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Form **990-PF****Return of Private Foundation**
or Section 4947(a)(1) Trust Treated as Private Foundation

OMB No 1545-0052

2013Department of the Treasury
Internal Revenue Service▶ Do not enter Social Security numbers on this form as it may be made public.
▶ Information about Form 990-PF and its separate instructions is at www.irs.gov/form990pf.

Open to Public Inspection

For calendar year 2013 or tax year beginning , and ending

Name of foundation THE SUNSHINE LADY FOUNDATION, INC.		A Employer identification number 56-1977987
Number and street (or P O box number if mail is not delivered to street address) P.O. BOX 1074	Room/suite	B Telephone number (see instructions) 252-240-2788
City or town, state or province, country, and ZIP or foreign postal code MOREHEAD CITY NC 28557		C If exemption application is pending, check here ☐
G Check all that apply ☐ Initial return ☐ Initial return of a former public charity ☐ Final return ☐ Amended return ☐ Address change ☐ Name change		D 1. Foreign organizations, check here ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ☐
H Check type of organization ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here ☐
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ▶ \$ 22,720,911	J Accounting method ☒ Cash ☐ Accrual ☐ Other (specify)	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received (attach schedule)	1,131,997			
	2 Check ☐ if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities	37	37	37	
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	1,410,944			
	b Gross sales price for all assets on line 6a	7,202,971			
	7 Capital gain net income (from Part IV, line 2)		4,667,179		
	8 Net short-term capital gain			0	
	9 Income modifications				
	10a Gross sales less returns and allowances				
b Less Cost of goods sold					
c Gross profit or (loss) (attach schedule)					
11 Other income (attach schedule)					
12 Total. Add lines 1 through 11	2,542,978	4,667,216	37		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	0			
	14 Other employee salaries and wages	130,657	13,066		117,591
	15 Pension plans, employee benefits	71,931	7,193		64,738
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule) STMT 1	3,995	400		3,596
	c Other professional fees (attach schedule)				
	17 Interest				
	18 Taxes (attach schedule) (see instructions) STMT 2	107,342	242		2,176
	19 Depreciation (attach schedule) and depletion STMT 3				
	20 Occupancy	5,824	582		5,242
	21 Travel, conferences, and meetings	59,373			59,373
	22 Printing and publications	2,601			2,601
	23 Other expenses (att. sch) STMT 4	187,535			187,385
	24 Total operating and administrative expenses. Add lines 13 through 23	569,258	21,483	0	442,702
	25 Contributions, gifts, grants paid SEE STATEMENT 5	6,462,138			6,462,138
26 Total expenses and disbursements. Add lines 24 and 25	7,031,396	21,483	0	6,904,840	
27 Subtract line 26 from line 12					
a Excess of revenue over expenses and disbursements	-4,488,418				
b Net investment income (if negative, enter -0-)		4,645,733			
c Adjusted net income (if negative, enter -0-)			37		

For Paperwork Reduction Act Notice, see instructions.

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3 617

Part II Balance Sheets		Beginning of year	End of year	
			(a) Book Value	(b) Book Value
Assets	1 Cash – non-interest-bearing	1,068,332	867,525	867,526
	2 Savings and temporary cash investments			
	3 Accounts receivable ▶ Less allowance for doubtful accounts ▶			
	4 Pledges receivable ▶ Less allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7 Other notes and loans receivable (att. schedule) ▶ Less allowance for doubtful accounts ▶	0		
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments – U.S. and state government obligations (attach schedule)			
	b Investments – corporate stock (attach schedule) SEE STMT 6	20,395,431	16,516,704	21,786,785
	c Investments – corporate bonds (attach schedule)			
	11 Investments – land, buildings, and equipment basis ▶ Less accumulated depreciation (attach sch.) ▶			
	12 Investments – mortgage loans			
	13 Investments – other (attach schedule)			
Liabilities	14 Land, buildings, and equipment basis ▶ Less accumulated depreciation (attach sch.) ▶ STMT 7	1,727 1,727	150	
	15 Other assets (describe ▶ SEE STATEMENT 8)	475,334	66,600	66,600
	16 Total assets (to be completed by all filers – see the instructions Also, see page 1, item I)	21,939,247	17,450,829	22,720,911
	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	0	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here 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 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	21,939,247	17,450,829	
	30 Total net assets or fund balances (see instructions)	21,939,247	17,450,829	
	31 Total liabilities and net assets/fund balances (see instructions)	21,939,247	17,450,829	

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	21,939,247
2 Enter amount from Part I, line 27a	2	-4,488,418
3 Other increases not included in line 2 (itemize) ▶	3	
4 Add lines 1, 2, and 3	4	17,450,829
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	17,450,829

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:	P		
b 28 SHARES CL A BERKSHIRE HATHAWAY	D		
c 7 SHARES CL A BERKSHIRE HATHAWAY	P		
d 6 SHARES CL A BERKSHIRE HATHAWAY	P		
e 4230 SHARES CL B BERKSHIRE HATHAWAY	P		

(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 4,667,781		602	4,667,179
c 1,093,357		1,093,357	
d 966,150		966,150	
e 475,683		475,683	

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

(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a			
b			4,667,179
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	4,667,179
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6)	If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8	3	

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	11,278,190	11,132,092	1.013124
2011	10,305,536	10,293,339	1.001185
2010	9,161,305	9,896,204	0.925739
2009	9,598,908	2,545,862	3.770396
2008	11,140,801	5,356,721	2.079780

2 Total of line 1, column (d)	2	8.790224
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	1.758045
4 Enter the net value of noncharitable-use assets for 2013 from Part X, line 5	4	22,362,588
5 Multiply line 4 by line 3	5	39,314,436
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	46,457
7 Add lines 5 and 6	7	39,360,893
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	6,904,840

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 ☐ 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 ☐ and enter 1% of Part I, line 27b		1	92,915
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	92,915
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	92,915
6 Credits/Payments			
a 2013 estimated tax payments and 2012 overpayment credited to 2013	6a 93,000		
b Exempt foreign organizations – tax withheld at source	6b		
c Tax paid with application for extension of time to file (Form 8868)	6c		
d Backup withholding erroneously withheld	6d		
7 Total credits and payments Add lines 6a through 6d		7	93,000
8 Enter any penalty for underpayment of estimated tax Check here ☒ if Form 2220 is attached		8	3
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	82
11 Enter the amount of line 10 to be Credited to 2014 estimated tax ☐ 0 Refunded ☐		11	82

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
b 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
c 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 ☐ \$ (2) On foundation managers ☐ \$		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ☐ \$		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities		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) ☐ 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

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? Website address ► WWW.SUNSHINELADY.ORG	13	X	

14 The books are in care of ► **JUDY WOOTEN** Telephone no ► **252-240-2788**
P.O. BOX 1074
 Located at ► **MOREHEAD CITY** NC ZIP+4 ► **28557**

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**

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? ☐ Yes ☒ No		
(2)	Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No		
(3)	Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No		
(4)	Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☒ No		
(5)	Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☒ No		
(6)	Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days) ☐ Yes ☒ No		
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? 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 ► 20 , 20 , 20 , 20 ☐ Yes ☒ 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 ► 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? ☐ Yes ☒ No		
b	If "Yes," did it have excess business holdings in 2013 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2013) N/A	3b	
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	X
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2013?	4b	X

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

5a During the year did the foundation pay or incur any amount to				
(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	☐ Yes ☒ No			
(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?	☐ Yes ☒ No			
(3) Provide a grant to an individual for travel, study, or other similar purposes?	☐ Yes ☒ No			
(4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see instructions)	☐ Yes ☒ No			
(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?	☐ Yes ☒ No			
b If any answer is "Yes" to 5a(1)–(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?	N/A	5b		
Organizations relying on a current notice regarding disaster assistance check here	☐			
c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?	N/A ☐ Yes ☐ No			
If "Yes," attach the statement required by Regulations section 53.4945–5(d)				
6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	☐ Yes ☒ No			
b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?		6b		X
If "Yes" to 6b, file Form 8870				
7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	☐ Yes ☒ No			
b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?	N/A	7b		

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors**1 List all officers, directors, trustees, foundation managers and their compensation (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
SEE STATEMENT 9				

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
ANNE EWING P.O. BOX 1074 MOREHEAD CITY NC 28557	EXEC DIRECTO 40.00	65,000	20,296	0

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

0

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)**3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE."**

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		

Total number of others receiving over \$50,000 for professional services **▶****Part IX-A Summary of Direct Charitable Activities**

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

	Expenses
1 PRISON EDUCATION. GRANT AMOUNT: \$2,101,149	
	119,706
2 SCHOLARSHIPS. GRANT AMOUNT: \$1,005,510	
	72,295
3 HUMANITARIAN GRANTS - FAMILIES IN CRISIS. GRANT AMOUNT: \$701,409	
	147,118
4 SHELTERS AND RESPITE ORGANIZATIONS. GRANT AMOUNT: \$649,253	
	136,179

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

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

	Amount
1 N/A	
2	
All other program-related investments See instructions	
3	
Total. Add lines 1 through 3 ▶	

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
a	Average monthly fair market value of securities	1a	22,728,472
b	Average of monthly cash balances	1b	532,960
c	Fair market value of all other assets (see instructions)	1c	0
d	Total (add lines 1a, b, and c)	1d	23,261,432
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	23,261,432
4	Cash deemed held for charitable activities. Enter 1½% of line 3 (for greater amount, see instructions) SEE STATEMENT 10	4	898,844
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	22,362,588
6	Minimum investment return. Enter 5% of line 5	6	1,118,129

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

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	6,904,840
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	6,904,840
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b (see instructions)	5	0
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	6,904,840

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				
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				
f Total of lines 3a through e				
4 Qualifying distributions for 2013 from Part XII, line 4 ▶ \$ 6,904,840				
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				
e Remaining amount distributed out of corpus	6,904,840			
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:	6,904,840			
a Corpus Add lines 3f, 4c, and 4e Subtract line 5				
b Prior years' undistributed income Subtract line 4b from line 2b				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed				
d Subtract line 6c from line 6b Taxable amount – see instructions				
e Undistributed income for 2012 Subtract line 4a from line 2a Taxable amount – see instructions				
f Undistributed income for 2013 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2014				
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions)				
8 Excess distributions carryover from 2008 not applied on line 5 or line 7 (see instructions)				
9 Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a				
10 Analysis of line 9				
a Excess from 2009				
b Excess from 2010				
c Excess from 2011				
d Excess from 2012				
e Excess from 2013				

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

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2013, enter the date of the ruling **N/A**

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

	Tax year				(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	37	47	3	14	101
b 85% of line 2a	31	40	3	12	86
c Qualifying distributions from Part XII, line 4 for each year listed	6,904,840	11,278,190	10,305,536	9,161,305	37,649,871
d Amounts included in line 2c not used directly for active conduct of exempt activities	4,998,649	9,738,237	7,839,624	6,504,252	29,080,762
e Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c	1,906,191	1,539,953	2,465,912	2,657,053	8,569,109
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	745,419	371,070	343,111	329,873	1,789,473
c "Support" alternative test – enter					
(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

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

1 Information Regarding Foundation Managers:

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

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

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

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

a The name, address, and telephone number or e-mail address of the person to whom applications should be addressed
THE SUNSHINE LADY FOUNDATION, INC. 252-240-2788
P.O. BOX 1074 MOREHEAD CITY NC 28557

b The form in which applications should be submitted and information and materials they should include
SEE ATTACHED APPLICATIONS

c Any submission deadlines
SEE ATTACHED APPLICATIONS

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

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

		Yes	No
1	Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?		
a	Transfers from the reporting foundation to a noncharitable exempt organization of		
	(1) Cash	1a(1)	X
	(2) Other assets	1a(2)	X
b	Other transactions		
	(1) Sales of assets to a noncharitable exempt organization	1b(1)	X
	(2) Purchases of assets from a noncharitable exempt organization	1b(2)	X
	(3) Rental of facilities, equipment, or other assets	1b(3)	X
	(4) Reimbursement arrangements	1b(4)	X
	(5) Loans or loan guarantees	1b(5)	X
	(6) Performance of services or membership or fundraising solicitations	1b(6)	X
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c	X
d	If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received		

[illegible]

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

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

Sign Here	Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.				May the IRS discuss this return with the preparer shown below (see instructions)? ☒ Yes ☐ No	
	Signature of officer or trustee <u>Debra F. Harvell</u>		Date <u>8-14-14</u>		Title <u>V-PRES/TREAS</u>	
Paid Preparer Use Only	Print/Type preparer's name		Preparer's signature <u>Debra F. Harvell</u>		Date <u>08/14/14</u>	Check ☒ if self-employed
	Firm's name ▶ <u>HARVELL & COMPANY</u>				PTIN <u>P00428207</u>	
	Firm's address ▶ <u>407 N 35TH ST</u> <u>MOREHEAD CITY, NC 28557-3107</u>				Firm's EIN ▶ <u>56-1638995</u> Phone no <u>252-726-7010</u>	

Schedule B
(Form 990, 990-EZ,
or 990-PF)Department of the Treasury
Internal Revenue Service**Schedule of Contributors**

OMB No 1545-0047

2013

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

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

Name of the organization

Employer identification number

THE SUNSHINE LADY FOUNDATION, INC.**56-1977987**

Organization type (check one)

Filers of:

Section:

Form 990 or 990-EZ

☐ 501(c)() (enter number) organization☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation☐ 527 political organization

Form 990-PF

☒ 501(c)(3) exempt private foundation☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation☐ 501(c)(3) taxable private foundationCheck if your organization is covered by the **General Rule** or a **Special Rule**.**Note.** Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.**General Rule**

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

Special Rules

- ☐ For a section 501(c)(3) organization filing Form 990 or 990-EZ that met the 33¹/₃ % support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi) and received from any one contributor, during the year, a contribution of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 for use exclusively for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals. Complete Parts I, II, and III.
- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions for use exclusively for religious, charitable, etc., purposes, but these contributions did not total to more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an exclusively religious, charitable, etc., purpose. Do not complete any of the parts unless the **General Rule** applies to this organization because it received nonexclusively religious, charitable, etc., contributions of \$5,000 or more during the year. ▶ \$

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

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

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

Name of organization

THE SUNSHINE LADY FOUNDATION, INC.

Employer identification number

56-1977987**Part I** **Contributors** (see instructions). Use duplicate copies of Part I if additional space is needed.

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	WARREN BUFFET 1410 KIEWIT PLAZA OMAHA NE 68131	\$ 1,114,100	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions)
2	JONATHAN L. BRANDT 617 WEST END AVE. APT 5B NEW YORK NY 10024-1607	\$ 15,500	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)

Name of organization THE SUNSHINE LADY FOUNDATION, INC.	Employer identification number 56-1977987
---	---

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

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
1	10,000 SH BRKSHIRE HATHAWAY CL B	\$ 1,114,100	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	

56-1977987

Federal Statements

FYE: 12/31/2013

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

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
INDIRECT ACCOUNTING FEES	\$ 3,995	\$ 400	\$	\$ 3,596
TOTAL	\$ 3,995	\$ 400	\$ 0	\$ 3,596

Statement 2 - Form 990-PF, Part I, Line 18 - Taxes

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
EXCISE TAXES	\$ 104,924	\$	\$	\$
PROPERTY TAXES	2,418	242		2,176
TOTAL	\$ 107,342	\$ 242	\$ 0	\$ 2,176

Statement 3 - Form 990-PF, Part I, Line 19 - Depreciation

Date Acquired	Description	Cost Basis	Prior Year Depreciation	Method	Life	Current Year Depreciation	Net Investment Income	Adjusted Net Income
\$		\$				\$	\$	\$
\$		0	\$	0		\$	0	\$
TOTAL		\$	0			\$	0	\$

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

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
EXPENSES		\$	\$	
REFERENCE MATERIALS	3,033			3,033
OFFICE SUPPLIES	3,930			3,780
TELEPHONE	10,769			10,769

56-1977987

Federal Statements

FYE: 12/31/2013

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

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
POSTAGE & SHIPPING	\$ 6,802	\$	\$	\$ 6,802
REPAIRS & MAINTENANCE	90			90
INSURANCE	19,790			19,790
DUES & SUBSCRIPTIONS	6,420			6,420
UTILITIES	1,588			1,588
CONSULTING FEES	129,227			129,227
FEES	2,597			2,597
MEALS	1,686			1,686
GIFTS	1,603			1,603
TOTAL	\$ 187,535	\$ 0	\$ 0	\$ 187,385

Statement 5 - Form 990-PF, Part I, Line 25 - Noncash Contributions, Gifts, Grants

Amount	Noncash Description	FMV Explanation	Book Value Amount	Book Value Explanation	Date
408,734	1705 WILLIAM ST		408,734		

Statement 6 - Form 990-PF, Part II, Line 10b - Corporate Stock Investments

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
BERKSHIRE HATHAWAY CLASS A	\$ 20,324,100	\$ 14,896,000	COST	\$ 19,924,800
BERKSHIRE HATHAWAY CLASS B	71,331	1,620,704	COST	1,861,985
TOTAL	\$ 20,395,431	\$ 16,516,704		\$ 21,786,785

Federal Statements

56-1977987

FYE: 12/31/2013

Statement 7 - Form 990-PF, Part II, Line 14 - Land, Building, and Equipment

Description	Beginning Net Book	End Cost / Basis	End Accumulated Depreciation	Net FMV
COMPUTER	\$ 150	\$ 1,727	\$ 1,727	\$
PHONES & PRINTER				
2 FILING CABINETS				
SLF COMPUTER				
ASB COMPUTER				
CHAIR, MAT, BOOKCASES				
COPIER				
COMPUTER				
PHONES & TRANSCRIBER				
FILING CABINETS				
COPIER/SHREDDER				
2 COMPUTERS				
COPIER				
OKIDATA PRINTER				
COMPUTER (MHC OFFICE)				
COMPUTER, MONITOR, PRINTER				
FURNITURE FOR WISP OFFICE				
TELEPHONES				
COMPUTER, DESK, CHAIR				
LAPTOP COMPUTER				
LAPTOP COMPUTER				
COMPUTER (2)				
PHONE EQUIPMENT				
LAPTOP COMPUTER				
PRINTER				
TOTAL	\$ 150	\$ 1,727	\$ 1,727	\$ 0

Federal Statements**Statement 8 - Form 990-PF, Part II, Line 15 - Other Assets**

<u>Description</u>	<u>Beginning of Year</u>	<u>End of Year</u>	<u>Fair Market Value</u>
1705 WILLIAM STREET PROPERTY	\$ 408,734	\$	\$
2300 PARTLOW ROAD PROPERTY	66,600	66,600	66,600
TOTAL	\$ 475,334	\$ 66,600	\$ 66,600

Federal Statements

56-1977987

FYE: 12/31/2013

Statement 9 - Form 990-PF, Part VIII, Line 1 - List of Officers, Directors, Trustees, Etc.

Name and Address	Title	Average Hours	Compensation	Benefits	Expenses
DORIS BUFFETT P.O. BOX 1074 MOREHEAD CITY NC 28557	PRESIDENT	15.00	0	0	0
DIANE GRIMSLEY P.O. BOX 1074 MOREHEAD CITY NC 28557	V-PRES/TREAS	15.00	0	0	0
MITTY BEAL P.O. BOX 1074 MOREHEAD CITY NC 28557	SECRETARY	15.00	0	0	0
REBECCA CURRIE P.O. BOX 1074 MOREHEAD CITY NC 28557	MEMBER	15.00	0	0	0
ALEX BUFFETT ROZEK P.O. BOX 1074 MOREHEAD CITY NC 28557	MEMBER	15.00	0	0	0

Federal Statements

FYE: 12/31/2013

Statement 10 - Form 990-PF, Part X, Line 4 - Cash Deemed Held - Greater Amount Explanation

<u>Description</u>	<u>Amount</u>
THE SUNSHINE LADY FOUNDATION, INC. REQUIRED A MINIMUM CASH BALANCE OF \$898,844 IN ORDER TO COVER CURRENT ADMINISTRATIVE EXPENSES AND NORMAL CHARITABLE DISBURSEMENTS DURING THE MONTH OF JANUARY 2014. OF THIS TOTAL AMOUNT, \$100,464 WAS NEEDED FOR ADMINISTRATIVE EXPENSES AND \$1,007,125 WAS DISBURSED FOR CHARITABLE AND EDUCATIONAL PURPOSES.	898,844
TOTAL	898,844

Form 990-PF, Part XV, Line 2b - Application Format and Required Contents

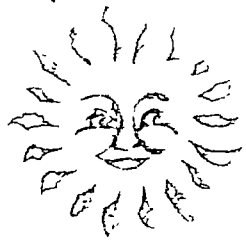
<u>Description</u>
SEE ATTACHED APPLICATIONS

Form 990-PF, Part XV, Line 2c - Submission Deadlines

<u>Description</u>
SEE ATTACHED APPLICATIONS

Form 990-PF, Part XV, Line 2d - Award Restrictions or Limitations

<u>Description</u>
SEE ATTACHED APPLICATIONS



2013 SUNBEAM GRANT APPLICATION FORM

The Sunshine Lady Foundation mission is to invest in organizations and programs dedicated to providing opportunities for the advancement of education, well being and new life choices for disadvantaged people, with special empathy for the working poor and families in crisis.

DATE SUBMITTED _____

RECIPIENT ORGANIZATION (attach IRS letter of determination of tax exemption)

Address _____

Phone / email _____

Contact person _____

PROJECT OR FUND NAME

DESCRIBE BRIEFLY HOW THE FUNDS WILL BE USED

(Please include all requested supporting materials with this application)

AMOUNT REQUESTED _____

WHEN WILL FUNDS BE NEEDED _____

SUNBEAM'S NAME _____

Phone / email _____

APPROVED or REJECTED by review committee

AUTHORIZED BY: _____, on _____



THE SUNSHINE LADY Foundation, Inc.

Scholarship Application

SLF Scholarships – PO Box 454 • Morehead City, NC 28557
252-393-7146 • slfscholarships@usa.net

The SUNSHINE LADY Foundation is a private foundation working primarily with students from North Carolina.

Education is the key to success. Every student who is capable, motivated and willing to work hard should have the opportunity to earn a college degree. Our scholarships are for young people who show the greatest promise of success, have financial need, and have made education a number one priority. We expect each student's family to do all that they can to ensure a better future for their children through education. We view each scholarship as an investment in an individual's future as well as an investment in the future of our country.

- | | |
|----------------------------------|---|
| <u>1. Academic Ability:</u> | Unweighted GPA of 3.0 or better; NOT NEGOTIABLE;
Standardized test scores: SAT 1500/2400 preferred; ACT: 25. |
| <u>2. Proper Use of English:</u> | Ability to write and speak grammatically correct English;
SAT writing score of 500 is preferred. |
| <u>3. Financial Need:</u> | Proven need (FAFSA application AND SAR required + tax returns) |
| <u>4. Family/Friend Support:</u> | Willingness to make financial sacrifices and offer advice, support,
and encouragement. |

We expect all Sunshine Lady scholarship recipients to abstain from self-destructive behaviors that sabotage efforts to be successful. As you become a Sunshine Lady Scholar you will sign a contract pledging to refrain from:

Body piercing (except ears)
Tattooing
Using illegal substances, alcohol or tobacco
Being involved in criminal activity
Having a credit card
Sustaining unhealthy body weight

A healthy lifestyle in terms of nutrition, exercise and general daily activities is necessary to attain your objectives and live life to the fullest. Good citizenship is mandatory.

You are required to maintain a 3.0 GPA for each term of funding.

(attach additional pages if necessary – put your name on each page)

Biographical Information

Full name _____ Birthdate _____ SS# _____
Home address _____ Mailing address _____
Email address _____ County _____ Driver's lic. # _____
Home phone _____ Cell phone _____

Parent/Guardian/Spouse's Name _____

Everyone who lives in your home (give name, age, relationship to you) _____

Name, address, phone number of parent if not living in the home _____

Grandparent's names and professions (before retirement, if retired now) _____

Family members' occupations (for everyone living in your home, list name, occupation and work phone, even if part-time occupation) _____

Who is the one person from whom you seek guidance and advice? _____

What is his/her relationship to you? _____

How will he/she be supportive of your educational endeavors? _____

Describe your community service history. _____

How did you find out about this scholarship? _____

Do you plan to live and work in your home county when you graduate from college? _____

Explain. _____

Academic Information

(provide supporting documentation; leave NO blank spaces)

School you currently attend (name, address, phone number) _____

Your cumulative GPA (unweighted) _____ Your combined SAT score _____

The college you plan to attend _____ Major _____

*SID or PID # from school _____ Date Classes Begin _____

*(this is your student identification or personal identification number assigned by the school)

Reason you chose this college _____

Expected month and year of graduation from this placement (EGD) _____

Financial Information

(provide supporting documentation, leave NO blank spaces)

Total annual income of all family members in your home (including part-time work) _____

(provide federal tax returns plus W2's or 1099's for the last three years)

Annual income of 2nd parent if he/she is not living in the home _____

What impact does this income have on your potential funding for school? Explain _____

If your family owns their home, how much is still owed? _____

The monthly mortgage payment _____ The home's tax value is _____

Would your family be willing to re-finance/take out a 2nd mortgage or to take out loans for your education?

If not, why not? _____

If your family rents, what is the monthly rent? _____

COMPLETE list of family's major debts (cars, other property, credit card, etc.) _____

COMPLETE list of family's major assets (savings, stocks, property, investments, inheritance, etc.) _____

Amount of money your family has put aside for your education _____

If none (or very little) has been put aside, why? Explain in detail _____

(attach additional pages if necessary – put your name on each page)

—Financial Information, continued—

Do you work? _____ If “no”, Explain _____

Name, address and phone number of your current employer _____

If you did not include a letter of reference from your employer, explain _____

Hours you work per week _____ Hourly rate of pay _____

Your job duties _____

What you do with your earnings _____

If you plan to work while at college, the number of hours per week _____

Name of employer _____ Hourly rate _____

Is this a work-study position? _____ Did you request a work-study placement? _____ Explain _____

If you have a car, what is the year, make and model? _____ Year purchased _____

Purchase price _____ Amount owed _____ Monthly payment _____

Will you take the car to college? _____ If so, who would pay expenses? _____

Would you sell the car to improve your financial situation if necessary? _____ Explain _____

Qualifying Details (cost-have=need)

(provide supporting documentation, leave NO blank spaces)

Estimate your TRUE ANNUAL cost of attendance (COA): Total _____ Provide breakdown.

Tuition/Fees _____ Books _____ Computer _____ Room/Board _____

Travel _____ Other (give details) _____

(provide supporting statement from the school showing what THEY estimate the annual COA to be)

Amount you have, or expect to have, toward this COA _____

List sources and amounts included in this estimate: _____

BREAKDOWN: Applicant's savings _____ Loans _____

Family savings _____ Loans _____

Grandparents' contributions _____

Other family member contributions _____

School's Financial Aid Package: grants _____ loans _____

work/study _____ scholarships _____

other outside awards _____

OTHER resources & amounts _____

In addition to completing the FAFSA, list all other forms of financial assistance/grants/scholarships for which you have applied AND the results so far for each one _____

(provide copies of FAFSA application, student aid report SAR and announcement letters for each)

Explain IN DETAIL any unusual family or personal circumstances that have an impact on your financial situation and your ability to pay for college (for example siblings in college, medical crisis expenses, loss of primary income, major moves, etc.) _____

How much are you asking the Sunshine Lady Foundation to award for this year's college expenses? _____

How did you arrive at this figure? _____ What do you need it for? _____

I understand that.

- The foundation reserves the right, at its discretion, to cancel or reduce any awards without liability
- The foundation may do a criminal record check using my driver's license and/or social security number. I give permission for such a check and release any government agency and/or its personnel or representatives and The Sunshine Lady Foundation from any and all liability for sharing such information.
- I am submitting this application for a scholarship award, subject to the terms of The Sunshine Lady Foundation's scholarship program, and I certify that the information in this application is true and correct to the best of my knowledge

Signature of Applicant

Date

Applicant's Narratives

(Your answers will be used to further assess your writing skills. Use a word processor for this section and submit with your application and check list. Spelling, grammar and neatness will be considered and WILL make a difference. Be sure to use spell-check and grammar-check programs and have someone proof your work. This is your chance to show your own creativity and passion. Do your best work. Put your name on each page.)

1. Define what being a "good citizen" means to you and name someone, not in your family, who best fits this definition. Tell why?
 2. Choose any one social issue of today and explain how you feel about this issue and why?
 3. Examine the administration of President _____. What was the most remarkable change that occurred while he served that impacts today's society? How and why?
 4. Who influenced you to go to college? How and when did this occur?
 5. What is the most serious mistake you have made in your life and how did it impact you? How did you change in response to this mistake? What did you learn?
 6. Describe, in 200 words or less, your senior project. Explain why you chose this topic and what you learned. If you are a non-traditional student, or did not have a senior project, choose what you think is the most pressing academic issue of our time and write about how it can be resolved.
 7. Describe how your home and local environment have shaped you and your thinking about life.
 8. Why are you a good candidate to receive this award? Include points speaking equally to both merit and need.
-

Additional Questions for Applicants Already Attending College

1. How has your life changed since you began college?
 2. What have been your biggest surprises? Disappointments? Satisfactions?
 3. Who/what has been the greatest help to you? Greatest discouragement?
 4. What is the most pressing issue on today's college campuses? How do you think this issue should be resolved?
 5. What new time management and study skills have you found most helpful to your success as a college student?
-

Parent/Guardian/Mentor's Narrative

1. What is your name? Your age and relationship to the applicant?
2. What is the highest level of school you completed? Do you wish you had gone further? Why or why not?
3. Why do you want this applicant to go to college? How long have you been planning for it? In what ways did you plan?
4. What are your goals for this applicant?
5. What do you think are the major obstacles to reaching these goals? What will you do to help remove these obstacles?
6. Explain your thoughts on the applicant having a "full college experience", which includes not coming home often. What will you do to support such an experience?
7. Explain your level of commitment (financial, emotional, other) to the applicant's college education and how you are carrying out this commitment.
8. Why should this candidate be chosen for this award? Include points speaking equally to both merit and need.

THE SUNSHINE LADY FOUNDATION Scholarship Application Process:

Here's the deal:

First and foremost, honor all deadlines!

-Applications must be postmarked by July 1 for fall assistance and December 15 for spring assistance.

-Read the application in its entirety before beginning. Follow the directions with no exceptions or omissions

-Make and keep a copy of all information before submitting anything to the Foundation

-Direct any questions about the application to the e-mail address. slfscholarships@usa.net

-Incomplete applications STILL must arrive on time to be reviewed. Any missing information must be noted, explaining why you cannot provide that particular information and when it will arrive, YOU must do the follow-up

-Once you have submitted your application, DO NOT CALL to check on its status; you will be notified of all decisions.

-Correct spelling and grammar usage are expected throughout the application. Have someone proof-read the application before it is submitted. This is your first impression with the Foundation and only you can make it positive. Take this process seriously if your need is serious! All awards are based equally on merit and need

Checklist of Items to Submit as Part of the Application Process

IN ORDER - please make sure you have all of these!

1. ☐ Application, pages 2-3, neatly printed in black ink, with your signature on page 3;
2. ☐ A recent, 2 x 3 photograph of yourself,
3. ☐ A letter of acceptance from your college;
4. ☐ A current invoice or billing statement from the school showing the total cost of annual attendance and all activity on your personal account;
5. ☐ A copy of your FAFSA application form and notice of all financial aid, grants, loans and assistance as listed on the SAR (student aid form) from your current college or the one you plan to attend;
6. ☐ A list showing amounts of all "outside" grants, scholarships and awards, indicating which awards are one-time and which are renewable (if you have none, state that);
7. ☐ Official and complete final high school transcripts showing graduation date and all standardized test scores, along with complete transcripts from all other academic placements since high school
8. ☐ W-2 or 1099 forms and the first two pages of tax returns for the last three (3) years for everyone living in your household, include the entire tax return if any family member is self-employed. If you don't have copies, contact the IRS to secure them; if you have filed for an extension, provide W-2's as documentation of all income, # of family members and proof of the filed extension;

Reference letters should arrive to you in sealed, signed envelopes and be added to your application.

9. ☐ Three (3) letters of reference from school personnel at your most recent academic placement: (one (1) from a counselor or administrator, two (2) from teachers in your projected area of concentration);
10. ☐ Two (2) letters of reference from non-school adults and non-family members (including your current employer making sure the adult explains his or her relationship);
11. ☐ Applicant's narratives (see page 4);
12. ☐ Parent/guardian/mentor's narratives (see page 4);
13. ☐ Additional questions (if already enrolled in college – see page 4);
14. ☐ List of any of the above information that cannot be provided at the time this package is submitted and what you are doing to secure that information (remember to collect it first and then send it on to the Foundation after you have made certain the information is pertinent).

The Sunshine Lady Foundation
Grants Made Through Morehead City Account
January through December 2013

<u>Awarded to</u>	<u>Purpose</u>	<u>Amount</u>
Grants Through Morehead City Account		
Adjunct Scholarship Expense		
110 Greenwich St Assoc, LLC	Adjunct Scholarship Grants	2,500.00
ACC OP (Pirates Place), LLC	Adjunct Scholarship Grants	2,500.00
ACS	Adjunct Scholarship Grants	600 00
Angela Eremie, Landlord	Adjunct Scholarship Grants	2,000 00
Bank of America	Adjunct Scholarship Grants	87 97
Ben Mitchell, Landlord	Adjunct Scholarship Grants	2,500 00
Billhighway	Adjunct Scholarship Grants	2,500 00
Blue Cross & Blue Shield of NC	Adjunct Scholarship Grants	400 00
Campus Crossing Apartment Homes	Adjunct Scholarship Grants	2,000 00
Carteret Craven EMC	Adjunct Scholarship Grants	1,900 00
Colonial Townhouse - Apt 31D	Adjunct Scholarship Grants	7,500 00
Cornerstone Chnstian Child Dev. Center	Adjunct Scholarship Grants	3,087.00
Corrdor Property Management	Adjunct Scholarship Grants	9,500 00
Dept of Ed / Direct Loans	Adjunct Scholarship Grants	1,144 47
Dept of Ed / Loan Servicing Center	Adjunct Scholarship Grants	2,500 00
Dept of Ed / NELNET	Adjunct Scholarship Grants	9,300 00
Dept of Ed/Great Lakes	Adjunct Scholarship Grants	23,657 00
Dept of Education Federal Loan Servicing	Adjunct Scholarship Grants	51,482 00
Diamond Equity Group	Adjunct Scholarship Grants	500 00
Duke Energy Progress	Adjunct Scholarship Grants	350 00
Faulkner Properties	Adjunct Scholarship Grants	3,000 00
First Citizens Bank and Trust Co	Adjunct Scholarship Grants	2,500 00
Geico Insurance	Adjunct Scholarship Grants	750 00
Georgia's Own Credit Union	Adjunct Scholarship Grants	2,200 00
K. Hebb	Adjunct Scholarship Grants	500 00
K Jeffnes	Adjunct Scholarship Grants	1,000 00
M Radford	Adjunct Scholarship Grants	500 00
McMasters Realty Trust Co	Adjunct Scholarship Grants	1,500.00
Nationwide Insurance	Adjunct Scholarship Grants	300 00
PNC Bank	Adjunct Scholarship Grants	2,000 00
Rediet Tilahun	Adjunct Scholarship Grants	3,000.00
Sallie Mae - Dept of Ed Loan Servicing	Adjunct Scholarship Grants	6,552.56
Stanley Nelson, Landlord	Adjunct Scholarship Grants	3,000 00
State Farm Auto Insurance	Adjunct Scholarship Grants	1,500 00
Sterling Cottages at West End	Adjunct Scholarship Grants	2,500.00
Steven Zlecker, Lessor	Adjunct Scholarship Grants	2,000.00
Steven Zlecker, Lessor	Adjunct Scholarship Grants	500.00
Sunchase Greenville, LLC	Adjunct Scholarship Grants	2,500 00
The Edge Apartments	Adjunct Scholarship Grants	5,000 00
Tnnity Properties	Adjunct Scholarship Grants	2,500 00

The Sunshine Lady Foundation
Grants Made Through Morehead City Account
January through December 2013

Awarded to	Purpose	Amount
Triton Investments	Adjunct Scholarship Grants	3,500 00
US Dept of Ed - Great Lakes	Adjunct Scholarship Grants	21,500 00
US DEPT of Ed / Federal Loan Servicing	Adjunct Scholarship Grants	8,899.00
US Dept of Ed/Sallie Mae	Adjunct Scholarship Grants	7,500 00
V Cupil-Garcia	Adjunct Scholarship Grants	500 00
Verizon Wireless	Adjunct Scholarship Grants	1,200.00
WAJ Management, LLC	Adjunct Scholarship Grants	2,500.00
Wake Forest University	Adjunct Scholarship Grants	1,900.00
Wells Fargo Dealer Services	Adjunct Scholarship Grants	2,000 00
Zeta Tau Alpha Fraternity	Adjunct Scholarship Grants	2,500 00

Total Adjunct Scholarship Expense		221,310.00
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Post Secondary

Andover - Newton Theology School	Scholarship Grant	5,500 00
Appalachian State University	Scholarship Grant	4,000 00
Asbury College	Scholarship Grant	5,500.00
Auburn University	Scholarship Grant	5,000 00
Ave Maria University	Scholarship Grant	2,500 00
Babson College	Scholarship Grant	2,500 00
Barton College	Scholarship Grant	2,500 00
Bellarmino University	Scholarship Grant	2,500 00
Biola University	Scholarship Grant	5,000.00
Boston University	Scholarship Grant	3,000 00
Brigham Young University	Scholarship Grant	3,700 00
Campbell University	Scholarship Grant	13,600 00
Cape Fear Community College	Scholarship Grant	350 00
Carter Community College	Scholarship Grant	6,500.00
Christopher Newport University	Scholarship Grant	5,000 00
Colorado State University	Scholarship Grant	2,500.00
Covenant College	Scholarship Grant	13,000 00
Craven Community College	Scholarship Grant	1,000 00
Duke University	Scholarship Grant	7,500 00
East Carolina University	Scholarship Grant	39,200.00
Elon University	Scholarship Grant	2,500 00
Emmanuel College	Scholarship Grant	2,500.00
Gardner-Webb University	Scholarship Grant	6,000 00
George Mason University	Scholarship Grant	7,500.00
Georgia Southern University	Scholarship Grant	4,500 00
Hampden-Sydney College	Scholarship Grant	5,000 00
Hendrix College	Scholarship Grant	2,500.00
Hollins University	Scholarship Grant	2,500.00

The Sunshine Lady Foundation
Grants Made Through Morehead City Account
January through December 2013

Awarded to	Purpose	Amount
Howard University	Scholarship Grant	5,000.00
Johnson & Wales University	Scholarship Grant	2,500 00
Kent State University	Scholarship Grant	5,000 00
King College	Scholarship Grant	600 00
King University	Scholarship Grant	2,500 00
La Roche College	Scholarship Grant	2,500 00
Lewis & Clark College	Scholarship Grant	2,500 00
Long Island University	Scholarship Grant	3,000.00
Manst College	Scholarship Grant	5,000 00
Massachusetts College of Art & Design	Scholarship Grant	5,000.00
Massachusetts Institute of Technology	Scholarship Grant	5,000 00
Massasoit Community College	Scholarship Grant	1,500 00
Meredith College	Scholarship Grant	26,700.00
Methodist College	Scholarship Grant	7,500.00
Methodist University	Scholarship Grant	2,500 00
NC Central University	Scholarship Grant	8,300.00
NC State University	Scholarship Grant	42,300.00
NC Wesleyan College	Scholarship Grant	2,500.00
No. VA Comm College	Scholarship Grant	4,500.00
Nova Southeastern University	Scholarship Grant	2,500.00
Penn State University	Scholarship Grant	10,000.00
Philadelphia University	Scholarship Grant	5,000 00
Pratt Institute	Scholarship Grant	2,500 00
Randolph College	Scholarship Grant	2,500.00
Rochester Institute of Technology	Scholarship Grant	3,500.00
Saint Anselm	Scholarship Grant	5,000.00
Savannah College of Art & Design	Scholarship Grant	2,500.00
Southeastern University	Scholarship Grant	2,500 00
St Francis College	Scholarship Grant	8,500.00
St. Mary's College-Notre Dame-Indiana	Scholarship Grant	3,000.00
The King's College	Scholarship Grant	9,400.00
U C. Berkeley	Scholarship Grant	2,500 00
UNC G - Costa Rica Program	Scholarship Grant	1,200.00
Univ. of NC @ Greensboro Int'l Pgms Ctr	Scholarship Grant	2,000 00
University of California @ Los Angeles	Scholarship Grant	5,000 00
University of Georgia	Scholarship Grant	3,500.00
University of Maine/Augusta	Scholarship Grant	1,800 00
University of Mary Washington	Scholarship Grant	2,500 00
University of NC @ Chapel Hill	Scholarship Grant	19,950.00
University Of NC @ Charlotte	Scholarship Grant	5,000 00
University of NC @ Greensboro	Scholarship Grant	11,500.00
University of NC @ Pembroke	Scholarship Grant	2,500.00

The Sunshine Lady Foundation
Grants Made Through Morehead City Account
January through December 2013

<u>Awarded to</u>	<u>Purpose</u>	<u>Amount</u>
University of NC @ Wilmington	Scholarship Grant	29,800 00
University of North Dakota	Scholarship Grant	5,000 00
University of West Flonda	Scholarship Grant	2,500 00
Vermont Technical College	Scholarship Grant	4,500.00
Virginia Commonwealth University	Scholarship Grant	13,500 00
Virginia Tech	Scholarship Grant	6,800.00
Wake Forest University	Scholarship Grant	5,000 00
Wingate University	Scholarship Grant	6,000 00
Woodbury University	Scholarship Grant	8,000.00
Total Post Secondary		<u>493,200.00</u>
Total Grants Through Morehead City Account		<u><u>714,510.00</u></u>

Grants Through Sunbeam and Mercantile Broker Accounts
January through December 2013

	<u>Recipient</u>	<u>Account</u>	<u>Amount</u>
Grants			
Afghanistan			
	Women for Afghan Women	Sunbeam First Citizens	25,000 00
	Mangold Fund	Sunbeam First Citizens	26,000 00
Total Afghanistan			<u>51,000.00</u>
Camps			
Camps - Individual scholarships			
S.O.K.S. / Young Life			
	Fredericksburg Baptist Church	Sunbeam First Citizens	9,000 00
Total S O.K S / Young Life			<u>9,000 00</u>
Camps - Individual scholarships - Other			
	Communities in Schools - Brunswick, Inc	Sunbeam First Citizens	5,000 00
Total Camps - Individual scholarships - Other			<u>5,000 00</u>
Total Camps - Individual scholarships			<u>14,000 00</u>
Total Camps			14,000 00
Community Organization -Family			
Challenge Grants			
	Crystal Coast Habitat for Humanity	Sunbeam First Citizens	10,000.00
	DELCO Literacy Council	Sunbeam First Citizens	10,000 00
Total Challenge Grants			<u>20,000 00</u>
Community Organization -Family - Other			
	Stafford Junction	Sunbeam First Citizens	19,500.00
Total Community Organization -Family - Other			<u>19,500 00</u>
Total Community Organization -Family			39,500 00
Community Organizations - Youth			
City Pool			
	City of Fredericksburg	Sunbeam First Citizens	50,715.00
Total City Pool			<u>50,715 00</u>
Community Organizations - Youth - Other			
	Strath Haven ABC	Sunbeam First Citizens	20,000.00
	fredericksburg Area Museum and Cultural C	Sunbeam First Citizens	1,500 00
	Opportunities Unlimited for the Blind, In	Sunbeam First Citizens	9,500 00
	Kappa Foundation of Fredericksburg Inc	Sunbeam First Citizens	6,000.00
	Education Works	Sunbeam First Citizens	50,000.00
	Strath Haven ABC	Sunbeam First Citizens	25,000 00

Grants Through Sunbeam and Mercantile Broker's Accounts
January through December 2013

Recipient	Account	Amount
Total Community Organizations - Youth - Other		<u>112,000.00</u>
Total Community Organizations - Youth		162,715.00
Domestic Violence		
Domestic Violence - individuals		
Domestic Violence Shelter and Services,	Sunbeam First Citizens	5,000.00
Project Self-Sufficiency-Loveland	Sunbeam First Citizens	5,000.00
Jeffrey Law Firm, LLC	Sunbeam First Citizens	1,500.00
Domestic Violence Shelter and Services,	Sunbeam First Citizens	5,000.00
WomanCare	Sunbeam First Citizens	5,000.00
Project Self-Sufficiency-Loveland	Sunbeam First Citizens	5,000.00
Deane, P Legal fees	Sunbeam First Citizens	<u>25,000.00</u>
Total Domestic Violence - individuals		51,500.00
Domestic violence orgs		
DV LEAP	Sunbeam First Citizens	2,500.00
Fear 2 Freedom	Sunbeam First Citizens	<u>25,000.00</u>
Total Domestic violence orgs		27,500.00
PEACE client assistance		
American Domestic Violence Crisis Line	Sunbeam First Citizens	10,000.00
Center for Domestic Peace	Sunbeam First Citizens	5,000.00
Artemis Center	Sunbeam First Citizens	5,000.00
Middle Way House	Sunbeam First Citizens	5,000.00
Crisis Connection, Inc.	Sunbeam First Citizens	5,000.00
Schuykill Women in Crisis	Sunbeam First Citizens	5,000.00
SafeNet, Inc.	Sunbeam First Citizens	5,000.00
Safe Place, Inc	Sunbeam First Citizens	5,000.00
Womens Resource Center	Sunbeam First Citizens	5,000.00
New House	Sunbeam First Citizens	5,000.00
Columbus Regional Shelter	Sunbeam First Citizens	5,000.00
Womens Coalition of St. Croix	Sunbeam First Citizens	10,000.00
The Haven of RCS	Sunbeam First Citizens	5,000.00
Domestic Abuse Services	Sunbeam First Citizens	5,000.00
Bridges of Williamson City	Sunbeam First Citizens	5,000.00
Christians as Family Advocates	Sunbeam First Citizens	5,000.00
Project Safe, Inc	Sunbeam First Citizens	5,000.00
Strengthen our Sisters	Sunbeam First Citizens	5,000.00
Siren-Eaton Shelter, Inc	Sunbeam First Citizens	5,000.00
Domestic Abuse Intervention Services	Sunbeam First Citizens	5,000.00
CASA, Inc	Sunbeam First Citizens	5,000.00
Hope Family Services	Sunbeam First Citizens	5,000.00
Domestic Abuse Services	Sunbeam First Citizens	2,600.00
SafePlace	Sunbeam First Citizens	5,000.00

Grants Through Sunbeam and Mercantile Broker Accounts
January through December 2013

	<u>Recipient</u>	<u>Account</u>	<u>Amount</u>
Total PEACE client assistance			127,600 00
Total Domestic Violence			206,600.00
Educational Organization/School			
Fburg Mentoring programs			
	James Monroe High School	Sunbeam First Citizens	12,000 00
Total Fburg Mentoring programs			12,000 00
Fburg mentoring scholarships			
	Massaponax High School	Sunbeam First Citizens	0.00
	James Monroe High School	Sunbeam First Citizens	14,000 00
Total Fburg mentoring scholarships			14,000 00
Partnership for Academic Excell			
College tour			
	Partnership for Academic Excellence	Sunbeam First Citizens	15,000.00
Total College tour			15,000.00
Total Partnership for Academic Excell			15,000 00
Vermelle's GEMS + GENTS			
	Claflin University - GEMS	Sunbeam First Citizens	100,000.00
Total Vermelle's GEMS + GENTS			100,000.00
Educational Organization/School - Other			
	Carteret County Schools-	Sunbeam First Citizens	4,000 00
	Site Concepts (Northern VA	Sunbeam First Citizens	0.00
	Miracle Recreation	Sunbeam First Citizens	5,000 00
	Call Me Mister- Longwood University	Sunbeam First Citizens	5,000 00
	Call Me Mister- Longwood University	Sunbeam First Citizens	0 00
	Caroline Co Public Schools Foundation	Sunbeam First Citizens	50,000.00
	Parkside Elementary School	Sunbeam First Citizens	5,000.00
Total Educational Organization/School - Other			69,000.00
Total Educational Organization/School			210,000 00
Health Care/Medical Research			
FRAXA			
	FRAXA	Mercantile brokerage	158,449 95
	FRAXA	Mercantile brokerage	73,817 25
	FRAXA	Sunbeam First Citizens	4,679 79
Total FRAXA			236,946 99
Hannah's Hope			

Grants Through Sunbeam and Mercantile Broker Accounts
January through December 2013

	<u>Recipient</u>	<u>Account</u>	<u>Amount</u>
	Hannah's Hope Fund	Mercantile brokerage	443,455 16
	Hannah's Hope Fund	Sunbeam First Citizens	6,544 84
Total Hannah's Hope			450,000 00
Health Care/Medical Research - Other			
	Girl Power 2 Cure, Inc	Sunbeam First Citizens	10,000 00
	NAMI- Central Virginia	Sunbeam First Citizens	14,060 00
Total Health Care/Medical Research - Other			24,060 00
Total Health Care/Medical Research			711,006 99
Housing (homeless/respice)			
Rappahannock Shelters			
	Rappahannock Area Community Services Brd'	Mercantile brokerage	291,206 55
	Rappahannock Area Community Services Brd'	Mercantile brokerage	328,421 29
	Rappahannock Area Community Services Brd'	Sunbeam First Citizens	4,625.59
Total Rappahannock Shelters			624,253 43
Housing (homeless/respice) - Other			
	Aldersgate Special Needs Ministry	Sunbeam First Citizens	25,000.00
Total Housing (homeless/respice) - Other			25,000 00
Total Housing (homeless/respice)			649,253 43
Humanitarian Grants			
Car/Van donation			
	M I T.S. of Virginia	Sunbeam First Citizens	21,532 20
	Fred Hunsucker	Sunbeam First Citizens	2,000 00
	Capitol One	Sunbeam First Citizens	4,468 65
	Honda Financial Services	Sunbeam First Citizens	6,694.02
	Ed Napleton KIA	Sunbeam First Citizens	8,000.00
	Ally Financial Bank	Sunbeam First Citizens	2,998 24
	Ally Financial Bank	Sunbeam First Citizens	419 62
	Meineke Car Center	Sunbeam First Citizens	244.85
	Ride Away	Sunbeam First Citizens	18,000 00
	Browning's Reliable Cars & Trucks, LLC	Sunbeam First Citizens	9,713 99
	Mark Inman Insurance Agency	Sunbeam First Citizens	386.00
	B H. Cars	Sunbeam First Citizens	0.00
	B H Cars	Sunbeam First Citizens	1,162 50
	Earl and Janet Robb	Sunbeam First Citizens	500 00
	Holman Honda	Sunbeam First Citizens	0.00
	Holman Honda	Sunbeam First Citizens	10,000 00
	Ocean Conversions and Mobility Inc.	Sunbeam First Citizens	1,892 00
	Central Avenue Nissan	Sunbeam First Citizens	8,942 82
	GEICO	Sunbeam First Citizens	227 55

**Grants Through Sunbeam and Mercantile Broker Accounts
January through December 2013**

Recipient	Account	Amount
Don Ayres Pontiac Inc.	Sunbeam First Citizens	19,997.45
Met Life Auto & Home	Sunbeam First Citizens	299.00
KSW Federal Credit Union	Sunbeam First Citizens	22,741.97
Credit Acceptance Corporation	Sunbeam First Citizens	5,901.06
Vehicle Remarketing Services	Sunbeam First Citizens	1,303.83
Tennessee Valley Ford	Sunbeam First Citizens	10,000.00
AMS Van	Sunbeam First Citizens	20,000.00
Benson Automotive	Sunbeam First Citizens	1,600.00
Jay Hatfield Mobility	Sunbeam First Citizens	21,000.00
Advanced Vehicle Modifications	Sunbeam First Citizens	20,000.00
NJ Motor Vehicle Commission	Sunbeam First Citizens	1,599.50
Benson Automotive	Sunbeam First Citizens	764.95
AMS Van	Sunbeam First Citizens	19,950.75
Cummings Mobility	Sunbeam First Citizens	14,818.27
Bank of America	Sunbeam First Citizens	1,725.96
Bank of America	Sunbeam First Citizens	1,633.22
Total Car/Van donation		260,518.40
Credit card- loan debt		
Funeral Expense		
Bank of America	Sunbeam First Citizens	1,622.00
Webb Funeral Home	Sunbeam First Citizens	4,113.88
Total Funeral Expense		5,735.88
Credit card- loan debt - Other		
Springleaf Financial Services	Sunbeam First Citizens	6,772.07
Farmers State Bank	Sunbeam First Citizens	891.86
Credit One Bank	Sunbeam First Citizens	543.06
Springleaf Financial Services	Sunbeam First Citizens	2,579.50
Capitol One	Sunbeam First Citizens	1,225.00
Complete Cash	Sunbeam First Citizens	2,108.74
First National Bank	Sunbeam First Citizens	3,525.47
Chase Payment Processing	Sunbeam First Citizens	4,460.31
Bank of America	Sunbeam First Citizens	3,947.00
Bank of America	Sunbeam First Citizens	7,000.00
Mid-Illini Credit Union	Sunbeam First Citizens	3,155.79
Total Credit card- loan debt - Other		36,208.80
Total Credit card- loan debt		41,944.68
Discretionary Funds/individuals		
Penquis	Sunbeam First Citizens	10,000.00
St. Katharine Drexel Catholic Church	Sunbeam First Citizens	10,000.00
Transitional Housing BARN, Inc.	Sunbeam First Citizens	35,000.00
Elkins Middle School	Sunbeam First Citizens	10,000.00

Grants Through Sunbeam and Mercantile Broker's Accounts
January through December 2013

	Recipient	Account	Amount
	UVA Children's Hospital	Sunbeam First Citizens	10,000 00
	Trustees of Boston University, BUMC	Sunbeam First Citizens	0.00
	Trustees of Boston University, BUMC	Sunbeam First Citizens	0 00
	Trustees of Boston University, BUMC	Sunbeam First Citizens	0 00
	Trustees of Boston University, BUMC	Sunbeam First Citizens	136,000 00
	St Katharine Drexel Catholic Church	Sunbeam First Citizens	10,000 00
	Pathways to Spirit	Sunbeam First Citizens	30,000 00
Total Discretionary Funds/individuals			<u>251,000.00</u>
Foresclosure			
	HFC Beneficial	Sunbeam First Citizens	10,617 15
	Henrico Federal Credit Union	Sunbeam First Citizens	2,601 00
	USDA - RD	Sunbeam First Citizens	3,573 60
	OCWEN Loan Servicing	Sunbeam First Citizens	11,189 09
Total Foreclosure			<u>27,980 84</u>
House repairs			
Furniture/appliances			
	Jody Lail Heating & Cooling	Sunbeam First Citizens	3,200 00
	E&E Gliddon Air Conditioning	Sunbeam First Citizens	3,488 00
	Alick's Home Medical Equipment, Inc	Sunbeam First Citizens	2,899 00
	W.A Atkins & Sons, Inc	Sunbeam First Citizens	898 88
	Rick's Appliance	Sunbeam First Citizens	902 34
	Air America Heating & Cooling	Sunbeam First Citizens	4,800 00
	Bank of America	Sunbeam First Citizens	2,669 45
	Bank of America	Sunbeam First Citizens	2,361 60
	Bank of America	Sunbeam First Citizens	2,089.08
Total Furniture/appliances			<u>23,308 35</u>
Roofing			
	Merrimack Valley Roofing & Gutar	Sunbeam First Citizens	2,450 00
	Merrimack Valley Roofing & Gutar	Sunbeam First Citizens	2,450 00
	AAA Roofing	Sunbeam First Citizens	3,000 00
	AAA Roofing	Sunbeam First Citizens	2,990 00
	AAA Roofing	Sunbeam First Citizens	2,016 00
Total Roofing			<u>12,906.00</u>
House repairs - Other			
	Huby's Enterpnses	Sunbeam First Citizens	1,805 00
	Dalworth New Floors	Sunbeam First Citizens	1,038 61
	Ray Plumbing Co	Sunbeam First Citizens	6,285 00
	Bank of Amerca	Sunbeam First Citizens	887 40
Total House repairs - Other			<u>10,016 01</u>
Total House repairs			<u>46,230 36</u>

Grants Through Sunbeam and Mercantile Broker Accounts
January through December 2013

	<u>Recipient</u>	<u>Account</u>	<u>Amount</u>
Legal fees			
Bankruptcy			
	Olsen Daines	Sunbeam First Citizens	1,581 00
	Modesto Lopez, Esq	Sunbeam First Citizens	1,500 00
	Bank of America	Sunbeam First Citizens	1,586.80
Total Bankruptcy			4,667 80
Legal fees - Other			
	Fairfax County General District Court	Sunbeam First Citizens	1,069 55
	VA Dept Motor Vehicles	Sunbeam First Citizens	145 00
	Division of Child Support	Sunbeam First Citizens	4,427 64
	Anthony M Genova Esq.	Sunbeam First Citizens	2,000 00
	Morrow, Poppe, Watermeier & Lonowski PC	Sunbeam First Citizens	5,000 00
		Sunbeam First Citizens	-9,500 00
	Joe Marion P.C	Sunbeam First Citizens	9,500 00
		Sunbeam First Citizens	-780 71
Total Legal fees - Other			11,861 48
Total Legal fees			16,529.28
Medical expense			
Dental expense			
	Ronald E Caylor DMD	Sunbeam First Citizens	1,532 50
	Robinson Dental Group	Sunbeam First Citizens	1,230 00
	GE Capital	Sunbeam First Citizens	6,562 50
	Horsley Orthodontics	Sunbeam First Citizens	3,346 79
	Parkway Dental North	Sunbeam First Citizens	2,597 50
	Dr. Alvarez DDS	Sunbeam First Citizens	6,940 00
	Healthy Smiles Dental	Sunbeam First Citizens	1,151 00
	Baylor College of Dentistry	Sunbeam First Citizens	750 00
	Brier Creek Dental	Sunbeam First Citizens	460 00
	Diversified Hearing Services	Sunbeam First Citizens	4,800.00
	University of NY School of Dental Med	Sunbeam First Citizens	2,284.00
	Affordable Dentures	Sunbeam First Citizens	1,650.00
	John H Watts DDS	Sunbeam First Citizens	473.00
	Horsley Orthodontics	Sunbeam First Citizens	-298.50
	Philomena Oboh, DDS	Sunbeam First Citizens	305.00
	Jaznel Cruz DDS	Sunbeam First Citizens	1,700.00
	Brad L. Marsh DMD	Sunbeam First Citizens	2,646.00
	Fredericksburg Dental Care	Sunbeam First Citizens	4,096.00
	Harvey W. Allen, DDS	Sunbeam First Citizens	2,550.00
	Mountainside Hospital Dental Dept.	Sunbeam First Citizens	4,886.80
	Steven M. Hedges, DMD, P C.	Sunbeam First Citizens	445.00
	Personalized Dental Care PLLC	Sunbeam First Citizens	1,244 00

Grants Through Sunbeam and Mercantile Broker Accounts
January through December 2013

	<u>Recipient</u>	<u>Account</u>	<u>Amount</u>
Total Dental expense			51,351.59
Health insurance			
	Golden Rule Ins Co	Sunbeam First Citizens	1,217.35
	Bank of America	Sunbeam First Citizens	402.45
Total Health insurance			1,619.80
Hearing aids			
	Lane Custom Hearing	Sunbeam First Citizens	500.00
	Lane Custom Hearing	Sunbeam First Citizens	1,000.00
	Moran Hearing Aid Center Inc	Sunbeam First Citizens	2,790.00
Total Hearing aids			4,290.00
Medical expense - Other			
	Running Brook Farm	Sunbeam First Citizens	1,722.50
	Dr. Jeffrey S. Epstein, MD PA	Sunbeam First Citizens	1,700.00
	Great Lakes Medical Systems Ltd	Sunbeam First Citizens	5,985.00
	Noora Abdulhameed - Key Bank	Sunbeam First Citizens	2,000.00
	Bridgeside Counseling & Neurofeedback	Sunbeam First Citizens	960.00
	John Dietrick MD	Sunbeam First Citizens	500.00
	Dr Michele Loewe	Sunbeam First Citizens	370.00
	Corporate Touch	Sunbeam First Citizens	2,250.00
	Physicians's Institute	Sunbeam First Citizens	2,000.00
	Corporate Touch	Sunbeam First Citizens	2,250.00
	Bank of America	Sunbeam First Citizens	1,140.43
Total Medical expense - Other			20,877.93
Total Medical expense			78,139.32
Rent/Mortgage payments			
	Bank of America	Sunbeam First Citizens	7,443.38
	Aquia Realty Inc	Sunbeam First Citizens	14,000.00
	Southern Lifestyles Realty	Sunbeam First Citizens	2,250.00
	Katrina Pantano - landlord	Sunbeam First Citizens	5,400.00
	Grandview Apartments	Sunbeam First Citizens	831.00
	Select Portfolio Servicing Inc	Sunbeam First Citizens	3,231.54
	Citi Mortgage Inc	Sunbeam First Citizens	4,819.62
	Madison Falls Run	Sunbeam First Citizens	3,804.00
	Aquia Realty Inc.	Sunbeam First Citizens	2,000.00
	MMG	Sunbeam First Citizens	4,100.00
	Crosswinds 1 Condominium	Sunbeam First Citizens	4,994.46
	Carlito Rodriguez - landlord	Sunbeam First Citizens	3,000.00
	Michael Brandon	Sunbeam First Citizens	4,615.39
	Bank of America	Sunbeam First Citizens	3,253.77
	Elani Yalanis - landlord	Sunbeam First Citizens	1,500.00

Grants Through Sunbeam and Mercantile Broker Accounts
January through December 2013

Recipient	Account	Amount
Real Properties of Tampa Bay	Sunbeam First Citizens	750 00
Hutch Investments, LLC	Sunbeam First Citizens	1,000.00
Vanderbilt Mortgage and Finance Inc	Sunbeam First Citizens	2,011 83
Christopher Square Apts.	Sunbeam First Citizens	2,700 00
Vanderbilt Mortgage and Finance Inc	Sunbeam First Citizens	1,931 02
River Road Apartments	Sunbeam First Citizens	2,931 00
LUC Properties	Sunbeam First Citizens	2,240 00
Mr Alberto Olmos - landlord	Sunbeam First Citizens	3,075 00
Vanderbilt Mortgage and Finance Inc	Sunbeam First Citizens	1,168 58
James Schneider Apts	Sunbeam First Citizens	1,172 00
Commercial Investment Properties	Sunbeam First Citizens	4,710 00
Hutch Investments, LLC	Sunbeam First Citizens	1,500 00
Enc Thompson	Sunbeam First Citizens	1,700 00
Preferred Properties Inc	Sunbeam First Citizens	2,765.00
Ms Helen Wooten - landlord	Sunbeam First Citizens	2,750 00
OCWEN Loan Servicing	Sunbeam First Citizens	3,921 00
River Road Apartments	Sunbeam First Citizens	1,605 00
Nationstar Mortgage	Sunbeam First Citizens	1,330 69
Nationstar Mortgage	Sunbeam First Citizens	1,115 44
Carrington Mortgage Services	Sunbeam First Citizens	1,528 92
Bank of America	Sunbeam First Citizens	2,841.51
Bank of America	Sunbeam First Citizens	1,964 84
Bank of America	Sunbeam First Citizens	1,395 40
Total Rent/Mortgage payments		113,350 39
Taxes -Property/income		
Broward County Tax Collector	Sunbeam First Citizens	439 32
Borough of Laurel Springs	Sunbeam First Citizens	6,870 38
Queen Anne's County	Sunbeam First Citizens	1,439 69
Total Taxes -Property/income		8,749.39
Utilities		
PSEG	Sunbeam First Citizens	500.00
Omaha Public Power District	Sunbeam First Citizens	1,000 00
Cox communications	Sunbeam First Citizens	475.00
Nolin Rural Electric Coop	Sunbeam First Citizens	450 00
Florida Power and Light	Sunbeam First Citizens	89 78
FPL	Sunbeam First Citizens	200.00
Central Maine Power	Sunbeam First Citizens	300 00
Pen Bay Oil Co.	Sunbeam First Citizens	2,000 00
Comcast	Sunbeam First Citizens	432 55
Commonwealth Edison	Sunbeam First Citizens	322 50
Ameren Illinois	Sunbeam First Citizens	800 00
Bank of America	Sunbeam First Citizens	1,205 37
Bank of America	Sunbeam First Citizens	1,104 70

Grants Through Sunbeam and Mercantile Broker Accounts
January through December 2013

	<u>Recipient</u>	<u>Account</u>	<u>Amount</u>
Total Utilities			8,879.90
Humanitarian Grants - Other			
	City of Fredericksburg DSS	Sunbeam First Citizens	600.00
	City of Fredericksburg DSS	Sunbeam First Citizens	500.00
Total Humanitarian Grants - Other			<u>1,100.00</u>
Total Humanitarian Grants			854,422.56
Prison education			
Graterford			
	Villanova University	Sunbeam First Citizens	<u>7,000.00</u>
Total Graterford			<u>7,000.00</u>
Prison - after prison			
	Fund for the City of New York	Sunbeam First Citizens	0.00
	Mercy College	Sunbeam First Citizens	2,215.00
	Fund for the City of New York	Sunbeam First Citizens	40,000.00
	Post Prison Education Project	Sunbeam First Citizens	25,000.00
	Mercy College	Sunbeam First Citizens	2,215.00
	StepUP Ministry	Sunbeam First Citizens	25,000.00
	Passage Home	Sunbeam First Citizens	25,000.00
	Post Prison Education Project	Sunbeam First Citizens	50,000.00
	Fund for the City of New York	Sunbeam First Citizens	<u>45,000.00</u>
Total Prison - after prison			214,430.00
Prison - Maine			
	Mid-Coast School of Technology	Sunbeam First Citizens	431.64
	Friends of Longcreek Youth	Sunbeam First Citizens	10,000.00
	University of Maine at Augusta	Sunbeam First Citizens	2,723.38
	University of Maine at Augusta	Sunbeam First Citizens	45,062.60
	University of Maine at Augusta	Sunbeam First Citizens	592.80
	Southern Maine Community College	Sunbeam First Citizens	3,620.10
	University of Maine at Augusta	Sunbeam First Citizens	77.42
	University of Maine at Augusta	Sunbeam First Citizens	4,006.70
	University of Maine at Augusta	Sunbeam First Citizens	22,526.40
	University of Maine at Augusta	Sunbeam First Citizens	590.40
	University of Maine at Augusta	Sunbeam First Citizens	590.40
	University of Maine at Augusta	Sunbeam First Citizens	1,954.05
	University of Maine at Augusta	Sunbeam First Citizens	-1,598.40
	University of Maine at Augusta	Sunbeam First Citizens	<u>2,089.50</u>
Total Prison - Maine			92,666.99
Prison NY			
	Vietnam Veterans of America Chapter #205	Sunbeam First Citizens	2,500.00

Grants Through Sunbeam and Mercantile Broker Accounts
January through December 2013

	<u>Recipient</u>	<u>Account</u>	<u>Amount</u>
	Genesee Community College	Sunbeam First Citizens	49,159.00
	Medaille College	Sunbeam First Citizens	66,000.00
	Cornell University	Sunbeam First Citizens	75,000.00
	Cornell University	Sunbeam First Citizens	19,117.09
	Cornell University	Sunbeam First Citizens	75,000.00
	Vietnam Veterans of America Chapter #205	Sunbeam First Citizens	2,500.00
Total Prison NY			<u>289,276.09</u>
 Vera - NJ & NC			
	Rutgers University	Sunbeam First Citizens	100,000.00
	Rutgers University	Sunbeam First Citizens	200,000.00
	Vera Institute of Justice	Mercantile brokerage	156,887.32
	Vera Institute of Justice	Sunbeam First Citizens	43,112.68
	Rutgers University	Sunbeam First Citizens	250,000.00
Total Vera - NJ & NC			<u>750,000.00</u>
 Virginia Prison			
	FHEG Rappahannock Comm Coll Bookstore	Sunbeam First Citizens	3,878.40
	Piedmont VA Community College	Sunbeam First Citizens	4,855.50
	Treasurer of Virginia-FCCW Div. of Ed	Sunbeam First Citizens	111.00
	FHEG Rappahannock Comm Coll Bookstore	Sunbeam First Citizens	9,223.37
	Germanna Community College	Sunbeam First Citizens	12,888.00
	Rappahannock Community College	Sunbeam First Citizens	18,145.29
	Germanna Community College Bookstore	Sunbeam First Citizens	1,771.45
	Treasurer of Virginia-FCCW Div. of Ed	Sunbeam First Citizens	885.70
	Germanna Community College	Sunbeam First Citizens	28,759.50
	FHEG Piedmont VA Com Coll Bookstore	Sunbeam First Citizens	9,039.99
	Piedmont VA Community College	Sunbeam First Citizens	38,968.50
	Treasurer of Virginia	Sunbeam First Citizens	475.00
	FHEG Germanna Bookstore - Fredericksburg	Sunbeam First Citizens	2,886.28
	Treasurer of VA-Fluvanna Correctional	Sunbeam First Citizens	1,307.15
	Germanna Community College	Sunbeam First Citizens	747.00
	Rappahannock Community College	Sunbeam First Citizens	10,423.89
	FHEG Germanna Bookstore - Fredericksburg	Sunbeam First Citizens	2,658.15
	FHEG Piedmont VA Com Coll Bookstore	Sunbeam First Citizens	4,878.60
	Piedmont VA Community College	Sunbeam First Citizens	15,438.00
	Germanna Community College	Sunbeam First Citizens	15,562.50
	FHEG Rappahannock Comm Coll Bookstore	Sunbeam First Citizens	2,069.68
	Piedmont VA Community College	Sunbeam First Citizens	28,730.00
	Germanna Community College	Sunbeam First Citizens	39,000.00
	Rappahannock Community College	Sunbeam First Citizens	4,055.70
	Germanna Community College	Sunbeam First Citizens	747.00
	FHEG Piedmont VA Com Coll Bookstore	Sunbeam First Citizens	5,283.00
Total Virginia Prison			<u>262,788.65</u>

Grants Throu Sunbeam and Mercantile Broker Accounts
January through December 2013

	<u>Recipient</u>	<u>Account</u>	<u>Amount</u>
Prison education - Other			
	Northeastern Junior College	Sunbeam First Citizens	7,000 00
	College Guild	Sunbeam First Citizens	6,000 00
	Center for Community Transitions	Sunbeam First Citizens	683.19
	Northeastern Junior College	Sunbeam First Citizens	7,000.00
	Rhode Island Dept of Corrections	Sunbeam First Citizens	8,683 50
	Center for Community Transitions	Sunbeam First Citizens	1,018 47
	Rhode Island Dept of Corrections	Sunbeam First Citizens	9,297.75
	Hudson Link, Inc	Mercantile brokerage	116,802 40
	Walla Walla Community College	Sunbeam First Citizens	190,000 00
	College Guild	Sunbeam First Citizens	6,000.00
	Northeastern Junior College	Sunbeam First Citizens	7,000.00
	Northeastern Junior College	Sunbeam First Citizens	7,000.00
	Center for Community Transitions	Sunbeam First Citizens	1,880 55
	Walla Walla Community College	Sunbeam First Citizens	100,000.00
	Northeastern Junior College	Sunbeam First Citizens	7,000 00
	Rhode Island Dept of Corrections	Sunbeam First Citizens	9,621 34
			<u>484,987.20</u>
Total Prison education - Other			
			2,101,148.93
Scholarships			
Adjunct scholarship assistance			
	Germanna Community College	Sunbeam First Citizens	500 00
	National Student Leadership Program	Sunbeam First Citizens	1,000 00
	VSU	Sunbeam First Citizens	500 00
	Bank of America	Sunbeam First Citizens	1,450 16
	Bank of America	Sunbeam First Citizens	1,890 21
	Morehead City Parks and Rec	Sunbeam First Citizens	660.00
			<u>6,000 37</u>
Total Adjunct scholarship assistance			
			6,000 37
After school/extracurricular			
	Community Arts Center	Sunbeam First Citizens	5,000 00
			<u>5,000 00</u>
Total After school/extracurricular			
			5,000 00
Buffett Fellows - UVA			
	UVA - Center for Children, Families & the	Sunbeam First Citizens	25,000 00
			<u>25,000 00</u>
Total Buffett Fellows - UVA			
			25,000 00
Germanna			
	germanna Community College Foundation	Sunbeam First Citizens	50,000.00
			<u>50,000.00</u>
Total Germanna			
			50,000.00
Hungarian scholarships			

Grants Through Sunbeam and Mercantile Broker Accounts
January through December 2013

	<u>Recipient</u>	<u>Account</u>	<u>Amount</u>
	Hungarian Scholarship Fund	Sunbeam First Citizens	25,000.00
Total Hungarian scholarships			25,000 00
Red Sox Scholars			
	Red Sox Foundation	Sunbeam First Citizens	85,000.00
	Red Sox Foundation	Sunbeam First Citizens	55,000 00
Total Red Sox Scholars			140,000 00
URock			
	University College at Rockland	Sunbeam First Citizens	27,000 00
Total URock			27,000 00
Scholarships - Other			
	HCR Cares, Inc	Sunbeam First Citizens	5,000 00
	Virginia Commonwealth University	Sunbeam First Citizens	996 33
	Todd, Bremer & Lawson Inc	Sunbeam First Citizens	9,256.54
	Mercer University	Sunbeam First Citizens	4,809.85
	HCR Cares, Inc.	Sunbeam First Citizens	3,000.00
	Drexel Medical College - Woman One	Sunbeam First Citizens	20,000 00
	Western International University	Sunbeam First Citizens	4,860 00
	Western International University	Sunbeam First Citizens	4,150 00
	Buffalo State College	Sunbeam First Citizens	5,173 75
Total Scholarships - Other			57,246.47
Total Scholarships			335,246 84
Student Sunbeams			
Campus Christian Community			
	Campus Christian Community	Sunbeam First Citizens	2,000 00
	Students Helping Honduras Inc.	Sunbeam First Citizens	2,000 00
Total Campus Christian Community			4,000.00
Total Student Sunbeams			4,000.00
Total Grants			5,338,893.75