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

Do not enter Social Security numbers on this form as it may be made public.

, and ending

Department of the Treasury Internal Revenue Service

▶ Information about Form 990-PF and its separate instructions is at www irs.gov/form990of. For calendar year 2013 or tax year beginning

| | Nar | me of foundation | . . | , | A Employer identification | on number |
|--|-----------------------|---|---|---------------------|--|--|
| | | onnie & Carol Poole Family | r Poundation | | 56-208773 | Λ |
| | | mber and street (or PO box number if mail is not delivered to street a | | Room/suite | | <u></u> |
| | | c/o Carol J. Poole, P.O. Bo | • | noonvalue | B Telephone number 919-818-9: | 101 |
| • | | y or town, state or province, country, and ZIP or foreign po | | <u> </u> | C If exemption application is | T |
| | | Raleigh, NC 27619 | , s. m. 1000 | | I exemption application is | pending, check here |
| • | | Check all that apply: Initial return | Initial return of a fo | rmer public charity | D 1. Foreign organization | ns, check here |
| | | Final return | Amended return | • | | |
| | | Address change | Name change | | Foreign organizations in check here and attach or | neeting the 85% test, computation |
| • | H C | Check type of organization: X Section 501(c)(3) exe | empt private foundation | · | E If private foundation st | atus was terminated |
| | | Section 4947(a)(1) nonexempt charitable trust | Other taxable private founda | | under section 507(b)(| |
| - | I Fa | air market value of all assets at end of year J Accountin | • | X Accrual | F If the foundation is in a | 60-month termination |
| | | | ner (specify) | | under section 507(b)(| 1)(B), check here |
| | | \$ 1,078,712. (Part I, colun | nn (d) must be on cash b | oasis.) | | |
| l | Pa | Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not | (a) Revenue and | (b) Net investment | (c) Adjusted net | (1) Disbursements for charitable purposes |
| | | necessarily equal the amounts in column (a)) | expenses per books | income | income | (cash basis only) |
| | | 1 Contributions, gifts, grants, etc., received | | | N/A | |
| | | 2 Check X if the foundation is not required to attach Sch 8 | 22 | 2.2 | | <u> </u> |
| | | 3 Interest on savings and temporary cash investments | 23. | 23. 30,745. | | Statement 1 |
| | | 4 Dividends and interest from securities | 30,745. | 30,745. | | Statement 2 |
| | | 5a Gross rents | | | | |
| | | b Net rental income or (loss) | 46,739. | | | |
| | ne | 6a Net gain or (loss) from sale of assets not on line 10 b Gross sales price for all 851,463. | 40,739. | | | |
| | Revenue | 7 Capital gain net income (from Part IV, line 2) | | 46,739. | | |
| | Re | 8 Net short-term capital gain | | 10,133. | | |
| | | 9 Income modifications | | THE TO | | |
| | | 10a and allowances | 1 35 | 10 | | |
| | | b Less Cost of goods sold | P = - | 6014 10 | | |
| | | c Gross profit or (loss) | I'M NE | V 2 4 2011 (0) | | |
| | | 11 Other income | 100 100 | يخليب | À | |
| | | 12 Total. Add lines 1 through 11 | 77 \$ 507. | 77,507. | ا | |
| - | | 13 Compensation of officers, directors, trustees, etc | 1 00 | GUEIU 0. | | 0. |
| | | 14 Other employee salaries and wages | | | | |
| | | 15 Pension plans, employee benefits | | | | |
| | se | 16a Legal fees | | | | <u> </u> |
| | xpenses | b Accounting fees Stmt 3 | 5,593. | 5,593. | | 0. |
| | Ä | c Other professional fees | | | | |
| | tive | 17 Interest | | | <u> </u> | |
| • | and Administrative Ex | 18 Taxes | | | | - |
|) | ini | 19 Depreciation and depletion | | | | |
| | ΕÞ | 20 Occupancy | | | | |
| | Þ | 21 Travel, conferences, and meetings | | | | |
| | Jan | 22 Printing and publications 23 Other expenses Stmt 4 | 13,478. | 13,478. | | 0. |
| 999 | ting | 24 Total operating and administrative | 13,470. | 13,470. | | + • |
| | Operating | expenses. Add lines 13 through 23 | 19.071. | 19,071. | | 0. |
| | Ö | 25 Contributions, gifts, grants paid | 19,071. 52,250. | | | 52,250. |
| • | | 26 Total expenses and disbursements. | , | ** | | 1 |
| 2 | | Add lines 24 and 25 | 71,321. | 19,071. | | 52,250. |
| こうこうこうこうこうこうこうこうこうこうこうこうこうこうこうこうこうこうこう | | 27 Subtract line 26 from line 12: | | | | 1 |
| 1 | | Excess of revenue over expenses and disbursements | 6,186. | | | |
| | | b Net investment income (if negative, enter -0-) | | 58,436. | | |
| | | C Adjusted net income (if negative, enter -0-) | | | N/A | |

| 1 Cash - non-interest-bearing | Doz | Balance Sheets Attached schedules and amounts in the description | Beginning of year | End of year | | | |
|--|----------------|--|-------------------|----------------|---------------------------|--|--|
| 2 Savrogs and temporary cash mesternens 3 Accounts rememble ▶ Less allowance for doubtful accounts ▶ 4 Pictiges receivable ▶ Less allowance for doubtful accounts ▶ 5 Grants receivable 8 Receivables use from officers, directors, trustees, and other degualified persons 7 Other reses returns trustee 1 Sample of the state of the st | Par | column should be for end-of-year amounts only | (a) Book Value | (b) Book Value | (c) Fair Market Value | | |
| 2 Savrogs and temporary cash mesternens 3 Accounts rememble ▶ Less allowance for doubtful accounts ▶ 4 Pictiges receivable ▶ Less allowance for doubtful accounts ▶ 5 Grants receivable 8 Receivables use from officers, directors, trustees, and other degualified persons 7 Other reses returns trustee 1 Sample of the state of the st | 1 | Cash - non-interest-bearing | | 11,703. | 11,703. | | |
| Security receivable Less allowance for doubtful accounts Periodics receivable Less allowance for doubtful accounts Periodics receivable Receivables due from officers, directors, trustees, and other dequalitied persons 228 | | | 25.757. | | | | |
| Less, allowance for doubtful accounts ▶ Less, allowance for doubtful accounts ▶ Carents receivable Less, allowance for doubtful accounts ▶ Server to the control of the co | | · · · | | | 33 / 2 23 . | | |
| 4 Pedges receivable | " | | | | | | |
| Carsin Screenible Car | | | + | | | | |
| S Grants receivable 6 Receivables due from officers, directors, trustees, and other desqualited persons 7 Out-room and text-increase 1. Less, 3 allowance for doubtful accounts 1. Less allowance for doubtful accounts 1. Less allowance for doubtful accounts 1. Less allowance for doubtful accounts 1. Investments comparte store 1. Investments comparte store 1. Investments comparte bonds 1. Investments investment comparte store 1. Investments investments comparte bonds 1. Investments investment devicate 1. Investments comparte bonds 1. Investments investment comparte bonds 1. Investments investment comparte bonds 1. Investments 1. Investments comparte bonds 1. Investments 1. Investments comparte bonds 1. Investments 1. I | ٩ ا | | | ľ | | | |
| Receivables due from officers, directors, trustees, and other decignalified persons 228 | - 1 | | | | | | |
| Total reason to transport to the company to the | 1 | }- | | | | | |
| Present extractions | 6 | Receivables due from officers, directors, trustees, and other | | | | | |
| 8 Sees allowance for doubthal accounts | | disqualified persons | 228. | 228. | 228. | | |
| Book Brown common Brown commo | 7 | Other notes and loans receivable | | | | | |
| 9 Prepard expenses and deterred charges 10a Investments - U.S. and state government obligations 11b Investments - corporate bonds 12b Investments - corporate bonds 15b Investm | | Less: allowance for doubtful accounts | 1 | | | | |
| 9 Prepard expenses and deterred charges 10a Investments - U.S. and state government obligations 11b Investments - corporate bonds 12b Investments - corporate bonds 15b Investm | Ø 8 | Inventories for sale or use | | | | | |
| | set o | | | | | | |
| b Investments - corporate stock Stmt 6 403,352, 351,493, 436,565, c Investments - corporate bonds Stmt 7 277,962, 248,463, 242,197. | ¥ 10 | | 29 019 | 52 211 | 51 501 | | |
| c investments und beliefing and equipment basis but is accommented dependent 2 investments - mortgage loans 12 investments - mortgage loans 13 investments - other St.mt. 8 255,566. 294,723. 297,269. 14 Land, buildings, and equipment basis Liss accomments dependent 15 Other assets (describe 16 Total assets (describe 16 Total assets (describe 16 Total assets) (describe 16 Total assets) (describe 16 Total assets) (describe 17 Accounts payable and accrued expenses 18 Grants payable and accrued expenses 18 Grants payable and accrued expenses 19 Deferred revenue 20 Lears from ortices, directors, busieves, and other desqualited persons 21 Total liabilities (add lines 17 through 22) 0. 0. 0. 23 Total liabilities (add lines 17 through 22) 0. 0. 0. 24 Defermanently restricted 991, 884. 998, 070. 25 Permanently restricted 991, 884. 998, 070. 26 Total net assets or fund balances 991, 884. 998, 070. 27 Capital stock, trust principal, or current funds 29 Paid-nor capital surplus, or land, bldg, and equipment fund 29 Paid-nor capital surplus, or land, bldg, and equipment fund 29 Paid-nor capital surplus, or land, bldg, and equipment fund 29 Paid-nor capital surplus, or land, bldg, and equipment fund 29 Paid-nor capital surplus, or land, bldg, and equipment fund 991, 884. 998, 070. 28 Paid-nor capital surplus, or land, bldg, and equipment fund 991, 884. 998, 070. 29 Paid-nor capital surplus, or land, bldg, and equipment fund 991, 884. 998, 070. 29 Paid-nor capital surplus, or land, bldg, and equipment fund 991, 884. 998, 070. 29 Paid-nor capital surplus, or land, bldg, and equipment fund 991, 884. 998, 070. 20 Total net assets or fund balances 991, 884. 998, 070. 20 Total net assets or fund balances at beginning of year-Part II, column (a), line 30 991, 884. 998, 070. 20 Total net assets or fund balances at beginning of year-Part II, column (b), line 30 998, 070. 30 Total net assets or fund balances at en | | | | | 136 565 | | |
| 1 | | } | | | 240,000. | | |
| Lists accumulated deprecution 12 Investments - mortgage loans 13 Investments - mortgage loans 14 Land, buildings, and equipment basis Less accumulated deprecution 15 Other assets (describe 16 Total assets (describe 16 Total assets (describe 17 Total assets (describe 17 Total assets (describe 18 Caracteristic 18 | | c Investments - corporate bonds | 2//,962. | 240,403. | 242,197. | | |
| 12 Investments - mortgage loans 13 Investments - other 14 Land, buildings, and equipment basis 15 Other assets (describe 15 Other assets (describe 16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item 1) 991,884 998,070 1,078,712 17 Accounts payable and accrued expenses 18 Grants payable 19 Deferred revenue 10 Deferred revenue | 11 | Investments land, buildings, and equipment basis | | | | | |
| 13 Investments - other | | Less accumulated depreciation | | | | | |
| 14 Land, buildings, and equipment basis ▶ 15 Other assets (describe ▶ 16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item 1) 17 Accounts payable and accrued expenses 18 Grants payable 19 Deferred revenue 20 Loans from officers, directors, trustees, and other disqualified persons 10 Mortgages and other notes payable 21 Zother liabilities (add lines 17 through 22) 22 Total liabilities (add lines 17 through 26 and lines 30 and 31. 23 Total liabilities (add lines 17 through 26 and lines 30 and 31. 24 Umrestricted 25 Temporarly restricted 26 Permanently restricted 27 Capital stock, trust principal, or current funds 28 Paid-in or capital surplus, or land, blidg., and equipment fund 29 Retained earnings, accumulated income, endowment, or other funds 30 Total 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) 20 Enter amount from Part I, line 27s 3 Other increases not included in line 2 (itemize) ▶ 4 Add lines 1, 2, and 3 5 Decreases not fund bulances at end of year (line 4 minus line 5) - Part II, column (b), line 30 6 998,0770. | 12 | Investments - mortgage loans | | | | | |
| 14 Land, buildings, and equipment basis ▶ 15 Other assets (describe ▶ 16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item 1) 17 Accounts payable and accrued expenses 18 Grants payable 19 Deferred revenue 20 Loans from officers, directors, trustees, and other disqualified persons 10 Mortgages and other notes payable 21 Zother liabilities (add lines 17 through 22) 22 Total liabilities (add lines 17 through 26 and lines 30 and 31. 23 Total liabilities (add lines 17 through 26 and lines 30 and 31. 24 Umrestricted 25 Temporarly restricted 26 Permanently restricted 27 Capital stock, trust principal, or current funds 28 Paid-in or capital surplus, or land, blidg., and equipment fund 29 Retained earnings, accumulated income, endowment, or other funds 30 Total 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) 20 Enter amount from Part I, line 27s 3 Other increases not included in line 2 (itemize) ▶ 4 Add lines 1, 2, and 3 5 Decreases not fund bulances at end of year (line 4 minus line 5) - Part II, column (b), line 30 6 998,0770. | 13 | Investments - other Stmt 8 | 255,566. | 294,723. | 297,269. | | |
| Less accumulated despreciation 15 Other assets (describe ► 16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item 1) 17 Accounts payable and accrued expenses 18 Grants payable 19 Deferred revenue 20 Usons from offices, directors, trustees, and other disqualified persons 21 Mortgages and other notes payable 22 Other liabilities (describe ► 23 Total liabilities (add lines 17 through 22) 24 Unrestricted 25 Temporarily restricted 26 Temporarily restricted 27 Total liabilities and not follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31. 28 Pardin or capital surplus, or land, blig., and equipment fund 29 Retained earnings, accumulated income, endowment, or other funds 28 Pardin or capital surplus, or land, blig., and equipment fund 29 Retained or capital surplus, or land, blig., and equipment fund 29 Retained earnings, accumulated income, endowment, or other funds 30 Total 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) 20 Enter amount from Part I, line 27a 3 Other increases not included in line 2 (itemize) ► 4 Add lines 1, 2, and 3 5 Decreases not included in line 2 (itemize) ► 5 Decreases not fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 6 998,0770. | 14 | Land, buildings, and equipment; basis ▶ | | | | | |
| 15 Other assets (describe ▶ 16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item 1) 17 Accounts payable and accrued expenses 18 Grants payable 19 Deferred revenue 20 Loars from officers, directors, trustees, and other disqualified persons 21 Mortgages and other notes payable 22 Other liabilities (add lines 17 through 22) 23 Total liabilities (add lines 17 through 22) 24 Unrestricted 25 Temporarily restricted 26 Permanently restricted 27 Capital stock, trust principal, or current funds 28 Paid-in or capital surplus, or land, bldg., and equipment fund 29 Retained earnings, accumulated income, endowment, or other funds 30 Total net assets or fund balances 1 Total net assets or fund balances at beginning of year - Part II, column (a), line 30 (must agree with end-of-year liquer eported on prior year's return) 2 Total net assets or fund balances at end of year (line 4 mmus line 5) - Part II, column (b), line 30 6 Total net assets or fund balances at end of year (line 4 mmus line 5) - Part II, column (b), line 30 6 Total net assets or fund balances at end of year (line 4 mmus line 5) - Part III, column (b), line 30 6 Total net assets or fund balances at end of year (line 4 mmus line 5) - Part III, column (b), line 30 6 Total net assets or fund balances at end of year (line 4 mmus line 5) - Part III, column (b), line 30 6 Total net assets or fund balances at end of year (line 4 mmus line 5) - Part III, column (b), line 30 6 Total net assets or fund balances at end of year (line 4 mmus line 5) - Part III, column (b), line 30 6 Total net assets or fund balances at end of year (line 4 mmus line 5) - Part III, column (b), line 30 6 Total net assets or fund balances at end of year (line 4 mmus line 5) - Part III, column (b), line 30 6 Total net assets or fund balances at end of year (line 4 mmus line 5) - Part III, column (b), line 30 | | | | į | | | |
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| 19 Deferred revenue 20 Loans from offices, directors, trustees, and other disqualified persons 21 Mortgages and other notes payable 22 Other liabilities (describe ▶ | - 1 | · · · · · · · · · · · · · · · · · · · | | | | | |
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| Total liabilities and complete lines 24 through 22) Total liabilities (add lines 17 through 22) Total liabilities and net assets or fund balances 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) Enter amount from Part I, line 27a Total net assets or fund balances at leginning of year - Part III, column (b), line 30 (must agree with end-of-year figure reported on prior year's return) Enter amount from Part I, line 27a Total net assets or fund balances at leginning of year - Part III, column (b), line 30 (must agree with end-of-year figure reported on prior year's return) Enter amount from Part I, line 27a Total net assets or fund balances at leginning of year - Part III, column (b), line 30 (Total net assets or fund balances at end of year (line 4 minus line 5) - Part III, column (b), line 30 Total net assets or fund balances at end of year (line 4 minus line 5) - Part III, column (b), line 30 Total net assets or fund balances at end of year (line 4 minus line 5) - Part III, column (b), line 30 Total net assets or fund balances at end of year (line 4 minus line 5) - Part III, column (b), line 30 | ਉਂ 21 | Mortgages and other notes payable | | | | | |
| 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 27 Capital stock, trust principal, or current funds 28 Paid-in or capital surplus, or land, bldg., and equipment fund 29 Retained earnings, accumulated income, endowment, or other funds 30 Total net assets or fund balances 991,884. 998,070. 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) 2 Enter amount from Part I, line 27a 3 Other increases not included in line 2 (itemize) 4 Add lines 1, 2, and 3 5 Decreases not included in line 2 (itemize) 5 0.6 6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part III, column (b), line 30 6 998,070. | 그 22 | Other liabilities (describe) | | | | | |
| 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 27 Capital stock, trust principal, or current funds 28 Paid-in or capital surplus, or land, bldg., and equipment fund 29 Retained earnings, accumulated income, endowment, or other funds 30 Total net assets or fund balances 991,884. 998,070. 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) 2 Enter amount from Part I, line 27a 3 Other increases not included in line 2 (itemize) 4 Add lines 1, 2, and 3 5 Decreases not included in line 2 (itemize) 5 0.6 6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part III, column (b), line 30 6 998,070. | | | | | | | |
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| and complete lines 24 through 26 and lines 30 and 31. 24 Unrestricted 25 Temporarily restricted 26 Permanently restricted 27 Capital stock, trust principal, or current funds 28 Paid-in or capital surplus, or land, bldg., and equipment fund 29 Retained earnings, accumulated income, endowment, or other funds 30 Total net assets or fund balances 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) 2 Enter amount from Part I, line 27a 3 Other increases not included in line 2 (itemize) 4 Add lines 1, 2, and 3 5 Decreases not included in line 2 (itemize) 5 0. 6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part III, column (b), line 30 6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part III, column (b), line 30 6 998,070. | - | | | | | | |
| 24 Unrestricted 25 Temporarily restricted 26 Permanently restricted 27 Temporarily restricted 28 Pard-in or capital stock, trust principal, or current funds 29 Paid-in or capital surplus, or land, bldg., and equipment fund 29 Retained earnings, accumulated income, endowment, or other funds 30 Total net assets or fund balances 31 Total liabilities and net assets/fund balances 4 Part III Analysis of Changes in Net Assets or Fund Balances 4 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) 29 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) 4 Add lines 1, 2, and 3 5 Decreases not included in line 2 (itemize) 5 0.6 6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 6 998,070. | | , | | Ì | | | |
| 31 Total liabilities and net assets/fund balances 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) 2 Enter amount from Part I, line 27a 3 Other increases not included in line 2 (itemize) ▶ 4 Add lines 1, 2, and 3 5 Decreases not included in line 2 (itemize) ▶ 5 O . 6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 6 998,070 . | 8 | · · · · · · · · · · · · · · · · · · · | 991 991 | 998 070 | | | |
| 31 Total liabilities and net assets/fund balances 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) 2 Enter amount from Part I, line 27a 3 Other increases not included in line 2 (itemize) ▶ 4 Add lines 1, 2, and 3 5 Decreases not included in line 2 (itemize) ▶ 5 O . 6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 6 998,070 . | 2 24 | | 331,004. | 330,070. | | | |
| 31 Total liabilities and net assets/fund balances 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) 2 Enter amount from Part I, line 27a 3 Other increases not included in line 2 (itemize) ▶ 4 Add lines 1, 2, and 3 5 Decreases not included in line 2 (itemize) ▶ 5 O . 6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 6 998,070 . | ᇛ 25 | | | | | | |
| 31 Total liabilities and net assets/fund balances 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) 2 Enter amount from Part I, line 27a 3 Other increases not included in line 2 (itemize) ▶ 4 Add lines 1, 2, and 3 5 Decreases not included in line 2 (itemize) ▶ 5 O . 6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 6 998,070 . | <u>m</u> 26 | | | | | | |
| 31 Total liabilities and net assets/fund balances 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) 2 Enter amount from Part I, line 27a 3 Other increases not included in line 2 (itemize) ▶ 4 Add lines 1, 2, and 3 5 Decreases not included in line 2 (itemize) ▶ 5 O . 6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 6 998,070 . | Ĕ | Foundations that do not follow SFAS 117, check here | | | | | |
| 31 Total liabilities and net assets/fund balances 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) 2 Enter amount from Part I, line 27a 3 Other increases not included in line 2 (itemize) ▶ 4 Add lines 1, 2, and 3 5 Decreases not included in line 2 (itemize) ▶ 5 O . 6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 6 998,070 . | Œ | and complete lines 27 through 31. | | | | | |
| 31 Total liabilities and net assets/fund balances 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) 2 Enter amount from Part I, line 27a 3 Other increases not included in line 2 (itemize) ▶ 4 Add lines 1, 2, and 3 5 Decreases not included in line 2 (itemize) ▶ 5 O . 6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 6 998,070 . | S 27 | Capital stock, trust principal, or current funds | | | | | |
| 31 Total liabilities and net assets/fund balances 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) 2 Enter amount from Part I, line 27a 3 Other increases not included in line 2 (itemize) ▶ 4 Add lines 1, 2, and 3 5 Decreases not included in line 2 (itemize) ▶ 5 O . 6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 6 998,070 . | ₹ 28 | Paid-in or capital surplus, or land, bldg., and equipment fund | | | | | |
| 31 Total liabilities and net assets/fund balances 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) 2 Enter amount from Part I, line 27a 3 Other increases not included in line 2 (itemize) ▶ 4 Add lines 1, 2, and 3 5 Decreases not included in line 2 (itemize) ▶ 5 O . 6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 6 998,070 . | ÿ 29 | | | | | | |
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| 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) 2 Enter amount from Part I, line 27a 3 Other increases not included in line 2 (itemize) ▶ 4 Add lines 1, 2, and 3 5 Decreases not included in line 2 (itemize) ▶ 5 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 6 998,070. | z " | Total net assess of fund balances | 331,0011 | 330,070. | | | |
| 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) 2 Enter amount from Part I, line 27a 3 Other increases not included in line 2 (itemize) ▶ 4 Add lines 1, 2, and 3 5 Decreases not included in line 2 (itemize) ▶ 5 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 6 998,070. | ١,, | Total Habilities and not accept the discourse | 001 001 | 009 070 | | | |
| 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) 2 Enter amount from Part I, line 27a 3 Other increases not included in line 2 (itemize) ► 4 Add lines 1, 2, and 3 5 Decreases not included in line 2 (itemize) ► 5 O • 6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 6 998,070 • | 31 | Total Habilities and net assets/fund balances | 331,004. | 330,070. | | | |
| 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) 2 Enter amount from Part I, line 27a 3 Other increases not included in line 2 (itemize) ► 4 Add lines 1, 2, and 3 5 Decreases not included in line 2 (itemize) ► 5 O • 6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 1 991,884 • 2 6,186 • 3 0 • 6 998,070 • | Parl | Analysis of Changes in Net Assets or Fund Ba | alances | | | | |
| (must agree with end-of-year figure reported on prior year's return) 2 Enter amount from Part I, line 27a 3 Other increases not included in line 2 (itemize) ► 4 Add lines 1, 2, and 3 5 Decreases not included in line 2 (itemize) ► 5 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 1 991,884. 2 6,186. 3 0. 4 998,070. | | | | | _ | | |
| 3 0. 4 Add lines 1, 2, and 3 5 Decreases not included in line 2 (itemize) ▶ 5 Decreases not included in line 2 (itemize) ▶ 6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 6 998,070. | | | 30 | | 004 004 | | |
| 3 0. 4 Add lines 1, 2, and 3 5 Decreases not included in line 2 (itemize) ▶ 5 Decreases not included in line 2 (itemize) ▶ 6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 6 998,070. | | | | 1 | 991,884. | | |
| 3 0. 4 Add lines 1, 2, and 3 5 Decreases not included in line 2 (itemize) ▶ 5 Decreases not included in line 2 (itemize) ▶ 6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 6 998,070. | | | | 2 | 6,186. | | |
| 4 Add lines 1, 2, and 3 5 Decreases not included in line 2 (itemize) ► 6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 4 998,070. 5 0. 6 998,070. | 3 Oth | er increases not included in line 2 (itemize) | | 3 | 0. | | |
| 5 Decreases not included in line 2 (itemize) ► 5 0. 6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 6 998,070. | | | - | 4 | 998,070. | | |
| 6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 6 998,070. | | | | | | | |
| | | | umn (b), line 30 | | 998.070. | | |
| Form QQA_DF (2012) | | The state of the s | Α-μ | | Form 990-PF (2013) | | |

| Part IV Capital Gains | and Losses for Ta | ax on Investmer | nt Income | | | | | | |
|--|---|---|---------------------------------------|----------|----------------------------|----------------------------|---------------------|------------------------------|------------------------------------|
| (a) List and descr 2-story brick wa | ribe the kind(s) of propert rehouse; or common sto | y sold (e.g., real estate, ck, 200 shs. MLC Co.) | | 1 1 | How ac - Purc - Dona | quired hase ation | (c) Date (mo., d | | (d) Date sold (mo., day, yr.) |
| 1a BB&T Attachmen | t | | | | | P | Vari | ous | Various |
| b Barclays PLC | | | | | | P | Vari | ous | Various |
| C | | | | | | | | • | |
| <u>d</u> | | | | <u> </u> | | | | | |
| e | | | | <u> </u> | | | | | <u>.</u> |
| (e) Gross sales price | (f) Depreciation allo (or allowable) | | ost or other basis expense of sale | | | | | ain or (loss s (f) minus | (g) |
| a 851,318. | | | 804,72 | 4. | | | | | 46,594. |
| ь 145. | | | | | | | | | 145. |
| С | | | | | | | | | |
| d | | | | 1 | | | | | |
| e | | | | | | | | | _ |
| Complete only for assets showin | g gain in column (h) and | owned by the foundation | n on 12/31/69 | | | | | ol. (h) gain | |
| (i) F.M.V. as of 12/31/69 | (j) Adjusted bas | | xcess of col. (I) | | | col. | | not less tha (from col. (| |
| (1)1 :W:.V: as 01 12/3 1/09 | as of 12/31/69 | ove | r col. (j), if any | | | | L03303 | (110111 0012 (| |
| a | | | | | | | | | 46,594. |
| b | | | | | | | - | | 145. |
| С | | | | | | | • | | |
| d | | | | | | | | | |
| е | | | | | | | | | |
| | (If gain | , also enter in Part I, line | e 7 | 7 | | | | | |
| 2 Capital gain net income or (net ca | pital loss) If (loss | s), enter -0- ın Part İ, lın | e 7 | | 2 | | | | 46,739. |
| 3 Net short-term capital gain or (los | s) as defined in sections | 1222(5) and (6): | | | | | | | |
| If gain, also enter in Part I, line 8, | | TEEE(O) and (O). | | 11 | | | | | |
| If (loss), enter -0- in Part I, line 8 | (0) | | | 別 | 3 | | | N/A | |
| Part V Qualification U | nder Section 494 | 0(e) for Reduce | d Tax on Net | Inv | estn | nent Inc | ome | | |
| (For optional use by domestic private | foundations subject to th | ie section 4940(a) tax o | n net investment in | come | :.) | | | | |
| | · | , , | | | • | | | | |
| If section 4940(d)(2) applies, leave the | is part blank. | | | | | | | | |
| Was the foundation liable for the sect | ion 4942 tax on the distri | butable amount of any v | ear in the base per | rod? | | | | | Yes X No |
| If "Yes," the foundation does not quali | | | | | | | | | |
| 1 Enter the appropriate amount in e | | | | ntries. | | | | | - |
| (a) | | (b) | T | (c) | | | 1 | D - 1 - 1 | (d) |
| Base periód years Calendar year (or tax year beginnir | Adjusted qu | alifying distributions | Net value of no | | | use assets | 1 . | Distrit col. (b) div | putión ratio vided by col. (c)) |
| 2012 | 9/ | 106,500. | | 1 | . 05 | 4,461 | | (00 (0) 0 | .100999 |
| 2011 | | 5,600. | | 1 | .04 | $\frac{1}{6}, \frac{3}{3}$ | 1 | | .005352 |
| 2010 | | 563,774. | | | | $\frac{3,3,6}{2,646}$ | | | .545951 |
| 2009 | | 596,417. | | | | $\frac{1,769}{1}$ | | | .389365 |
| 2009 | | 623,837 | | | | 5,868 | | | .320596 |
| 2008 | | 023,037 | ' | | , J - | 3,000 | + - | | • 320390 |
| 9. Total of line 1 column (d) | | | | | | | , | | 1.362263 |
| 2 Total of line 1, column (d) | | | | | | | 2 | | 1.302203 |
| 3 Average distribution ratio for the 5 | | e the total on line 2 by 5 | , or by the number | of yea | ars | | | | 070453 |
| the foundation has been in existen | ice if less than 5 years | | | | | | 3 | | .272453 |
| | | | | | | | | | |
| 4 Enter the net value of noncharitab | le-use assets for 2013 fro | m Part X, line 5 | | | | | 4 | | 1,041,191. |
| | | | | | | | 1 1 | | |
| 5 Multiply line 4 by line 3 | | | | | | | 5 | | 283,676. |
| | | | | | | | | | |
| 6 Enter 1% of net investment incom | e (1% of Part I, line 27b) | | | | | | 6 | | 584. |
| | · | | | | | | | | |
| 7 Add lines 5 and 6 | | | | | | | 7 | | 284,260. |
| | | | | | | | | | |
| 8 Enter qualifying distributions from | Part XII, line 4 | | | | | | 8 | | 52,250. |
| If line 8 is equal to or greater than | | art VI line 1h and com | niete that nart usin | n a 10. | % tour | ate | لـــــا | | , |
| See the Part VI instructions. | ino r, chook the box iii r | ur vi, iiio ib, and com | pioto triat part usin | ya 17 | νιακί | uic. | | | |
| | | | | | | | | | |

| Form 990-PF (2013) Lonnie & Carol Poole Family Foundation | | -208 | | | Page 4 |
|--|-------------|--|--------------|-------|--------|
| Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), o | 494 | <u> 8 - see</u> | instru | uctio | ns) |
| 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% | | <u> </u> | | 1,1 | 69. |
| of Part I, line 27b | | | | | |
| 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 | <u>!</u> | | | 0. |
| 3 Add lines 1 and 2 | 3 | } | | 1,1 | 69. |
| 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 | ; T | | 1,1 | 69. |
| 6 Credits/Payments: | | | | | |
| a 2013 estimated tax payments and 2012 overpayment credited to 2013 6a4, 721 | . • | | | | |
| b Exempt foreign organizations - tax withheld at source 6b | | | | | |
| c Tax paid with application for extension of time to file (Form 8868) | | | | | |
| d Backup withholding erroneously withheld 6d | | | | | |
| 7 Total credits and payments. Add lines 6a through 6d | 7_7 | <u>, </u> | | 4,7 | 21. |
| 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 | - □1 | 0 | | 3,5 | 52. |
| 11 Enter the amount of line 10 to be; Credited to 2014 estimated tax > 3,552 • Refunded | 1 | 1 | | | 0. |
| Part VII-A Statements Regarding Activities | | | | | |
| 1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or interventional | ne in | | | Yes | No |
| any political campaign? | | | 1a | | X |
| b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for the definit | оп)? | | 1b | | X |
| If the answer is "Yes" to $_{1a}$ or $_{1b}$, attach a detailed description of the activities and copies of any materials public | shed o | r | | | |
| distributed by the foundation in connection with the activities. | | | | | |
| c Did the foundation file Form 1120-POL for this year? | | | 1c | | X |
| d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: | | | | | |
| (1) On the foundation. ▶ \$ O • (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. ► \$ 0 • | | | | l | 1 |
| 2 Has the foundation engaged in any activities that have not previously been reported to the IRS? | | | 2 | | X |
| If "Yes," attach a detailed description of the activities | | | | | |
| 3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation | ı, or | | | | |
| bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes | | | 3 | l | Х |
| 4a Did the foundation have unrelated business gross income of \$1,000 or more during the year? | | | 4a | | X |
| b If "Yes," has it filed a tax return on Form 990-T for this year? | | N/A | 4b | | |
| 5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? | | | 5 | | Х |
| If "Yes," attach the statement required by General Instruction T | | | | | |
| 6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: | | | | | |
| By language in the governing instrument, or | | | | Ì | |
| By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the st | ate law | | | | |
| remain in the governing instrument? | | | 6 | 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 | ΧV | | 7 | Х | |
| | | | | | |
| 8a Enter the states to which the foundation reports or with which it is registered (see instructions) | | | | İ | |
| 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 | | | 8b | Х | |
| 9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for continuous continuous status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for continuous status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for continuous status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for continuous status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for continuous status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for continuous status as a private operating status as a private operating status as a private operating status as a section of the continuous status as a section of the continuous status as a section of the continuous status as a section of the continuous status as a section of the continuous status at the continuous status as a section of the continuous status as a section of the continuous status at the continuous status as a section of the continuous status as a section of the continuous status as a section of the continuous status at the continuous status as a section of the continuous status as a section of the continuous status at the conti | alendar | | 1 | | |
| year 2013 or the taxable year beginning in 2013 (see instructions for Part XIV)? If "Yes," complete Part XIV | | | 9 | | X |
| 10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses | | | 10 | | Х |
| | | For | m 990 | -PF | (2013) |

| | 1990-PF (2013) Lonnie & Carol Poole Family Foundation 56-20 | <u> </u> | | Page 5 |
|----|---|-----------------|----------|----------|
| _ | art 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? | ŀ | | |
| | If "Yes," attach statement (see instructions) | 12 | | Х |
| 13 | Did the foundation comply with the public inspection requirements for its annual returns and exemption application? | 13 | Х | _ |
| | Website address ► N/A | | | |
| 14 | The books are in care of ▶ Robert H. Hall Telephone no. ▶919- | 303-7 | 402 | |
| | Located at ▶P.O. Box 1750, Apex, NC ZIP+4 ▶ | 27502 | | |
| 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 | N | /A | |
| 16 | At any time during calendar year 2013, did the foundation have an interest in or a signature or other authority over a bank, | | Yes | No |
| | securities, or other financial account in a foreign country? | 16 | | Х |
| | See the instructions for exceptions and filing requirements for Form TD F 90-22.1. If "Yes," enter the name of the foreign | | • | |
| | country | | | |
| Pa | rt 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? | | | |
| | (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) | | | |
| | a disqualified person? | | | |
| | (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? | - 1 | | |
| | (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? | | | |
| | (5) Transfer any income or assets to a disqualified person (or make any of either available | ĺ | | |
| | for the benefit or use of a disqualified person)? | | | |
| | (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.) | | | |
| h | 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)? N/A | 16 | i | |
| | Organizations relying on a current notice regarding disaster assistance check here | " | | |
| 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 | ' i | | |
| · | before the first day of the tax year beginning in 2013? | 1c | | Х |
| 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)): | | | |
| 9 | 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 ▶ , , , | | | |
| ь | 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 | | |
| | If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. | 20 | | |
| | | | | |
| 30 | Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time | | | |
| Ja | during the year? | | | |
| | 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 | 95 | | |
| A٠ | Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? | 3b 4a | | <u> </u> |
| | Did the foundation mivest during the year any amount in a manner that would jeopardize its charitable purposes? Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that | 48 | \dashv | |
| u | had not been removed from jeopardy before the first day of the tax year beginning in 2013? | 46 | | X |
| _ | ······································ | Form 990 | LDE | |
| | | runn yyl | ,-PF(| ZU 13) |

| Form 990-PF (2013) Lonnie & Carol Poole Fam | | | 56-2087 | 730 | Page 6 |
|---|---|-----------------------------|--|--|------------------------|
| Part VII-B Statements Regarding Activities for Which I | Form 4720 May Be I | Required (contin | ued) | | |
| 5a During the year did the foundation pay or incur any amount to: | | _ | | | |
| (1) Carry on propaganda, or otherwise attempt to influence legislation (section | 1 4945(e))? | Y | es 🗶 No 📗 | | |
| (2) Influence the outcome of any specific public election (see section 4955); o | r to carry on, directly or indir | | | | |
| any voter registration drive? | | es X No | | | |
| (3) Provide a grant to an individual for travel, study, or other similar purposes | | Y | es 🗶 No | | |
| (4) Provide a grant to an organization other than a charitable, etc., organization | n described in section | | | | |
| 509(a)(1), (2), or (3), or section 4940(d)(2)? | | | es 🗶 No | | |
| (5) Provide for any purpose other than religious, charitable, scientific, literary, | or educational purposes, or t | | [12] | | |
| the prevention of cruelty to children or animals? | | · | es 🗶 No | | |
| b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify und | · | in Regulations | 37/3 | | |
| section 53.4945 or in a current notice regarding disaster assistance (see instru | · | | N/A | 5b | |
| Organizations relying on a current notice regarding disaster assistance check h | | | | | ŀ |
| c If the answer is "Yes" to question 5a(4), does the foundation claim exemption fr | | . — | l | ŀ | ļ |
| expenditure responsibility for the grant? | | I/A Y | es LLI No | İ | |
| If "Yes," attach the statement required by Regulations section 53 4945 | • • | | | | - 1 |
| 6a Did the foundation, during the year, receive any funds, directly or indirectly, to | pay premiums on | | es X No | | |
| a personal benefit contract? | arganal banafit contractO | Y (| es LAJ NO | | x |
| b Did the foundation, during the year, pay premiums, directly or indirectly, on a p | ersonal 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 s | helter transaction() | | es X No | | - 1 |
| b If "Yes," did the foundation receive any proceeds or have any net income attribu | | | N/A | 7b | |
| Part VIII Information About Officers, Directors, Trusto | | nagere Highli | | 70 | |
| Paid Employees, and Contractors | ccs, i cuitadion me | inagers, riigin | , | | |
| 1 List all officers, directors, trustees, foundation managers and their | compensation. | | | | |
| | (b) Title, and average hours per week devoted | (c) Compensation | (d) Contributions to | (e) | Expense ount, other |
| (a) Name and address | nours per week devoted to position | (If not paid, enter -0-) | (d) Contributions to employee benefit plans and deferred compensation | acco | owances |
| Carol J. Poole | Pres/Direct | , | Somponsacon | <u> </u> | |
| 700 N. Peninsula | | | | | |
| New Smyrna Beach, FL 32169 | 5.00 | 0. | 0. | | 0. |
| | Sec/Treas | | | | |
| 2600 Hilltop Farms Road | | | | ł | |
| Apex, NC 27502 | 1.00 | 0. | 0. | 1 | 0. |
| | | | | | |
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| | | | | | |
| | | | | | |
| | | | | | |
| | | | | <u> </u> | |
| 2 Compensation of five highest-paid employees (other than those inc | | enter "NONE." | (d) Contributions to | T (-) | Evnagas |
| (a) Name and address of each employee paid more than \$50,000 | (b) Title, and average hours per week | (c) Compensation | employee benefit plans and deferred | acco | Expense ount, other |
| MONT | devoted to position | | compensation | all | owances |
| NONE . | | | | | |
| | | | | | |
| · · · · · · · · · · · · · · · · · · · | | | | | |
| | <u> </u> | | | ├ | |
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| · | | - | | | _ |
| | | | | | |
| Total number of other employees paid over \$50,000 | <u> </u> | <u></u> | | 1 | 0 |
| Total number of other employees paid evel 400,000 | | | | | |

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|--|---------------|------------------|------------------|
| Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Hi Paid Employees, and Contractors (continued) | ghly | | |
| 3 Five highest-paid independent contractors for professional services. If none, enter "NONE." | | | |
| (a) Name and address of each person paid more than \$50,000 (b) Type of | service | (c) Com | pensation |
| NONE | | | |
| · · · · · · · · · · · · · · · · · · · | | | |
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| | | | |
| Total number of others receiving over \$50,000 for professional services Part IX-A Summary of Direct Charitable Activities | | <u> </u> | 0 |
| | | | |
| 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 | | | |
| <u> </u> | | | |
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| 3 | | | |
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| <u> </u> | | | |
| 4 | | | |
| | | | |
| Part IX-B Summary of Program-Related Investments | | | |
| Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2. | Т | Amount | |
| 1 N/A | | 741104111 | |
| | $\overline{}$ | | |
| | | | |
| 2 | | | |
| | | | |
| | | | |
| All other program-related investments. See instructions. | | | |
| 3 | | | |
| | | | |
| | | | |
| Total. Add lines 1 through 3 | <u> </u> | | 0. |
| | | Form 990- | PF (2013) |

Part X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see instructions.) Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes: 1,012,262. a Average monthly fair market value of securities 1a 1b b Average of monthly cash balances c Fair market value of all other assets 1c 1,057,047. d Total (add lines 1a, b, and c) 1d e Reduction claimed for blockage or other factors reported on lines 1a and 0. 1e 1c (attach detailed explanation) Acquisition indebtedness applicable to line 1 assets 2 Subtract line 2 from line 1d 3 4 15,856. Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions) 1,041,191. Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4 5 52,060. Minimum investment return. Enter 5% of line 5 6 Part XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain and do not complete this part.) foreign organizations check here 52,060. Minimum investment return from Part X, line 6 1.169 Tax on investment income for 2013 from Part VI, line 5 2a 2b Income tax for 2013. (This does not include the tax from Part VI.) 1,169 Add lines 2a and 2b 2c Distributable amount before adjustments. Subtract line 2c from line 1 3 50.891. 3 4 Recoveries of amounts treated as qualifying distributions 50,891. 5 Add lines 3 and 4 6 0. Deduction from distributable amount (see instructions) 50,891. Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1 7 Qualifying Distributions (see instructions) Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes: 52,250 Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26 1a Program-related investments - total from Part IX-B 1b Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes 2 Amounts set aside for specific charitable projects that satisfy the: a Suitability test (prior IRS approval required) За 3b Cash distribution test (attach the required schedule) 52,250. Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4 4 Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b 5 250 Adjusted qualifying distributions, Subtract line 5 from line 4 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

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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, | <u> </u> | · | | - |
| line 7 | | | | 50,891. |
| 2 Undistributed income, if any, as of the end of 2013 | | | | |
| a Enter amount for 2012 only | | | 0. | |
| b Total for prior years: | | _ | | |
| ,, | | 0. | | |
| 3 Excess distributions carryover, if any, to 2013: | | | - | |
| aFrom 2008 541,360. | i | | | |
| b From 2009 520,635. | | | | |
| c From 2010 514,394. | | | | |
| dFrom 2011 | | | | |
| eFrom 2012 54,652. | 4 624 244 | | | |
| f Total of lines 3a through e | 1,631,041. | | | |
| 4 Qualifying distributions for 2013 from | | | | • |
| Part XII, line 4. ▶\$ 52,250 • | | | • | |
| a Applied to 2012, but not more than line 2a | | | 0. | |
| b Applied to undistributed income of prior | | , | | |
| years (Election required - see instructions) | | 0. | | <u> </u> |
| c Treated as distributions out of corpus | 0 | | | |
| (Election required - see instructions) | 0. | | | E0 001 |
| d Applied to 2013 distributable amount | 1,359. | | | 50,891. |
| e Remaining amount distributed out of corpus 5 Excess distributions carryover applied to 2013 | 0. | | | 0. |
| (If an amount appears in column (d), the same amount must be shown in column (a)) | | | | <u> </u> |
| 6 Enter the net total of each column as indicated below: | | | | |
| a Corpus Add lines 3f, 4c, and 4e Subtract line 5 | 1,632,400. | | | |
| b Prior years' undistributed income. Subtract | | | - " | |
| line 4b from line 2b | | 0. | | |
| c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed | | 0. | | |
| d Subtract line 6c from line 6b. Taxable | | | | |
| amount - see instructions | | 0. | | |
| e Undistributed income for 2012. Subtract line | | | | |
| 4a from line 2a. Taxable amount - see instr. | | | 0. | |
| f Undistributed income for 2013. Subtract | | | | |
| lines 4d and 5 from line 1. This amount must | | | | |
| be distributed in 2014 | | | | 0. |
| 7 Amounts treated as distributions out of | | | | |
| corpus to satisfy requirements imposed by | | | | |
| section 170(b)(1)(F) or 4942(g)(3) | 0. | | | |
| 8 Excess distributions carryover from 2008 | | | | |
| not applied on line 5 or line 7 | 541,360. | | | |
| 9 Excess distributions carryover to 2014. | 1 001 015 | | | |
| Subtract lines 7 and 8 from line 6a | 1,091,040. | | | |
| O Analysis of line 9: | | | | |
| a Excess from 2009 520, 635. | | | | |
| b Excess from 2010 514,394. | ľ | } | | |
| c Excess from 2011 | | | | |
| d Excess from 2012 54,652. e Excess from 2013 1,359. | | | ļ | |
| e Excess from 2013 1,359. | | | i | |

| Form 990-PF (2013) Lonnie | & Carol Poo | le Family F | oundation | 56-20 | 87730 Page 10 |
|---|------------------------------|-----------------------------|-----------------------------|-----------------------------|---------------|
| Part XIV Private Operating F | oundations (see in: | structions and Part VII | -A, question 9) | N/A | |
| 1 a If the foundation has received a ruling o | r determination letter that | t it is a private operating | | <u>-</u> : | |
| foundation, and the ruling is effective fo | r 2013, enter the date of t | the ruling | • | | |
| b Check box to indicate whether the found | fation is a private operatir | ng foundation described i | n section | 4942(j)(3) or 49 | 42(j)(5) |
| 2 a Enter the lesser of the adjusted net | Tax year | · | Prior 3 years | | |
| income from Part I or the minimum | (a) 2013 | (b) 2012 | (c) 2011 | (d) 2010 | (e) Total |
| 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 | | 1 | | | |
| section 4942(j)(3)(B)(iii) | - | | | | |
| (3) Largest amount of support from | | • | | | |
| an exempt organization | | | | | |
| (4) Gross investment income Part XV Supplementary Info | rmation (Comple | to this part only | if the foundation | had \$5 000 or ma | ro in cocoto |
| at any time during t | | | ii the loundation | nad \$5,000 or mo | re in assets |
| 1 Information Regarding Foundatio | n Managers: | | | | |
| a List any managers of the foundation who | o have contributed more f | than 2% of the total contr | butions received by the | foundation before the clos | e of any tax |
| year (but only if they have contributed m | iore than \$5,000). (See se | ection 507(d)(2).) | | | |
| Carol J. Poole | | | | | |
| b List any managers of the foundation who | | | or an equally large portio | in of the ownership of a pa | tnership or |
| other entity) of which the foundation has | a 10% or greater interes | it. | | | |
| None | | | | | |
| 2 Information Regarding Contributi | on, Grant, Gift, Loan, | Scholarship, etc., Pr | ograms: | | |
| Check here 🕨 🗶 If the foundation o | | | | | |
| the foundation makes gifts, grants, etc. | (see instructions) to indiv | iduals or organizations ui | nder other conditions, co | mplete items 2a, b, c, and | d. |
| a The name, address, and telephone number | per or e-mail address of the | he person to whom applic | cations should be addres | sed: | |
| | | | | | |
| | | | | | |
| b The form in which applications should b | e submitted and informat | ion and materials they sh | ould include: | | |
| | | | | | |
| c Any submission deadlines: | | | | | |
| d Any restrictions or limitations on awards | , such as by geographica | l areas, charitable fields, | kınds of institutions, or o | ther factors: | |

Part XV Supplementary Information (continued) 3 Grants and Contributions Paid During the Year or Approved for Future Payment If recipient is an individual, Recipient Purpose of grant or contribution Foundation show any relationship to Amount status of any foundation manager Name and address (home or business) or substantial contributor recipient a Paid during the year Salvation Army Public Charitable P.O. Box 10666 Raleigh, NC 27605 4,000. Environmental Research & Education Public Charitable Foundation 3301 Benson Drive, Suite 301 Raleigh, NC 27609 35,000. Public Ronald McDonald House Charitable 4601 Six Forks, Suite 200 Raleigh, NC 27609 2,000. Fathers Forver Public Charitable 223 US 70 Garner, NC 27529 2,500. Read and Feed Public Charitable 193 High House Road 5,000. Cary, NC 27511 See continuation sheet(s) Total ▶ 3a 52,250. b Approved for future payment None Total **▶** 3b

Part XVI-A Analysis of Income-Producing Activities

| Enter gross amounts unless otherwise indicated. | Unrelated | business income | | d by section 512, 513, or 514 | (e) | | |
|---|-----------------|-----------------|--|-------------------------------|---------------------------------------|--|--|
| - | (a) Business | (b) | (C) Exclu- | (d) | Related or exempt | | |
| 1 Program service revenue: | Business | Amount | sion code | Amount | function income | | |
| a | | | +-+ | | | | |
| | | - | <u> </u> | | | | |
| C | - | | 1 | | | | |
| d | - | | | | _ | | |
| e | | | | | | | |
| • | - + | | 1-1 | | | | |
| g Fees and contracts from government agencies | _ | | | | | | |
| 2 Membership dues and assessments | | | | | | | |
| 3 Interest on savings and temporary cash | | | | | | | |
| investments | | | 14 | 23. | | | |
| 4 Dividends and interest from securities | | - | 14 | 30,745. | | | |
| 5 Net rental income or (loss) from real estate: | | | | | | | |
| a Debt-financed property | | , _, | | | | | |
| b Not debt-financed property | | | 1 1 | | | | |
| 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 | 46,739. | | | |
| 9 Net income or (loss) from special events | | | | <u> </u> | | | |
| 10 Gross profit or (loss) from sales of inventory | | | 1 | | - | | |
| 11 Other revenue: | | | | | | | |
| a | ľ | | | | | | |
| b | | | | | | | |
| C | _ | | | | | | |
| d | | | | | · · · · · · · · · · · · · · · · · · · | | |
| e | | | | | | | |
| 12 Subtotal. Add columns (b), (d), and (e) | - | 0 | . | 77,507. | 0. | | |
| 13 Total. Add line 12, columns (b), (d), and (e) | <u> </u> | - | | 13 | 77,507. | | |
| (See worksheet in line 13 instructions to verify calculations.) |) | | | | | | |

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

| Line No. ▼ | Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes). | | | | | | | | |
|---------------|---|--|--|--|--|--|--|--|--|
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Form 990-PF (2013) Lonnie & Carol Poole Family Foundation 56-2087730 Page 13 Part XVII Information Regarding Transfers To and Transactions and Relationships With Noncharitable **Exempt Organizations**

| | • | rectly engage in any or the follow | • • | • • | | 163 | 110 |
|---------------|--|--|--|--|--------------------------------|----------------|-------------------------|
| | |)(3) organizations) or in section 5 | , , , | rations? | | | |
| a Trai | sfers from the reporting found | ation to a noncharitable exempt o | organization of: | | | | |
| (1) | Cash | | | | 1a(1) | | X |
| (2) | Other assets | | | | 1a(2) | | X |
| b Oth | er transactions: | | | | | | |
| (1) | Sales of assets to a noncharita | ble exempt organization | | | 1b(1) | | X |
| | | ncharitable exempt organization | | | 1b(2) | | X |
| | Rental of facilities, equipment, | · • | | | 1b(3) | | <u>X</u> |
| | Reimbursement arrangements | | | | 1b(4) | | $\overline{\mathbf{x}}$ |
| ٠, | Loans or loan guarantees | | | | 1b(5) | - | X |
| | - | embership or fundraising solicitat | ione | | 1b(6) | | X |
| | | uling lists, other assets, or paid ei | | | 10(0) | 1 | <u>x</u> |
| | • , • | • • • | • • | ays show the fair market value of the goo | للتنا | otc | |
| | • | | | in any transaction or sharing arrangeme | | cis, | |
| | | other assets, or services received | | in any transaction of sharing arrangement | oni, show in | | |
| a)Line no | 1 | (c) Name of noncharitab | | (d) Description of transfers, transactions | and charing an | | |
| a) Line no | (b) Amount involved | N/A | no exempt organization | (a) Description of transiers, transactions | , and snamy an | angeme | |
| | - | N/A | | | | | |
| | | | - | | | | |
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| 2a Isti | e foundation directly or indirect | tly affiliated with, or related to, on | ie or more tax-exempt organiza | ations described | | | |
| ın s | ection 501(c) of the Code (other | r than section 501(c)(3)) or in sec | ction 527? | | Yes | X | No |
| b If "Y | es," complete the following sch | edule | | | | | |
| | (a) Name of org | janization | (b) Type of organization | (c) Description of rela | tionship | | |
| | N/A | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | - | | | | | |
| | | | | tatements, and to the best of my knowledge | May the IRS of | iecuse f | nis |
| Sign | and belief, it is true, correct, and cor | nplete Declaration of preparer (other th | nan taxpayer) is based on all informat | tion of which preparer has any knowledge | return with the shown below | prepare | 31' |
| Here | TYRK: T | 11111201 | 11/14/14 | Sect treas | X Yes | (366 11130 | No |
| | Signature of officer or trustee | | Date | Title | | | |
| | Print/Type preparer's na | ame Preparer's | | | TIN | | |
| | | 1, , | $\overline{}$ | self- employed | | | |
| Paid | J. Timmons | Robinson | mak dans | . / / / / | P00142 | 596 | |
| Prepa | | hes Pittman & (| Gupton L.L.P | Firm's EIN ▶ 56 | | | |
| Use C | | TOD I I COMMITT & | capoon, nur | Timis Env > 30 | _ = = - 7 4 | | |
| | - 1 | 00 Sunday Drive | e Suite 300 | | | | |
| | | leigh, NC 2760 | | Phone no. 919 | _232_5 | 900 | |
| | | TEIGHT, NC 2/00 | <u>'</u> | Tellolis IIO. 313 | Form 990 | | 20121 |
| | | | | | roini 33C | ,-FF (| 2013) |

Lonnie & Carol Poole Family Foundation

56-2087730

Part XV Supplementary Information Grants and Contributions Paid During the Year (Continuation) If recipient is an individual, Recipient Purpose of grant or contribution Foundation show any relationship to any foundation manager or substantial contributor Amount status of Name and address (home or business) recipient American Cancer Society Public Charitable 8300 Health Park #10 250. Raleigh, NC 27615 American Diabetes Association Charitable 2418 Blue Ridge Road Raleigh, NC 27607 1,000. Charitable UPMC/Andy Russell Celebrity Classic 3600 Forbes Ave Pittsburgh, NC 15213 2,500. 3,750. Total from continuation sheets

| Form 990-PF Inter | est on Sav | ings and Tem | porary (| ash In | vestments | Statement 1 |
|--|-----------------|------------------------------|---------------------------|-------------------------|---------------------------------|---------------------------------------|
| Source | Reve | | | (b) vestment come | (c) Adjusted Net Income | |
| BB&T Investment Ac | | | | 23. | | |
| Total to Part I, 1 | | 23. | 23. | | 23. | |
| Form 990-PF | Dividend | ds and Inter | est from | Secur | ities | Statement 2 |
| Source | Gross Amount | Capital Gains Dividend | Rev | a) renue Books | (b) Net Invest ment Incom | _ |
| BB&T Investment Account #243 | 30,745 | 5. | 0. 3 | 0,745. | 30,745 | · · · · · · · · · · · · · · · · · · · |
| To Part I, line 4 | 30,745 | 5. | 0 | 0,745. | 30,745 | j |
| Form 990-PF | | Accounti | ng Fees | | | Statement 3 |
| Description | | (a) Expenses Per Books | (b) Net Inv ment In | est- | (c) Adjusted Net Income | (d) Charitable Purposes |
| Accounting Fees Legal Fees | - | 3,275. 2,318. | | ,275. | | 0. |
| To Form 990-PF, Pg | 1, ln 16b | 5,593. | 5 | ,593. | | 0. |
| Form 990-PF | | Other Expenses | | | Statement 4 | |
| Description | | (a) Expenses Per Books | (b) Net Inv ment In | est- | (c) Adjusted Net Income | (d) Charitable Purposes |
| Management Fees Taxes Bookkeeping Softwa | re | 12,483. 791. 204. | 12 | ,483. 791. 204. | | 0. 0. 0. |
| To Form 990-PF, Pg | | 13,478. | 13 | ,478. | | 0. |
| | | | | | | |

| Form 990-PF U.S. and S | State/City Gove | rnment Obligations | Statement 5 |
|---|-----------------------|---------------------------|---------------------------------|
| Description | | Other Gov't Book Value | Fair Market Value |
| US & State Government Obligat | ions X | 52,211. | 51,501. |
| Total U.S. Government Obligat | ions | 52,211. | 51,501. |
| Total State and Municipal Gov | ernment Obliga | tions | |
| Total to Form 990-PF, Part II | , line 10a | 52,211. | 51,501. |
| Form 990-PF | Corporate S | tock | Statement 6 |
| Description | | Book Value | Fair Market Value |
| Corporate Stocks | | 351,493. | 436,565. |
| Total to Form 990-PF, Part II | , line 10b | 351,493. | 436,565. |
| Form 990-PF | Corporate B | onds | Statement 7 |
| Description | | Book Value | Fair Market Value |
| Corporate Bonds | | 248,463. | 242,197. |
| Total to Form 990-PF, Part II | , line 10c | 248,463. | 242,197. |
| Form 990-PF | Other Invest | ments | Statement 8 |
| Description | Valua M eth | | Fair Market Value |
| Corporate Obligations International Obligations Specialty Funds | COS' COS' COS' | r 136,410. | 16,342. 140,522. 140,405. |
| Total to Form 990-PF, Part II | , line 13 | 294,723. | 297,269. |
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