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Return of Private Foundation

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

OMB No 1545-0052

2013

Department of the Treasury
Internal Revenue Service

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

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

Open to Public Inspection

For calendar year 2013 or tax year beginning

, and ending

Name of foundation

THE JANE K. LOWE CHARITABLE FOUNDATION

Number and street (or P.O. box number if mail is not delivered to street address)

P.O. BOX 348

Room/suite

A Employer identification number

63-6203439

B Telephone number

(256) 536-1231

City or town, state or province, country, and ZIP or foreign postal code

HUNTSVILLE, AL 35804-0348

G Check all that apply:

☐ Initial return☐ Initial return of a former public charity☐ Final return☐ Amended return☐ Address change☐ Name change

H Check type of organization:

☒ Section 501(c)(3) exempt private foundation☐ Section 4947(a)(1) nonexempt charitable trust☐ Other taxable private foundation

I Fair market value of all assets at end of year

(from Part II, col (c), line 16)

\$ 35,307,862.

J Accounting method:

☐ Cash☐ Accrual☒ Other (specify) **MODIFIED CASH**

(Part I, column (d) must be on cash basis)

C If exemption application is pending, check here ☐D 1. Foreign organizations, check here ☐2. Foreign organizations meeting the 85% test, check here and attach computation ☐E If private foundation status was terminated under section 507(b)(1)(A), check here ☐F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

Part I

Analysis of Revenue and Expenses

(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))

(a) Revenue and expenses per books

(b) Net investment income

(c) Adjusted net income

(d) Disbursements for charitable purposes (cash basis only)

		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received				
	2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments	240,466.	240,466.	240,466.	STATEMENT 1
	4 Dividends and interest from securities	520,616.	520,616.	520,616.	STATEMENT 2
	5a Gross rents	14,061.	14,061.	14,061.	STATEMENT 3
	b Net rental income or (loss)	14,061.			
	6a Net gain or (loss) from sale of assets not on line 10	1,396,156.			
	b Gross sales price for all assets on line 6a	4,941,741.			
	7 Capital gain net income (from Part IV, line 2)		1,396,156.		
	8 Net short-term capital gain			N/A	
	9 Income modifications				
	10a Gross sales less returns and allowances				
Operating and Administrative Expenses	b Less Cost of goods sold				
	c Gross profit or (loss)				
	11 Other income				
	12 Total. Add lines 1 through 11	2,171,299.	2,171,299.	775,143.	
	13 Compensation of officers, directors, trustees, etc.	150,000.	150,000.	150,000.	0.
	14 Other employee salaries and wages	28,000.	28,000.	28,000.	0.
	15 Pension plans, employee benefits				
	16a Legal fees STMT 4	13,618.	13,618.	13,618.	0.
	b Accounting fees STMT 5	8,426.	8,426.	8,426.	0.
	c Other professional fees STMT 6	37,493.	37,493.	37,493.	0.
	17 Interest				
	18 Taxes STMT 7	52,425.	14,188.	14,188.	0.
	19 Depreciation and depletion	1,152.	0.	1,152.	
	20 Occupancy	8,400.	8,400.	8,400.	0.
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses STMT 8	16,615.	16,615.	16,615.	0.
	24 Total operating and administrative expenses. Add lines 13 through 23	316,129.	276,740.	277,892.	0.
	25 Contributions, gifts, grants paid	1,501,821.			1,501,821.
	26 Total expenses and disbursements. Add lines 24 and 25	1,817,950.	276,740.	277,892.	1,501,821.
	27 Subtract line 26 from line 12:				
	a Excess of revenue over expenses and disbursements	353,349.			
	b Net investment income (if negative, enter -0-)		1,894,559.		
	c Adjusted net income (if negative, enter -0-)			497,251.	

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only		Beginning of year	End of year	
				(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash - non-interest-bearing				
	2	Savings and temporary cash investments		400,676.	1,027,386.	1,027,386.
	3	Accounts receivable ▶				
		Less: allowance for doubtful accounts ▶				
	4	Pledges receivable ▶				
		Less: allowance for doubtful accounts ▶				
	5	Grants receivable				
	6	Receivables due from officers, directors, trustees, and other disqualified persons				
	7	Other notes and loans receivable ▶				
		Less: allowance for doubtful accounts ▶				
	8	Inventories for sale or use				
	9	Prepaid expenses and deferred charges				
	10a	Investments - U.S. and state government obligations				
	b	Investments - corporate stock		275,589.		
	c	Investments - corporate bonds	STMT 9	4,185,342.	3,634,560.	4,118,733.
	11	Investments - land, buildings, and equipment basis ▶	15,780.			
	Less accumulated depreciation	STMT 10 ▶	246,780.	15,780.	50,000.	
12	Investments - mortgage loans					
13	Investments - other	STMT 11	22,160,047.	22,973,270.	30,060,599.	
14	Land, buildings, and equipment: basis ▶	14,498.				
	Less accumulated depreciation	STMT 12 ▶	4,126.	2,974.	2,974.	
15	Other assets (describe ▶)	STATEMENT 13)	61,088.	48,170.	48,170.	
16	Total assets (to be completed by all filers - see the instructions. Also, see page 1, item 1)		27,333,648.	27,702,140.	35,307,862.	
Liabilities	17	Accounts payable and accrued expenses				
	18	Grants payable				
	19	Deferred revenue				
	20	Loans from officers, directors, trustees, and other disqualified persons				
	21	Mortgages and other notes payable				
	22	Other liabilities (describe ▶)	STATEMENT 14)	997.	16,140.	
23	Total liabilities (add lines 17 through 22)		997.	16,140.		
Net Assets or Fund Balances		Foundations that follow SFAS 117, check here ▶	<input checked="" type="checkbox"/>			
		and complete lines 24 through 26 and lines 30 and 31.				
	24	Unrestricted				
	25	Temporarily restricted		27,332,651.	27,686,000.	
	26	Permanently restricted				
		Foundations that do not follow SFAS 117, check here ▶	<input type="checkbox"/>			
		and complete lines 27 through 31				
	27	Capital stock, trust principal, or current funds				
	28	Paid-in or capital surplus, or land, bldg., and equipment fund				
	29	Retained earnings, accumulated income, endowment, or other funds				
30	Total net assets or fund balances		27,332,651.	27,686,000.		
31	Total liabilities and net assets/fund balances		27,333,648.	27,702,140.		

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	27,332,651.
2	Enter amount from Part I, line 27a	2	353,349.
3	Other increases not included in line 2 (itemize) ▶	3	0.
4	Add lines 1, 2, and 3	4	27,686,000.
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	27,686,000.

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)		(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a				
b SEE ATTACHED STATEMENT				
c				
d				
e				

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a			
b			
c			
d			
e 4,941,741.		3,545,585.	1,396,156.

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

(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a			
b			
c			
d			
e			1,396,156.

2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7
If (loss), enter -0- in Part I, line 7 } **2** 1,396,156.

3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6):
If gain, also enter in Part I, line 8, column (c).
If (loss), enter -0- in Part I, line 8 } **3** 2,381.

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	1,537,651.	30,482,234.	.050444
2011	1,429,179.	31,171,702.	.045849
2010	1,322,342.	28,939,771.	.045693
2009	1,639,487.	26,607,475.	.061618
2008	1,915,830.	33,130,521.	.057827

2 Total of line 1, column (d)	2	.261431
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	.052286
4 Enter the net value of noncharitable-use assets for 2013 from Part X, line 5	4	32,434,161.
5 Multiply line 4 by line 3	5	1,695,853.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	18,946.
7 Add lines 5 and 6	7	1,714,799.
8 Enter qualifying distributions from Part XII, line 4	8	1,501,821.

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions.

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see 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 type="checkbox"/> and enter 1% of Part I, line 27b		1	37,891.
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	37,891.
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	37,891.
6 Credits/Payments:			
a 2013 estimated tax payments and 2012 overpayment credited to 2013	6a	22,400.	
b Exempt foreign organizations - tax withheld at source	6b		
c Tax paid with application for extension of time to file (Form 8868)	6c	25,500.	
d Backup withholding erroneously withheld	6d		
7 Total credits and payments. Add lines 6a through 6d	7	47,900.	
8 Enter any penalty for underpayment of estimated tax. Check here <input checked="" type="checkbox"/> if Form 2220 is attached	8	329.	
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	9,680.	
11 Enter the amount of line 10 to be: Credited to 2014 estimated tax <input type="checkbox"/> Refunded <input checked="" type="checkbox"/>	11	0.	

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
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. <input type="checkbox"/> \$ 0. (2) On foundation managers. <input type="checkbox"/> \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. <input type="checkbox"/> \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), and Part XV	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) <input type="checkbox"/> AL		
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)			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)			X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?		X	

Website address **WWW.LOWEFOUNDATION.ORG**

14 The books are in care of **JOHN R. WYNN** Telephone no. **(256) 536-1231**
 Located at **P.O. BOX 348, HUNTSVILLE, AL** ZIP+4 **35801**

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here ☐
 and enter the amount of tax-exempt interest received or accrued during the year **15** **N/A**

16 At any time during calendar year 2013, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? **16** **Yes** **No**
 See the instructions for exceptions and filing requirements for Form TD F 90-22.1. If "Yes," enter the name of the foreign country **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 checked="" type="checkbox"/> Yes <input 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 <input type="checkbox"/>	1b	X
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2013?	1c	X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):		
a At the end of tax year 2013, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2013? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years N/A		
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.) N/A	2b	
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. N/A		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b If "Yes," did it have excess business holdings in 2013 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2013) N/A	3b	
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2013?	4b	X

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

5a During the year did the foundation pay or incur any amount to:

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

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

6b

X

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

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

7b

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

N/A

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors

1 List all officers, directors, trustees, foundation managers and their compensation.

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
W.F. SANDERS, JR. 700 GREENE STREET, S.E. HUNTSVILLE, AL 35801	TRUSTEE 4.00	50,000.	0.	0.
RICHARD J. SMITH 1697 E. STONEHURST DRIVE, S.E. HUNTSVILLE, AL 35801	TRUSTEE 10.00	50,000.	0.	0.
JOHN R. WYNN 1 ST. CHARLES ROAD HUNTSVILLE, AL 35801	TRUSTEE 4.00	50,000.	0.	0.

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

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

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

0

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

(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

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

	Amount
1 N/A	
2	
All other program-related investments. See instructions.	
3	
Total. Add lines 1 through 3	0.

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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	31,869,179.
b	Average of monthly cash balances	1b	957,759.
c	Fair market value of all other assets	1c	101,144.
d	Total (add lines 1a, b, and c)	1d	32,928,082.
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	32,928,082.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	493,921.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	32,434,161.
6	Minimum investment return. Enter 5% of line 5	6	1,621,708.

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	1,621,708.
2a	Tax on investment income for 2013 from Part VI, line 5	2a	37,891.
b	Income tax for 2013. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	37,891.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	1,583,817.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	1,583,817.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	1,583,817.

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	1,501,821.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	1,501,821.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	0.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	1,501,821.

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				1,583,817.
2 Undistributed income, if any, as of the end of 2013				
a Enter amount for 2012 only			1,501,817.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2013:				
a From 2008				
b From 2009				
c From 2010				
d From 2011				
e From 2012				
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2013 from Part XII, line 4: ▶ \$ 1,501,821.				
a Applied to 2012, but not more than line 2a			1,501,817.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2013 distributable amount				4.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2013 (If an amount appears in column (d), the same amount must be shown in column (a))	0.			0.
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	0.			
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 2012. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2013. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2014				1,583,813.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)	0.			
8 Excess distributions carryover from 2008 not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2014 Subtract lines 7 and 8 from line 6a	0.			
10 Analysis of line 9:				
a Excess from 2009				
b Excess from 2010				
c Excess from 2011				
d Excess from 2012				
e Excess from 2013				

N/A

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

☐ 4942(j)(3) or ☐ 4942(j)(5)

- b 85% of line 2a**

- d** Amounts included in line 2c not used directly for active conduct of exempt activities

- Subtract line 2d from line 2c

- 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**

1 Information Regarding Foundation Managers:

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

NONE

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

NONE

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

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

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

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

- c Any submission deadlines:

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

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				
AGNES SCOTT COLLEGE 141 EAST COLLEGE AVE. DECATUR, GA 30030		PUBLIC CHARITY	PROVIDE EDUCATION	75,091.
BIG BROTHERS BIG SISTERS 701 ANDREW JACKSON WAY NE HUNTSVILLE, AL 35801		PUBLIC CHARITY	FUNDING FOR RECRUITING AND DEVELOPING VOLUNTEERS & MENTORING STUDENTS	20,073.
BOYS & GIRLS CLUBS OF NORTH ALABAMA P.O. BOX 73 HUNTSVILLE, AL 35804		PUBLIC CHARITY	FUNDING FOR YEAR ROUND TUTORING PROGRAM FOR YOUTH	50,000.
COMMUNITY BALLET ASSOCIATION OF HUNTSVILLE P.O. BOX 373 HUNTSVILLE, AL 35804		PUBLIC CHARITY	FUNDING FOR HISTORICALLY ACCURATE SETS FOR PLAY PRODUCTIONS	20,073.
FIRST STOP, INC. 206 STOKES STREET HUNTSVILLE, AL 35805		PUBLIC CHARITY	FUNDING FOR CASE MGMT PROGRAM AND NEW FACILITY	50,000.
Total SEE CONTINUATION SHEET(S) ▶ 3a				1,501,821.
b Approved for future payment				
AGNES SCOTT COLLEGE 141 EAST COLLEGE AVE. DECATUR, GA 30030		PUBLIC CHARITY	EDUCATION	79,191.
GIRLS INC. 4600 BLUE SPRINGS RD NW HUNTSVILLE, AL 35810		PUBLIC CHARITY	EDUCATION	79,191.
HUNTSVILLE BOYS AND GIRLS CLUB 215 ABINGDON AVE. NW HUNTSVILLE, AL 35801		PUBLIC CHARITY	EDUCATION	79,191.
Total SEE CONTINUATION SHEET(S) ▶ 3b				950,291.

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
		(a) Business code	(b) Amount	(c) Exclu- sion 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			14	240,466.	
4	Dividends and interest from securities			14	520,616.	
5	Net rental income or (loss) from real estate:					
a	Debt-financed property					
b	Not debt-financed property			16	14,061.	
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	1,389,475.	6,681.
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.		2,164,618.	6,681.
13	Total. Add line 12, columns (b), (d), and (e)					2,171,299.

(See worksheet in line 13 instructions to verify calculations.)

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

[illegible]

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


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

[illegible]

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

- b** If "Yes," complete the following schedule.

(a) Name of organization	(b) Type of organization	(c) Description of relationship
N/A		

Sign Here	Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.				May the IRS discuss this return with the preparer shown below (see instr.)? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No		
	Signature of officer or trustee 		Date 16-16-14		Title TRUSTEE		
Paid Preparer Use Only	Print/Type preparer's name		Preparer's signature		Date	Check <input type="checkbox"/> if self-employed	PTIN
	LARRY B. GILLEY		LARRY B. GILLEY		06/13/14		P00187719
	Firm's name ▶ MDA PROFESSIONAL GROUP, PC					Firm's EIN ▶ 63-0681783	
	Firm's address ▶ 307 CLINTON AVE, STE 500 HUNTSVILLE, AL 35801					Phone no. 256-533-9105	

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold, e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a WELLS FARGO	P	01/01/13	06/30/13
b WELLS FARGO	P	06/30/11	06/30/13
c REALIZED LOSS - DECREASE IN BASIS OF SECURITIES	P	06/30/11	06/30/13
d ST CAPITAL GAIN - K-1 POWERSHARES DB AGRI FUND	P	01/01/13	06/30/13
e SEC. 1256 LOSS - K-1 POWERSHARES DB AGRI FUND		06/30/11	06/30/13
f LAND - 200 WEST SIDE SQUARE	P	06/30/03	08/16/13
g CAPITAL GAINS DIVIDENDS			
h			
i			
j			
k			
l			
m			
n			
o			

(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 42,016.		39,636.	2,380.
b 3,774,825.		3,256,730.	518,095.
c 24,899.			24,899.
d 1.			1.
e		18,219.	-18,219.
f 276,593.		231,000.	45,593.
g 823,407.			823,407.
h			
i			
j			
k			
l			
m			
n			
o			

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

(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
a			** 2,380.
b			518,095.
c			24,899.
d			** 1.
e			-18,219.
f			45,593.
g			823,407.
h			
i			
j			
k			
l			
m			
n			
o			

2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter "-0-" in Part I, line 7 }	2	1,396,156.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter "-0-" in Part I, line 8 }	3	2,381.

990-PF Attachment - Realized Gains
The Jane K Lowe Charitable Foundation
12/31/2013

EIN 63-6203439

Quantity	Description 1	Date Acquired	Date Sold	Sale Price	Cost	Gain (Loss)	Term
25,130 31	ARTISAN SMALL CAP VALU	11/30/2009	2/7/2013	407,613 54	337,500 00	70,113 54	LONG
28 382	ARTISAN SMALL CAP VALU	12/18/2009	2/7/2013	460 35	397 06	63 29	LONG
8,278 15	ARTISAN SMALL CAP VALU	3/15/2010	2/7/2013	134,271 53	125,000 00	9,271 53	LONG
31 03	ARTISAN SMALL CAP VALU	12/20/2010	2/7/2013	503 30	521 61	(18 31)	LONG
2,449 77	ARTISAN SMALL CAP VALU	12/16/2011	2/7/2013	39,735 19	35,472 59	4,262 60	LONG
667 046	ARTISAN SMALL CAP VALU	12/16/2011	2/7/2013	10,819 49	9,658 83	1,160 66	LONG
14 099	ARTISAN SMALL CAP VALU	12/16/2011	2/7/2013	228 68	204 15	24 53	LONG
2,871 91	COHEN & STEERS RLTY SHS	12/15/2009	6/3/2013	200,000 00	132,222 86	67,777 14	LONG
22,113 77	MFS VALUE FD CL I	10/12/2009	8/16/2013	674,912 11	450,000 00	224,912 11	LONG
115 684	MFS VALUE FD CL I	12/14/2009	8/16/2013	3,530 67	2,378 51	1,152 16	LONG
71 474	MFS VALUE FD CL I	3/29/2010	8/16/2013	2,181 38	1,545 02	636 36	LONG
104 319	MFS VALUE FD CL I	6/28/2010	8/16/2013	3,183 81	2,073 53	1,110 28	LONG
73 514	MFS VALUE FD CL I	9/30/2010	8/16/2013	2,243 64	1,553 64	690 00	LONG
106 259	MFS VALUE FD CL I	12/13/2010	8/16/2013	3,243 02	2,375 96	867 06	LONG
70 786	MFS VALUE FD CL I	3/28/2011	8/16/2013	2,160 39	1,689 40	470 99	LONG
109 147	MFS VALUE FD CL I	6/27/2011	8/16/2013	3,331 16	2,555 12	776 04	LONG
108 455	MFS VALUE FD CL I	9/29/2011	8/16/2013	3,310 05	2,262 38	1,047 67	LONG
150 892	MFS VALUE FD CL I	12/12/2011	8/16/2013	4,605 22	3,334 71	1,270 51	LONG
86 422	MFS VALUE FD CL I	3/23/2012	8/16/2013	2,637 60	2,145 86	491 74	LONG
129 446	MFS VALUE FD CL I	6/27/2012	8/16/2013	3,950 69	3,008 32	942 37	LONG
19,543 97	JPM TR I HGBROGE SEL CL	10/29/2010	8/14/2013	284,560 26	300,000 00	(15,439 74)	LONG
8,324 80	DAVIS NY VENTURE FD CL Y	9/10/2010	8/16/2013	325,000 00	255,957 66	69,042 34	LONG
5,000	POWERSHARES DB AGRCL ETF	2/12/2010	6/3/2013	127,997 76	127,499 50	498 26	LONG
1,500	POWERSHARES DB AGRCL ETF	10/19/2010	6/3/2013	38,399 34	42,522 00	(4,122 66)	LONG
3,500	POWERSHARES DB AGRCL ETF	10/19/2010	6/3/2013	89,603 69	99,218 00	(9,614 31)	LONG
19,860 97	VANGUARD INVT GRADE ADMR	12/10/2009	6/3/2013	200,000 00	193,247 27	6,752 73	LONG
5,796 08	VANGUARD SPLZD PORT INVS	12/15/2009	6/3/2013	70,828 05	116,671 78	(45,843 73)	LONG
3 055	VANGUARD SPLZD PORT INVS	3/24/2010	6/3/2013	37 33	63 76	(26 43)	LONG
4,184 10	VANGUARD SPLZD PORT INVS	10/19/2010	6/3/2013	51,129 70	99,997 68	(48,867 98)	LONG
422 263	VANGUARD SPLZD PORT INVS	12/20/2010	6/3/2013	5,160 05	10,881 49	(5,721 44)	LONG
73 993	VANGUARD SPLZD PORT INVS	12/20/2010	6/3/2013	904 19	1,906 76	(1,002 57)	LONG
22 066	VANGUARD SPLZD PORT INVS	3/24/2011	6/3/2013	269 64	555 40	(285 76)	LONG
780 803	VANGUARD SPLZD PORT INVS	12/20/2011	6/3/2013	9,541 42	15,342 34	(5,800 92)	LONG
37 41	VANGUARD SPLZD PORT INVS	12/20/2011	6/3/2013	457 15	735 09	(277 94)	LONG
184 765	VANGUARD SPLZD PORT INVS	3/22/2012	6/3/2013	2,257 83	3,576 95	(1,319 12)	LONG

990-PF Attachment - Realized Gains
The Jane K Lowe Charitable Foundation
12/31/2013

EIN 63-6203439

Quantity	Description 1	Date Acquired	Date Sold	Sale Price	Cost	Gain (Loss)	Term
175 41	VANGUARD SP1ZD PORT INVS	3/22/2012	6/3/2013	2,143 51	3,395.84	(1,252 33)	LONG
7,423 91	VANGUARD REIT INDEX SIG	12/15/2009	6/3/2013	200,000.00	119,004 81	80,995 19	LONG
7,304 60	VANGUARD INFLATION-PRCTD	9/25/2009	6/3/2013	200,000 00	179,181 89	20,818 11	LONG
100,000	ALTRIA GROUP 7% 11/4/13	8/25/2004	11/4/2013	100,000.00	102,550 35	(2,550 35)	LONG
150,000	AMERICAN EXP 7% 03/19/18	10/30/2008	2/6/2013	186,819 00	132,893 30	53,925 70	LONG
100,000	SLM CORP 5 375% 1/15/13	7/27/2004	1/15/2013	100,000 00	101,118 00	(1,118 00)	LONG
150,000	TARGET 5 875% 07/15/16	11/5/2008	2/6/2013	176,143 50	135,846 49	40,297 01	LONG
100,000	WYETH 5 5% 2/1/14	11/20/2008	12/16/2013	100,650 99	98,664 00	1,986 99	LONG
LONG-TERM SUBTOTAL				3,774,825 23	3,256,729 91	518,095 32	
554 555	ARTISAN SMALL CAP VALU	12/20/2012	2/7/2013	8,994 89	8,556 79	438 10	SHORT
300 522	ARTISAN SMALL CAP VALU	12/20/2012	2/7/2013	4,874 47	4,637 06	237 41	SHORT
297 439	ARTISAN SMALL CAP VALU	12/20/2012	2/7/2013	4,824 47	4,589 49	234 98	SHORT
98 07	MFS VALUE FD CL I	9/26/2012	8/16/2013	2,993 10	2,511 56	481 54	SHORT
169 454	MFS VALUE FD CL I	12/12/2012	8/16/2013	5,171 74	4,314 31	857 43	SHORT
152 844	MFS VALUE FD CL I	12/12/2012	8/16/2013	4,664 81	3,891 42	773 39	SHORT
98 653	MFS VALUE FD CL I	3/28/2013	8/16/2013	3,010 89	2,787 92	222 97	SHORT
3 307	MFS VALUE FD CL I	3/28/2013	8/16/2013	100 93	93 46	7 47	SHORT
121 02	MFS VALUE FD CL I	6/27/2013	8/16/2013	3,693 55	3,556 77	136 78	SHORT
294 805	VANGUARD SP1ZD PORT INVS	12/31/2012	6/3/2013	3,602 53	4,601 70	(999 17)	SHORT
6 932	VANGUARD SP1ZD PORT INVS	3/20/2013	6/3/2013	84 71	95 80	(11 09)	SHORT
SHORT-TERM SUBTOTAL				42,016 09	39,636 28	2,379 81	
ADJ FOR CHANGE IN COST BASIS OF INVESTMENTS							
OTHER INCOME-CONTRACTS & STRADDLES (PTP K-1)				24,898 87	18,219 00	24,898 87	LONG
NET ST GAIN (PTP K-1)				1 00		(18,219 00)	LONG
CAPITAL GAIN DISTRIBUTIONS ON 1099				823,407 00		1 00	SHORT
LAND - 200 WEST SIDE SQUARE				276,593 00	231,000 00	823,407 00	LONG
						45,593 00	LONG
				4,941,741 19	3,545,585 19	1,396,156 00	

Part XV Supplementary Information**3 Grants and Contributions Paid During the Year (Continuation)**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
GIRLS INC. 4600 BLUE SPRINGS RD NW HUNTSVILLE, AL 35810		PUBLIC CHARITY	EDUCATION-NON PROFIT ORGANIZATION FOR GIRLS	75,091.
HEALS INC. 1100 MERIDIAN STREET HUNTSVILLE, AL 35801		PUBLIC CHARITY	FUNDING FOR DENTAL CLINIC STAFF AND SUPPLIES	20,073.
HUNTSVILLE BOYS AND GIRLS CLUB 215 ABINGDON AVE. NW HUNTSVILLE, AL 35801		PUBLIC CHARITY	EDUCATION-NON PROFIT ORGANIZATION FOR BOYS & GRILS	75,091.
HUNTSVILLE CHAMBER MUSIC GUILD 301 SPARKMAN DRIVE HUNTSVILLE, AL 35899		PUBLIC CHARITY	FUNDING FOR CULTURAL ENRICHMENT PROGRAM	20,073.
HUNTSVILLE HOSPITAL FOUNDATION 101 SIVLEY ROAD HUNTSVILLE, AL 35801		PUBLIC CHARITY	FUNDING FOR INPATIENT HOSPICE PROGRAM	100,000.
HUNTSVILLE MADISON COUNTY RESCUE SQUAD P.O. BOX 2062 HUNTSVILLE, AL 35804		PUBLIC CHARITY	FUNDING TO ENHANCE RESCUE AND RECOVERY RESOURCES	20,073.
HUNTSVILLE SYMPHONY ORCHESTRA PO BOX 2400 HUNTSVILLE, AL 35804		PUBLIC CHARITY	FUNDING FOR YOUTH VIOLIN PROGRAM	20,073.
NEIGHBORHOOD CONCEPTS INC. 116 SOUTH JEFFERSON STREET, STE 207 HUNTSVILLE, AL 35801		PUBLIC CHARITY	FUNDING FOR COMMUNITY GARDEN SPACE IN AN IMPOVERISHED NEIGHBORHOOD	20,073.
NORTH ALABAMA SCIENCE CENTER, INC. 102 D WYNN DRIVE HUNTSVILLE, AL 35805		PUBLIC CHARITY	FUNDING FOR EDUCATIONAL SUITE AT NEW LOCATION	100,000.
RANDOLPH SCHOOL 1005 DRAKE AVE. HUNTSVILLE, AL 35802		PUBLIC CHARITY	PROVIDE EDUCATION	75,091.
Total from continuation sheets				1,286,584.

Part XV Supplementary Information**3 Grants and Contributions Paid During the Year (Continuation)**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
RANDOLPH SCHOOL 1005 DRAKE AVE. HUNTSVILLE, AL 35802		PUBLIC CHARITY	FUNDING FOR COMMUNITY LEARNING INITIATIVE FOR STUDENTS, EDUCATORS, AND COMMUNITY	50,000.
THE CARE CENTER 5439 MAIN DRIVE NEW HOPE, AL 35760		PUBLIC CHARITY	FUNDING FOR PURCHASE OF BUILDING AND PROPERTY REPAIRS	20,073.
THE LOVING CARING ANIMAL ORGANIZATION INC. P.O. BOX 1531 MADISON, AL 35748		PUBLIC CHARITY	FUNDING TOWARD SPAYING, NEUTERING, AND CARE OF ANIMALS	20,073.
UNIV ALA HUNTSVILLE FOUNDATION 102 ALUMNI HOUSE HUNTSVILLE, AL 35899		PUBLIC CHARITY	EDUCATION AND MAINTENANCE FOR LOWE HOUSE	50,000.
UNIVERSITY OF ALABAMA - BIRMINGHAM 701 SOUTH 20TH ST BIRMINGHAM, AL 35294		PUBLIC CHARITY	EDUCATION AND RESEARCH	525,636.
VANDERBILT UNIVERSITY 105 KIRKLAND HALL NASHVILLE, TN 37240		PUBLIC CHARITY	EDUCATION AND RESEARCH	75,091.
WOMEN'S BUSINESS CENTER OF NORTH ALABAMA INC 225 CHURCH STREET HUNTSVILLE, AL 35801		PUBLIC CHARITY	FUNDING FOR FINANCIAL LITERACY PROGRAM FOR COMMUNITY	20,073.
Total from continuation sheets				

63-6203439

3 Grants and Contributions Approved for Future Payment (Continuation)

FORM 990-PF INTEREST ON SAVINGS AND TEMPORARY CASH INVESTMENTS STATEMENT 1

SOURCE	(A) REVENUE PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME
INTEREST FROM K-1 POWERSHARES			
OB AGRICULTURE FUND	94.	94.	94.
WELLS FARGO	240,372.	240,372.	240,372.
TOTAL TO PART I, LINE 3	240,466.	240,466.	240,466.

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
WELLS FARGO	1,344,023.	823,407.	520,616.	520,616.	520,616.
TO PART I, LINE 4	1,344,023.	823,407.	520,616.	520,616.	520,616.

FORM 990-PF RENTAL INCOME STATEMENT 3

KIND AND LOCATION OF PROPERTY	ACTIVITY NUMBER	GROSS RENTAL INCOME
COMMERCIAL REAL ESTATE, HUNTSVILLE, AL	1	14,061.
TOTAL TO FORM 990-PF, PART I, LINE 5A		14,061.

FORM 990-PF LEGAL FEES STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
LEGAL FEES	13,618.	13,618.	13,618.	0.
TO FM 990-PF, PG 1, LN 16A	13,618.	13,618.	13,618.	0.

FORM 990-PF	ACCOUNTING FEES			STATEMENT	5
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
ACCOUNTING	8,426.	8,426.	8,426.	0.	
TO FORM 990-PF, PG 1, LN 16B	8,426.	8,426.	8,426.	0.	

FORM 990-PF	OTHER PROFESSIONAL FEES			STATEMENT	6
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
INVESTMENT CUSTODIAL FEES	32,993.	32,993.	32,993.	0.	
APPRAISAL FEES	4,500.	4,500.	4,500.	0.	
TO FORM 990-PF, PG 1, LN 16C	37,493.	37,493.	37,493.	0.	

FORM 990-PF	TAXES			STATEMENT	7
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
FOREIGN TAXES	11,890.	11,890.	11,890.	0.	
PAYROLL TAXES	2,144.	2,144.	2,144.	0.	
TAXES PAID ON INVESTMENT INCOME	37,908.	0.	0.	0.	
PENALTIES AND INTEREST	329.	0.	0.	0.	
AD VALOREM TAXES	44.	44.	44.	0.	
ALABAMA BUSINESS PRIVILEGE TAX	110.	110.	110.	0.	
TO FORM 990-PF, PG 1, LN 18	52,425.	14,188.	14,188.	0.	

FORM 990-PF	OTHER EXPENSES			STATEMENT	8
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
OFFICE EXPENSES	9,639.	9,639.	9,639.		0.
INSURANCE	6,976.	6,976.	6,976.		0.
TOTAL TO FORM 990-PF, PG 1, LN 23	16,615.	16,615.	16,615.		0.

FORM 990-PF	CORPORATE BONDS		STATEMENT	9
DESCRIPTION	BOOK VALUE		FAIR MARKET VALUE	
CORPORATE BONDS	3,634,560.		4,118,733.	
TOTAL TO FORM 990-PF, PART II, LINE 10C	3,634,560.		4,118,733.	

FORM 990-PF	DEPRECIATION OF ASSETS HELD FOR INVESTMENT		STATEMENT	10
DESCRIPTION	COST OR OTHER BASIS	ACCUMULATED DEPRECIATION	BOOK VALUE	
LAND	231,000.	0.	231,000.	
LAND - GREENBRIER TRACT	15,780.	0.	15,780.	
TOTAL TO FM 990-PF, PART II, LN 11	246,780.	0.	246,780.	

FORM 990-PF	OTHER INVESTMENTS		STATEMENT	11
DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE	
MUTUAL FUNDS	COST	22,875,001.	29,946,839.	
FOREIGN BONDS	COST	98,269.	113,760.	
TOTAL TO FORM 990-PF, PART II, LINE 13		22,973,270.	30,060,599.	

FORM 990-PF	DEPRECIATION OF ASSETS NOT HELD FOR INVESTMENT		STATEMENT 12
DESCRIPTION	COST OR OTHER BASIS	ACCUMULATED DEPRECIATION	BOOK VALUE
OFFICE EQUIPMENT	4,254.	4,254.	0.
FURNITURE AND FIXTURES	2,580.	2,580.	0.
COMPUTER	1,259.	1,259.	0.
PRINTER	649.	649.	0.
COMPUTER	3,596.	2,500.	1,096.
PRINTER/COPIER/SCANNER	2,160.	1,123.	1,037.
TOTAL TO FM 990-PF, PART II, LN 14	14,498.	12,365.	2,133.

FORM 990-PF	OTHER ASSETS		STATEMENT 13
DESCRIPTION	BEGINNING OF YR BOOK VALUE	END OF YEAR BOOK VALUE	FAIR MARKET VALUE
ACCRUED INTEREST RECEIVABLE	61,088.	48,170.	48,170.
TO FORM 990-PF, PART II, LINE 15	61,088.	48,170.	48,170.

FORM 990-PF	OTHER LIABILITIES		STATEMENT 14
DESCRIPTION	BOY AMOUNT	EOY AMOUNT	
PAYROLL TAXES WITHHELD AND PAYABLE	656.	320.	
INCOME TAXES PAYABLE	341.	15,820.	
TOTAL TO FORM 990-PF, PART II, LINE 22	997.	16,140.	

Application for Extension of Time To File an Exempt Organization Return

OMB No 1545-1709

► File a separate application for each return.

► Information about Form 8868 and its instructions is at www.irs.gov/form8868.

- If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** and check this box ☒
- If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only **Part II** (on page 2 of this form)

Do not complete Part II unless you have already been granted an automatic 3-month extension on a previously filed Form 8868

Electronic filing (e-file). You can electronically file Form 8868 if you need a 3-month automatic extension of time to file (6 months for a corporation required to file Form 990-T), or an additional (not automatic) 3-month extension of time. You can electronically file Form 8868 to request an extension of time to file any of the forms listed in Part I or Part II with the exception of Form 8870, Information Return for Transfers Associated With Certain Personal Benefit Contracts, which must be sent to the IRS in paper format (see instructions). For more details on the electronic filing of this form, visit www.irs.gov/efile and click on e-file for Charities & Nonprofits

Part I Automatic 3-Month Extension of Time. Only submit original (no copies needed).

A corporation required to file Form 990-T and requesting an automatic 6-month extension - check this box and complete

Part I only ☐

All other corporations (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns

Type or print	Name of exempt organization or other filer, see instructions.	Enter filer's identifying number
	THE JANE K. LOWE CHARITABLE FOUNDATION	Employer identification number (EIN) or 63-6203439
File by the due date for filing your return. See instructions	Number, street, and room or suite no. If a P.O. box, see instructions. P.O. BOX 348	Social security number (SSN)
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. HUNTSVILLE, AL 35804-0348	

Enter the Return code for the return that this application is for (file a separate application for each return)

04

Application Is For	Return Code	Application Is For	Return Code
Form 990 or Form 990-EZ	01	Form 990-T (corporation)	07
Form 990-BL	02	Form 1041-A	08
Form 4720 (individual)	03	Form 4720 (other than individual)	09
Form 990-PF	04	Form 5227	10
Form 990-T (sec. 401(a) or 408(a) trust)	05	Form 6069	11
Form 990-T (trust other than above)	06	Form 8870	12

JOHN R. WYNN

- The books are in the care of ► **P.O. BOX 348 - HUNTSVILLE, AL 35801**

Telephone No ► **(256) 536-1231**

Fax No ►

- If the organization does not have an office or place of business in the United States, check this box ☐

- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) _____ If this is for the whole group, check this box ☐. If it is for part of the group, check this box ☐ and attach a list with the names and EINs of all members the extension is for

- 1 I request an automatic 3-month (6 months for a corporation required to file Form 990-T) extension of time until **AUGUST 15, 2014**, to file the exempt organization return for the organization named above. The extension is for the organization's return for ☒ calendar year **2013** or ☐ tax year beginning _____, and ending _____

- 2 If the tax year entered in line 1 is for less than 12 months, check reason: ☐ Initial return ☐ Final return ☐ Change in accounting period

3a If this application is for Forms 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	3a	\$	47,900.
b If this application is for Forms 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit.	3b	\$	22,400.
c Balance due. Subtract line 3b from line 3a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	3c	\$	25,500.

Caution. If you are going to make an electronic funds withdrawal (direct debit) with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions