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

OMB No 1545-0052

**2014**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](http://www.irs.gov/form990pf).

Open to Public Inspection

For calendar year 2014 or tax year beginning , and ending

Name of foundation <b>ARTHUR AND LINDEE LUCAS FAMILY FOUNDATION, INC.</b>		A Employer identification number <b>26-1591821</b>						
Number and street (or P.O. box number if mail is not delivered to street address) <b>301 SEA ISLAND ROAD, SUITE 6</b>	Room/suite	B Telephone number (see instructions) <b>912-634-9877</b>						
City or town, state or province, country, and ZIP or foreign postal code <b>ST. SIMONS ISLAND GA 31522</b>		C If exemption application is pending, check here ▶ <input type="checkbox"/>						
G Check all that apply: <table border="0"> <tr> <td><input type="checkbox"/> Initial return</td> <td><input type="checkbox"/> Initial return of a former public charity</td> </tr> <tr> <td><input type="checkbox"/> Final return</td> <td><input type="checkbox"/> Amended return</td> </tr> <tr> <td><input type="checkbox"/> Address change</td> <td><input type="checkbox"/> Name change</td> </tr> </table>		<input type="checkbox"/> Initial return	<input type="checkbox"/> Initial return of a former public charity	<input type="checkbox"/> Final return	<input type="checkbox"/> Amended return	<input type="checkbox"/> Address change	<input type="checkbox"/> Name change	D 1 Foreign organizations, check here ▶ <input type="checkbox"/> 2 Foreign organizations meeting the 85% test, check here and attach computation ▶ <input type="checkbox"/>
<input type="checkbox"/> Initial return	<input type="checkbox"/> Initial return of a former public charity							
<input type="checkbox"/> Final return	<input type="checkbox"/> Amended return							
<input type="checkbox"/> Address change	<input type="checkbox"/> Name change							
H Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here ▶ <input type="checkbox"/>						
I Fair market value of all assets at end of year (from Part II, col (c), line 16) ▶ \$ <b>2,287,052</b>	J Accounting method <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify)	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ▶ <input type="checkbox"/>						

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received (attach schedule)	137,832			
	2 Check <input type="checkbox"/> if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	2,004	2,004		
	4 Dividends and interest from securities	57,271	57,271		
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	43,880			
	b Gross sales price for all assets on line 6a <b>258,121</b>				
	7 Capital gain net income (from Part IV, line 2)		43,880		
	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	240,987	103,155	0		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	0			
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule) <b>STMT 1</b>	2,655			
	c Other professional fees (attach schedule) <b>STMT 2</b>	15,423	15,273		150
	17 Interest				
	18 Taxes (attach schedule) (see instructions) <b>STMT 3</b>	4,003			
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (att sch) <b>STMT 4</b>	380			
	24 Total operating and administrative expenses. Add lines 13 through 23	22,461	15,273	0	150
	25 Contributions, gifts, grants paid	95,000			95,000
26 Total expenses and disbursements. Add lines 24 and 25	117,461	15,273	0	95,150	
27 Subtract line 26 from line 12					
a Excess of revenue over expenses and disbursements	123,526				
b Net investment income (if negative, enter -0-)		87,882			
c Adjusted net income (if negative, enter -0-)			0		

For Paperwork Reduction Act Notice, see instructions.

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Form 990-PF (2014)

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<b>Part II Balance Sheets</b> Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
<b>Assets</b>	1 Cash – non-interest-bearing	204,893	144,946	144,946
	2 Savings and temporary cash investments			
	3 Accounts receivable ▶ 400			
	Less: allowance for doubtful accounts ▶	400	400	400
	4 Pledges receivable ▶			
	Less: allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7 Other notes and loans receivable (att. schedule) ▶			
	Less: allowance for doubtful accounts ▶ 0			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments – U S and state government obligations (attach schedule)			
	b Investments – corporate stock (attach schedule) SEE STMT 5	1,162,702	1,229,349	2,020,915
	c Investments – corporate bonds (attach schedule) SEE STMT 6		37,742	41,991
	11 Investments – land, buildings, and equipment basis ▶			
<b>Liabilities</b>	Less: accumulated depreciation (attach sch.) ▶			
	12 Investments – mortgage loans			
	13 Investments – other (attach schedule) SEE STATEMENT 7		79,084	78,800
	14 Land, buildings, and equipment basis ▶			
	Less: accumulated depreciation (attach sch.) ▶			
	15 Other assets (describe ▶ )			
	16 <b>Total assets</b> (to be completed by all filers – see the instructions Also, see page 1, item I)	1,367,995	1,491,521	2,287,052
	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
<b>Net Assets or Fund Balances</b>	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable (attach schedule)			
	22 Other liabilities (describe ▶ )			
	23 <b>Total liabilities</b> (add lines 17 through 22)	0	0	
	<b>Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31.</b> ▶ <input type="checkbox"/>			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	<b>Foundations that do not follow SFAS 117, check here and complete lines 27 through 31.</b> ▶ <input checked="" type="checkbox"/>			
	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	1,367,995	1,491,521	
	30 <b>Total net assets or fund balances</b> (see instructions)	1,367,995	1,491,521	
	31 <b>Total liabilities and net assets/fund balances</b> (see instructions)	1,367,995	1,491,521	

**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	1,367,995
2 Enter amount from Part I, line 27a	2	123,526
3 Other increases not included in line 2 (itemize) ▶	3	
4 Add lines 1, 2, and 3	4	1,491,521
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	1,491,521

**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.)
<b>1a</b>	<b>SEE ATTACHED MERRILL LYNCH</b>	<b>P</b>	<b>VARIOUS</b>	<b>VARIOUS</b>
<b>b</b>	<b>SEE ATTACHED MERRILL LYNCH</b>	<b>P</b>	<b>VARIOUS</b>	<b>VARIOUS</b>
<b>c</b>	<b>MERRILL LYNCH</b>			
<b>d</b>				
<b>e</b>				

  

(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)
<b>a</b> 101,813		108,785	-6,972
<b>b</b> 156,266		105,456	50,810
<b>c</b> 42			42
<b>d</b>			
<b>e</b>			

  

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

(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
<b>a</b>			-6,972
<b>b</b>			50,810
<b>c</b>			42
<b>d</b>			
<b>e</b>			

  

<b>2</b> Capital gain net income or (net capital loss)	<div style="border: 1px solid black; padding: 2px;">           If gain, also enter in Part I, line 7            If (loss), enter -0- in Part I, line 7         </div>	<b>2</b>	<b>43,880</b>
<b>3</b> 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		<b>3</b>	

**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	59,045	1,708,915	0.034551
2012	49,887	1,420,664	0.035115
2011	60,069	1,234,442	0.048661
2010	43,271	1,061,143	0.040778
2009	23,903	885,986	0.026979

  

<b>2</b> Total of line 1, column (d)	<b>2</b>	<b>0.186084</b>
<b>3</b> 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	<b>3</b>	<b>0.037217</b>
<b>4</b> Enter the net value of noncharitable-use assets for 2014 from Part X, line 5	<b>4</b>	<b>1,995,637</b>
<b>5</b> Multiply line 4 by line 3	<b>5</b>	<b>74,272</b>
<b>6</b> Enter 1% of net investment income (1% of Part I, line 27b)	<b>6</b>	<b>879</b>
<b>7</b> Add lines 5 and 6	<b>7</b>	<b>75,151</b>
<b>8</b> Enter qualifying distributions from Part XII, line 4 If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions	<b>8</b>	<b>95,150</b>

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

<b>1a</b>	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>b</b>	Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b	<b>1</b>	<b>879</b>
<b>c</b>	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col (b).		
<b>2</b>	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	<b>2</b>	<b>0</b>
<b>3</b>	Add lines 1 and 2	<b>3</b>	<b>879</b>
<b>4</b>	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	<b>4</b>	<b>0</b>
<b>5</b>	<b>Tax based on investment income.</b> Subtract line 4 from line 3. If zero or less, enter -0-	<b>5</b>	<b>879</b>
<b>6</b>	<b>Credits/Payments</b>		
<b>a</b>	2014 estimated tax payments and 2013 overpayment credited to 2014	<b>6a</b>	<b>1,000</b>
<b>b</b>	Exempt foreign organizations – tax withheld at source	<b>6b</b>	
<b>c</b>	Tax paid with application for extension of time to file (Form 8868)	<b>6c</b>	
<b>d</b>	Backup withholding erroneously withheld	<b>6d</b>	
<b>7</b>	Total credits and payments. Add lines 6a through 6d	<b>7</b>	<b>1,000</b>
<b>8</b>	Enter any <b>penalty</b> for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	<b>8</b>	
<b>9</b>	<b>Tax due.</b> If the total of lines 5 and 8 is more than line 7, enter <b>amount owed</b>	<b>9</b>	
<b>10</b>	<b>Overpayment.</b> If line 7 is more than the total of lines 5 and 8, enter the <b>amount overpaid</b>	<b>10</b>	<b>121</b>
<b>11</b>	Enter the amount of line 10 to be <b>Credited to 2015 estimated tax</b> <b>121</b> <b>Refunded</b>	<b>11</b>	

**Part VII-A Statements Regarding Activities**

	Yes	No
<b>1a</b> 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?		<b>X</b>
<b>b</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 <b>1a</b> or <b>1b</b> , attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities		<b>X</b>
<b>c</b> Did the foundation file <b>Form 1120-POL</b> for this year?		<b>X</b>
<b>d</b> Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation <b>\$</b> _____ (2) On foundation managers <b>\$</b> _____		
<b>e</b> Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <b>\$</b> _____		
<b>2</b> 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	<b>2</b>	<b>X</b>
<b>3</b> 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	<b>3</b>	<b>X</b>
<b>4a</b> Did the foundation have unrelated business gross income of \$1,000 or more during the year?	<b>4a</b>	<b>X</b>
<b>b</b> If "Yes," has it filed a tax return on <b>Form 990-T</b> for this year?	<b>4b</b>	
<b>5</b> Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T	<b>5</b>	<b>X</b>
<b>6</b> 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?	<b>6</b>	
<b>7</b> 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	<b>7</b>	<b>X</b>
<b>8a</b> Enter the states to which the foundation reports or with which it is registered (see instructions) <b>GA</b>		
<b>b</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	<b>8b</b>	<b>X</b>
<b>9</b> 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	<b>9</b>	<b>X</b>
<b>10</b> Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	<b>10</b>	<b>X</b>

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

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		<b>X</b>
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		<b>X</b>
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► <b>N/A</b>	13	<b>X</b>	
14	The books are in care of ► <b>JOHN B. WARREN, JR.</b> <b>3715 NORTHSIDE PARKWAY 4-575</b> Located at ► <b>ATLANTA</b> GA ZIP+4 ► <b>30327</b> Telephone no ► <b>404-816-1436</b>			
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 ► <b>15</b>			
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? 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 ►	16	Yes	No <b>X</b>

**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
<b>1a</b>	During the year did the foundation (either directly or indirectly):		
(1)	Engage in the sale or exchange, or leasing of property with a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(2)	Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(3)	Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(4)	Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(5)	Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(6)	Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days ) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
<b>b</b>	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here N/A <input checked="" type="checkbox"/> <b>1b</b>		
<b>c</b>	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? N/A <b>1c</b>		
<b>2</b>	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))		
<b>a</b>	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? If "Yes," list the years ► 20 , 20 , 20 , 20 <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
<b>b</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 <b>2b</b>		
<b>c</b>	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		
<b>3a</b>	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>b</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 ) N/A <b>3b</b>		
<b>4a</b>	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	<b>4a</b>	<b>X</b>
<b>b</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?	<b>4b</b>	<b>X</b>

**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 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)? **N/A** ☐ **5b**

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

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

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

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

**b** Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? **6b** ☐ Yes ☒ No **X**

If "Yes" to 6b, file Form 8870

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

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

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

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (if not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
ARTHUR M. LUCAS 301 SEA ISLAND ROAD SUITE 6 ST. SIMONS ISLAND GA 31522	TRUSTEE 0.00	0	0	0
LINDA H. LUCAS 1756 WEST PACES FERRY ROAD ATLANTA GA 30327	TRUSTEE 0.00	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

**0**

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

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

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

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

	Expenses
1 N/A	
2	
3	
4	

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

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

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



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

<b>1</b>	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes.		
<b>a</b>	Average monthly fair market value of securities	<b>1a</b>	<b>1,982,740</b>
<b>b</b>	Average of monthly cash balances	<b>1b</b>	<b>43,287</b>
<b>c</b>	Fair market value of all other assets (see instructions)	<b>1c</b>	<b>0</b>
<b>d</b>	<b>Total</b> (add lines 1a, b, and c)	<b>1d</b>	<b>2,026,027</b>
<b>e</b>	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	<b>1e</b>	<b>0</b>
<b>2</b>	Acquisition indebtedness applicable to line 1 assets	<b>2</b>	<b>0</b>
<b>3</b>	Subtract line 2 from line 1d	<b>3</b>	<b>2,026,027</b>
<b>4</b>	Cash deemed held for charitable activities. Enter 1½% of line 3 (for greater amount, see instructions)	<b>4</b>	<b>30,390</b>
<b>5</b>	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. Enter here and on Part V, line 4	<b>5</b>	<b>1,995,637</b>
<b>6</b>	<b>Minimum investment return.</b> Enter 5% of line 5	<b>6</b>	<b>99,782</b>

**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.)

<b>1</b>	Minimum investment return from Part X, line 6	<b>1</b>	<b>99,782</b>
<b>2a</b>	Tax on investment income for 2014 from Part VI, line 5	<b>2a</b>	<b>879</b>
<b>b</b>	Income tax for 2014 (This does not include the tax from Part VI )	<b>2b</b>	
<b>c</b>	Add lines 2a and 2b	<b>2c</b>	<b>879</b>
<b>3</b>	Distributable amount before adjustments. Subtract line 2c from line 1	<b>3</b>	<b>98,903</b>
<b>4</b>	Recoveries of amounts treated as qualifying distributions	<b>4</b>	
<b>5</b>	Add lines 3 and 4	<b>5</b>	<b>98,903</b>
<b>6</b>	Deduction from distributable amount (see instructions)	<b>6</b>	
<b>7</b>	<b>Distributable amount</b> as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	<b>7</b>	<b>98,903</b>

**Part XII Qualifying Distributions** (see instructions)

<b>1</b>	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
<b>a</b>	Expenses, contributions, gifts, etc. – total from Part I, column (d), line 26	<b>1a</b>	<b>95,150</b>
<b>b</b>	Program-related investments – total from Part IX-B	<b>1b</b>	
<b>2</b>	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	<b>2</b>	
<b>3</b>	Amounts set aside for specific charitable projects that satisfy the:		
<b>a</b>	Suitability test (prior IRS approval required)	<b>3a</b>	
<b>b</b>	Cash distribution test (attach the required schedule)	<b>3b</b>	
<b>4</b>	<b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	<b>4</b>	<b>95,150</b>
<b>5</b>	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)	<b>5</b>	<b>879</b>
<b>6</b>	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4	<b>6</b>	<b>94,271</b>

**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
<b>1</b> Distributable amount for 2014 from Part XI, line 7				<b>98,903</b>
<b>2</b> Undistributed income, if any, as of the end of 2014				
<b>a</b> Enter amount for 2013 only			<b>84,491</b>	
<b>b</b> Total for prior years: 20____, 20____, 20____				
<b>3</b> Excess distributions carryover, if any, to 2014				
<b>a</b> From 2009				
<b>b</b> From 2010				
<b>c</b> From 2011				
<b>d</b> From 2012				
<b>e</b> From 2013				
<b>f</b> Total of lines 3a through e				
<b>4</b> Qualifying distributions for 2014 from Part XII, line 4. ► \$ <b>95,150</b>				
<b>a</b> Applied to 2013, but not more than line 2a			<b>84,491</b>	
<b>b</b> Applied to undistributed income of prior years (Election required – see instructions)				
<b>c</b> Treated as distributions out of corpus (Election required – see instructions)				
<b>d</b> Applied to 2014 distributable amount				<b>10,659</b>
<b>e</b> Remaining amount distributed out of corpus				
<b>5</b> Excess distributions carryover applied to 2014 (If an amount appears in column (d), the same amount must be shown in column (a) )				
<b>6</b> Enter the net total of each column as indicated below:				
<b>a</b> Corpus Add lines 3f, 4c, and 4e. Subtract line 5				
<b>b</b> Prior years' undistributed income Subtract line 4b from line 2b				
<b>c</b> 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				
<b>d</b> Subtract line 6c from line 6b Taxable amount – see instructions				
<b>e</b> Undistributed income for 2013. Subtract line 4a from line 2a Taxable amount – see instructions				
<b>f</b> Undistributed income for 2014 Subtract lines 4d and 5 from line 1. This amount must be distributed in 2015				<b>88,244</b>
<b>7</b> 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)				
<b>8</b> Excess distributions carryover from 2009 not applied on line 5 or line 7 (see instructions)				
<b>9</b> Excess distributions carryover to 2015. Subtract lines 7 and 8 from line 6a				
<b>10</b> Analysis of line 9.				
<b>a</b> Excess from 2010				
<b>b</b> Excess from 2011				
<b>c</b> Excess from 2012				
<b>d</b> Excess from 2013				
<b>e</b> Excess from 2014				



**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)				
<b>a</b> Paid during the year <b>SEE STATEMENT 8</b>				<p style="text-align: right;"><b>95,000</b></p>
<b>Total</b>			<b>▶ 3a</b>	<b>95,000</b>
<b>b</b> Approved for future payment <b>N/A</b>				
<b>Total</b>			<b>▶ 3b</b>	





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

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

OMB No. 1545-0047

**2014**▶ Information about Schedule B (Form 990, 990-EZ, 990-PF) and its instructions is at [www.irs.gov/form990](http://www.irs.gov/form990).**Name of the organization****ARTHUR AND LINDEE LUCAS FAMILY  
FOUNDATION, INC.****Employer identification number****26-1591821****Organization type (check one):****Filers of:****Section:**

Form 990 or 990-EZ

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

Form 990-PF

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

- ☒
- For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions

**Special Rules**

- ☐ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33<sup>1</sup>/<sub>3</sub> % support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 exclusively for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I, II, and III.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions exclusively for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an exclusively religious, charitable, etc., purpose. Do not complete any of the parts unless the **General Rule** applies to this organization because it received nonexclusively religious, charitable, etc., contributions totaling \$5,000 or more during the year ▶ \$

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

Name of organization

ARTHUR AND LINDEE LUCAS FAMILY

Employer identification number

26-1591821

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

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	ART LUCAS 2012 NONGRANTOR CHARITABLE LEAD TRUST 802 WOODLEY DRIVE  ATLANTA GA 30305	\$ 137,832	Person <input checked="checked" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions )
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions )
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions )
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions )
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions )
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)



ARTHUR AND LINDEE LUCAS FAMILY

## 2014 ANNUAL STATEMENT SUMMARY

The following sections are provided to facilitate your review and the preparation of your return.

The 2014 Proceeds from Broker and Barter Exchange Transactions section includes both sales of positions for "covered securities" and "noncovered securities." A covered security includes securities when the purchase date of the security occurred within the following timeline: Equities acquired on or after January 1, 2011, Mutual Funds acquired on or after January 1, 2012, and Option Transactions and certain debt securities acquired on or after January 1, 2014. Legislation requires reporting the gross proceeds of the sales of "covered" and "noncovered" securities and the adjusted cost basis for "covered securities." Any sale of a security that is considered a "noncovered security" will still be included in this section with the adjusted cost basis (where available) but the adjusted basis will not be transmitted to the IRS.

In calculating gain (loss), unless otherwise noted, it was assumed that the oldest position was liquidated first, and that you have made an election to amortize the premium paid on the purchase of taxable bonds. Under the Cost Basis Reporting Regulations, brokers need not track wash sale activity for substantially identical securities, transactions across accounts, or between covered and noncovered securities. However, you as a taxpayer still have to track and report wash sales as you have in the past which would include all of the aforementioned transaction types. Securities distributed from a retirement account reflect the tax basis on the date of distribution. Other methods for calculating gain (loss) are available. The cost basis for most Original Issue Discount ("OID") obligations includes the accretion of OID.

This is important tax information and is being furnished to the Internal Revenue Service. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported.

### 1099-B

### 2014 PROCEEDS FROM BROKER & BARTER EXCHANGE TRANSACTIONS

1a Description of Property	1b. Date of Acquisition	1c. Date of Sale or Exchange	1d. Amount	1e. Cost Basis	1f. IRS Code	1g. Adjustments	Gain or (Loss)	Remarks
<b>SHORT TERM CAPITAL GAINS AND LOSSES - 1099-B Line 2</b>								
<b>COVERED TRANSACTIONS-1099-B Line 3, Cost basis reported to IRS (Code A)</b>								
CONOCOPHILLIPS	CUSIP Number	20825C104						
29,0000 Sale	07/01/14	12/19/14	2,030.15	2,498.67	0.00		(468.52)	
CORNING INC	CUSIP Number	219350105						
386,0000 Sale	05/17/13	01/16/14	7,160.10	6,128.52	0.00		1,031.58	
GENL DYNAMICS CORP COM	CUSIP Number	369550108						
77,0000 Sale	02/20/13	01/16/14	7,358.48	5,142.21	0.00		2,216.27	
44,0000 Sale	02/21/13	01/16/14	4,204.85	2,921.52	0.00		1,283.33	
<b>Security Subtotal</b>			<b>11,563.33</b>	<b>8,063.73</b>	<b>0.00</b>		<b>3,499.60</b>	
HATTERAS FINL CORP	CUSIP Number	41902R103						
1316,0000 Sale	01/07/14	01/29/14	22,950.64	23,125.54	0.00		(174.90)	
229,0000 Sale	01/07/14	01/29/14	4,000.61	4,024.13	0.00		(23.52)	
<b>Security Subtotal</b>			<b>26,951.25</b>	<b>27,149.67</b>	<b>0.00</b>		<b>(198.42)</b>	
JOHNSON AND JOHNSON COM	CUSIP Number	478160104						
2,0000 Sale	09/11/13	07/14/14	210.47	177.35	0.00		33.12	
2,0000 Sale	12/11/13	07/14/14	210.47	188.63	0.00		21.84	
1,0000 Sale	03/12/14	07/14/14	105.23	86.76	0.00		18.47	
2,0000 Sale	03/12/14	07/14/14	210.47	185.77	0.00		24.70	

ARTHUR AND LINDEE LUCAS FAMILY

2014 ANNUAL STATEMENT SUMMARY

2014 PROCEEDS FROM BROKER & BARTER EXCHANGE TRANSACTIONS

1099-B

1a Description of Property	1b Date of Acquisition	1c Date of Sale or Exchange	1d Amount	1e Cost Basis	1f IRS Code 1g Adjustments	Gain or (Loss)	Remarks
<b>JOHNSON AND JOHNSON COM</b>							
2.0000 Sale	06/11/14	07/14/14	210.48	207.79	0.00	2.69	
1637 Sale	06/11/14	07/21/14	16.56	16.11	0.00	0.45	
<b>Security Subtotal</b>			<b>963.68</b>	<b>862.41</b>	<b>0.00</b>	<b>101.27</b>	
<b>WINDSTREAM HOLDINGS INC</b>							
<b>SHS</b>							
365.0000 Sale	06/30/14	12/19/14	3,176.31	3,561.68	0.00	(385.37)	
553.0000 Sale	07/01/14	12/19/14	4,812.32	5,400.66	0.00	(588.34)	
777.0000 Sale	07/02/14	12/19/14	6,761.61	7,555.01	0.00	(793.40)	
244.0000 Sale	07/08/14	12/19/14	2,123.34	2,394.82	0.00	(271.48)	
440.0000 Sale	07/09/14	12/19/14	3,828.98	4,313.54	0.00	(484.56)	
307.0000 Sale	07/10/14	12/19/14	2,671.58	3,027.42	0.00	(355.84)	
235.0000 Sale	07/14/14	12/19/14	2,045.01	2,330.17	0.00	(285.16)	
637.0000 Sale	07/15/14	12/19/14	5,543.31	6,340.13	0.00	(796.82)	
433.0000 Sale	07/17/14	12/19/14	3,768.06	4,297.79	0.00	(529.73)	
407.0000 Sale	07/25/14	12/19/14	3,541.80	4,187.70	0.00	(645.90)	
389.0000 Sale	07/28/14	12/19/14	3,385.16	4,014.21	0.00	(629.05)	
1320.0000 Sale	07/29/14	12/19/14	11,486.92	16,658.40	0.00	(5,171.48)	
<b>Security Subtotal</b>			<b>53,144.40</b>	<b>64,081.53</b>	<b>0.00</b>	<b>(10,937.13)</b>	
<b>Covered Short Term Capital Gains and Losses Subtotal</b>			<b>101,812.91</b>	<b>108,784.53</b>	<b>0.00</b>	<b>(6,971.62)</b>	
<b>NET SHORT TERM CAPITAL GAINS AND LOSSES</b>			<b>101,812.91</b>	<b>108,784.53</b>	<b>0.00</b>	<b>(6,971.62)</b>	
<b>LONG TERM CAPITAL GAINS AND LOSSES - 1099-B Line 2</b>							
<b>COVERED TRANSACTIONS-1099-B Line 3, Cost basis reported to IRS (Code D)</b>							
<b>ALBEMARLE CORP COM</b>							
<b>012653101</b>							
38.0000 Sale	02/20/13	12/19/14	2,216.88	2,447.75	0.00	(230.87)	
86.0000 Sale	02/21/13	12/19/14	5,017.15	5,484.96	0.00	(467.81)	
52.0000 Sale	02/22/13	12/19/14	3,033.62	3,378.15	0.00	(344.53)	
44.0000 Sale	04/08/13	12/19/14	2,566.91	2,732.65	0.00	(165.74)	
<b>Security Subtotal</b>			<b>12,834.56</b>	<b>14,043.51</b>	<b>0.00</b>	<b>(1,208.95)</b>	
<b>CHEVRON CORP</b>	<b>CUSIP Number</b>	<b>166764100</b>					
97.0000 Sale	04/08/13	12/19/14	10,683.61	11,359.06	0.00	(675.45)	

ARTHUR AND LINDEE LUCAS FAMILY

2014 ANNUAL STATEMENT SUMMARY

2014 PROCEEDS FROM BROKER & BARTER EXCHANGE TRANSACTIONS

1099-B

1a. Description of Property	1b. Date of Acquisition	1c. Date of Sale or Exchange	1d. Amount	1e. Cost Basis	1f. IRS Code 1g. Adjustments	Gain or (Loss)	Remarks
<b>JOHNSON AND JOHNSON COM</b>							
1 0000 Sale	12/09/09	06/30/14	105.15	64.98	0.00 (N)	40.17	
3 0000 Sale	02/18/10	06/30/14	315.46	194.89	0.00 (N)	120.57	
1 0000 Sale	03/16/11	07/10/14	105.60	61.45	0.00	44.15	
4 0000 Sale	03/16/11	07/10/14	422.42	233.78	0.00	188.64	
1 0000 Sale	06/15/11	07/10/14	105.60	60.95	0.00	44.65	
4 0000 Sale	06/15/11	07/10/14	422.42	267.81	0.00	154.61	
1 0000 Sale	12/14/11	07/10/14	105.60	64.59	0.00	41.01	
2 0000 Sale	12/14/11	07/10/14	211.21	126.84	0.00	84.37	
2 0000 Sale	03/14/12	07/10/14	211.21	130.62	0.00	80.59	
1 0000 Sale	06/13/12	07/10/14	105.60	64.40	0.00	41.20	
2 0000 Sale	06/13/12	07/10/14	211.22	128.47	0.00	82.75	
1 0000 Sale	09/12/12	07/10/14	105.61	65.33	0.00	40.28	
2 0000 Sale	09/12/12	07/10/14	211.22	136.75	0.00	74.47	
1 0000 Sale	12/12/12	07/10/14	105.04	142.56	0.00	68.66	
1 0000 Sale	03/13/13	07/11/14	210.10	71.16	0.00	33.88	
2 0000 Sale	03/13/13	07/11/14	210.10	156.71	0.00	53.39	
1 0000 Sale	06/12/13	07/11/14	105.05	85.31	0.00	19.74	
1 0000 Sale	06/12/13	07/11/14	105.23	85.31	0.00	19.92	
<b>Security Subtotal</b>			<b>3,374.96</b>	<b>2,141.91</b>	<b>0.00</b>	<b>1,233.05</b>	
<b>MEADWESTVACO CORP</b>							
144 0000 Sale	05/03/11	01/28/14	5,169.22	4,309.72	0.00	859.50	
110 0000 Sale	05/03/11	01/29/14	3,952.53	3,292.14	0.00	660.39	
52 0000 Sale	05/04/11	01/29/14	1,868.47	1,542.66	0.00	325.81	
239 0000 Sale	05/04/11	01/30/14	8,630.50	7,090.30	0.00	1,540.20	
76 0000 Sale	05/04/11	01/31/14	2,743.31	2,254.65	0.00	488.66	
206 0000 Sale	05/05/11	01/31/14	7,435.84	6,113.76	0.00	1,322.08	
9 0000 Sale	05/06/11	01/31/14	324.87	270.80	0.00	54.07	
115 0000 Sale	05/06/11	02/03/14	4,069.16	3,460.29	0.00	608.87	
121 0000 Sale	05/06/11	02/04/14	4,127.88	3,640.82	0.00	487.06	
54 0000 Sale	05/09/11	02/04/14	1,842.20	1,619.75	0.00	222.45	
<b>Security Subtotal</b>			<b>40,163.98</b>	<b>33,594.89</b>	<b>0.00</b>	<b>6,569.09</b>	
<b>WINTHROP REALTY SER</b>							
PFD STK							
1 0000 Exchange	04/09/13	09/15/14	25.48	27.70	0.00	(2.22)	
1 0000 Exchange	04/11/13	09/15/14	25.48	27.69	0.00	(2.21)	
20 0000 Exchange	04/15/13	09/15/14	509.62	556.08	0.00	(46.46)	
8 0000 Exchange	04/16/13	09/15/14	203.85	222.98	0.00	(19.13)	

ARTHUR AND LINDEE LUCAS FAMILY

Account No.  
6AL-02014

Taxpayer No.  
26-1591821

Page  
10 of 20

## 2014 ANNUAL STATEMENT SUMMARY

### 1099-B 2014 PROCEEDS FROM BROKER & BARTER EXCHANGE TRANSACTIONS

1a Description of Property	1b. Date of Acquisition	1c. Date of Sale or Exchange	1d Amount	1e Cost Basis	1f. IRS Code 1g Adjustments	Gain or (Loss)	Remarks
WINTHROP REALTY SER							
PFD STK							
4.0000 Exchange	04/17/13	09/15/14	101.93	111.60	0.00	(9.67)	
2.0000 Exchange	04/18/13	09/15/14	50.97	55.48	0.00	(4.51)	
<b>Security Subtotal</b>			<b>917.33</b>	<b>1,001.53</b>	<b>0.00</b>	<b>(84.20)</b>	
<b>Covered Long Term Capital Gains and Losses Subtotal</b>			<b>67,974.44</b>	<b>62,140.90</b>	<b>0.00</b>	<b>5,833.54</b>	

### NONCOVERED TRANSACTIONS-1099-B Line 5, Cost basis not reported to IRS (Code E)

BRISTOL-MYERS SQUIBB CO	CUSIP Number	110122108					
224.0000 Sale	04/28/10	01/13/14	12,620.75	5,460.83	0.00	7,159.92	
205.0000 Sale	04/28/10	01/15/14	11,193.45	4,997.63	0.00	6,195.82	
170.0000 Sale	04/28/10	01/16/14	9,302.31	4,144.38	0.00	5,157.93	
<b>Security Subtotal</b>			<b>33,116.51</b>	<b>14,602.84</b>	<b>0.00</b>	<b>18,513.67</b>	
COCA COLA COM	CUSIP Number	191216100					
120.0000 Sale	04/28/10	01/15/14	4,775.16	3,174.48	0.00	1,600.68	
JOHNSON AND JOHNSON COM	CUSIP Number	478160104					
73.0000 Sale	04/28/10	06/30/14	7,676.35	4,717.17	0.00	2,959.18	
129.0000 Sale	04/28/10	07/01/14	13,605.63	8,335.81	0.00	5,269.82	
10.0000 Sale	04/28/10	07/02/14	1,057.28	646.19	0.00	411.09	
4.0000 Sale	04/28/10	07/07/14	421.51	258.47	0.00	163.04	
41.0000 Sale	04/28/10	07/09/14	4,346.88	2,649.37	0.00	1,697.51	
3.0000 Sale	06/16/10	07/09/14	318.07	177.92	0.00	140.15	
1.0000 Sale	06/16/10	07/10/14	105.60	59.31	0.00	46.29	
1.0000 Sale	09/15/10	07/10/14	105.60	59.35	0.00	46.25	
4.0000 Sale	09/15/10	07/10/14	422.42	242.86	0.00	179.56	
4.0000 Sale	12/15/10	07/10/14	422.42	251.99	0.00	170.43	
<b>Security Subtotal</b>			<b>28,481.76</b>	<b>17,398.44</b>	<b>0.00</b>	<b>11,083.32</b>	
LOWE'S COMPANIES INC	CUSIP Number	548661107					
147.0000 Sale	04/28/10	07/01/14	7,085.67	3,961.46	0.00	3,124.21	

ARTHUR AND LINDEE LUCAS FAMILY

2014 ANNUAL STATEMENT SUMMARY

2014 PROCEEDS FROM BROKER & BARTER EXCHANGE TRANSACTIONS

1099-B

1a. Description of Property	1b. Date of Acquisition	1c. Date of Sale or Exchange	1d. Amount	1e. Cost Basis	1f. IRS Code	1g. Adjustments	Gain or (Loss)	Remarks
<b>NEWMARKET CORP</b>								
5,000 Sale	04/28/10	06/30/14	1,965.64	549.69		0.00	1,415.95	
8,000 Sale	04/28/10	07/01/14	3,155.11	879.50		0.00	2,275.61	
2,000 Sale	04/28/10	07/02/14	785.76	219.88		0.00	565.88	
1,000 Sale	04/28/10	07/07/14	392.54	109.94		0.00	282.60	
1,000 Sale	04/28/10	07/08/14	394.64	109.94		0.00	284.70	
3,000 Sale	04/28/10	07/09/14	1,174.29	329.81		0.00	844.48	
3,000 Sale	04/28/10	07/10/14	1,159.91	329.81		0.00	830.10	
2,000 Sale	04/28/10	07/11/14	771.99	219.88		0.00	552.11	
1,000 Sale	04/28/10	07/14/14	388.94	109.94		0.00	279.00	
3,000 Sale	04/28/10	07/15/14	1,157.84	329.81		0.00	828.03	
1,000 Sale	04/28/10	07/16/14	387.12	109.94		0.00	277.18	
2,000 Sale	04/28/10	07/17/14	773.29	219.88		0.00	553.41	
3,000 Sale	04/28/10	07/18/14	1,158.01	329.81		0.00	828.20	
3,000 Sale	04/28/10	07/23/14	1,166.89	329.81		0.00	837.08	
<b>Security Subtotal</b>			<b>14,831.97</b>	<b>4,177.64</b>		<b>0.00</b>	<b>10,654.33</b>	
<b>Noncovered Long Term Capital Gains and Losses Subtotal</b>								
			<b>88,291.07</b>	<b>43,314.86</b>		<b>0.00</b>	<b>44,976.21</b>	
<b>NET LONG TERM CAPITAL GAINS AND LOSSES</b>								
			<b>156,265.51</b>	<b>105,455.76</b>		<b>0.00</b>	<b>50,809.75</b>	
<b>SALES PROCEEDS AND NET GAINS AND LOSSES</b>								
			<b>258,078.42</b>				<b>43,838.13</b>	
<b>COVERED SHORT TERM GAINS/LOSSES</b>								
<b>COVERED LONG TERM GAINS/LOSSES</b>								
<b>NONCOVERED LONG TERM GAINS/LOSSES</b>								
							<b>(6,971.62)</b>	
							<b>5,833.54</b>	
							<b>44,976.21</b>	

(Y) The gain or loss of this transaction includes an adjustment to basis for the deferred loss amount on one or more previous "Wash Sales"

## Federal Statements

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

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
ACCOUNTING FEES	\$ 2,655	\$	\$	\$
TOTAL	\$ 2,655	\$ 0	\$ 0	\$ 0

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

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
INVESTMENT ADVISORY FEES	\$ 15,273	\$ 15,273	\$	\$ 150
EMA ANNUAL FEE	150			
TOTAL	\$ 15,423	\$ 15,273	\$ 0	\$ 150

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

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
INTERNAL REVENUE SERVICE	\$ 4,003	\$	\$	\$
TOTAL	\$ 4,003	\$ 0	\$ 0	\$ 0

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

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
EXPENSES		\$	\$	
OFFICE EXPENSE	380			
TOTAL	\$ 380	\$ 0	\$ 0	\$ 0

120203 Arthur and Lindee Lucas Family  
26-1591821  
FYE: 12/31/2014

## Federal Statements

### Statement 5 - Form 990-PF, Part II, Line 10b - Corporate Stock Investments

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
CORPORATE STOCK	\$ 1,162,702	\$ 1,229,349	COST	\$ 2,020,915
TOTAL	\$ 1,162,702	\$ 1,229,349		\$ 2,020,915

### Statement 6 - Form 990-PF, Part II, Line 10c - Corporate Bond Investments

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
CORPORATE BONDS	\$	\$ 37,742	COST	\$ 41,991
TOTAL	\$ 0	\$ 37,742		\$ 41,991

### Statement 7 - Form 990-PF, Part II, Line 13 - Other Investments

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
SPDR CLOSED IN FUND	\$	\$ 79,084	COST	\$ 78,800
TOTAL	\$ 0	\$ 79,084		\$ 78,800

### Statement 8 - Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the Year

Name	Address	Relationship	Status	Purpose	Amount
BOYS AND GIRLS CLUBS	ATLANTA GA 30303	NONE	100 EDGEWOOD AVENUE	PUBLIC CHARI OPERATING FUNDS	1,000
ST. SIMONS PREBYTERIAN CHURCH	ST SIMONS ISLAND GA 31522	NONE	205 KINGS WAY	PUBLIC CHARI OPERATING FUNDS	5,000
TRINITY SCHOOL	ATLANTA GA 30327	NONE	4301 NORTHSIDE PARKWAY	PUBLIC CHARI OPERATING FUNDS	5,000

120203 Arthur and Lindee Lucas Family  
 26-1591821  
 FYE: 12/31/2014

## Federal Statements

### Statement 8 - Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the Year (continued)

Name		Address		Relationship	Status	Purpose	Amount
ST. SIMONS LAND TRUST		1624	FREDERICA ROAD			PUBLIC CHARI OPERATING FUNDS	12,500
ST. SIMONS ISLAND GA 3152	NONE						
COASTAL COLLEGE OF GEORGIA FOUNDAT	3700 ALTAMA STREET					PUBLIC CHARI OPERATING FUNDS	11,000
BRUNSWICK GA 31521	NONE						
CHEROKEE GARDEN LIBRARY	2 WEST WESLEY ROAD					PUBLIC CHARI OPERATING FUNDS	5,000
ATLANTA GA 30305	NONE						
COMMUNITIES OF COASTAL GA FOUNDATIO	1626 FREDERICA ROAD					PUBLIC CHARI OPERATING FUNDS	27,000
ST. SIMONS ISLAND GA 3152	NONE						
WESTMINSTER SCHOOLS	1424 WEST PACES FERRY RD					PUBLIC CHARI OPERATING FUNDS	5,000
ATLANTA GA 30327	NONE						
COASTAL GEORGIA HISTORICAL SOCIETY	610 BEACHVIEW DRIVE					PUBLIC CHARI OPERATING FUNDS	1,000
ST. SIMONS ISLAND GA 3152	NONE						
SOUTHEAST GA HEALTHCARE SYSTEM	2415 PARKWOOD DRIVE					PUBLIC CHARI OPERATING FUNDS	1,000
BRUNSWICK GA 31520	NONE						
SKYLAND TRAIL	1961 NORTH DRUID HILLS RD					PUBLIC CHARI OPERATING FUNDS	500
ATLANTA GA 30329	NONE						
COASTAL SYMPHONY	3885 ALTAMA AVENUE					PUBLIC CHARI OPERATING FUNDS	1,000
BRUNSWICK GA 31520	NONE						
DAVIS LOVE FOUNDATION	PO BOX 20344					PUBLIC CHARI OPERATING FUNDS	17,000
ST. SIMONS ISLAND GA 3152	NONE						
EMORY PARKINSONS COMPREHENSIVE CARE	1841 CLIFTON ROAD					PUBLIC CHARI OPERATING FUNDS	1,000
ATLANTA GA 30329	NONE						
STAR FOUNDATION	PO BOX 516					PUBLIC CHARI OPERATING FUNDS	500
GEYSERVILLE CA 95441	NONE						
THE CENTER FOR THE VISUALLY IMPAIRE	739 WEST PEACHTREE STREET					PUBLIC CHARI OPERATING FUNDS	1,500
ATLANTA GA 30308	NONE						
TOTAL							95,000