Form **990-PF**

Department of the Treasury
Internal Revenue Service

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

OMB No 1545-0052
2014
Open to Public Inspection

For calendar year 2014 or tax year beginning , 2014, and ending , 20

Name of foundation: ROBERT L. MAULDIN CHARITABLE TRUST
A Employer identification number: 20-3969051

Number and street (or P O. box number if mail is not delivered to street address): 385 WINTERLOCKEN ROAD
Room/suite:
B Telephone number (see instructions): 704-637-2002

City or town, state or province, country, and ZIP or foreign postal code: SALISBURY, NC 28144
C If exemption application is pending, check here ▶ ☐

G Check all that apply: ☐ Initial return ☐ Initial return of a former public charity ☐ Final return ☐ Amended return ☐ Address change ☐ Name change

D 1. Foreign organizations, check here ▶ ☐
2. Foreign organizations meeting the 85% test, check here and attach computation ▶ ☐

H Check type of organization: ☑ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation

E If private foundation status was terminated under section 507(b)(1)(A), check here ▶ ☐

I Fair market value of all assets at end of year *(from Part II, col. (c), line 16)* ▶ $ 300,267
J Accounting method: ☑ Cash ☐ Accrual ☐ Other (specify) *(Part I, column (d) must be on cash basis)*

F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ▶ ☐

Part I **Analysis of Revenue and Expenses** *(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))*

	Line	Description	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1	Contributions, gifts, grants, etc., received (attach schedule)				
	2	Check ▶ ☐ if the foundation is not required to attach Sch. B				
	3	Interest on savings and temporary cash investments	3	3	3	
	4	Dividends and interest from securities	6,308	6,308	6,308	
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10				
	b	Gross sales price for all assets on line 6a				
	7	Capital gain net income (from Part IV, line 2)		10,704		
	8	Net short-term capital gain			0	
	9	Income modifications				
	10a	Gross sales less returns and allowances				
	b	Less: Cost of goods sold				
	c	Gross profit or (loss) (attach schedule)				
	11	Other income (attach schedule)				
	12	**Total.** Add lines 1 through 11	6,311	17,015	6,311	
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc.				
	14	Other employee salaries and wages				
	15	Pension plans, employee benefits				
	16a	Legal fees (attach schedule)				
	b	Accounting fees (attach schedule)				
	c	Other professional fees (attach schedule)				
	17	Interest				
	18	Taxes (attach schedule) (see instructions)	189	189	189	
	19	Depreciation (attach schedule) and depletion				
	20	Occupancy				
	21	Travel, conferences, and meetings				
	22	Printing and publications				
	23	Other expenses (attach schedule)	4,272	4,272	4,272	
	24	**Total operating and administrative expenses.** Add lines 13 through 23	4,461	4,461	4,461	
	25	Contributions, gifts, grants paid	14,250			14,250
	26	**Total expenses and disbursements.** Add lines 24 and 25	18,711	4,461	4,461	
	27	Subtract line 26 from line 12:				
	a	**Excess of revenue over expenses and disbursements**	(12,400)			
	b	**Net investment income** (if negative, enter -0-)		12,554		
	c	**Adjusted net income** (if negative, enter -0-)			1,850	

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Part II	**Balance Sheets** Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions.)	Beginning of year (a) Book Value	End of year (b) Book Value	End of year (c) Fair Market Value
Assets 1	Cash—non-interest-bearing			
2	Savings and temporary cash investments	22,424	50,019	50,019
3	Accounts receivable ▶			
	Less: allowance for doubtful accounts ▶			
4	Pledges receivable ▶			
	Less: allowance for doubtful accounts ▶			
5	Grants receivable			
6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
7	Other notes and loans receivable (attach schedule) ▶			
	Less: allowance for doubtful accounts ▶			
8	Inventories for sale or use			
9	Prepaid expenses and deferred charges			
10a	Investments—U.S. and state government obligations (attach schedule)			
b	Investments—corporate stock (attach schedule)	227,488	197,558	250,248
c	Investments—corporate bonds (attach schedule)			
11	Investments—land, buildings, and equipment: basis ▶			
	Less: accumulated depreciation (attach schedule) ▶			
12	Investments—mortgage loans			
13	Investments—other (attach schedule)			
14	Land, buildings, and equipment: basis ▶			
	Less: accumulated depreciation (attach schedule) ▶			
15	Other assets (describe ▶)			
16	**Total assets** (to be completed by all filers—see the instructions. Also, see page 1, item I)	249,912	247,577	300,267
Liabilities 17	Accounts payable and accrued expenses			
18	Grants payable			
19	Deferred revenue			
20	Loans from officers, directors, trustees, and other disqualified persons			
21	Mortgages and other notes payable (attach schedule)			
22	Other liabilities (describe ▶)			
23	**Total liabilities** (add lines 17 through 22)			
Net Assets or Fund Balances	**Foundations that follow SFAS 117, check here** ▶ ☐ **and complete lines 24 through 26 and lines 30 and 31.**			
24	Unrestricted			
25	Temporarily restricted			
26	Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ ☐ **and complete lines 27 through 31.**			
27	Capital stock, trust principal, or current funds	249,912	247,577	
28	Paid-in or capital surplus, or land, bldg., and equipment fund			
29	Retained earnings, accumulated income, endowment, or other funds			
30	**Total net assets or fund balances** (see instructions)	249,912	247,577	
31	**Total liabilities and net assets/fund balances** (see instructions)	249,912	247,577	

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	249,912
2	Enter amount from Part I, line 27a	2	(12,400)
3	Other increases not included in line 2 (itemize) ▶ INVESTMENT ACCOUNT REINVESTMENTS	3	10,065
4	Add lines 1, 2, and 3	4	247,577
5	Decreases not included in line 2 (itemize) ▶	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	247,577

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	CAPITAL GAIN DISTRIBUTIONS- WELLS FARGO ADVISORS ACCOUNT			
b	SCHEDULE - WELLS FARGO ADVISORS			
c	SCHEDULE- WELLS FARGO ADVISORS			
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				3,575
b				1,786
c				5,343
d				
e				

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				

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	10,704
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c) (see instructions). If (loss), enter -0- in Part I, line 8	3	(1,783)

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))
2013			
2012			
2011			
2010			
2009			

2	**Total** of line 1, column (d)	2	
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	
4	Enter the net value of noncharitable-use assets for 2014 from Part X, line 5	4	
5	Multiply line 4 by line 3	5	
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	
7	Add lines 5 and 6	7	
8	Enter qualifying distributions from Part XII, line 4	8	

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 ▶ ☐ and enter "N/A" on line 1. Date of ruling or determination letter: ________ (attach copy of letter if necessary—see instructions)			
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ▶ ☐ and enter 1% of Part I, line 27b	1	251	
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		
3	Add lines 1 and 2	3	251	
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4		
5	**Tax based on investment income.** Subtract line 4 from line 3. If zero or less, enter -0-	5	251	
6	Credits/Payments:			
a	2014 estimated tax payments and 2013 overpayment credited to 2014 — 6a			
b	Exempt foreign organizations—tax withheld at source — 6b			
c	Tax paid with application for extension of time to file (Form 8868) — 6c			
d	Backup withholding erroneously withheld — 6d			
7	Total credits and payments. Add lines 6a through 6d	7		
8	Enter any **penalty** for underpayment of estimated tax. Check here ☐ if Form 2220 is attached	8		
9	**Tax due.** If the total of lines 5 and 8 is more than line 7, enter **amount owed** ▶	9	251	
10	**Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶	10		
11	Enter the amount of line 10 to be: **Credited to 2015 estimated tax** ▶ — **Refunded** ▶	11		

Part VII-A Statements Regarding Activities

			Yes	No
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a		✓
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes (see Instructions for the definition)?	1b		✓
	*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.*			
c	Did the foundation file **Form 1120-POL** for this year?	1c		✓
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: **(1)** On the foundation. ▶ $ ________ **(2)** On foundation managers. ▶ $ ________			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ $ ________			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? *If "Yes," attach a detailed description of the activities.*	2		✓
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*	3		✓
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		✓
b	If "Yes," has it filed a tax return on **Form 990-T** for this year?	4b		✓
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? *If "Yes," attach the statement required by General Instruction T.*	5		✓
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?	6	✓	
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*	7	✓	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ ________			
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	✓	
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 2014 or the taxable year beginning in 2014 (see instructions for Part XIV)? *If "Yes," complete Part XIV*	9		
10	Did any persons become substantial contributors during the tax year? *If "Yes," attach a schedule listing their names and addresses*	10		✓

Part VII-A Statements Regarding Activities *(continued)*

			Yes	No
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		✓
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		✓
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13		
	Website address ▶			
14	The books are in care of ▶ MARK MAULDIN Telephone no. ▶ 704-637-2002			
	Located at ▶ 385 WINTERLOCKEN ROAD, SALISBURY, NC ZIP+4 ▶ 28144			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of **Form 1041**—Check here ▶ ☐ and enter the amount of tax-exempt interest received or accrued during the year ▶ 15			
16	At any time during calendar year 2014, 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		✓
	See the instructions for exceptions and filing requirements for FinCEN Form 114, (formerly TD F 90-22.1). If "Yes," enter the name of the foreign country ▶			

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

			Yes	No
	File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			
1a	During the year did the foundation (either directly or indirectly):			
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☑ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☑ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☑ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☑ No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☑ No			
	(6) Agree to pay money or property to a government official? (**Exception.** Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) ☐ Yes ☑ No			
b	If any answer is "Yes" to 1a(1)–(6), did **any** of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)?	1b		
	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 before the first day of the tax year beginning in 2014?	1c		✓
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):			
a	At the end of tax year 2014, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2014? ☐ Yes ☐ No			
	If "Yes," list the years ▶ 20___ , 20___ , 20___ , 20___			
b	Are there any years listed in 2a for which the foundation is **not** applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to **all** years listed, answer "No" and attach statement—see instructions.)	2b		✓
c	If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here. ▶ 20___ , 20___ , 20___ , 20___			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☑ No			
b	If "Yes," did it have excess business holdings in 2014 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 2014.)*	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		✓
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 2014?	4b		✓

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

			Yes	No
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 4945(d)(4)(A)? (see instructions) ☐ Yes ☑ No			
	(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☑ No			
b	If any answer is "Yes" to 5a(1)–(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?	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? ☐ Yes ☐ No			
	If "Yes," attach the statement required by Regulations section 53.4945–5(d).			
6a	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? ☐ Yes ☑ No			
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?	6b		✓
	If "Yes" to 6b, file Form 8870.			
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☑ No			
b	If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?	7b		

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

1 List all officers, directors, trustees, foundation managers and their compensation (see instructions).

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
ROBERT MARK MAULDIN 385 WINTERLOCKEN ROAD, SALISBURY, NC 28144	TRUSTEE	0	0	0

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

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

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

Part VIII **Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors** *(continued)*

3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE."

(a) Name and address of each person paid more than $50,000	(b) Type of service	(c) Compensation
NONE		
Total number of others receiving over $50,000 for professional services ▶		

Part IX-A Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc	Expenses
1 CALVARY LUTHERAN CHURCH, SPENCER, NC 28159	12,000
2 NORTH ROWAN HIGH SCHOOL, SPENCER, NC 28159	1,500
3 SPENCER LITTLE LEAGUE, SPENCER, NC 28159	500
4 TOWN OF SPENCER, NC 28159	250

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

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1	
2	
All other program-related investments See instructions	
3	
Total. Add lines 1 through 3 ▶	

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	275,493
b	Average of monthly cash balances	1b	28,621
c	Fair market value of all other assets (see instructions)	1c	
d	**Total** (add lines 1a, b, and c)	1d	304,114
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation) — 1e		
2	Acquisition indebtedness applicable to line 1 assets	2	
3	Subtract line 2 from line 1d	3	304,114
4	Cash deemed held for charitable activities. Enter 1 ½ % of line 3 (for greater amount, see instructions)	4	4,562
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3. Enter here and on Part V, line 4	5	299,552
6	**Minimum investment return.** Enter 5% of line 5	6	14,978

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	14,978
2a	Tax on investment income for 2014 from Part VI, line 5	2a	251		
b	Income tax for 2014. (This does not include the tax from Part VI.)	2b			
c	Add lines 2a and 2b			2c	251
3	Distributable amount before adjustments. Subtract line 2c from line 1			3	14,727
4	Recoveries of amounts treated as qualifying distributions			4	
5	Add lines 3 and 4			5	14,727
6	Deduction from distributable amount (see instructions)			6	
7	**Distributable amount** as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1			7	14,727

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	14,250
b	Program-related investments—total from Part IX-B	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	**Qualifying distributions.** Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	14,250
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b (see instructions)	5	124
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	14,126

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 2013	(c) 2013	(d) 2014
1	Distributable amount for 2014 from Part XI, line 7				14,727
2	Undistributed income, if any, as of the end of 2014:				
a	Enter amount for 2013 only			0	
b	Total for prior years: 20___,20___,20___		0		
3	Excess distributions carryover, if any, to 2014:				
a	From 2009				
b	From 2010				
c	From 2011				
d	From 2012				
e	From 2013 233				
f	**Total** of lines 3a through e	233			
4	Qualifying distributions for 2014 from Part XII, line 4: ▶ $				
a	Applied to 2013, but not more than line 2a			0	
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 2014 distributable amount				14,250
e	Remaining amount distributed out of corpus				
5	Excess distributions carryover applied to 2014 *(If an amount appears in column (d), the same amount must be shown in column (a).)*	233			233
6	**Enter the net total of each column as indicated below:**				
a	Corpus. Add lines 3f, 4c, and 4e. Subtract line 5				
b	Prior years' undistributed income. Subtract line 4b from line 2b				
c	Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed				
d	Subtract line 6c from line 6b. Taxable amount—see instructions				
e	Undistributed income for 2013. Subtract line 4a from line 2a. Taxable amount—see instructions				
f	Undistributed income for 2014. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2015				244
7	Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required—see instructions)				
8	Excess distributions carryover from 2009 not applied on line 5 or line 7 (see instructions)				
9	**Excess distributions carryover to 2015.** Subtract lines 7 and 8 from line 6a	0			
10	Analysis of line 9:				
a	Excess from 2010				
b	Excess from 2011				
c	Excess from 2012				
d	Excess from 2013				
e	Excess from 2014				

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

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2014, enter the date of the ruling . . . . . . ▶

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

	Tax year	Prior 3 years			
	(a) 2014	(b) 2013	(c) 2012	(d) 2011	(e) Total
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed	1,850	3,293	4,374	4,064	13,581
b 85% of line 2a	1,573	2,799	3,718	3,454	11,544
c Qualifying distributions from Part XII, line 4 for each year listed	14,250	15,500	14,300	10,700	54,750
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	14,250	15,500	14,300	10,700	54,750
3 Complete 3a, b, or c for the alternative test relied upon:					
a "Assets" alternative test—enter:					
(1) Value of all assets	300,267	302,764	281,413	268,896	1,153,340
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test—enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed					
c "Support" alternative test—enter:					
(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

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

1 Information Regarding Foundation Managers:

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

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

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

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

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

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 Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
CALVARY LUTHERAN CHURCH SPENCER, NC 28159			RELIGIOUS	12,000
NORTH ROWAN HIGH SCHOOL SPENCER, NC 28159			EDUCATIONAL	1,500
SPENCER, NC LITTLE LEAGUE SPENCER, NC 28159			CIVIC- COMMUNITY	500
TOWN OF SPENCER, NC SPENCER, NC 28159			CIVIC-COMMUNITY SUPPORT	, 250
Total . . . . ▶ 3a				14,250
b *Approved for future payment*				
Total . . . . ▶ 3b				

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.	Unrelated business income (a) Business code	Unrelated business income (b) Amount	Excluded by section 512, 513, or 514 (c) Exclusion code	Excluded by section 512, 513, or 514 (d) Amount	(e) Related or exempt function income (See instructions.)
1 Program service revenue:					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities					6,311
5 Net rental income or (loss) from real estate:					
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal property					
7 Other investment income					
8 Gain or (loss) from sales of assets other than inventory					
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue: a CAPITAL GAIN -SECURITIES					10,704
b					
c					
d					
e					
12 Subtotal. Add columns (b), (d), and (e)					17,015

13 **Total.** Add line 12, columns (b), (d), and (e) . . . 13 17,015

(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). (See instructions.)
	ASSISTS CALVARY LUTHERAN CHURCH IN MAINTAINING SUPPORT TO THE CONGREGATION AND COMMUNITY THROUGH WORSHIP AND EDUCATIONAL OPPORTUNITIES
	SUPPORTS NORTH ROWAN HIGH SCHOOL IN ITS EDUCATIONAL OPPORTUNITIES AND ACTIVITIES FOR STUDENTS
	SUPPORTS SPENCER, NC LITTLE LEAGUE IN FOSTERING COMMUNITY RELATIONS IN A DEPRESSED COMMUNITY AND PROVIDING OPPORTUNITIES FOR LESS FORTUNATE CHILDREN
	SUPPORTS TOWN OF SPENCER, NC IN COMMUNITY EVENTS SPONSORED BY THE TOWN

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

			Yes	No
1	Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?			
a	Transfers from the reporting foundation to a noncharitable exempt organization of:			
	(1) Cash	1a(1)		✓
	(2) Other assets	1a(2)		✓
b	Other transactions:			
	(1) Sales of assets to a noncharitable exempt organization	1b(1)		✓
	(2) Purchases of assets from a noncharitable exempt organization	1b(2)		✓
	(3) Rental of facilities, equipment, or other assets	1b(3)		✓
	(4) Reimbursement arrangements	1b(4)		✓
	(5) Loans or loan guarantees	1b(5)		✓
	(6) Performance of services or membership or fundraising solicitations	1b(6)		✓
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c		✓

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.

(a) Line no	(b) Amount involved	(c) Name of noncharitable exempt organization	(d) Description of transfers, transactions, and sharing arrangements

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

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

[signature] TTEE 5/7/15 ▶ TRUSTEE

Signature of officer or trustee Date Title

May the IRS discuss this return with the preparer shown below (see instructions)? ☑ Yes ☐ No

Paid Preparer Use Only

Print/Type preparer's name	Preparer's signature	Date	Check ☑ if self-employed	PTIN
ALVIN B. BRANDON				P01296681
Firm's name ▶ ALVIN B. BRANDON, CPA			Firm's EIN ▶	56-1844694
Firm's address ▶ P.O. BOX 3177, SALISBURY, NC 28145			Phone no	704-637-2002

WELLS FARGO ADVISORS

2014 Amended Forms 1099

Corrected Date: 03/17/15

Account Number: 4409-2663

R.L. MAULDIN CHARITABLE TR
ROBERT M MAULDIN TTEE

Reportable Tax Information

The information provided below is in accordance with Federal tax regulations and the IRS instructions that govern our reporting requirements. You should review this information carefully when completing your Form 8949 and Schedule D. There may be instances where our reporting requirements will not be consistent with your particular tax accounting position or elections. For these reasons, the IRS requires us to provide you with this reminder: **Taxpayers are ultimately responsible for the accuracy of their tax returns.**

1099-B Proceeds from Broker and Barter Exchange Transactions [illegible] OMB No. 1545-0715

Short Term Gains/Losses - Report on Form 8949, Part I with Box A checked

Box 2: Type of Gain or Loss - Short Term
Box 3: Basis Reported to the IRS
Box 5: Box not Checked (Covered Security)

The 1099-B data referenced by a Box Number is reported to the IRS. The additional information not referenced by a Box Number is not reported to the IRS, but may be helpful to complete your return

Description CUSIP (Box 1a)	Quantity Sold	Date Acquired (Box 1b)	Date Sold or Disposed (Box 1c)	Proceeds (Box 1d)	Cost or Other Basis (Box 1e)	Code (Box 1f)	Adjustments (Box 1g)	Gain/Loss Amount	Additional Information
BLACKROCK FUNDS II - *	1 29300	11/01/2013	08/26/2014	13 52	13 56		0 00	-0 04	
FLOATING RATE INCOME PRT	3.96700	12/02/2013	08/26/2014	41.49	41 65		0.00	-0 16	
CUSIP. 09256H187	3 87300	01/02/2014	08/26/2014	40 51	40 71		0.00	-0.20	
	3 87300	02/03/2014	08/26/2014	40 51	40 78		0 00	-0.27	
	3 68300	03/03/2014	08/26/2014	38 52	38 74		0.00	-0.22	
	4.06000	04/01/2014	08/26/2014	42.47	42.67		0 00	-0 20	
	3 99800	05/01/2014	08/26/2014	41 82	41.94		0 00	-0.12	
	4.22700	06/02/2014	08/26/2014	44 22	44 47		0 00	-0.25	
	4.47100	07/01/2014	08/26/2014	46.77	47.12		0 00	-0 35	
	4 84300	08/01/2014	08/26/2014	50.67	50.75		0.00	-0.08	
Subtotals	**38.28800**			**$400.50**	**$402.39**		**$0.00**	**($1.89)**	
DWS SECS TR *	0.88000	03/22/2013	03/17/2014	14 02	14.17		0 00	-0.15	
ENHANCED COMMODITY STRAT	0 12000	03/22/2013	03/17/2014	1 91	1.93		0 00	-0 02	
CUSIP. 23337G258	11 40000	04/25/2013	03/17/2014	181.73	178.98		0.00	2.75	
	0 20000	04/25/2013	03/17/2014	3 18	3 27		0 00	-0.09	
	3.60000	07/10/2013	03/17/2014	57 39	55 26		0 00	2 13	
	0 20000	07/10/2013	03/17/2014	3 18	3.13		0 00	0 05	
	24 00000	07/31/2013	03/17/2014	382 61	366 00		0.00	16.61	
Subtotals	**40.40000**			**$644.02**	**$622.74**		**$0.00**	**$21.28**	

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2014 Amended Forms 1099

Corrected Date: 03/17/15

Account Number: 4409-2663

R.L. MAULDIN CHARITABLE TR
ROBERT M MAULDIN TTEE

1099-B Proceeds from Broker and Barter Exchange Transactions continued — OMB NO 1545-0715

Short Term Gains/Losses - Report on Form 8949, Part I with Box A checked

Box 2: Type of Gain or Loss - Short Term
Box 3: Basis Reported to the IRS
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Description CUSIP (Box 1a)	Quantity Sold	Date Acquired (Box 1b)	Date Sold or Disposed (Box 1c)	Proceeds (Box 1d)	Cost or Other Basis (Box 1e)	Code (Box 1f)	Adjustments (Box 1g)	Gain/Loss Amount	Additional Information
FEDERATED EQUITY FDS * PRUDENT BEAR FD INSTL CL CUSIP 314172339	3836.10000	08/26/2014	10/21/2014	9,321 72	9,206 64		0 00	115 08	
FRANKLIN CUSTODIAN FDS * INCOME SER ADV CL AD CUSIP: 353496847	11 57600	11/04/2013	08/26/2014	29 40	27 32		0 00	2 08	
	11 63100	12/03/2013	08/26/2014	29 54	27.45		0 00	2 09	
	11 58400	01/06/2014	08/26/2014	29.42	27.57		0 00	1.85	
	11 24300	02/04/2014	08/26/2014	28 55	26.42		0 00	2 13	
	10 87300	03/04/2014	08/26/2014	27.62	26.53		0.00	1.09	
	10 78900	04/02/2014	08/26/2014	27 40	26.65		0 00	0.75	
	10 70400	05/02/2014	08/26/2014	27.19	26 76		0 00	0.43	
	10.70500	06/03/2014	08/26/2014	27 19	26 87		0 00	0.32	
	10 53900	07/02/2014	08/26/2014	26.78	26.98		0 00	-0.20	
	10 88000	08/04/2014	08/26/2014	27 65	27 09		0 00	0 56	
Subtotals	**110.52400**			**$280.74**	**$269.64**		**$0.00**	**$11.10**	
NEUBERGER BERMAN * EQUITY FDS EMERGING CUSIP: 641224415	1 47800	12/17/2013	08/26/2014	26.56	24 22		0 00	2.34	
SPDR GOLD TRUST ETF CUSIP. 78463V107	50 00000	08/25/2014	12/31/2014	5,700 11	6,146 00		0.00	-445.89	CORR
TEMPLETON GLOBAL INVT * TR FRONTIER MARKETS FD CUSIP 88019R641	282 43500	08/26/2014	12/31/2014	4,067.06	5,549 84		0 00	-1,482 78	
	11.64800	12/11/2014	12/31/2014	167.73	169.01		0 00	-1 28	
	9 86500	12/11/2014	12/31/2014	142 06	143 14		0.00	-1.08	
	0 95200	12/11/2014	12/31/2014	13.71	13 81		0 00	-0.10	
Subtotals	**304.90000**			**$4,390.56**	**$5,875.80**		**$0.00**	**($1,485.24)**	
Totals (8949, Part I with Box A checked)				**$20,764.21**	**$22,547.43**		**$0.00**	**($1,783.22)**	

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WELLS FARGO ADVISORS

2014 Amended Forms 1099

Corrected Date: 03/17/15

Account Number: 4409-2663

R.L. MAULDIN CHARITABLE TR
ROBERT M MAULDIN TTEE

1099-B Proceeds from Broker and Barter Exchange Transactions (continued) OMB NO. 1545-0715

Long Term Gains/Losses - Report on Form 8949, Part II with Box D checked

Box 2: Type of Gain or Loss - Long Term
Box 3: Basis Reported to the IRS
Box 5: Box not Checked (Covered Security)

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Description CUSIP (Box 1a)	Quantity Sold	Date Acquired (Box 1b)	Date Sold or Disposed (Box 1c)	Proceeds (Box 1d)	Cost or Other Basis (Box 1e)	Code (Box 1f)	Adjustments (Box 1g)	Gain/Loss Amount	Additional Information
ALLIANZ FDS MLTI-STRAT *	102 73600	08/06/2013	08/26/2014	1,621 19	1,626 32		0.00	-5 13	
RCM SHORT DURATION HIGH	1 11700	08/06/2013	08/26/2014	17 62	17 68	W	0 06	0 00	
CUSIP· 01880B884	0.69700	08/06/2013	08/26/2014	10.99	11.03	W	0 04	0.00	
Subtotals	**104.55000**			**$1,649.80**	**$1,655.03**		**$0.10**	**($5.13)**	
BLACKROCK FUNDS II - *	511.00000	04/25/2013	08/26/2014	5,345.05	5,375.72		0 00	-30 67	
FLOATING RATE INCOME PRT	9.00000	07/10/2013	08/26/2014	94 14	93 69		0 00	0.45	
CUSIP. 09256H187	1 00000	07/10/2013	08/26/2014	10 46	10 45		0 00	0.01	
	700.00000	08/06/2013	08/26/2014	7,322.00	7,322 00		0 00	0.00	
Subtotals	**1221.00000**			**$12,771.65**	**$12,801.86**		**$0.00**	**($30.21)**	
BLACKROCK FDS II * MULTI-ASSET INCOME PORT CUSIP· 09256H336	106.93800	08/06/2013	08/26/2014	1,237.27	1,177 39		0 00	59.88	
WILLIAM BLAIR SM-MID * CAP CUSIP: 093001295	19 13200	01/28/2013	08/26/2014	384 55	295 98		0.00	88.57	
DWS SECS TR *	5.60000	01/27/2012	03/17/2014	89 26	98 28		0.00	-9 02	
ENHANCED COMMODITY STRAT	0 20000	01/27/2012	03/17/2014	3 18	3 43		0 00	-0 25	
CUSIP: 23337G258	4.00000	06/25/2012	03/17/2014	63.76	64.60		0.00	-0 84	
	2.20000	09/24/2012	03/17/2014	35 06	38 05		0.00	-2 98	
	5 40000	09/27/2012	03/17/2014	86.08	92.61		0 00	-6.53	
	1 80000	01/28/2013	03/17/2014	28.69	29.79		0 00	-1 10	
	0.20000	01/28/2013	03/17/2014	3 18	3.70		0.00	-0 52	
Subtotals	**19.40000**			**$309.21**	**$330.46**		**$0.00**	**($21.25)**	

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2014 Amended Forms 1099

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Account Number: 4409-2663

R.L. MAULDIN CHARITABLE TR
ROBERT M MAULDIN TTEE

1099-B Proceeds from Broker and Barter Exchange Transactions continued — OMB No 1545-0715

Long Term Gains/Losses - Report on Form 8949, Part II with Box D checked

Box 2: Type of Gain or Loss - Long Term
Box 3: Basis Reported to the IRS
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DELAWARE GROUP INCOME * FDS INC DIVERSIFIED FLTG CUSIP: 245908637	363.72600	08/06/2013	08/26/2014	3,135 32	3,114.97		0 00	20.35	Original Basis	3,128 05
FIRST EAGLE FDS * AMERICA CL I CUSIP. 32008F663	12 02900	04/25/2013	08/26/2014	491 99	380.48		0.00	111.51		
FRANKLIN CUSTODIAN FDS * INCOME SER ADV CL AD CUSIP: 353496847	58.00000	01/27/2012	08/26/2014	147.32	123 54		0.00	23.78		
	32.00000	03/23/2012	08/26/2014	81 28	69.12		0 00	12.16		
	58 00000	09/27/2012	08/26/2014	147.32	128.76		0.00	18.56		
	4 00000	04/25/2013	08/26/2014	10.16	9 32		0.00	0.84		
	71 00000	07/10/2013	08/26/2014	180.34	161.17		0.00	19.17		
	1 00000	07/10/2013	08/26/2014	2 54	2 27		0 00	0.27		
Subtotals	**224.00000**			**$568.96**	**$494.18**		**$0.00**	**$74.78**		
GOLDMAN SACHS TR * STRATEGIC INCOME FD CL CUSIP. 38145C646	77 73900	08/02/2012	08/26/2014	820.15	774.29		0.00	45 86		
ISHARES MSCI EAFE INDEX CUSIP. 464287465	28.00000	06/25/2012	04/16/2014	1,874.21	1,326.78		0 00	547.43		
ISHARES CORE S&P MIDCAP ETF CUSIP. 464287507	4.00000	06/25/2012	08/25/2014	571 23	358 24		0 00	212 99		
ISHARES ETF 0-5 YEAR TIPS BOND CUSIP: 46429B747	14.00000	07/31/2013	08/25/2014	1,420.55	1,415 80		0.00	4.75	Original Basis.	1,418.34

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WELLS FARGO ADVISORS

2014 Amended Forms 1099

Corrected Date: 03/17/15

Account Number: 4409-2663

R.L. MAULDIN CHARITABLE TR
ROBERT M MAULDIN TTEE

1099-B Proceeds from Broker and Barter Exchange Transactions (continued) OMB NO. 1545-0715

Long Term Gains/Losses - Report on Form 8949, Part II with Box D checked

Box 2: Type of Gain or Loss - Long Term
Box 3: Basis Reported to the IRS
Box 5: Box not Checked (Covered Security)

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Description CUSIP (Box 1a)	Quantity Sold	Date Acquired (Box 1b)	Date Sold or Disposed (Box 1c)	Proceeds (Box 1d)	Cost or Other Basis (Box 1e)	Code (Box 1f)	Adjustments (Box 1g)	Gain/Loss Amount	Additional Information
JP MORGAN TR I STRATEGIC INCOME OPPTY CUSIP 4812A4351	63 91400	08/06/2013	08/26/2014	759.30	758 66		0 00	0.64	
NEUBERGER BERMAN * EQUITY FDS EMERGING CUSIP: 641224415	280.00000	08/06/2013	08/26/2014	5,031 60	4,435 20		0.00	596 40	
PIMCO 0-5 YEAR HIGH ETF YIELD CORPORATE BOND CUSIP· 72201R783	31 00000	07/31/2013	08/25/2014	3,283 29	3,245 53		0.00	37.76	
VANGUARD SHORT TERM ETF CORP BD CUSIP. 92206C409	72 00000	07/31/2013	08/25/2014	5,771.02	5,729 71		0 00	41 31	
Totals (8949, Part II with Box D checked)				**$40,080.10**	**$38,294.56**		**$0.10**	**$1,785.64**	

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2014 Amended Forms 1099

Corrected Date: 03/17/15

Account Number: 4409-2663

R.L. MAULDIN CHARITABLE TR
ROBERT M MAULDIN TTEE

1099-B Proceeds from Broker and Barter Exchange Transactions (continued) OMB NO 1545-0715

Long Term Gains/Losses - Report on Form 8949, Part II with Box E checked

Box 2: Type of Gain or Loss - Long Term
Box 3: Basis Not Reported to the IRS
Box 5: Box Checked (Noncovered Security)

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Description CUSIP (Box 1a)	Quantity Sold	Date Acquired (Box 1b)	Date Sold or Disposed (Box 1c)	Proceeds (Box 1d)	Cost or Other Basis	Code	Adjustments	Gain/Loss Amount	Additional Information
DWS SECS TR • ENHANCED COMMODITY STRAT CUSIP. 23337G258	105 60000	11/02/2011	03/17/2014	1,683 26	2,038.08		0 00	-354 82	
	26 60000	12/14/2011	03/17/2014	424 00	457.51		0 00	-33 51	
	5 40000	12/16/2011	03/17/2014	86 07	90.72		0.00	-4 65	
	0 20000	12/16/2011	03/17/2014	3 18	3.63		0 00	-0 45	
Subtotals	**137.80000**			**$2,196.51**	**$2,589.94**		**$0.00**	**($393.43)**	
FRANKLIN CUSTODIAN FDS • INCOME SER ADV CL AD CUSIP: 353496847	2306.00000	12/16/2011	08/26/2014	5,857.23	4,704.24		0 00	1,152.99	
ISHARES MSCI EAFE INDEX CUSIP: 464287465	11.00000	12/17/2009	04/16/2014	736 29	605.87		0 00	130.42	
	6 00000	10/15/2010	04/16/2014	401 61	344.44		0 00	57.17	
	43 00000	01/21/2011	04/16/2014	2,878 22	2,546 35		0 00	331 87	
	7 00000	06/23/2011	04/16/2014	468 54	401 07		0 00	67.47	
	13 00000	08/24/2011	04/16/2014	870 16	677 28		0 00	192 88	
	14 00000	11/02/2011	04/16/2014	937.10	715 77		0 00	221.33	
Subtotals	**94.00000**			**$6,291.92**	**$5,290.78**		**$0.00**	**$1,001.14**	
ISHARES CORE S&P MIDCAP ETF CUSIP. 464287507	11 00000	12/17/2009	08/25/2014	1,570 85	787.70		0 00	783.15	
	9 00000	07/30/2010	08/25/2014	1,285 25	681 70		0 00	603 55	
	15 00000	10/15/2010	08/25/2014	2,142 08	1,226 65		0 00	915 43	
	9 00000	08/24/2011	08/25/2014	1,285 25	750 12		0.00	535 13	
Subtotals	**44.00000**			**$6,283.43**	**$3,446.17**		**$0.00**	**$2,837.26**	
IVY FDS INC • ASSET STRATEGY FD CL I CUSIP: 466001864	14 56200	10/01/2009	08/26/2014	468 46	308.43		0 00	160 03	

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WELLS FARGO ADVISORS

2014 Amended Forms 1099

Corrected Date: 03/17/15

Account Number: 4409-2663

R.L. MAULDIN CHARITABLE TR
ROBERT M MAULDIN TTEE

1099-B Proceeds from Broker and Barter Exchange Transactions continued ... OMB NO. 1545-0715

Long Term Gains/Losses - Report on Form 8949, Part II with Box E checked

Box 2: Type of Gain or Loss - Long Term
Box 3: Basis Not Reported to the IRS
Box 5: Box Checked (Noncovered Security)

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Description CUSIP (Box 1a)	Quantity Sold	Date Acquired (Box 1b)	Date Sold or Disposed (Box 1c)	Proceeds (Box 1d)	Cost or Other Basis	Code	Adjustments	Gain/Loss Amount	Additional Information
SELECT SECTOR SPDR FD MATERIALS CUSIP. 81369Y100	5 00000	07/10/2009	08/25/2014	251 44	121 05		0 00	130 39	
FINANCIAL SELECT ETF SECTOR SPDR CUSIP. 81369Y605	11 00000	03/21/2011	08/25/2014	256 51	179 39		0 00	77.12	
INDUSTRIAL SELECT ETF SECTOR SPDR CUSIP: 81369Y704	3 00000	12/17/2009	08/25/2014	162 93	84.56		0.00	78.37	
TEMPLETON INCOME TR * GLOBAL BD FD ADVISOR CL CUSIP. 880208400	122.00000	10/01/2009	08/26/2014	1,631.14	1,521 34		0.00	109 80	
	1 00000	10/04/2009	08/26/2014	13.37	12 51		0.00	0.86	
	6 00000	10/04/2009	08/26/2014	80 22	74 46		0 00	5.76	
	2 00000	10/04/2009	08/26/2014	26 74	24.81		0 00	1 93	
	1.00000	10/19/2009	08/26/2014	13 37	12 68		0 00	0 69	
	1 00000	11/18/2009	08/26/2014	13.37	12 74		0 00	0.63	
	1.00000	12/17/2009	08/26/2014	13 37	12 61		0 00	0 76	
	1 00000	12/18/2009	08/26/2014	13.37	12 58		0 00	0 79	
	1 00000	01/20/2010	08/26/2014	13.37	12 94		0 00	0.43	
	1.00000	02/18/2010	08/26/2014	13 37	12 85		0 00	0 52	
	1 00000	03/17/2010	08/26/2014	13 37	13 18		0 00	0.19	
	1 00000	04/19/2010	08/26/2014	13 37	13 53	W	0 16	0 00	
	3.00000	05/07/2010	08/26/2014	40 11	39.05		0.00	1.06	
	1 00000	05/19/2010	08/26/2014	13 37	13 23		0.00	0 14	
	1 00000	05/20/2010	08/26/2014	13.37	12.71		0 00	0.66	
	1 00000	06/17/2010	08/26/2014	13 37	12 99		0.00	0.38	
	1.00000	07/19/2010	08/26/2014	13.37	13.02		0 00	0.35	

2014 Amended Forms 1099

Corrected Date: 03/17/15

Account Number: 4409-2663

R.L. MAULDIN CHARITABLE TR
ROBERT M MAULDIN TTEE

1099-B Proceeds from Broker and Barter Exchange Transactions continued — OMB NO. 1545-0715

Long Term Gains/Losses - Report on Form 8949, Part II with Box E checked

Box 2: Type of Gain or Loss - Long Term
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Description CUSIP (Box 1a)	Quantity Sold	Date Acquired (Box 1b)	Date Sold or Disposed (Box 1c)	Proceeds (Box 1d)	Cost or Other Basis	Code	Adjustments	Gain/Loss Amount	Additional Information
TEMPLETON INCOME TR *	1 00000	08/20/2010	08/26/2014	13 37	13 35		0 00	0 02	
GLOBAL BD FD ADVISOR CL	1 00000	08/20/2010	08/26/2014	13 37	13 07		0 00	0 30	
CUSIP. 880208400	0 54000	09/17/2010	08/26/2014	7 21	7 29	W	0.08	0 00	
	0 46000	09/17/2010	08/26/2014	6 16	6 21	W	0 05	0 00	
	0 51700	10/19/2010	08/26/2014	6.91	7.12	W	0 21	0.00	
	0.48300	10/19/2010	08/26/2014	6 46	6 66		0.00	-0.20	
	1.00000	11/17/2010	08/26/2014	13 37	13.55		0 00	-0 18	
	3 00000	12/17/2010	08/26/2014	40 11	40 14		0 00	-0.03	
	1.00000	12/17/2010	08/26/2014	13.37	13 49		0.00	-0 12	
	1 00000	01/20/2011	08/26/2014	13 37	13 51		0.00	-0 14	
	79 50600	01/24/2011	08/26/2014	1,063 00	1,067.77		0 00	-4.77	
Subtotals	**235.50600**			**$3,148.72**	**$3,029.39**		**$0.50**	**$119.83**	
VOYA MUT FDS *	2 00000	01/04/2010	08/26/2014	40 98	29 34		0.00	11 64	
GLOBAL REAL ESTATE FD	2.00000	04/05/2010	08/26/2014	40.98	29 90		0 00	11.08	
CUSIP. 92914A885	1.00000	04/06/2010	08/26/2014	20.49	15 31		0 00	5 18	
	2 00000	07/02/2010	08/26/2014	40.98	26 73		0 00	14 25	
	1 00000	07/02/2010	08/26/2014	20 49	13 77		0 00	6 72	
	1 00000	10/04/2010	08/26/2014	20 49	15 80		0.00	4.69	
	5.00000	01/03/2011	08/26/2014	102 45	81 40		0 00	21.05	
	24.97300	01/24/2011	08/26/2014	511 70	411.56		0 00	100 14	
	1 00000	01/24/2011	08/26/2014	20 49	16.07		0 00	4.42	
Subtotals	**39.97300**			**$819.05**	**$639.88**		**$0.00**	**$179.17**	
Totals (8949, Part II with Box E checked)				**$25,736.20**	**$20,393.83**		**$0.50**	**$5,342.87**	

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