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Form **990-PF**

Department of the Treasury
Internal Revenue Service

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

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

OMB No 1545-0052

2013

Open to Public Inspection

For calendar year 2013, or tax year beginning 01-01-2013, and ending 12-31-2013

Name of foundation MCKEE GROUP FOUNDATION		A Employer identification number 27-4528533
Number and street (or P O box number if mail is not delivered to street address) Room/suite 19124 PENINSULA POINT DR		B Telephone number (see instructions)
City or town, state or province, country, and ZIP or foreign postal code CORNELIUS, NC 28031		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) ▶ \$ 184,862	J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ (Part I, column (d) must be on cash basis.)	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <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)				
	2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	32	32	32	
	4 Dividends and interest from securities	10,351	10,351	10,351	
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	16,987			
	b Gross sales price for all assets on line 6a 129,492				
	7 Capital gain net income (from Part IV, line 2)		925		
	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) (attach schedule)					
11 Other income (attach schedule)	66	145	66		
12 Total. Add lines 1 through 11	27,436	11,453	10,449		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc				
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)				
	c Other professional fees (attach schedule)	1,804	1,804	1,804	
	17 Interest				
	18 Taxes (attach schedule) (see instructions)				
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
22 Printing and publications					
23 Other expenses (attach schedule)	5,985	5,985	5,985		
24 Total operating and administrative expenses.					
Add lines 13 through 23	7,789	7,789	7,789	0	
25 Contributions, gifts, grants paid	20,000			20,000	
26 Total expenses and disbursements. Add lines 24 and 25	27,789	7,789	7,789	20,000	
27 Subtract line 26 from line 12					
a Excess of revenue over expenses and disbursements	-353				
b Net investment income (if negative, enter -0-)		3,664			
c Adjusted net income (if negative, enter -0-)			2,660		

Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)

Part II Balance Sheets		Beginning of year		End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value	
Assets	1 Cash—non-interest-bearing		77	77	
	2 Savings and temporary cash investments	6,794	5,205	5,205	
	3 Accounts receivable ▶ _____ Less allowance for doubtful accounts ▶ _____				
	4 Pledges receivable ▶ _____ Less allowance for doubtful accounts ▶ _____				
	5 Grants receivable				
	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)				
	7 Other notes and loans receivable (attach schedule) ▶ _____ Less allowance for doubtful accounts ▶ _____				
	8 Inventories for sale or use				
	9 Prepaid expenses and deferred charges				
	10a Investments—U S and state government obligations (attach schedule)				
	b Investments—corporate stock (attach schedule)	52,791 <input checked="" type="checkbox"/>	34,186	47,832	
	c Investments—corporate bonds (attach schedule).	99,513 <input checked="" type="checkbox"/>	124,398	131,748	
	11 Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____				
	12 Investments—mortgage loans				
	13 Investments—other (attach schedule)	5,121			
	14 Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____				
15 Other assets (describe ▶ _____)					
16 Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	164,219	163,866	184,862		
Liabilities	17 Accounts payable and accrued expenses				
	18 Grants payable				
	19 Deferred revenue				
	20 Loans from officers, directors, trustees, and other disqualified persons				
	21 Mortgages and other notes payable (attach schedule)				
	22 Other liabilities (describe ▶ _____)				
23 Total liabilities (add lines 17 through 22)		0			
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here <input checked="" type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.				
	24 Unrestricted	164,219	163,866		
	25 Temporarily restricted				
	26 Permanently restricted				
	Foundations that do not follow SFAS 117, check here <input type="checkbox"/> and complete lines 27 through 31.				
	27 Capital stock, trust principal, or current funds				
	28 Paid-in or capital surplus, or land, bldg, and equipment fund				
	29 Retained earnings, accumulated income, endowment, or other funds				
30 Total net assets or fund balances (see page 17 of the instructions)	164,219	163,866			
31 Total liabilities and net assets/fund balances (see page 17 of the instructions)	164,219	163,866			

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	164,219
2	Enter amount from Part I, line 27a	2	-353
3	Other increases not included in line 2 (itemize) ▶ _____	3	
4	Add lines 1, 2, and 3	4	163,866
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	163,866

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			

(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			
b			
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(j) FMV as of 12/31/69	(k) Adjusted basis as of 12/31/69	(l) Excess of col (i) over col (j), if any	
a			
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	925
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6)		3	
If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8			

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

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

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

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

1 Enter the appropriate amount in each column for each year, see page 18 of the instructions before making any entries

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2012	10,000	15,391	0.649730
2011			
2010			
2009			
2008			

2 Total of line 1, column (d).	2	0.649730
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	0.649730
4 Enter the net value of noncharitable-use assets for 2013 from Part X, line 5.	4	15,174
5 Multiply line 4 by line 3.	5	9,859
6 Enter 1% of net investment income (1% of Part I, line 27b).	6	37
7 Add lines 5 and 6.	7	9,896
8 Enter qualifying distributions from Part XII, line 4.	8	20,000

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 page 18 of the instructions)

Table with 11 rows for excise tax calculations. Includes categories like Exempt operating foundations, Domestic foundations, Tax under section 511, and Tax due. Total amount owed is 37.

Part VII-A Statements Regarding Activities

Table with 10 rows for activity statements. Includes questions about influencing legislation, political purposes, Form 1120-POL, political expenditures, and substantial contributors. Includes Yes/No columns.

Part VII-A Statements Regarding Activities (continued)

11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions).	11		No
12 Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		No
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address N/A	13	Yes	
14 The books are in care of CHRISTOPHER MCKEE Telephone no (704) 907-1301 Located at 19124 PENINSULA POINT DR CORNELIUS NC ZIP +4 28031			
15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here <input type="checkbox"/> and enter the amount of tax-exempt interest received or accrued during the year 15			
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 instructions for exceptions and filing requirements for Form TD F 90-22.1 If "Yes", enter the name of the foreign country N/A	16	Yes	No

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 page 20 of the instructions)? <input type="checkbox"/> Organizations relying on a current notice regarding disaster assistance check here. <input type="checkbox"/>	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			
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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years 20__ , 20__ , 20__ , 20__				
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions).	2b			
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here 20__ , 20__ , 20__ , 20__				
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <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? (<i>Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2013.</i>)	3b			
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a			No
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2013?	4b			No

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

<p>5a During the year did the foundation pay or incur any amount to</p> <p>(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>(3) Provide a grant to an individual for travel, study, or other similar purposes? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>(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). <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>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)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No Organizations relying on a current notice regarding disaster assistance check here. <input type="checkbox"/></p> <p>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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," attach the statement required by Regulations section 53.4945–5(d).</p> <p>6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes" to 6b, file Form 8870.</p> <p>7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>b If yes, did the foundation receive any proceeds or have any net income attributable to the transaction? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p>			
5b			
6b		No	
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
CHRISTOPHER MCKEE 19124 PENINSULA POINT DR CORNELIUS, NC 28031	DIRECTOR 1 00	0	0	0
TRACEY MCKEE 19124 PENINSULA POINT RD CORNELIUS, NC 28031	DIRECTOR 0 00	0	0	0
DARLA DAVIS 21624 SCOTTCREST CIRCLE CORNELIUS, NC 28031	DIRECTOR 0 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.

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 ADA JENKINS CENTER	10,000
2 DAVIDSON UNITED METHODIST CHURCH	10,000
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 page 24 of the 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	14,965
b	Average of monthly cash balances.	1b	440
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	15,405
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	
2	Acquisition indebtedness applicable to line 1 assets.	2	
3	Subtract line 2 from line 1d.	3	15,405
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	231
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	15,174
6	Minimum investment return. Enter 5% of line 5.	6	759

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	759
2a	Tax on investment income for 2013 from Part VI, line 5.	2a	37
b	Income tax for 2013 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	37
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	722
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	722
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	722

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	20,000
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	20,000
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	37
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	19,963

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				722
2 Undistributed income, if any, as of the end of 2013				
a Enter amount for 2012 only.				
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. 9,381				
f Total of lines 3a through e.	9,381			
4 Qualifying distributions for 2013 from Part XII, line 4 ▶ \$ 20,000				
a Applied to 2012, but not more than line 2a				
b Applied to undistributed income of prior years (Election required—see instructions).				
c Treated as distributions out of corpus (Election required—see instructions).				
d Applied to 2013 distributable amount.				722
e Remaining amount distributed out of corpus	19,278			
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	28,659			
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				
f Undistributed income for 2013 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2014				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions).				
8 Excess distributions carryover from 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.	28,659			
10 Analysis of line 9				
a Excess from 2009.				
b Excess from 2010.				
c Excess from 2011.				
d Excess from 2012. 9,381				
e Excess from 2013. 19,278				

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 organization 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 organization had \$5,000 or more in assets at any time during the year—see instructions.)

1 Information Regarding Foundation Managers:

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

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

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

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

- a** The name, address, and telephone number or e-mail address of the person to whom applications should be addressed
CHRISTOPHER MCKEE
19124 PENINSULA POINT DR
CORNELIUS, NC 28031
(704) 907-1301

- b** The form in which applications should be submitted and information and materials they should include
NONE

- c** Any submission deadlines
NONE

- d** Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors
NONE

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 <i>Paid during the year</i> ADA JENKINS CENTER PO BOX 1842 DAVIDSON, NC 28036			PROVIDE ASSISTANCE	10,000
DAVIDSON UNITED METHODIST CHURCH PO BOX 718 DAVIDSON, NC 28036			PROVIDE ASSISTANCE	10,000
Total				20,000
b <i>Approved for future payment</i>				
Total				3b

TY 2013 Compensation Explanation

Name: MCKEE GROUP FOUNDATION

EIN: 27-4528533

Person Name	Explanation
CHRISTOPHER MCKEE	
TRACEY MCKEE	
DARLA DAVIS	

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

TY 2013 Gain/Loss from Sale of Other Assets Schedule

Name: MCKEE GROUP FOUNDATION

EIN: 27-4528533

Name	Date Acquired	How Acquired	Date Sold	Purchaser Name	Gross Sales Price	Basis	Basis Method	Sales Expenses	Total (net)	Accumulated Depreciation
SEE ATTACHED - LPL - LONG TERM	2012-03	PURCHASE	2013-09		59,167	48,399			10,768	
SEE ATTACHED - LPL - SHORT TERM	2013-03	PURCHASE	2013-09		69,400	64,106			5,294	

**TY 2013 Investments Corporate
Bonds Schedule**

Name: MCKEE GROUP FOUNDATION

EIN: 27-4528533

Name of Bond	End of Year Book Value	End of Year Fair Market Value
MUTUAL FUNDS	124,398	131,748

**TY 2013 Investments Corporate
Stock Schedule****Name:** MCKEE GROUP FOUNDATION**EIN:** 27-4528533

Name of Stock	End of Year Book Value	End of Year Fair Market Value
COMMON STOCK	27,499	39,622
OTHER SECURITIES	6,687	8,210

TY 2013 Investments - Other Schedule

Name: MCKEE GROUP FOUNDATION

EIN: 27-4528533

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
TEEKAY LNG PARTNERS LP	AT COST		
RENTECH NITROGEN PARTNERS LP	AT COST		

TY 2013 Other Expenses Schedule

Name: MCKEE GROUP FOUNDATION

EIN: 27-4528533

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
EXPENSES				
MISC EXPENSE	5,985	5,985	5,985	

TY 2013 Other Income Schedule**Name:** MCKEE GROUP FOUNDATION**EIN:** 27-4528533

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
TEEKAY LNG PARTNERS LP	34	34	34
KKR & CO LP	31	31	31
BLACKSTONE GROUP LP	80	80	80
TEEKAY LNG PARTNERS, LP	1		1
RENTECH NITROGEN PARTNERS LP	-90		-90
KKR & CO LP	-5		-5
BLACKSTONE GROUP	15		15

TY 2013 Other Professional Fees Schedule

Name: MCKEE GROUP FOUNDATION

EIN: 27-4528533

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT ADVISORY FEES	1,804	1,804	1,804	

Account Detail as of December 31, 2013

YEAR-TO-DATE LONG-TERM REALIZED GAIN/LOSS

Closing Date	Transaction Type	Description/SecurityID	Date Acquired	Quantity	Acquisition Price	Cost Basis	Sale Price	Proceeds	Gain or Loss
09/04/13	Sell	ALLIANCBERNSTEIN HIGH INCOME CL A AGDAX	03/26/12	-826.18	\$9.04	\$7,468.66	\$9.30	\$7,683.47	\$214.81

YEAR-TO-DATE LONG-TERM REALIZED GAIN/LOSS continue on page 18



Account Detail as of December 31, 2013

YEAR-TO-DATE LONG-TERM REALIZED GAIN/LOSS (continued)

Closing Date	Transaction Type	Description/SecurityID	Date Acquired	Quantity	Acquisition Price	Cost Basis	Sale Price	Proceeds	Gain or Loss
04/22/13	Sell	AVON PRODUCTS INC AVP	01/20/12	-185	18 50	3,421 58	21 85	4,042 15	620 57
08/22/13	Sell	CONOCOPHILLIPS COP	01/09/12	-42	56 21	2,360 99	66 27	2,783 29	422 30
05/28/13	Sell	DAIMLER AG REG SHS DDAIF	01/09/12	-67	47 07	3,153 69	62 71	4,201 49	1,047 80
04/22/13	Sell	GENERAL ELECTRIC COMPANY GE	01/09/12	-100	18 84	1,883 99	21 24	2,123 95	239 96
04/22/13	Sell		01/09/12	-66	18 84	1,243 43	21 24	1,401 93	158 50
	Total			-166		3,127.42		3,525.88	398.46
11/20/13	Sell	NUVEEN PREFERRED SECS CL A NPSAX	07/12/12	-487 508	16 41	8,000 00	17 16	8,365 63	365 63
04/03/13	Sell	PHILLIPS 66 PSX	01/09/12	-21	33 41	701 65	62 13	1,304 69	603 04
02/07/13	Sell	RENTECH NITROGEN PARTNERS LTD PARTNERSHIP RNF	11/07/11	-70	20 16	1,411 20	47 02	3,291 32	1,880 12
02/07/13	Sell	SEAGATE TECHNOLOGY PLC STX	10/04/11	-47	9 55	448 78	34 48	1,620 52	1,171 74
09/04/13	Sell		10/04/11	-60	9 55	572 91	39 20	2,351 95	1,779 04
	Total			-107		1,021.69		3,972.47	2,950.78
09/04/13	Sell	SOUTHERN COPPER CORP DEL SCCO	10/04/11	-102	23 65	2,317 13	27 34	2,788 63	471 50
09/04/13	Sell	TCW EMERGING MARKETS INCOME CL N TGINX	10/04/11	-487 31	9 85	4,798 65	10 53	5,131 37	332 72

YEAR-TO-DATE LONG-TERM REALIZED GAIN/LOSS continue on page 19

Account Detail as of December 31, 2013

YEAR-TO-DATE LONG-TERM REALIZED GAIN/LOSS (continued)

Closing Date	Transaction Type	Description/SecurityID	Date Acquired	Quantity	Acquisition Price	Cost Basis	Sale Price	Proceeds	Gain or Loss
09/04/13	Sell	TCW EMERGING (continued)	01/09/12	-535 07	10 63	5,687 79	10 53	5,634 29	-53 50
Total				-1,022.38		10,486.44		10,765.66	279.22
02/12/13	Sell	TEEKAY LNG PARTNERS LIMITED PARTNERSHIP UNIT TGP	10/04/11	-81	30 17	2,443 77	40 99	3,320 12	876 35
08/22/13	Sell	TOTAL S A SPONSORED ADR TOT	10/04/11	-57	43 59	2,484 63	54 77	3,121 83	637 20
TOTAL YEAR-TO-DATE LONG-TERM REALIZED GAIN/LOSS						\$48,398.85		\$59,166.63	\$10,767.78

YEAR-TO-DATE SHORT-TERM REALIZED GAIN/LOSS

Closing Date	Transaction Type	Description/SecurityID	Date Acquired	Quantity	Acquisition Price	Cost Basis	Sale Price	Proceeds	Gain or Loss
09/04/13	Sell	ALLIANCEBERNSTEIN HIGH INCOME CL A AGDAX	03/13/13	-165 803	\$9 65	\$1,600 00	\$9 30	\$1,541 97	-\$58 03
04/22/13	Sell	AVON PRODUCTS INC AVP	05/22/12	-65	16 76	1,089 40	21 85	1,420 21	330 81
04/22/13	Sell		01/02/13	-100	14 60	1,460 00	21 85	2,184 96	724 96
Total				-165		2,549.40		3,605.17	1,055.77
12/18/13	Sell	CAPSTEAD MTG CORP NEW REIT CMO	03/13/13	-200	12 75	2,550 00	12 14	2,426 95	-123 05
12/18/13	Sell		03/13/13	-100	12 75	1,274 99	12 14	1,213 48	-61 51
Total				-300		3,824.99		3,640.43	-184.56
02/20/13	Sell	CLIFFS NATURAL RES INC CLF	11/28/12	-120	29 45	3,534 12	27 09	3,250 84	-283 28

YEAR-TO-DATE SHORT-TERM REALIZED GAIN/LOSS continue on page 20



Account Detail as of December 31, 2013

YEAR-TO-DATE SHORT-TERM REALIZED GAIN/LOSS (continued)

Closing Date	Transaction Type	Description/SecurityID	Date Acquired	Quantity	Acquisition Price	Cost Basis	Sale Price	Proceeds	Gain or Loss
04/03/13	Sell	ETABLISSEMENTS DELHAIZE FRERES ET CIE LE LION SA SPONS ADR DEG	07/25/12	-100	32 88	3,287 99	52 72	5,271 89	1,983 90
02/20/13	Sell	GOLD FIELDS LTD NEW SPONSORED ADR GFI	07/25/12	-250	12 42	3,104 98	10 36	2,589 96	-5 15 02
02/20/13	Sell		02/04/13	-100	11 96	1,196 00	10 36	1,035 97	-160 03
02/20/13	Sell		02/04/13	-50	11 96	598 00	10 36	518 00	-80 00
	Total			-400		4,898.98		4,143.93	-755.05
02/07/13	Sell	GOLDMAN SACHS EMERGING MARKETS DEBT CL A GSDAX	07/16/12	-594 796	13 45	8,000 00	13 49	8,023 80	23 80
08/22/13	Sell	HATTERAS FINANCIAL CORP REIT HTS	04/22/13	-138	27 62	3,811 28	17 68	2,440 07	-1,371 21
08/22/13	Sell	MAINSTAY HIGH YIELD OPPORTUNITIES CL A MYHAX	02/07/13	-167 785	12 21	2,048 66	11 92	2,000 00	-48 66
05/28/13	Sell	NAVIOS MARITIME HLDGS INC NM	02/07/13	-200	3 75	749 60	5 61	1,121 98	372 38
05/28/13	Sell		02/07/13	-800	3 75	2,998 40	5 60	4,482 92	1,484 52
	Total			-1,000		3,748.00		5,604.90	1,856.90
11/20/13	Sell	NUVEEN PREFERRED SECS CL A NPSAX	03/13/13	-50 619	17 78	900 00	17 16	868 63	-31 37

YEAR-TO-DATE SHORT-TERM REALIZED GAIN/LOSS continue on page 21

Account Detail as of December 31, 2013

YEAR-TO-DATE SHORT-TERM REALIZED GAIN/LOSS (continued)

Closing Date	Transaction Type	Description/SecurityID	Date Acquired	Quantity	Acquisition Price	Cost Basis	Sale Price	Proceeds	Gain or Loss
04/23/13	Sell	NUVEEN HIGH YIELD MUNICIPAL BOND CL A NHMAX	05/22/12	-549 115	16 39	9,000 00	17 36	9,532 64	532 64
04/03/13	Sell	PHILLIPS 66 PSX	06/19/12	-70	34 26	2,398 19	62 13	4,349 01	1,950 82
09/04/13	Sell	PIMCO SMALL CAP STOCKPLUS AR CL A PCKAX	11/28/12	-443 036	8 01	3,548 72	9 32	4,129 10	580 38
09/04/13	Sell	SASOL LIMITED SPONSORED ADR SSL	02/12/13	-100	45 00	4,500 00	47 08	4,707 92	207 92
09/04/13	Sell	SOUTHERN COPPER CORP DEL SCCO	05/23/13	-23	31 67	728 41	27 34	628 81	-99 60
02/07/13	Sell	STMICROELECTRONICS N V NY REGISTRY STM	02/09/12	-150	6 87	1,030 49	8 36	1,253 97	223 48
12/18/13	Sell	TELEFONICA BRASIL SA SPONSORED ADR VIV	09/04/13	-174	20 44	3,556 54	18 09	3,147 62	-408 92
08/22/13	Sell	TOTAL S A SPONSORED ADR TOT	11/28/12	-23	49 58	1,140 34	54 77	1,259 69	119 35
TOTAL YEAR-TO-DATE SHORT-TERM REALIZED GAIN/LOSS						\$64,106.11		\$69,400.39	\$5,294.28
						Cost Basis		Proceeds	Gain or Loss
TOTAL YEAR-TO-DATE REALIZED GAIN/LOSS						\$112,504.96		\$128,567.02	\$16,062.06

