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Form **990-PF**

Return of Private Foundation

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

OMB No 1545-0052

2013Department of the Treasury
Internal Revenue Service

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

Open to Public Inspection

For calendar year 2013 or tax year beginning , and ending

Name of foundation THE BLANCHE AND JULIAN ROBERTSON FAMILY FOUNDATION, INC.		A Employer identification number 56-2027907
Number and street (or P O box number if mail is not delivered to street address) C/O DAVID E. SETZER, PO BOX 4242	Room/suite	B Telephone number (see instructions) 704-637-0511
City or town, state or province, country, and ZIP or foreign postal code SALISBURY NC 28145-4242		C If exemption application is pending, check here <input type="checkbox"/>
G Check all that apply: <input type="checkbox"/> Initial return <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Final return <input type="checkbox"/> Amended return <input type="checkbox"/> Address change <input type="checkbox"/> Name change		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
H Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col (c), line 16) ► \$ 15,636,933	J Accounting method: <input type="checkbox"/> Cash <input type="checkbox"/> Accrual <input checked="" type="checkbox"/> Other (specify) MODIFIED CASH	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1	Contributions, gifts, grants, etc., received (attach schedule)				
2	Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B				
3	Interest on savings and temporary cash investments				
4	Dividends and interest from securities	231,852	231,852		
5a	Gross rents				
b	Net rental income or (loss)				
6a	Net gain or (loss) from sale of assets not on line 10	448,590			
b	Gross sales price for all assets on line 6a	5,367,871			
7	Capital gain net income (from Part IV, line 2)		448,590		
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	680,442	680,442	0	
13	Compensation of officers, directors, trustees, etc	0			
14	Other employee salaries and wages				
15	Pension plans, employee benefits				
16a	Legal fees (attach schedule)				
b	Accounting fees (attach schedule) Stmt 1	1,040	52		988
c	Other professional fees (attach schedule) Stmt 2	60,000	3,000		57,000
17	Interest				
18	Taxes (attach schedule) (see instructions) Stmt 3	8,630			
19	Depreciation (attach schedule) and depletion Stmt 4	3,641			
20	Occupancy				
21	Travel, conferences, and meetings				
22	Printing and publications				
23	Other expenses (attach schedule) Stmt 5	15,245	762		14,483
24	Total operating and administrative expenses. Add lines 13 through 23	88,556	3,814	0	72,471
25	Contributions, gifts, grants paid	2,900,606			2,900,606
26	Total expenses and disbursements. Add lines 24 and 25	2,989,162	3,814	0	2,973,077
27	Subtract line 26 from line 12:				
a	Excess of revenue over expenses and disbursements	-2,308,720			
b	Net investment income (if negative, enter -0-)		676,628		
c	Adjusted net income (if negative, enter -0-)			0	

For Paperwork Reduction Act Notice, see instructions.

Form 990-PF (2013)

SCANNED MAY 19 2014
Revenue

Operating and Administrative Expenses

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Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value		
Assets	1	Cash – non-interest-bearing		6,012	11,998	11,998
	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		5,040	8,640	8,640
	10a	Investments – U.S. and state government obligations (attach schedule)				
	b	Investments – corporate stock (attach schedule)				
	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) See Statement 6		12,844,457	10,529,792	15,616,295	
14	Land, buildings, and equipment basis ▶ 216,678					
	Less: accumulated depreciation (attach sch) ▶ Stmt 7 62,618		157,701	154,060		
15	Other assets (describe ▶)					
16	Total assets (to be completed by all filers – see the instructions Also, see page 1, item I)		13,013,210	10,704,490	15,636,933	
Liabilities	17	Accounts payable and accrued expenses				
	18	Grants payable				
	19	Deferred revenue				
	20	Loans from officers, directors, trustees, and other disqualified persons				
	21	Mortgages and other notes payable (attach schedule)				
	22	Other liabilities (describe ▶)				
	23	Total liabilities (add lines 17 through 22)		0	0	
Net Assets or Fund Balances		Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31. ▶ <input type="checkbox"/>				
	24	Unrestricted				
	25	Temporarily restricted				
	26	Permanently restricted				
		Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. ▶ <input checked="" type="checkbox"/>				
	27	Capital stock, trust principal, or current funds		18,152,632	18,152,632	
	28	Paid-in or capital surplus, or land, bldg, and equipment fund				
	29	Retained earnings, accumulated income, endowment, or other funds		-5,139,422	-7,448,142	
	30	Total net assets or fund balances (see instructions)		13,013,210	10,704,490	
31	Total liabilities and net assets/fund balances (see instructions)		13,013,210	10,704,490		

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	13,013,210
2	Enter amount from Part I, line 27a	2	-2,308,720
3	Other increases not included in line 2 (itemize) ▶	3	
4	Add lines 1, 2, and 3	4	10,704,490
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	10,704,490

Part IV Capital Gains and Losses for Tax on Investment Income

1a	(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	379,797.884 shares Vanguard ST Trea	P	Various	Various
b	32,619.143 shares Vanguard Stock Mkt	P	Various	Various
c	Short Term Treasury Adm			
d				
e				

	(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a	4,065,106		4,055,199	9,907
b	1,300,000		864,082	435,918
c	2,765			2,765
d				
e				

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

	(i) FMV 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				9,907
b				435,918
c				2,765
d				
e				

2 Capital gain net income or (net capital loss)	<div style="border: 1px solid black; padding: 2px;"> If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 </div>	2	448,590
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	2,230,711	16,050,418	0.138981
2011	1,973,841	17,076,216	0.115590
2010	2,171,545	17,395,104	0.124837
2009	1,957,804	16,909,507	0.115781
2008	2,113,312	20,737,664	0.101907

2 Total of line 1, column (d)	2	0.597096
3 Average distribution ratio for the 5-year base period – divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	0.119419
4 Enter the net value of noncharitable-use assets for 2013 from Part X, line 5	4	15,678,442
5 Multiply line 4 by line 3	5	1,872,304
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	6,766
7 Add lines 5 and 6	7	1,879,070
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	2,973,077

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 – see instructions)

1a	Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1. Date of ruling or determination letter: (attach copy of letter if necessary—see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b	1	6,766
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	6,766
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	6,766
6	Credits/Payments:		
a	2013 estimated tax payments and 2012 overpayment credited to 2013	6a	8,640
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	8,640
8	Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8	
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	1,874
11	Enter the amount of line 10 to be Credited to 2014 estimated tax 1,874 Refunded	11	

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
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 ► bjrfoundation@bellsouth.net	13	X	
14	The books are in care of ► DAVID E. SETZER P O BOX 4242 Located at ► SALISBURY NC ZIP+4 ► 28145-4242	Telephone no. ► 704-637-0511		
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 – Check here and enter the amount of tax-exempt interest received or accrued during the year	15		<input type="checkbox"/>
16	At any time during calendar year 2013, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for Form TD F 90-22.1 If "Yes," enter the name of the foreign country ►	16	Yes	No X

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

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

		Yes	No
1a	During the year did the foundation (either directly or indirectly):		
(1)	Engage in the sale or exchange, or leasing of property with a disqualified person?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
(2)	Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
(3)	Furnish goods, services, or facilities to (or accept them from) a disqualified person?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
(4)	Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
(5)	Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
(6)	Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here	N/A	
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2013?	N/A	
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	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement – see instructions)	N/A	
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ► 20 , 20 , 20 , 20		
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
b	If "Yes," did it have excess business holdings in 2013 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2013)	N/A	
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		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?		X

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

- (1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☒ No
- (2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☒ No
- (3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☒ No
- (4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see instructions) ☐ Yes ☒ No
- (5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☒ No

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

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

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

If "Yes," attach the statement required by Regulations section 53.4945–5(d).

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

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? **6b** ☒

If "Yes" to 6b, file Form 8870.

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

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

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

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
See Statement 8				

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

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

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

0

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

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

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

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

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

Expenses

1 N/A**2****3****4****Part IX-B** Summary of Program-Related Investments (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	15,751,976
b	Average of monthly cash balances	1b	11,164
c	Fair market value of all other assets (see instructions)	1c	154,060
d	Total (add lines 1a, b, and c)	1d	15,917,200
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	15,917,200
4	Cash deemed held for charitable activities. Enter 1½% of line 3 (for greater amount, see instructions)	4	238,758
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	15,678,442
6	Minimum investment return. Enter 5% of line 5	6	783,922

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	783,922
2a	Tax on investment income for 2013 from Part VI, line 5	2a	6,766
b	Income tax for 2013. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	6,766
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	777,156
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	777,156
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	777,156

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	2,973,077
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	2,973,077
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	6,766
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	2,966,311

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				777,156
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	1,087,201			
b From 2009	1,121,463			
c From 2010	1,315,000			
d From 2011	1,130,104			
e From 2012	1,445,450			
f Total of lines 3a through e	6,099,218			
4 Qualifying distributions for 2013 from Part XII, line 4: \$ 2,973,077				
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				777,156
e Remaining amount distributed out of corpus	2,195,921			
5 Excess distributions carryover applied to 2013 (If an amount appears in column (d), the same amount must be shown in column (a).)				
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	8,295,139			
b Prior years' undistributed income. Subtract line 4b from line 2b				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed				
d Subtract line 6c from line 6b. Taxable amount – see instructions				
e Undistributed income for 2012. Subtract line 4a from line 2a. Taxable amount – see instructions				
f Undistributed income for 2013. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2014				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions)				
8 Excess distributions carryover from 2008 not applied on line 5 or line 7 (see instructions)	1,087,201			
9 Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a	7,207,938			
10 Analysis of line 9:				
a Excess from 2009	1,121,463			
b Excess from 2010	1,315,000			
c Excess from 2011	1,130,104			
d Excess from 2012	1,445,450			
e Excess from 2013	2,195,921			

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

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

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

	Tax year	Prior 3 years			(e) Total
	(a) 2013	(b) 2012	(c) 2011	(d) 2010	
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon:					
a "Assets" alternative test – enter:					
(1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test – enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed					
c "Support" alternative test – enter:					
(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

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

1 Information Regarding Foundation Managers:

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

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

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

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

a The name, address, and telephone number or e-mail address of the person to whom applications should be addressed.
DAVID E SETZER 704-637-0511
PO BOX 4242 SALISBURY NC 28145-4242

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

c Any submission deadlines
SEE ATTACHED APPLICATION

d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors
See Statement 9

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year SEE ATTACHED SCHEDULE				2,900,606
Total			▶ 3a	2,900,606
b Approved for future payment N/A				
Total			▶ 3b	

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.

Enter gross amounts unless otherwise indicated.	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue:					
a _____					
b _____					
c _____					
d _____					
e _____					
f _____					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities			14	231,852	
5 Net rental income or (loss) from real estate					
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal property					
7 Other investment income					
8 Gain or (loss) from sales of assets other than inventory			18	448,590	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue: a _____					
b _____					
c _____					
d _____					
e _____					
12 Subtotal. Add columns (b), (d), and (e)		0		680,442	0
13 Total. Add line 12, columns (b), (d), and (e)				13	680,442

(See worksheet in line 13 instructions to verify calculations)

Part XVI-B	Relationship of Activities to the Accomplishment of Exempt Purposes
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[illegible]

Federal Statements

56-2027907

FYE: 12/31/2013

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

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
ACCOUNTING	\$ 1,040	\$ 52	\$	\$ 988
Total	\$ 1,040	\$ 52	\$ 0	\$ 988

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

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
MANAGEMENT FEE	\$ 60,000	\$ 3,000	\$	\$ 57,000
Total	\$ 60,000	\$ 3,000	\$ 0	\$ 57,000

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

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
FEDERAL EXCISE TAXES	\$ 8,630	\$	\$	\$
Total	\$ 8,630	\$ 0	\$ 0	\$ 0

Federal Statements

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Statement 4 - 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
2/28/02	LAND	\$ 55,300	\$		0	\$	\$	\$
	OFFICE CONDO							
2/28/02		141,996	39,595	S/L	39	3,641		
	OFFICE FIXTURES							
4/01/02		19,382	19,382	S/L	7			
Total		\$ 216,678	\$ 58,977			\$ 3,641	\$ 0	\$ 0

Statement 5 - Form 990-PF, Part I, Line 23 - Other Expenses

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
Expenses				
OFFICE EXPENSES	7,904	395		7,509
INSURANCE	2,064	103		1,961
MEMBERSHIPS	1,840	92		1,748
UTILITIES	3,415	171		3,244
BANK CHARGES	22	1		21
Total	\$ 15,245	\$ 762	\$ 0	\$ 14,483

Statement 6 - Form 990-PF, Part II, Line 13 - Other Investments

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
VANGUARD SHORT-TERM TREASURY FD ADM	\$ 5,881,793	\$ 3,223,266		\$ 3,280,650
VANGUARD TOTAL STOCK MK INX FD INST	6,962,664	7,306,526		12,335,645
Total	\$ 12,844,457	\$ 10,529,792		\$ 15,616,295

Federal Statements

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
BUILDING	\$ 102,401	\$ 161,378	\$ 62,618	\$
LAND	55,300	55,300		
Total	\$ 157,701	\$ 216,678	\$ 62,618	\$ 0

Statement 8 - Form 990-PF, Part VIII, Line 1 - List of Officers, Directors, Trustees, Etc.

Name and Address	Title	Average Hours	Compensation	Benefits	Expenses
CATRELIA S HUNTER P.O. BOX 4242 SALISBURY NC 28145-4242	DIRECTOR	5.00	0	0	0
MARGARET H KLUTTZ PO BOX 4242 SALISBURY NC 28145-4242	DIRECTOR / C	5.00	0	0	0
B CLAY LINDSAY, JR. PO BOX 4242 SALISBURY NC 28145-4242	DIRECTOR / V	5.00	0	0	0
R SCOTT MADDOX PO BOX 4242 SALISBURY NC 28145-4242	DIRECTOR	5.00	0	0	0
LILLIAN L MORGAN PO BOX 4242 SALISBURY NC 28145-4242	DIRECTOR / S	5.00	0	0	0
ALEX T ROBERTSON PO BOX 4242 SALISBURY NC 28145-4242	DIRECTOR	5.00	0	0	0
J SPENCER ROBERTSON PO BOX 4242	DIRECTOR	5.00	0	0	0

Federal Statements

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56-2027907

FYE: 12/31/2013

**Statement 8 - Form 990-PF, Part VIII, Line 1 - List of Officers, Directors, Trustees,
Etc. (continued)**

Name and Address	Title	Average Hours	Compensation	Benefits	Expenses
SALISBURY NC 28145-4242					
WYNHAM ROBERTSON PO BOX 4242 SALISBURY NC 28145-4242	DIRECTOR	5.00	0	0	0
FRED J STANBACK PO BOX 4242 SALISBURY NC 28145-4242	DIRECTOR	5.00	0	0	0
JASON WALSER P.O. BOX 4242 SALISBURY NC 28145-4242	DIRECTOR	5.00	0	0	0
BRET BUSBY P.O. BOX 4242 SALISBURY NC 28145-4242	DIRECTOR	5.00	0	0	0
TIMOTHY BATES P.O. BOX 4242 SALISBURY NC 28145-4242	DIRECTOR	5.00	0	0	0

Federal Statements**Form 990-PF, Part XV, Line 2b - Application Format and Required Contents****Description**

SEE ATTACHED APPLICATION

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

SEE ATTACHED APPLICATION

Statement 9 - Form 990-PF, Part XV, Line 2d - Award Restrictions or Limitations**Description**

THE FOUNDATION, COMMITTED TO IMPROVING THE QUALITY OF LIFE IN SALISBURY AND ITS SURROUNDING AREA, IS INTERESTED IN FUNDING PROGRAMS WHICH ADDRESS SOCIAL, FAMILY, EDUCATIONAL, HEALTH, AND NEIGHBORHOOD ISSUES, AND THOSE WHICH ENRICH LIVES THROUGH CULTURAL ARTS AND RECREATIONAL OPPORTUNITIES.

Form **4562**

Depreciation and Amortization (Including Information on Listed Property)

Department of the Treasury
Internal Revenue Service (99)

▶ See separate instructions.

▶ Attach to your tax return.

OMB No 1545-0172

2013Attachment
Sequence No **179**

Name(s) shown on return

**THE BLANCHE AND JULIAN ROBERTSON
FAMILY FOUNDATION, INC.**

Identifying number

56-2027907

Business or activity to which this form relates

Indirect Depreciation**Part I Election To Expense Certain Property Under Section 179****Note:** If you have any listed property, complete Part V before you complete Part I.

1	Maximum amount (see instructions)	1	500,000
2	Total cost of section 179 property placed in service (see instructions)	2	
3	Threshold cost of section 179 property before reduction in limitation (see instructions)	3	2,000,000
4	Reduction in limitation Subtract line 3 from line 2. If zero or less, enter -0-	4	
5	Dollar limitation for tax year Subtract line 4 from line 1. If zero or less, enter -0- If married filing separately, see instructions	5	
6	(a) Description of property	(b) Cost (business use only)	(c) Elected cost
7	Listed property Enter the amount from line 29	7	
8	Total elected cost of section 179 property. Add amounts in column (c), lines 6 and 7	8	
9	Tentative deduction Enter the smaller of line 5 or line 8	9	
10	Carryover of disallowed deduction from line 13 of your 2012 Form 4562	10	
11	Business income limitation Enter the smaller of business income (not less than zero) or line 5 (see instructions)	11	
12	Section 179 expense deduction Add lines 9 and 10, but do not enter more than line 11	12	
13	Carryover of disallowed deduction to 2014. Add lines 9 and 10, less line 12	13	

Note: Do not use Part II or Part III below for listed property. Instead, use Part V**Part II Special Depreciation Allowance and Other Depreciation (Do not include listed property.) (See instructions.)**

14	Special depreciation allowance for qualified property (other than listed property) placed in service during the tax year (see instructions)	14	
15	Property subject to section 168(f)(1) election	15	
16	Other depreciation (including ACRS)	16	

Part III MACRS Depreciation (Do not include listed property.) (See instructions.)**Section A**

17	MACRS deductions for assets placed in service in tax years beginning before 2013	17	3,641
18	If you are electing to group any assets placed in service during the tax year into one or more general asset accounts, check here		

Section B—Assets Placed in Service During 2013 Tax Year Using the General Depreciation System

(a) Classification of property	(b) Month and year placed in service	(c) Basis for depreciation (business/investment use only—see instructions)	(d) Recovery period	(e) Convention	(f) Method	(g) Depreciation deduction
19a 3-year property						
b 5-year property						
c 7-year property						
d 10-year property						
e 15-year property						
f 20-year property						
g 25-year property			25 yrs.		S/L	
h Residential rental property			27 5 yrs.	MM	S/L	
i Nonresidential real property			39 yrs.	MM	S/L	
				MM	S/L	

Section C—Assets Placed in Service During 2013 Tax Year Using the Alternative Depreciation System

20a Class life					S/L	
b 12-year			12 yrs.		S/L	
c 40-year			40 yrs	MM	S/L	

Part IV Summary (See instructions.)

21	Listed property Enter amount from line 28	21	
22	Total. Add amounts from line 12, lines 14 through 17, lines 19 and 20 in column (g), and line 21. Enter here and on the appropriate lines of your return Partnerships and S corporations—see instructions	22	3,641
23	For assets shown above and placed in service during the current year, enter the portion of the basis attributable to section 263A costs	23	

For Paperwork Reduction Act Notice, see separate instructions.

Form **4562** (2013)

THE BLANCHE & JULIAN ROBERTSON
FAMILY FOUNDATION INC
December 31, 2013
RECAP OF ASSET AVERAGES

	Vanguard Short-Term Treasury Fund	Vanguard Total stock Market Index Fund	Total	Operations Account
January 31	6,329,007	9,598,078	15,927,085	5,571
February 28	6,327,083	9,720,541	16,047,624	14,249
March 31	6,096,899	10,100,856	16,197,755	6,413
April 30	5,956,203	10,272,579	16,228,782	10,158
May 31	6,413,599	9,718,284	16,131,883	11,154
June 30	5,921,119	9,597,696	15,518,815	9,722
July 31	5,161,778	10,622,835	15,784,613	18,466
August 31	4,622,497	10,807,445	15,429,942	7,972
September 30	4,156,962	11,206,396	15,363,358	13,807
October 31	3,753,765	11,682,089	15,435,854	13,154
November 30	3,323,215	12,018,491	15,341,706	11,299
December 31	3,280,650	12,335,645	15,616,295	11,998
Total	61,342,777	127,680,935	189,023,712	133,963
Average			15,751,976	11,164

THE BLANCHE & JULIAN ROBERTSON FAMILY FOUNDATION, INC.

SALISBURY, NORTH CAROLINA

GRANT PAYMENT RECORD / FISCAL 2013

• 1.	Arc of Rowan (2013 grant)(summer program)	\$15,000	5-23-2013
• 2	Bread Riot (2013 grant)(operating support) ..	\$2,000	11-19-2013
• 3.	Capstone Recovery Center (2013 grant)(repairs to Capstone House)	\$5,000 ..	5-28-2013
• 4	Carolina College Advising Corps (2013 grant)(Corps in Rowan County-Salisbury & North Rowan HS) ...	\$45,863	5-31-2013
• 5.	Catawba College (2013 grant)(master plan)	\$25,000	5-23-2013
• 6.	Center for International Understanding (2011 grant)(Teacher Global Awards)(2/3)	\$5,000 ..	4-29-2013
• 7.	Central North Carolina Council, BSA (2013 grant)(capital campaign for Camp Barnhardt).	\$10,000	8-28-2013
• 8.	Central North Carolina Council, BSA (2013 grant)(Friends of Scouting campaign—annual fund) ..	\$12,000	11-15-2013
• 9	Communities In Schools (2013 grant)(CSG)	\$50,000	7-25-2013
• 10	Community Care Clinic (2013 grant)(CSG) ..	\$50,000	6-4-2013
• 11.	Downtown Salisbury, Inc. (2012 grant)(Challenge)(roof repair to Empire Hotel)	\$47,500	6-17-2013
• 12	Families First-NC (2013 grant)(operating support for Second Step) ..	\$15,000	5-24-2013
• 13	Family Crisis Council (2013 grant)(Battered Women's Shelter)	\$35,000 ..	5-23-2013
• 14.	Food for Thought (2013 grant)(operating support)	\$2,500	9-4-2013
• 15.	Footprints in the Community (2013 grant)(summer therapy camp)	\$4,000	5-31-2013
• 16.	Godstock (2013 grant)(administrative funds)	\$7,500 ..	5-29-2013
• 17.	Habitat for Humanity (2012 grant)(property purchase for house building)	\$15,000	1-2-2013
• 18.	Habitat for Humanity (2013 grant)(Continuing Support Grant)	\$20,000 ..	6-27-2013
• 19	Happy's Farm (2013 grant)(scholarships, Pony Express Station)	\$5,000 ..	8-5-2013
• 20.	Healthy Children of Rowan County (2012 grant)(ADD/AD summer camp)(2/2)	\$10,000 ..	4-30-2013
• 21.	Healthy Children of Rowan County (2013 grant)(ADD/HD camp, Empower Youth, Girl Pride)	\$10,000 ..	6-21-2013
• 22.	Historic Neely School Foundation (2013 grant)(restoration of Neely School) ..	\$7,500	9-4-2013
• 23.	Hood Theological Seminary (2012 grant)(2/2 refectory construction)	\$62,500	6-6-2013
• 24.	Horizons Unlimited (2013 grant)(nanotechnology) ..	\$15,000	5-23-2013
• 25.	LandTrust for Central North Carolina (2013 grant)(furniture for new office) ..	\$5,000 ..	5-30-2013
• 26	Lee Street Theatre (capital campaign)(2013 grant)	\$15,000	12-2-2013
• 27.	Livingstone College (2013 grant)(Varick Auditorium upgrades)	\$25,000	9-4-2013
• 28	Meals on Wheels of Rowan (2013 CSG)	\$35,000	6-10-2013
• 29	Nazareth Children's Home (2012 grant)(transitional living cottage for women) ..	\$50,000	1-21-2013
• 30.	N.C. Center for Nonprofits (2013 grant)(Rowan Initiative) ..	\$10,000 ..	7-15-2013
• 31.	N C Cooperative Extension (2013 grant)(4-H innovative programming) ..	\$7,500	6-4-2013
• 32	Livingstone College (2012 grant)(Bridge program) ..	\$50,000	3-6-2013
• 33.	Partners in Learning (2013 grant)(campus safety program)	\$5,000	12-2-2013
• 34.	Pops at the Post (2012 grant)(2013 spring concert) ..	\$8,000 ..	3-7-2013
• 35.	Prevent Child Abuse Rowan (2013 grant)(operating support ..	\$10,000 ..	7-25-2013
• 36	Rowan County Literacy Council (2012 grant)(operating support) ..	\$10,000 ..	1-2-2013
• 37.	Rowan Crosby Scholars (2013 grant)(via Goodwill of Northwest NC)(Rowan Crosby Scholars program)	\$20,000	5-24-2013
• 38.	Rowan Helping Ministries (2011 grant)(partial payment on new facility)(architects' fees) ..	\$49,705.19	1-9-2013
• 39	Rowan Helping Ministries (2011 grant)(partial payment on new facility)(contractor fees, bond, insurance, etc) ..	\$68,406.65 ..	3-13-2013
• 40.	Rowan Helping Ministries (2011 grant)(partial payment on new facility)(contractor, arch Mgt fees, etc) ..	\$138,375.74 ..	4-4-2013
• 41	Rowan Helping Ministries (2011 grant)(partial payment on new facility)(contractor expenses) ..	\$238,322.21 ..	4-29-2013
• 42	Rowan Helping Ministries (2011 grant)(partial payment on new facility)(contractor expenses) ..	\$383,868.47 ..	9-6-2013
• 43	Rowan Helping Ministries (2011 grant)(partial payment on new facility)(contractor expenses) ..	\$372,972.28 ..	10-7-2013
• 44	Rowan Helping Ministries (2011 grant)(partial payment on new facility)(contractor expenses) ..	\$315,323.49 ..	11-4-2013
• 45.	Rowan Helping Ministries (2013 grant)(Crisis Assistance Ministry) ..	\$50,000 ..	7-15-2013
• 46.	Rowan Helping Ministries (2013 grant)(Continuing Support Grant Program) ..	\$50,000 ..	10-25-2013
• 47.	Rowan Museum (2013 grant)(operating support)	\$17,500	6-10-2013
• 48.	Rowan Pregnancy Support Center (2013 grant)(operating support) ..	\$5,000 ..	5-24-2013
• 49.	Rowan Vocational Opportunities (2013 grant)(HVAC installation) ..	\$30,200 ..	5-24-2013
• 50.	Rowan-Salisbury Schools (2013 grant)(Dole Elementary after school project) ..	\$15,000 ..	9-25-2013
• 51	Rowan-Salisbury Schools (2013 grant)(Elementary Honors Chorus 2014) ..	\$7,000 ..	8-30-2013
• 52	Rowan-Salisbury Schools (2013 grant)(Elementary school students field trips in Rowan County) ..	\$20,000 ..	9-13-2013
• 53	Rowan-Salisbury Schools (2013 grant)(STEM bus travels to rural communities) ..	\$8,000 ..	6-4-2013
• 54.	Rowan-Salisbury Schools (2012 grant)(1 1 Elementary iPad project) Year ½ ..	\$66,000 ..	3-11-2013
• 55	Rowan-Salisbury Schools (Knox Middle School)(2013 grant)(Connections Café) ..	\$2,500 ..	5-24-2013

• 56.	Rowan-Salisbury Schools (Knox Middle School)(2013)(gymnasium upgrades)	\$30,000	6-19-2013
• 57.	Rowan-Salisbury Schools (NRHS Entrepreneurial summer camp)(2013 grant)	\$14,000	8-29-2013
• 58.	Rowan-Salisbury Schools (NRHS chorus and bands)	\$12,405	10/21/2013
• 59.	Rowan-Salisbury Schools (Salisbury HS)(2013 grant)(calculators for mathematics department)	\$5,000	6-6-2013
• 60.	Rowan-Salisbury Schools (Salisbury HS)(2013 grant)(JROTC summer program)	\$17,564	6-13-2013
• 61.	Ruffy-Holmes Senior Center (2013 grant)(scholarship fund)	\$10,000	7-15-2013
• 62.	Salisbury Academy (2013 grant)(scholarship fund)	\$7,000	5-24-2013
• 63.	Salisbury Lions Club (2013 grant)(exams, glasses for the needy)	\$2,500	8-12-2013
• 64.	Salisbury-Rowan Community Action Agency (2013 grant)(case management system)	\$10,000	11/19/2013
• 65.	Salisbury-Rowan Symphony (2012 grant)(NC Symphony concerts for fifth grade students)	\$11,600	1-16-2013
• 66.	Saving Grace Farm (2013 grant)(transition in operations)	\$10,000	6-27-2013
• 67.	Special Olympics (2013 grant)(Special Olympics Rowan County)	\$10,000	5-24-2013
• 68.	UNCSA Foundation (2013 grant)(Shakespeare Lives! program)	\$2,000	6-27-2013
• 69.	United Way of Rowan County (2012 grant)(Continuing Support)(Day of Caring)	\$40,000	2-27-2013
• 70.	Waterworks Visual Arts Center (2013 grant)(operating support)	\$45,000	7-17-2013
• 71.	West Rowan Neighborhood Center Advisory Council (restoration of R.A. Clement School)	\$10,000	6-4-2013
• 72.	Westside Community Foundation, Inc.(2013 grant)(Stepping Up! Summer Program)	\$15,000	6-14-2013
• 73.	YMCA of Rowan County (support for Hurley Family branch)	\$25,000	11-14-2013
• 74.	Young Life Rowan (2013 grant)(camperships)	\$8,000	7/31/2013

75.	American Red Cross - Dole Chapter (disaster assistance)	5000.00	6/21/2013
76.	NC Dental Health Fund (Salisbury dental clinic, September)	25000.00	7/18/2013
77.	Rowan County Health Department (Health Link)	20,000.00	10/9/2013
		<u>2,900,106.03</u>	

78.	Association of Small Foundations	500.00	9/26/2013
		<u><u>2,900,606.03</u></u>	



THE BLANCHE & JULIAN ROBERTSON FAMILY FOUNDATION, INC.

◆ BOARD OF DIRECTORS ◆

• TIMOTHY BATES
1138 Laurel Street
Salisbury, NC 28144

• BRET BUSBY
5 Oak Road
Salisbury, NC 28144

• CATRELIA S. HUNTER
3855 Woodleaf Barber Road
Cleveland, NC 27013

• MARGARET H. KLUTTZ
520 South Fulton Street
Salisbury, NC 28144

• B. CLAY LINDSAY, JR.
Summit Developers, Inc.
P.O. Box 4283
Salisbury, NC 28145-4283

• R. SCOTT MADDOX
221 Sheridan Drive
Salisbury, NC 28144

• LILLIAN L. MORGAN
775 Stoner-Morgan Road
Salisbury, NC 28146

• ALEX T. ROBERTSON
Tiger Management, LLC
101 Park Avenue, 48th Floor
New York, NY 10178

• J. SPENCER ROBERTSON
44 Sidney Place
Brooklyn, NY 11201-4607

• WYNDHAM ROBERTSON
205 Cedar Berry Lane
Chapel Hill, NC 27517

FRED J. STANBACK, JR.
507 West Innes Street, Suite 270
Salisbury, NC 28144

JASON A. WALSER
P.O. Box 4284
Salisbury, NC 28145-4284

OFFICERS & STAFF

MARGARET H. KLUTTZ
Chair

B. CLAY LINDSAY, JR.
Vice-Chair

LILLIAN L. MORGAN
Secretary

DAVID E. SETZER
Executive Director

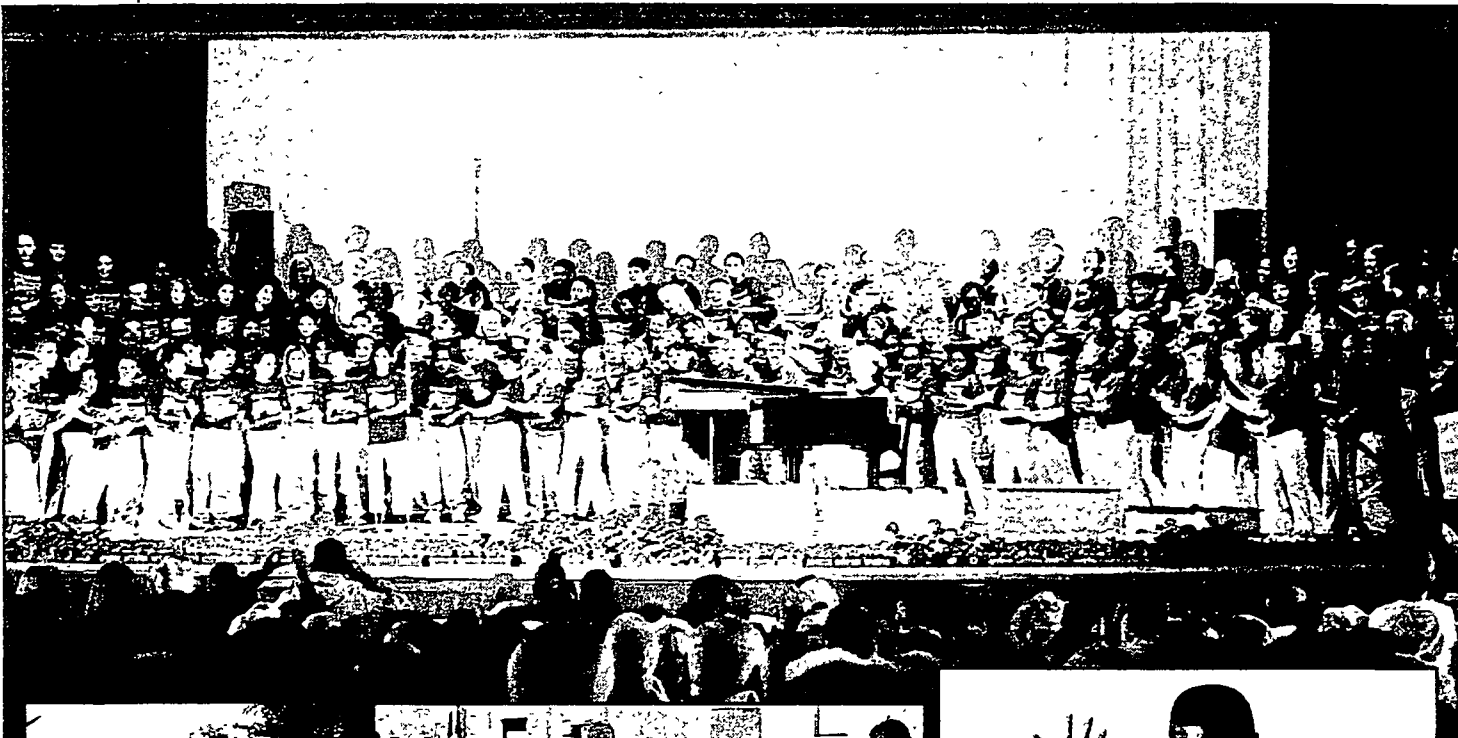
FOUNDATION MAILING ADDRESS:
P.O. Box 4242, Salisbury, NC 28145-4242

FOUNDATION OFFICE LOCATION:
141 East Council Street, Salisbury, NC 28144

Office: 704-637-0511 Fax: 704-637-0177

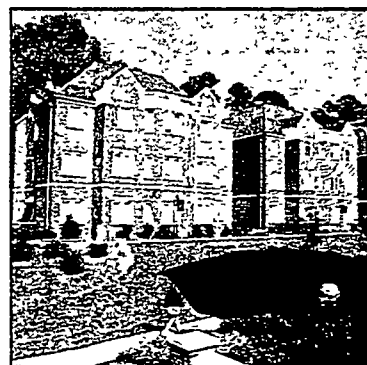
E-Mail: bjrfoundation@bellsouth.net

www.bjrff.org



2013 GRANT APPLICATION FORM

Deadline: 5 p.m. Friday,
MARCH 15, 2013



THE BLANCHE & JULIAN ROBERTSON FAMILY FOUNDATION
SALISBURY, NORTH CAROLINA

THE BLANCHE & JULIAN ROBERTSON FAMILY FOUNDATION, INC.
SALISBURY, NORTH CAROLINA

GRANT APPLICATION FORM / 2013

(Must be typed or printed) (Submission Deadline—March 15, 2013)

1. Name of organization _____

Mailing Address _____

City, State, Zip _____

Contact Person _____ Title _____

Telephone No. _____ Fax No _____ E-Mail _____

Tax Status *(check one)*:

☐ Tax-exempt charitable organization [501(c)3] Date of Exemption _____ ☐ Government tax-exempt unit

☐ Religious organization ☐ Affiliated with tax-exempt organization (specify fiscal agent: _____)

1 Name of Project to be Funded _____

Grant Amount Requested _____ Total Budget for Project _____

3 Starting Date _____ Completion Date _____

4. Description of Project _____

5 Current assets of your organization \$ _____ Date of latest audit or report _____

6 Are you an affiliate of the United Way? ☐ Yes ☐ No (_____ % of total budget) _____

7. What funds from other sources have been received or are under consideration for this project? _____

8. How do you plan to fund this project in the future? Do you have a sustainability plan? _____

9. List the three measurable results you expect to accomplish with this grant.

1. _____ 2. _____ 3. _____

10 Are any licensing, zoning, or regulatory approvals needed to conduct this project? ☐ Yes ☐ No

If yes, please explain. _____

REVIEW & APPROVAL OF GRANT APPLICATION

This application has been reviewed by our organization's governing body and chief executive officer and approved for submission. This organization accepts full responsibility for any funds received and will abide by The Blanche & Julian Robertson Family Foundation's Grant Provisions and Conditions.

Board Chair or Chief Operating Officer *(Signature Required)* _____

(Print Name) _____

Title _____ Date Signed _____

THE BLANCHE & JULIAN ROBERTSON FAMILY FOUNDATION, INC.

SALISBURY, NORTH CAROLINA

MISSION AND PHILOSOPHY

The Blanche & Julian Robertson Family Foundation, Inc. was incorporated in 1997 and funded by a generous gift from Julian H. Robertson, Jr. with additional support from his sisters, Wyndham Robertson and Blanche Bacon, children of the late Blanche S. & Julian H. Robertson, Sr. of Salisbury. The mission of the foundation, through its gifts and grants, is to improve the quality of life in Salisbury and surrounding area. The Foundation encourages efforts by tax-exempt organizations and governmental agencies dedicated to making our communities better places to live, work, and to raise and educate children.

GUIDELINES FOR GRANT APPLICATIONS

The following guidelines are used in the evaluation and consideration of grant requests:

- Grants are limited to programs and projects that will benefit the people of Salisbury and surrounding area. No grants are made to individuals or to religious organizations in their sectarian programming. Scholarships are not funded. Grants are not made to organizations outside of Rowan County.
- Preference in awarding grants will be made to those projects that encourage constructive change, strive toward achieving excellence, and have a significant component of public service.
- Except in unusual circumstances, grants will be made only to those entities designated by the IRS as public charities or nonprofit organizations, and government agencies with a charitable purpose.

GRANT APPLICATION PROCEDURE (PLEASE READ CAREFULLY)

(Note: One copy of materials is sufficient. Do not staple or bind materials or place them in a ring notebook.)

1. Complete the Grant Application Form/2013 and have it signed by the Board Chairman or Chief Operating Officer of your organization. Note: if you would like to receive this form online, email bjrfoundation@bellsouth.net and the form will be sent to you as a Word document, which you can fill out on screen, print, sign, and mail or hand-deliver to the Foundation at 141 East Council St., Salisbury, NC 28144.
2. Include the following attachments with the application form:
 - A cover letter, not more than two pages in length, which concisely addresses the following:
 - ☒ Objectives and background of the project;
 - ☒ Demonstration of need;
 - ☒ Specific plans and timetable;
 - ☒ Description of both the current and long-term funding plans; and
 - ☒ Qualifications of the organization and personnel concerned.
 - A budget for the specific project detailing how the funds will be spent and all sources and amounts of income. You must also submit a budget for your organization detailing both expenses and income for the current fiscal year. If you have received support from other foundations, please list each gift by name, amount, and date committed.
 - A copy of the most recent IRS 990 form or financial report for your organization approved and signed by your accountant, auditor, chief financial officer, or financial director.
 - List of your current Board of Directors or Board of Trustees.
 - Copy of your organization's IRS 501(c)3 or appropriate tax determination status letter.
(If your organization is exempt as a local unit of a national organization, attach your certification of membership. Do not send your federal tax ID number nor state exemption notice.)

3. Mail the application and supporting materials to: **The Blanche & Julian Robertson Family Foundation, Inc.,**
P.O. Box 4242, Salisbury, NC 28145-4242

--OR-- hand-deliver to the Foundation Office at 141 East Council Street, Salisbury, NC.

Grant Deadline is 5 p.m., Friday, March 15, 2013



To: All Grant Applicants

The Board of Directors of The Blanche & Julian Robertson Family Foundation welcomes your interest in applying for funds to support your project or program. Our Foundation is totally committed to the goal of improving the quality of life in Salisbury and surrounding area.

To assist you in understanding the types of projects and programs The Blanche & Julian Robertson Family Foundation is interested in supporting, please refer to the following category listing, in random order, of the types of efforts the Foundation may favorably consider. This is not an inclusive list, but it suggests the general direction of Foundation interest:

- Programs which address social problems and nurture positive social relationships
- Efforts aimed at enriching lives through exposure to the cultural arts
- Neighborhood revitalization programs, especially when such programs encourage development of transitional housing and enable first-time homeowners to purchase homes
- Programs that improve opportunities for youth at risk and families in crisis:
 - Innovative, under-funded school programs
 - Preschool programs
 - Programs providing youth activities, especially for after-school, weekends, and during summer
 - Family and parental counseling
 - Teen pregnancy programs

- Programs aimed at drug and crime reduction
- Programs supporting efforts by the unemployed or underemployed to improve their situation
- Efforts to improve broad-based educational, recreational, and athletic opportunities
- Efforts which address public health issues
- Programs which further environmental conservation and promote a green approach in construction of new facilities or remodeling of older structures.

The Foundation is also interested in programs and projects that demonstrate the attributes of leverage (where a grant will attract matching gifts or other funding), as well as innovation, thoroughness, passion, and commitment.

Over the past 15 years Robertson Family Foundation grants have reflected the following:

Arts & Culture	4.7%
Children, Youth & Families.....	31.2%
Community Development.....	13.1%
Education	38.7%
History & Preservation	2.7%
Public Health & Safety	9.6%

PLEASE NOTE:

The Foundation does not make grants to religious organizations in their sectarian programming or to individuals and does not fund scholarships.

Mailing Address:

THE BLANCHE & JULIAN ROBERTSON FAMILY FOUNDATION, INC.

P.O. BOX 4242, SALISBURY, NC 28145-4242

Office Location – 141 East Council Street, Salisbury, NC 28144

Phone: 704-637-0511 / Fax: 704-637-0177

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David E. Setzer, *Executive Director*

Application
Deadline:
March 15,
2013