4,931	
15,000	PROCTER & GAMBLE CO	70,370	1,085,349	1,221,150	
10,000	SOUTHERN COMPANY	-	444,516	411,100	
106,944	SPDR S&P 500 ETF TRUST	15,453,876	15,453,876	19,749,348	

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LINE		BEGINNING OF YEAR		END OF YEAR	
		(a) BOOK VALUE	(b) BOOK VALUE	(c) FAIR MARKET VALUE	
19,800	UNITED PARCEL SVC INC CL B	383,320	1,471,599	2,080,584	
20,700	VERIZON COMMUNICATIONS INC	106,308	907,630	1,017,198	
6,900	VISA, INC COM CLASS A	74,029	1,088,408	1,536,492	
9	YADKIN VY CO COM NEW	506	506	35,145	
TOTAL LINE 10b		37,500,889	63,854,524	111,385,803	

10c

INVESTMENTS-CORPORATE BONDS	
AETNA INC 6.5%	138,431
ALCOA INC 5.72%	490,230
ALCOA INC 6.0%	200,000
ALCOA INC 6.75%	247,500
AMERICAN EXPRESS CR CORP MEDIUM TERM 5.5%	199,442
AMERICAN EXPRESS CR CORP MEDIUM TERM 5.875%	501,250
AUTOZONE INC 5.75%	108,460
BANK AMER CORP SR INTERNOTES 6.0%	500,000
BARCLAYS BK PLC MEDIUM TERM NTS 5%	250,000
BB&T CORP SR MEDIUM TERM NTS 3.375%	505,000
BOTTLING GROUP LLC 5.5%	401,839
CITIGROUP INC MEDIUM TERM SR NTS VAR RT	250,000
COMCAST CORP NEW 5.9%	313,985
COMCAST CORP NEW 6.5%	112,995
DAIMLERCHRYSLER NORTH AMER HLDG CORP 6.5%	604,269
DEERE JOHN CAP CORP CORENOTES 3.25%	250,000
DEERE JOHN CAP CORP CORENOTES 5.25%	400,000
DOW CHEMICAL CO 7.6%	186,842
FORD MTR CR CO LLC MEDIUM TERM NTS 3.0%	250,000
FORD MTR CR CO LLC NT 7.0%	537,165
GENERAL ELEC CAP CORP INTERNOTES 5.0%	500,000
GENERAL ELEC CAP CORP INTERNOTES 5.3%	500,000
GEORGIA PWR CO 4.25%	503,250
GOLDMAN SACHS GROUP INC MEDIUM TERM 5.4%	500,000
GOLDMAN SACHS GROUP INC NT VAR RT	250,000
GOLDMAN SACHS GROUP INC VAR RT	250,000
HSBC FIN CORP INTERNOTES 4.35%	250,000
JOHNSON CONTROLS INC 5.5%	178,581

147,242	138,431	147,242
532,725	490,230	532,725
-	-	-
281,705	247,500	281,705
-	-	-
-	-	-
105,047	108,460	105,047
555,540	500,000	555,540
236,085	250,000	236,085
-	-	-
396,585	401,839	396,585
249,015	250,000	249,015
313,646	313,985	313,646
106,032	112,995	106,032
-	-	-
259,090	250,000	259,090
422,004	400,000	422,004
-	-	-
-	-	-
545,740	500,000	545,740
527,420	500,000	527,420
543,892	503,250	543,892
525,615	500,000	525,615
250,070	250,000	250,070
249,432	250,000	249,432
254,988	250,000	254,988
179,228	178,581	179,228

ANONYMOUS TRUST U/A DATED 2-4-2008
BALANCE SHEET ATTACHMENTS
TAX YEAR: 2013

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LINE		BEGINNING OF YEAR		END OF YEAR	
		(a) BOOK VALUE	(b) BOOK VALUE	(c) FAIR MARKET VALUE	
	KROGER CO 7.5%	115,981	115,981	100,228	
	LABORATORY CORP AMER HLDGS 5.625%	84,999	84,999	103,147	
	MERRILL LYNCH & CO INC 6.05%	500,000	500,000	550,112	
	MONDELEZ INTERNATIONAL INC 6.5%	165,420	165,420	174,295	
	MORGAN STANLEY 4.75%	127,824	127,824	125,994	
	PROTECTIVE LIFE CORP 7.375%	513,325	513,325	609,794	
	RYDER SYS INC MEDIUM TERM NTS 5.85%	93,470	93,470	110,780	
	SHELL INTL FIN B V 4.3%	505,000	505,000	548,059	
	SUNOCO INC NT 5.75%	236,175	236,175	271,787	
	TIME WARNER CABLE INC 7.5%	233,130	233,130	203,320	
	UNITED TECHNOLOGIES CORP 4.5%	266,313	266,313	282,860	
	VIACOM INC NEW 6.125%	109,742	109,742	113,158	
	WELLS FARGO & CO MEDIUM TERM NTS VAR RT	250,000	250,000	234,037	
	WELLS FARGO & CO MEDIUM TERM NTS VAR RT	-	500,000	489,415	
	WILMINGTON TR CORP SUB NT 4.875%	622,599	-	-	
	XEROX CORP 6.4%	95,556	95,556	110,529	
TOTAL LINE 10c		13,298,773	10,192,206	10,708,616	
13 INVESTMENTS-OTHER					
	AFFILIATED MANAGERS GROUP INC SR NT	20,000			
	AMERICAN FINL GROUP INC OHIO SR NT	20,000			
	COMMONWEALTH REIT SR NT	20,000			
	ENTERGY LA LLC IST MTG BD 6%	20,000			
	GOLDMAN SACHS GROUP INC NT	20,000			
	KKR FINL HLDGS LLC 8.375%	20,000			
	LLOYDS BKG GROUP PLC	20,000			
	PROTECTIVE LIFE CORP SUB DEB	20,000			
	QWEST CORP NT	20,000			
	RAYMOND JAMES FINL INC SR NT	20,000			
	TELEPHONE & DATA SYS INC PFD	20,000			
	UNITED STATES CELLULAR CORP SR NT	20,000			
TOTAL LINE 13		6,524,521	6,524,521	5,536,600	