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Return of Private Foundation

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

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

2014

Open to Public Inspection

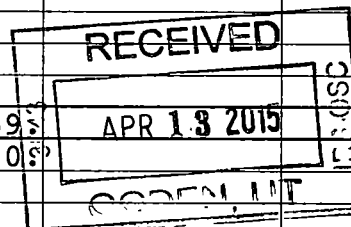
For calendar year 2014 or tax year beginning

, and ending

Name of foundation ANONYMOUS TRUST U/A DATED 2-4-2008		A Employer identification number 26-6220561
Number and street (or P O box number if mail is not delivered to street address) PO BOX 31143	Room/suite	B Telephone number (919) 571-3332
City or town, state or province, country, and ZIP or foreign postal code RALEIGH, NC 27622		C If exemption application is pending, check here ☐
G Check all that apply: ☐ Initial return ☐ Final return ☐ Address change ☐ Initial return of a former public charity ☐ Amended return ☐ 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) \$ 192,537,027.	J Accounting method: ☒ Cash ☐ Accrual ☐ Other (specify) _____	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a).)		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received				N/A	
2 Check ☒ if the foundation is not required to attach Sch. B					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities		5,283,647.	3,311,147.		STATEMENT 1
5a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10		86,412.			
b Gross sales price for all assets on line 6a		2,446,954.			
7 Capital gain net income (from Part IV, line 2)			86,412.		
8 Net short-term capital gain					
9 Income modifications					
10a Gross sales less returns and allowances					
b Less Cost of goods sold					
c Gross profit or (loss)					
11 Other income					
12 Total. Add lines 1 through 11		5,370,059.	3,397,559.		
13 Compensation of officers, directors, trustees, etc.		44,363.	0.		44,363.
14 Other employee salaries and wages					
15 Pension plans, employee benefits					
16a Legal fees STMT 2		10,440.	0.		10,440.
b Accounting fees STMT 3		12,725.	0.		12,725.
c Other professional fees STMT 4		153,297.	111,858.		0.
17 Interest					
18 Taxes STMT 5		14,785.	0.		0.
19 Depreciation and depletion					
20 Occupancy		750.	0.		750.
21 Travel, conferences, and meetings					
22 Printing and publications					
23 Other expenses STMT 6		7,921.	0.		7,921.
24 Total operating and administrative expenses. Add lines 13 through 23		244,281.	111,858.		76,199.
25 Contributions, gifts, grants paid		6,382,541.			6,382,541.
26 Total expenses and disbursements. Add lines 24 and 25		6,626,822.	111,858.		6,458,740.
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements		-1,256,763.			
b Net investment income (if negative, enter -0-)			3,285,701.		
c Adjusted net income (if negative, enter -0-)				N/A	

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Part II Balance Sheets

Attached schedules and amounts in the description column should be for end-of-year amounts only

				Beginning of year		End of year	
				(a) Book Value	(b) Book Value	(c) Fair Market Value	
Assets	1	Cash - non-interest-bearing					
	2	Savings and temporary cash investments		11,373,123.	5,523,360.	5,523,360.	
	3	Accounts receivable ▶					
		Less: allowance for doubtful accounts ▶					
	4	Pledges receivable ▶					
		Less: allowance for doubtful accounts ▶					
	5	Grants receivable					
	6	Receivables due from officers, directors, trustees, and other disqualified persons					
	7	Other notes and loans receivable ▶					
		Less: allowance for doubtful accounts ▶					
	8	Inventories for sale or use					
	9	Prepaid expenses and deferred charges					
	10a	Investments - U.S. and state government obligations STMT 9		38,965,854.	41,837,807.	47,909,630.	
	b	Investments - corporate stock STMT 10		63,854,524.	64,317,034.	120,915,985.	
	c	Investments - corporate bonds STMT 11		10,192,206.	11,447,010.	12,028,052.	
Liabilities	11	Investments - land, buildings, and equipment basis ▶					
		Less: accumulated depreciation ▶					
	12	Investments - mortgage loans					
	13	Investments - other STMT 12		6,524,521.	6,524,521.	6,160,000.	
	14	Land, buildings, and equipment: basis ▶					
		Less: accumulated depreciation ▶					
	15	Other assets (describe ▶)					
	16	Total assets (to be completed by all filers - see the instructions. Also, see page 1, item I)		130,910,228.	129,649,732.	192,537,027.	
	17	Accounts payable and accrued expenses					
	18	Grants payable					
Net Assets or Fund Balances	19	Deferred revenue					
	20	Loans from officers, directors, trustees, and other disqualified persons					
	21	Mortgages and other notes payable					
	22	Other liabilities (describe ▶ STATEMENT 13)		1,560.	2,285.		
	23	Total liabilities (add lines 17 through 22)		1,560.	2,285.		
		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		130,908,668.	129,647,447.		
	28	Paid-in or capital surplus, or land, bldg., and equipment fund		0.	0.		
	29	Retained earnings, accumulated income, endowment, or other funds		0.	0.		
	30	Total net assets or fund balances		130,908,668.	129,647,447.		
	31	Total liabilities and net assets/fund balances		130,910,228.	129,649,732.		

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	130,908,668.
2	Enter amount from Part I, line 27a	2	-1,256,763.
3	Other increases not included in line 2 (itemize) ▶ SEE STATEMENT 7	3	157,821.
4	Add lines 1, 2, and 3	4	129,809,726.
5	Decreases not included in line 2 (itemize) ▶ SEE STATEMENT 8	5	162,279.
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	129,647,447.

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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 PUBLICLY TRADED SECURITIES				
b PUBLICLY TRADED SECURITIES				
c				
d CAPITAL GAINS DIVIDENDS				
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 1,822,036.		1,857,113.	-35,077.
b 624,743.		503,429.	121,314.
c			0.
d 175.			175.
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			-35,077.
b			121,314.
c			0.
d			175.
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	86,412.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8 }		3	N/A

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	8,140,598.	171,357,134.	.047507
2012	4,787,567.	151,015,215.	.031703
2011	3,916,985.	76,718,942.	.051056
2010	2,679,385.	78,656,155.	.034065
2009	1,320,607.	55,273,690.	.023892

2 Total of line 1, column (d)	2	.188223
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	.037645
4 Enter the net value of noncharitable-use assets for 2014 from Part X, line 5	4	183,614,108.
5 Multiply line 4 by line 3	5	6,912,153.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	32,857.
7 Add lines 5 and 6	7	6,945,010.
8 Enter qualifying distributions from Part XII, line 4	8	6,458,740.

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.

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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	65,714.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b).			
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		2	0.
3 Add lines 1 and 2		3	65,714.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		4	0.
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-		5	65,714.
6 Credits/Payments:			
a 2014 estimated tax payments and 2013 overpayment credited to 2014	6a	29,403.	
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	29,403.	
8 Enter any penalty for underpayment of estimated tax. Check here ☒ if Form 2220 is attached	8	626.	
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	36,937.	
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?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for the definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. \$ 0. (2) On foundation managers. \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), and Part XV	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) <u>NC</u>		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2014 or the taxable year beginning in 2014 (see instructions for Part XIV)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

N/A

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Part VII-A Statements Regarding Activities (continued)

11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11	☒	X
12 Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12	☒	X
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ▶ N/A	13	☒	X
14 The books are in care of ▶ THE NORTHERN TRUST COMPANY Telephone no. ▶ (312) 630-6000 Located at ▶ 50 SOUTH LASALLE STREET, CHICAGO, IL ZIP+4 ▶ 60603			
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	15	☐	N/A
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 X

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

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

		Yes	No
1a During the year did the foundation (either directly or indirectly):			
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	☐ 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)? Organizations relying on a current notice regarding disaster assistance check here ▶	N/A	1b	
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? If "Yes," list the years ▶ _____	☐ Yes ☒ No		
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.)	N/A	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. ▶ _____			
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.)	N/A	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	☒

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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)? ☐ Yes ☒ No
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? ☐ Yes ☒ No
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**

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

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

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
ANNE B. FAIRCLOTH 207 N. CHESTNUT STREET CLINTON, NC 28328	TRUSTEE	0.00	0.	0.
MARIA M. LYNCH PO BOX 30515 RALEIGH, NC 27622	TRUSTEE	0.00	0.	0.
MARGARET TURLINGTON P.O. BOX 2087 CLINTON, NC 28329	SCHOLARSHIP COORDINATOR	28.00	44,363.	0.

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

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

Total number of other employees paid over \$50,000 0

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

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

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

0

Part IX-A Summary of Direct Charitable Activities

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

	Expenses
1 N/A	
2	
3	
4	

Part IX-B Summary of Program-Related Investments

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

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

Total. Add lines 1 through 3

0.

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	186,410,262.
b	Average of monthly cash balances	1b	
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	186,410,262.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	186,410,262.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	2,796,154.
5	Net value of noncharitable-use assets Subtract line 4 from line 3. Enter here and on Part V, line 4	5	183,614,108.
6	Minimum investment return. Enter 5% of line 5	6	9,180,705.

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	9,180,705.
2a	Tax on investment income for 2014 from Part VI, line 5	2a	65,714.
b	Income tax for 2014. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	65,714.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	9,114,991.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	9,114,991.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	9,114,991.

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	6,458,740.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	6,458,740.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	0.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	6,458,740.

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.

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Form 990-PF (2014)

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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				9,114,991.
2 Undistributed income, if any, as of the end of 2014				
a Enter amount for 2013 only			5,828,897.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2014:				
a From 2009				
b From 2010				
c From 2011				
d From 2012				
e From 2013				
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2014 from Part XII, line 4: ► \$ 6,458,740.				
a Applied to 2013, but not more than line 2a			5,828,897.	
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				629,843.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2014 (If an amount appears in column (d), the same amount must be shown in column (a).)	0.			0.
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	0.			
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 2013. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2014. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2015				8,485,148.
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)	0.			
8 Excess distributions carryover from 2009 not applied on line 5 or line 7	0.			
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				

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N/A

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

- Prior 3 years

- (4) Gross investment income

[illegible]

1 Information Regarding Foundation Managers:

- NONE

- NONE**

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

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

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3 Grants and Contributions Paid During the Year or Approved for Future Payment

423611
11-24-14

Enter gross amounts unless otherwise indicated.

Enter gross amounts unless otherwise indicated.		Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income	
		(a) Business code	(b) Amount	(c) Exclu- sion code	(d) Amount		
1 Program service revenue:							
a _____							
b _____							
c _____							
d _____							
e _____							
f _____							
g Fees and contracts from government agencies							
2 Membership dues and assessments							
3 Interest on savings and temporary cash investments							
4 Dividends and interest from securities				14	5,283,647.		
5 Net rental income or (loss) from real estate:							
a Debt-financed property							
b Not debt-financed property							
6 Net rental income or (loss) from personal property							
7 Other investment income							
8 Gain or (loss) from sales of assets other than inventory				18	86,412.		
9 Net income or (loss) from special events							
10 Gross profit or (loss) from sales of inventory							
11 Other revenue:							
a _____							
b _____							
c _____							
d _____							
e _____							
12 Subtotal. Add columns (b), (d), and (e)			0.		5,370,059.	0.	
13 Total Add line 12, columns (b), (d), and (e)						5,370,059.	

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

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

[illegible]

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LINE

	BEGINNING OF YEAR	END OF YEAR	(c) FAIR MARKET
	(a) BOOK VALUE	(b) BOOK VALUE	VALUE
10a INVESTMENTS- U.S AND			
STATE GOVERNMENT OBLIGATIONS			
ADMINISTRATORS OF THE TULANE EDL FD LA REV 5 0%	450,000	450,000	522,030
ALBEMARLE NC HOSP AUTH HEALTH CARE	1,565,681	1,565,681	1,950,366
BALDWIN CNTY ALA 4.25%	-	494,675	521,280
BRISTOL VA 4 888%	-	506,727	527,995
CHICAGO ILL BRD ED 4 882%	200,000	200,000	209,540
CHICAGO ILL BRD ED 5.082%	600,000	600,000	630,654
CORPUS CHRISTI TEX REGL TRANSN AUTH SYS REV 6.1%	772,500	770,805	874,462
DUNDEE TWP ILL PK DIST 6.0%	132,707	132,707	169,999
FLORIDA ST BRD GOVERNORS FLA INTL UNIV	100,000	100,000	101,477
FORT LAUDERDALE FL SPL OBLIG 5.143%	745,005	745,005	809,265
FULTON CNTY GA DEV AUTH REV 5.21%	-	508,026	556,235
GUILFORD CNTY NC PUB FACS CORP 4.564%	-	329,833	371,409
HAGERSTOWN MD 5.2%	253,815	253,440	280,205
HEALTH CARE AUTH FOR BAPTIST HEALTH ALA 5.5%	-	237,033	261,515
ILLINOIS ST 5.727%	514,595	513,057	549,680
MONTGOMERY CNTY NC CTFS PARTN PUB FACS	439,061	439,061	475,420
MONTGOMERY CNTY NC CTFS PARTN PUB FACS	434,839	434,839	474,010
NC CAPS FACS FIN AGY EDL FACSREV	494,845	494,845	508,395
NC CAPS FACS FIN AGY EDL FACSREV	197,860	197,860	216,768
NC CAPS FACS FIN AGY FIN AGY STUDENT	53,951	53,951	60,112
NC EASTN MUN PWR AGY PWR SYS REV SER	443,489	443,489	508,371
NC EASTN MUN PWR AGY PWR SYS REV SER	509,850	509,850	574,761
NC MED CARE COMMN HEALTH CARE EXTRAS	694,715	694,715	675,752
NC MED CARE COMMN HEALTH CARE FACS	95,350	-	-
NC MED CARE COMMN HEALTH CARE FACS	200,000	-	-
NC MED CARE COMMN HEALTH CARE FACS	493,420	493,420	507,485
NC MED CARE COMMN HEALTH CARE FACS	978,110	978,110	1,014,330
NC MED CARE COMMN HEALTH CARE FACS	1,515,723	1,515,723	1,675,014
NC MED CARE COMMN HEALTH CARE FACS	512,300	512,300	551,099
NC MED CARE COMMN HEALTH CARE FACS	3,340,721	3,340,721	3,713,668
NC MED CARE COMMN HEALTH CARE FACS	3,229,301	3,229,301	3,719,208
NC MED CARE COMMN HEALTH CARE FACS	1,444,824	1,444,824	1,817,820
NC MED CARE COMMN HEALTH CARE FACS	900,000	900,000	1,009,710

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LINE		BEGINNING OF YEAR		END OF YEAR	
		(a) BOOK VALUE	(b) BOOK VALUE	(c) FAIR MARKET VALUE	
	NC MED CARE COMMN HEALTH CARE FIRST	221,894	221,894	240,391	
	NC MED CARE COMMN HEALTH CARE FIRST	197,000	197,000	200,000	
	NC MED CARE COMMN HEALTH CARE FIRST	131,078	131,078	146,285	
	NC MED CARE COMMN HEALTH CARE FIRST	527,456	527,456	563,367	
	NC MED CARE COMMN HEALTH CARE FIRST	503,605	502,213	513,620	
	NC MED CARE COMMN HEALTH CARE FIRST	211,466	211,466	246,978	
	NC MED CARE COMMN HEALTH CARE FIRST	338,500	338,500	504,170	
	NC MED CARE COMMN HEALTH CARE FIRST	448,490	448,490	518,075	
	NC MED CARE COMMN HEALTH CARE FIRST	963,390	963,390	1,097,900	
	NC MED CARE COMMN RETIREMENT FACS	184,236	-	-	
	NC MED CARE COMMN RETIREMENT FACS	500,000	-	-	
	NC MED CARE COMMN RETIREMENT FACS	426,644	426,644	461,142	
	NC MED CARE COMMN RETIREMENT FACS	394,272	394,272	461,952	
	NC MED CARE COMMN RETIREMENT FACS	1,006,965	1,006,965	1,570,950	
	NC MED CARE COMMN RETIREMENT FACS	2,999,912	2,999,912	3,592,226	
	NC MED CARE COMMN RETIREMENT FIRST	700,360	700,360	895,616	
	NC MED CARE COMMN RETIREMENT FIRST	1,070,454	1,070,454	1,151,887	
	NC MED CARE COMMN RETIREMENT FIRST	453,000	453,000	606,582	
	NC MED CARE COMMN RETIREMENT FIRST	350,000	350,000	517,365	
	NC MED CARE COMMN RETIREMENT FIRST	2,126,396	2,126,396	2,551,500	
	NC MED CARE COMMN RETIREMENT FIRST	1,969,124	1,969,124	2,240,192	
	PEORIA CNTY ILL SCH DIST NO 150 5.35%	250,000	250,000	277,428	
	PEORIA CNTY ILL SCH DIST NO 150 5.45%	160,000	160,000	178,262	
	PERRY CNTY KY SCH DIST FIN CORP 5.0%	-	312,557	317,217	
	PHENIX CITY ALA 5 25%	-	160,000	170,522	
	PHENIX CITY ALA 5 25%	-	337,667	356,249	
	RALEIGH DURHAM NC ARPT AUTH ARPT REV	509,170	509,170	539,674	
	READING PA 5.53%	-	526,586	525,750	
	SOUTHWEST HIGHER ED AUTH INC TEX REV 4.156%	-	444,375	518,640	
	UNIVERSITY NC CHAPEL HILL REV 5 75%	509,780	508,840	543,490	
	UNIVERSITY NC CHARLOTTE REV TAXABLE	500,000	500,000	564,165	
	TOTAL LINE 10a (OTHER GOVERNMENT)	38,965,854	41,837,807	47,909,630	

END OF YEAR

SHARES HELD

10b

INVESTMENTS-CORPORATE STOCK

ABBOTT LABORATORIES

35,200

1,167,294

1,584,704

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LINE		BEGINNING OF YEAR		END OF YEAR	
		(a) BOOK VALUE	(b) BOOK VALUE	(c) FAIR MARKET VALUE	
15,400	ANADARKO PETE CORPORATION	1,201,147	1,201,147	1,270,500	
18,000	APPLE INCORPORATED	1,408,251	1,239,917	1,986,840	
21,200	CARDINAL HEALTH, INC.	903,912	903,912	1,711,476	
15,050	CATEPILLAR INC DEL	1,396,527	1,396,527	1,377,526	
12,000	CHEVRON CORPORATION	1,242,174	1,347,254	1,346,160	
32,800	COCA-COLA COMPANY	1,232,344	1,232,344	1,384,816	
10,000	COSTCO WHOLESALE CORPORATION	1,019,321	1,019,321	1,417,500	
14,700	DEERE & COMPANY	1,310,903	1,310,903	1,300,509	
7,380	DISCOVER FINL SVCS COM	11,311	11,311	483,316	
21,000	DOLLAR GENERAL CORP	1,049,577	935,874	1,484,700	
194	EXPRESS SCRIPTS HLDG CO	982	982	16,426	
14,950	EXXON MOBIL CORPORATION	1,239,488	1,328,731	1,382,128	
75,516	FIRST CITIZENS BANCSHARES INC NC CL A	260,292	260,292	19,089,690	
40,000	FREEMPORT-MCMORAN COPPER & GOLD	1,296,700	1,296,700	934,400	
19,262	GENERAL ELECTRIC CO	163,679	163,679	486,751	
6,800	INTL BUSINESS MACHINES CORP	1,338,678	1,338,678	1,090,992	
15,000	JPMORGAN CHASE & COMPANY	264,528	821,148	938,700	
13,400	JOHNSON & JOHNSON	966,686	966,686	1,401,238	
12,000	KANSAS CITY SOUTHERN COM NEW	992,635	1,105,529	1,464,360	
23,600	KRAFT FOODS GROUP, INC	1,124,675	1,124,675	1,478,776	
288,500	LINCOLN NATIONAL CORP	12,516	12,516	16,637,795	
12,000	MCDONALDS CORP	1,099,845	1,099,845	1,124,400	
2,312	MERCK & CO INC NEW	64,324	64,324	131,298	
58,990	MFC ISHARES TR SELECT DIVID ETF FD	3,436,035	3,436,035	4,683,806	
63,453	MFC ISHARES TR MSCI EAFE ETF FD	3,428,958	3,428,958	3,860,481	
41,233	MFC ISHARES TR MSCI EMERGING MKTS INDEX FD ETF	1,721,698	1,721,698	1,620,045	
41,258	MFC ISHARES TR RUSSELL 2000 ETF FD	3,425,046	3,425,046	4,937,345	
37,972	MFC SPDR S&P MIDCAP 400 ETF TR UNIT SER	6,830,238	6,830,238	10,023,469	
14,760	MORGAN STANLEY COM	57,276	57,276	572,688	
18,000	MOTOROLA SOLUTIONS, INC	1,253,029	1,031,638	1,207,440	
18,200	NORFOLK SOUTHERN CORP	1,146,754	1,248,855	1,994,902	
5,000	NUCOR CORP	163,786	163,786	245,250	
44,200	PFIZER INC	1,172,031	1,172,031	1,376,830	
100	PRINCIPAL FINL GROUP INC			5,194	
15,000	PROCTER & GAMBLE CO	1,085,349	1,085,349	1,366,350	
10,000	SOUTHERN COMPANY	444,516	444,516	491,100	

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LINE	BEGINNING OF YEAR		END OF YEAR	
	(a) BOOK VALUE	(b) BOOK VALUE	(c) FAIR MARKET VALUE	
106,944	15,453,876	15,453,876	21,976,992	
19,800	1,471,599	1,471,599	2,201,166	
20,700	907,630	907,630	968,346	
6,900	1,088,408	1,088,408	1,809,180	
9	506-	506	50,400	
	63,854,524	64,317,034	120,915,985	

TOTAL LINE 10b

10c

INVESTMENTS-CORPORATE BONDS

THOMSON REUTERS 3.95%	-	263,707	263,455
AETNA INC 6.5%	138,431	-	-
ALCOA INC 5 72%	490,230	490,230	548,260
ALCOA INC 6 75%	247,500	247,500	280,835
AUTOZONE INC 5 75%	108,460	106,654	100,140
BANK AMER CORP SR INTERNOTES 6.0%	500,000	500,000	548,150
BARCLAYS BK PLC MEDIUM TERM NTS 5%	250,000	250,000	253,792
BERKSHIRE HATHAWAY INC 3.0%	-	300,099	302,820
BOSTON UNIV 5.2%	-	253,669	302,060
BOTTLING GROUP LLC 5.5%	401,839	394,665	380,894
CITIGROUP INC MEDIUM TERM SR NTS VAR RT	250,000	250,000	250,593
COMCAST CORP NEW 5.9%	313,985	308,784	301,095
COMCAST CORP NEW 6 5%	112,995	110,230	100,229
DEERE JOHN CAP CORP CORENOTES 3 25%	250,000	250,000	257,237
DEERE JOHN CAP CORP CORENOTES 5 25%	400,000	400,000	404,216
GENERAL ELEC CAP CORP INTERNOTES 5.0%	500,000	500,000	539,640
GENERAL ELEC CAP CORP INTERNOTES 5.3%	500,000	500,000	509,135
GEORGIA PWR CO 4 25%	503,250	502,933	548,270
GOLDMAN SACHS GROUP INC MEDIUM TERM 5.4%	500,000	500,000	507,815
GOLDMAN SACHS GROUP INC NT VAR RT	250,000	250,000	249,212
GOLDMAN SACHS GROUP INC VAR RT	250,000	250,000	254,032
HSBC FIN CORP INTERNOTES 4 35%	250,000	-	-
JOHNSON CONTROLS INC 5.5%	178,581	176,164	172,792
KROGER CO 7.5%	115,981	-	-
LABORATORY CORP AMER HLDGS 5.625%	84,999	84,999	98,826
MERRILL LYNCH & CO INC 6.05%	500,000	500,000	529,463
MISSION HEALTH SYS INC 4.424%	-	260,700	293,043

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LINE		BEGINNING OF YEAR		END OF YEAR	
		(a) BOOK VALUE	(b) BOOK VALUE	(c) FAIR MARKET VALUE	
	MONDELEZ INTERNATIONAL INC 6.5%	165,420	163,355	167,997	
	MORGAN STANLEY 4.75%	127,824	-	-	
	NEW JERSEY BELL TEL CO 8.0%	-	309,808	316,405	
	PROTECTIVE LIFE CORP 7.375%	513,325	512,063	601,698	
	QUEST DIAGNOSTICS INC 4.25%	-	507,564	515,301	
	RYDER SYS INC MEDIUM TERM NTS 5.85%	93,470	93,470	107,988	
	SHELL INTL FIN B V 4.3%	505,000	504,513	548,730	
	SUNOCO INC NT 5.75%	236,175	236,175	270,285	
	TIME WARNER CABLE INC 7.5%	233,130	-	-	
	TOYOTA MTR CR CORP MEDIUM TERM NTS	-	250,000	247,577	
	UNITED TECHNOLOGIES CORP 4.5%	266,313	265,714	288,375	
	VIACOM INC NEW 6.125%	109,742	108,458	111,294	
	WELLS FARGO & CO MEDIUM TERM NTS VAR RT	250,000	250,000	249,777	
	WELLS FARGO & CO MEDIUM TERM NTS VAR RT	500,000	500,000	500,535	
	XEROX CORP 6.4%	95,556	95,556	106,086	

TOTAL LINE 10c

10,192,206 11,447,010 12,028,052

13 INVESTMENTS-OTHER

END OF YEAR
SHARES HELD

AFFILIATED MANAGERS GROUP INC SR NT	20,000	528,942	528,942	534,600
AMERICAN FINL GROUP INC OHIO SR NT	20,000	515,984	515,984	511,000
ENTERGY LA LLC IST MTG BD 6%	20,000	540,714	540,714	505,400
EQUITY COMWLTH SR NT	20,000	502,406	502,406	461,600
GOLDMAN SACHS GROUP INC NT	20,000	541,592	541,592	517,200
KKR FINL HLDGS LLC 8.375%	20,000	589,989	589,989	555,200
LLOYDS BKG GROUP PLC	20,000	558,767	558,767	515,600
PROTECTIVE LIFE CORP SUB DEB	20,000	529,546	529,546	513,400
QWEST CORP NT	20,000	540,577	540,577	519,000
RAYMOND JAMES FINL INC SR NT	20,000	564,526	564,526	545,800
TELEPHONE & DATA SYS INC PFD	20,000	554,382	554,382	493,200
UNITED STATES CELLULAR CORP SR NT	20,000	557,096	557,096	488,000

TOTAL LINE 13

6,524,521 6,524,521 6,160,000

FORM 990-PF	DIVIDENDS AND INTEREST FROM SECURITIES				STATEMENT 1
SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME
RAYMOND JAMES	1,003,688.	0.	1,003,688.	1,003,688.	
THE NORTHERN TRUST COMPANY	4,259,720.	175.	4,259,545.	2,307,459.	
THE NORTHERN TRUST COMPANY ACCRUED MARKET DISCOUNT	20,414.	0.	20,414.	0.	
TO PART I, LINE 4	5,283,822.	175.	5,283,647.	3,311,147.	

FORM 990-PF	LEGAL FEES			STATEMENT 2
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
LEGAL FEES	10,440.	0.		10,440.
TO FM 990-PF, PG 1, LN 16A	10,440.	0.		10,440.

FORM 990-PF	ACCOUNTING FEES			STATEMENT 3
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING FEES	4,475.	0.		4,475.
BOOKKEEPING FEES	8,250.	0.		8,250.
TO FORM 990-PF, PG 1, LN 16B	12,725.	0.		12,725.

FORM 990-PF	OTHER PROFESSIONAL FEES			STATEMENT	4
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
FIDUCIARY FEES NORTHERN TRUST	89,181.	47,742.		0.	
FIDUCIARY FEES RAYMOND JAMES	64,116.	64,116.		0.	
TO FORM 990-PF, PG 1, LN 16C	153,297.	111,858.		0.	

FORM 990-PF	TAXES			STATEMENT	5
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
FOREIGN TAXES PAID ON DIVIDENDS	15,785.	0.		0.	
IRS APPLICATION FEE REFUND	-1,000.	0.		0.	
TO FORM 990-PF, PG 1, LN 18	14,785.	0.		0.	

FORM 990-PF	OTHER EXPENSES			STATEMENT	6
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
POSTAGE, MAILING SERVICE	280.	0.		280.	
OFFICE EXPENSE	416.	0.		416.	
TELEPHONE	287.	0.		287.	
TRAVEL AND MEETINGS	4,777.	0.		4,777.	
SCHOLARSHIP COMMITTEE EXPENSE	1,566.	0.		1,566.	
CONTINUING EDUCATION	595.	0.		595.	
TO FORM 990-PF, PG 1, LN 23	7,921.	0.		7,921.	

FORM 990-PF	OTHER INCREASES IN NET ASSETS OR FUND BALANCES	STATEMENT	7
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DESCRIPTION	AMOUNT
INTEREST AND DIVIDENDS RECEIVED IN 2014 FOR 2013	133,278.
2013 ACCRUED INTEREST PAID REDUCING 2014 INCOME	24,543.
TOTAL TO FORM 990-PF, PART III, LINE 3	157,821.

FORM 990-PF	OTHER DECREASES IN NET ASSETS OR FUND BALANCES	STATEMENT	8
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DESCRIPTION	AMOUNT
INTEREST AND DIVIDENDS RECEIVED IN 2015 FOR 2014	162,279.
TOTAL TO FORM 990-PF, PART III, LINE 5	162,279.

FORM 990-PF	U.S. AND STATE/CITY GOVERNMENT OBLIGATIONS	STATEMENT	9
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DESCRIPTION	U.S. GOV'T	OTHER GOV'T	BOOK VALUE	FAIR MARKET VALUE
SEE ATTACHED SCHEDULE		X	41,837,807.	47,909,630.
TOTAL U.S. GOVERNMENT OBLIGATIONS				
TOTAL STATE AND MUNICIPAL GOVERNMENT OBLIGATIONS			41,837,807.	47,909,630.
TOTAL TO FORM 990-PF, PART II, LINE 10A			41,837,807.	47,909,630.

FORM 990-PF	CORPORATE STOCK	STATEMENT	10
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
SEE ATTACHED SCHEDULE	64,317,034.	120,915,985.
TOTAL TO FORM 990-PF, PART II, LINE 10B	64,317,034.	120,915,985.

FORM 990-PF	CORPORATE BONDS	STATEMENT 11
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
SEE ATTACHED SCHEDULE	11,447,010.	12,028,052.
TOTAL TO FORM 990-PF, PART II, LINE 10C	11,447,010.	12,028,052.

FORM 990-PF	OTHER INVESTMENTS	STATEMENT 12
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DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
SEE ATTACHED SCHEDULE	COST	6,524,521.	6,160,000.
TOTAL TO FORM 990-PF, PART II, LINE 13		6,524,521.	6,160,000.

FORM 990-PF	OTHER LIABILITIES	STATEMENT 13
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DESCRIPTION	BOY AMOUNT	EOY AMOUNT
OUTSTANDING CHECKS(NET)	200.	1,040.
PAYROLL LIABILITIES	1,360.	1,245.
TOTAL TO FORM 990-PF, PART II, LINE 22	1,560.	2,285.

FORM 990-PF

GRANT APPLICATION SUBMISSION INFORMATION
PART XV, LINES 2A THROUGH 2D

STATEMENT 14

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

MARGARET TURLINGTON, COORDINATOR
PO BOX 2087
CLINTON, NC 28329

TELEPHONE NUMBER

NAME OF GRANT PROGRAM

910-385-6716

THE SIMPLE GIFTS FUND SAMPSON COUNTY LOVE OF
LEARNING GRANT PROGRAM

RESTRICTIONS AND LIMITATIONS ON AWARDS

GRANTS FOR SCHOOLS UP TO \$3,000 AND INDIVIDUAL STIPENDS UP TO \$1,000 WILL BE AWARDED THREE TIMES ANNUALLY FOR THE ADVANCEMENT OF EDUCATORS AND THEIR STUDENTS, IN ORDER TO ENABLE TEACHERS TO PROVIDE ILLUMINATING PROGRAMS AND OPPORTUNITIES FOR STUDENTS IN THE CLASSROOM, AFTER SCHOOL, IN THE SUMMER OR ON WEEKENDS. THE GOAL IS TO INSPIRE THE IMPROVEMENT OF PUBLIC EDUCATION BY ENGAGING STUDENTS IN CRITICAL THINKING AND PROBLEM SOLVING THAT DEEPENS KNOWLEDGE OF SUBJECT MATTER. APPLICANTS MUST BE A TEN-MONTH TEACHER, GUIDANCE COUNSELOR OR MEDIA COORDINATOR IN A SAMPSON COUNTY OR CLINTON CITY PUBLIC K-12 SCHOOL; HAVE A MINIMUM OF TWO YEARS CLASSROOM TEACHING EXPERIENCE; BE A FULL TIME EDUCATOR SPENDING AT LEAST 50% OF THE TIME IN THE CLASSROOM OR A CLASSROOM-LIKE SETTING; HAVE THE INTENTION OF RETURNING TO TEACHING IN SAMPSON COUNTY IN THE CONSECUTIVE SCHOOL YEAR AND HAVE THE PROPOSAL REVIEWED AND APPROVED BY THE SCHOOL PRINCIPAL. GRANT FUNDS MAY BE USED FOR RESOURCE MATERIALS, SUPPLIES, EQUIPMENT, TRANSPORTATION, TECHNOLOGY OR STIPENDS. ALTHOUGH FUNDS MAY BE USED TO SUPPORT THE PROFESSIONAL DEVELOPMENT NECESSARY TO IMPLEMENT THE PROJECT, THE MAJORITY OF GRANT FUNDS MUST BE SPENT ON MATERIALS OR EDUCATIONAL EXPERIENCES FOR STUDENTS. EDUCATORS ARE ELIGIBLE TO APPLY OR REAPPLY FOR GRANTS IN SUBSEQUENT APPLICATION PERIODS. FUNDS MAY NOT BE USED FOR LOBBYING OR RELIGIOUS PURPOSES. \$69,696 TOTAL GRANTS WERE AWARDED IN 2014.

ANONYMOUS TRUST U/A DATED 2-4-2008

26-6220561

FORM 990-PF

GRANT APPLICATION SUBMISSION INFORMATION
PART XV, LINES 2A THROUGH 2D

STATEMENT 14

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

MARGARET TURLINGTON, COORDINATOR
PO BOX 2087
CLINTON, NC 28329

TELEPHONE NUMBER

NAME OF GRANT PROGRAM

910-385-6716

THE SIMPLE GIFTS SCHOLARSHIP PROGRAM

FORM AND CONTENT OF APPLICATIONS

SIMPLE GIFTS SCHOLARSHIP APPLICATION (AVAILABLE AT THE WEBSITE [HTTP://WWW.SIMPLEGIFTSFUND.ORG](http://www.simplegiftsfund.org)), A CURRENT RESUME, THREE RECOMMENDATIONS (TEACHER, PEER, ADDITIONAL), TRANSCRIPTS OF ACADEMIC RECORDS, A COPY OF THE US DEPARTMENT OF EDUCATION/STUDENT AID REPORT, A COPY OF THE FINANCIAL AWARD LETTER FROM THE COLLEGE/UNIVERSITY TO BE ATTENDED, A COPY OF THE LETTER(S) NOTIFYING THE APPLICANT OF SCHOLARSHIPS OR FELLOWSHIPS GRANTED.

ANY SUBMISSION DEADLINES

DECEMBER 1 FOR THE FOLLOWING ACADEMIC YEAR.

RESTRICTIONS AND LIMITATIONS ON AWARDS

THE SIMPLE GIFTS SCHOLARSHIP IS WORTH UP TO \$50,000 PER YEAR TO EARN A FOUR YEAR DEGREE AT AN OUT OF STATE LIBERAL ARTS COLLEGE OR UNIVERSITY. ELIGIBLE STUDENTS MUST BE A UNITED STATES CITIZEN AND A RESIDENT OF NORTH CAROLINA; HAVE ATTENDED A HIGH SCHOOL LOCATED IN SAMPSON COUNTY, NORTH CAROLINA FOR A MINIMUM OF TWO SCHOOL YEARS OR BE SCHEDULED TO COMPLETE A MINIMUM OF TWO YEARS AT THE TIME OF GRADUATION; BE SCHEDULED TO BECOME A HIGH SCHOOL GRADUATE IN THE YEAR OF THE APPLICATION OR BE A GRADUATE OF SAMPSON COMMUNITY COLLEGE; HAVE BEEN ACCEPTED INTO AND BE PLANNING TO ATTEND AN ACCREDITED LIBERAL ARTS COLLEGE OR UNIVERSITY; RANK IN THE TOP TWENTY-FIVE PERCENT OF HIS OR HER HIGH SCHOOL GRADUATING CLASS; AND HAVE AN UNMET FINANCIAL NEED. \$193,021 IN SCHOLARSHIPS WERE PAID IN 2014.

ANONYMOUS TRUST U/A DATED 2-4-2008

26-6220561

FORM 990-PF

GRANT APPLICATION SUBMISSION INFORMATION
PART XV, LINES 2A THROUGH 2D

STATEMENT 14

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

MARGARET TURLINGTON, COORDINATOR
PO BOX 2087
CLINTON, NC 28329

TELEPHONE NUMBER

NAME OF GRANT PROGRAM

910-385-6716

THE SIMPLE GIFTS FUND SAMPSON COUNTY TEACHERS
FELLOWSHIP GRANT PROGRAM

FORM AND CONTENT OF APPLICATIONS

APPLICANTS COMMITTING TO A SIX WEEK FULL TIME SUMMER PROJECT MUST SUBMIT A PERSONAL INFORMATION FORM WITH A DESCRIPTION OF THE PROJECT, A BUDGET AND A COPY OF A VALID NORTH CAROLINA TEACHING LICENSE ACCOMPANIED BY A RECOMMENDATION LETTER.

ANY SUBMISSION DEADLINES

PUBLICIZED ON THE SIMPLE GIFTS WEBSITE AND FLYERS TO SAMPSON COUNTY AND CLINTON CITY SCHOOLS.

RESTRICTIONS AND LIMITATIONS ON AWARDS

THE ONE TIME GRANTS ARE FOR \$8,000 EACH AND WILL NOT BE RENEWED. THE GRANTS ARE BASED SOLELY ON MERIT AND THE PROPOSALS WILL BE JUDGED ON SUBSTANCE, CLARITY, FEASIBILITY AND RESEARCH. THE SELECTION COMMITTEE WILL REVIEW THE EXPECTED DIRECT AND INDIRECT BENEFITS OF THE GRANT PROPOSAL TO THE TEACHER, HIS OR HER STUDENTS AND THE SCHOOL SYSTEM. THE GRANTS ARE AVAILABLE TO TEACHERS, GUIDANCE COUNSELORS AND LIBRARY MEDIA SPECIALISTS THAT HAVE BEEN EMPLOYED BY SAMPSON COUNTY OR CLINTON CITY SCHOOLS FOR AT LEAST ONE YEAR. THE APPLICANT MUST BE NORTH CAROLINA CERTIFIED IN GRADES K-12 AND BE EMPLOYED FULLTIME. THE GRANTS WILL BE TAXABLE TO THE RECIPIENT AND WILL STATE THAT THE RECIPIENT WILL REPAY THE TRUST IF THE PROJECT CANNOT BE COMPLETED. GRANTS TOTALING \$31,400 WERE PAID IN 2014.

ANONYMOUS TRUST U/A DATED 2-4-2008
TAX YEAR 2014

26-6220561
STATEMENT 15

GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

IF RECIPIENT IS AN
INDIVIDUAL, SHOW
ANY RELATIONSHIP
TO ANY FOUNDATION

RECIPIENT NAME AND ADDRESS (HOME OR BUSINESS)	MANAGER OR SUBSTANTIAL CONTRIBUTOR	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
NC DEPARTMENT OF CULTURAL RESOURCES 4601 MAIL SERVICE CENTER RALEIGH, NC 27699		PUBLIC CHARITY	LAND PURCHASE ALONGSIDE THE BENNETT PLACE STATE HISTORIC SITE	150,000
BLUE RIDGE PARKWAY FOUNDATION 717 SOUTH MARSHALL STREET, SUITE 105B WINSTON SALEM, NC 27101		PUBLIC CHARITY	JULIAN PRICE MEMORIAL PARK SUPPORT	300,000
ENVIRONMENTAL DEFENSE FUND 4000 WESTCHASE BOULEVARD RALEIGH, NC 27607		PUBLIC CHARITY	GENERAL OPERATING SUPPORT TO HELP BRING LASTING SOLUTIONS TO THE MOST SERIOUS ENVIRONMENTAL PROBLEMS AFFECTING THE AGRICULTURAL SOUTHEASTERN LANDSCAPE	2,000,000
HABITAT FOR HUMANITY OF WAKE COUNTY 2420 NORTH RALEIGH BOULEVARD RALEIGH, NC 27604		PUBLIC CHARITY	BUILDING INDEPENDENCE GRANT	25,000
HEARTS & HANDS FOR HAITI 6612 CREEDMOOR ROAD RALEIGH, NC 27613		PUBLIC CHARITY	GENERAL OPERATING SUPPORT; STAN AND PATTY WIEBE; TEACHERS TRAINING SCHOOL; TARASSE LAND AND CONSTRUCTION	100,000
THE HISTORIC PRESERVATION FOUNDATION OF NC, INC. 220 FAYETTEVILLE STREET, SUITE 200 RALEIGH, NC 27611		PUBLIC CHARITY	NEIGHBORHOOD REVITALIZATION FUND AND ITS WORK IN GOLDSBORO, NORTH CAROLINA	200,000

ANONYMOUS TRUST U/A DATED 2-4-2008
TAX YEAR: 2014

26-6220561
STATEMENT 15

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TO ANY FOUNDATION

RECIPIENT	IF RECIPIENT IS AN INDIVIDUAL, SHOW ANY RELATIONSHIP TO ANY FOUNDATION	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
NAME AND ADDRESS (HOME OR BUSINESS)	MANAGER OR SUBSTANTIAL CONTRIBUTOR			
HOPE ELEMENTARY CHARTER SCHOOL 1116 NORTH BLOUNT STREET RALEIGH, NC 27604		EDUCATIONAL	GENERAL OPERATING SUPPORT	50,000
IPAS 300 MARKET STREET, SUITE 200 CHAPEL HILL, NC 27516		PUBLIC CHARITY	GENERAL OPERATING SUPPORT TO HELP IMPROVE WOMEN'S REPRODUCTIVE HEALTH CARE AND FAMILY PLANNING SERVICES	5,000
INTERFAITH PRISON MINISTRY FOR WOMEN 112 SOUTH SALISBURY STREET RALEIGH, NC 27601		PUBLIC CHARITY	GENERAL OPERATING SUPPORT TO HELP PROVIDE CRITICAL CHAPLAINCY SERVICES AND TRANSITIONAL EDUCATION/SUPPORT FOR WOMEN IN PRISON	25,000
KIPP ENC COLLEGE PREP PUBLIC SCHOOLS 320 PLEASANT HILL ROAD GASTON, NC 27832		PUBLIC CHARITY	KIPP COLLEGE PREP PUBLIC SCHOOL DURHAM GRANT	200,000
THE MADEIRA SCHOOL 8328 GEORGETOWN PIKE MCLEAN, VA 22102		EDUCATIONAL	DORM MODERNIZATION CHALLENGE GRANT	1,374,536
THE MADEIRA SCHOOL 8328 GEORGETOWN PIKE MCLEAN, VA 22102		EDUCATIONAL	GENERAL OPERATING SUPPORT	300,000
NC MUSEUM OF ART FOUNDATION 4630 MAIL SERVICE CENTER RALEIGH, NC 27699		PUBLIC CHARITY	ART OF COLLABORATION IN SAMPSON COUNTY PROGRAM	67,888

ANONYMOUS TRUST U/A DATED 2-4-2008
TAX YEAR: 2014

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STATEMENT 15

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RECIPIENT	IF RECIPIENT IS AN INDIVIDUAL, SHOW ANY RELATIONSHIP TO ANY FOUNDATION	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTOR	AMOUNT
NAME AND ADDRESS (HOME OR BUSINESS)	CONTRIBUTOR			
SAMPSON COUNTY ARTS COUNCIL 709 COLLEGE STREET CLINTON, NC 28328	MANAGER OR SUBSTANTIAL CONTRIBUTOR	PUBLIC CHARITY	ADMINISTRATIVE SUPPORT AND REPAIRS TO THE VICTOR R. SMALL HOUSE, HOME OF THE SAMPSON ARTS COUNCIL	50,000
TEACH FOR AMERICA 324 BLACKWELL STREET, BAY 11, STE 1160 DURHAM, NC 27701		EDUCATIONAL	TO FUND THE EXPANSION OF TEACH FOR AMERICA TO SOUTHEASTERN NC	1,241,000
TOTAL AWARDS, GRANTS AND GIFTS				6,088,424
LOVE OF LEARNING GRANTS: UNION MIDDLE SCHOOL 455 RIVER ROAD. CLINTON, NC 28328		EDUCATIONAL INSTITUTION	NC WATER EXPLORATION: GRANT TO TAKE 8TH GRADE STUDENT GROUP TO EXPLORE VARIOUS AQUATIC ECOSYSTEMS AND LEARN HANDS ON SCIENCE BEHIND HOW WATER QUALITY AFFECTS BIODIVERSITY WITHIN THE REGION	1,456
LAKWOOD HIGH SCHOOL 245 LAKEWOOD SCHOOL ROAD SALEMBURG, NC 28385		EDUCATIONAL INSTITUTION	NC STATE FFA CONVENTION: OPPORTUNITY FOR FFA STUDENTS TO ATTEND AND COMPETE IN CAREER DEVELOPMENT EVENTS, WORKSHOPS AND NETWORKING	2,869
LAKWOOD HIGH SCHOOL 245 LAKEWOOD SCHOOL ROAD SALEMBURG, NC 28385		EDUCATIONAL INSTITUTION	FIT BIT FOR HEALTH: GRANT TO HELP TO INTRODUCE ANATOMY/PHYSIOLOGY STUDENTS TO HEALTH ISSUES THROUGH FIT BITS BY MONITORING DAILY CALORIC INTAKE, SLEEP CYCLES AND OVERALL HEALTH	2,500

ANONYMOUS TRUST U/A DATED 2-4-2008
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TO ANY FOUNDATION

MANAGER OR
SUBSTANTIAL
CONTRIBUTOR

FOUNDATION
STATUS OF
RECIPIENT

RECIPIENT

NAME AND ADDRESS (HOME OR BUSINESS)

PURPOSE OF GRANT OR
CONTRIBUTION

AMOUNT

HOBBDON HIGH SCHOOL
12201 HOBBDON HIGHWAY
NEWTON GROVE, NC 28366

WE DREAM OF PAINTING OUR DREAMS:
VISION TO PROVIDE PROFESSIONAL PAINTING
MATERIALS AND MEDIUMS FOR PROJECTS
WITHIN THE CLASSROOM AND SCHOOL

1,990

HOBBDON HIGH SCHOOL
12201 HOBBDON HIGHWAY
NEWTON GROVE, NC 28366

ART: BEHIND THE SCENES: GRANT TO HELP
INTRODUCE ART STUDENTS TO IMPORTANCE
OF VISUAL ART IN THE REAL WORLD. TO HELP
MAKE STUDENTS AWARE OF HOW MANY
ARTISTS WORK BEHIND THE SCENES OF
LARGER PRODUCTIONS WITH TWO FIELD
TRIPS IN THE FALL AND SPRING (DURHAM DPAC
EUE SCREEN GEMS IN WILMINGTON)

2,505

MIDWAY HIGH SCHOOL
15274 SPIVEY'S CORNER ROAD
NEWTON GROVE, NC 28366

WORLD WAR II AND THE HOLOCAUST: THE
FRONT LINES: GRANT TO HELP FUND EF
EDUCATIONAL TOUR TO EUROPE FOR 18
STUDENTS

3,000

HOBBDON HIGH SCHOOL
12201 HOBBDON HIGHWAY
NEWTON GROVE, NC 28366

WE'RE COVERING THE STORY: GRANT TO HELP
INTRODUCE JOURNALISM STUDENTS TO
CAREERS IN BROADCAST. TRAVEL TO DC,
NEWSEUM, CONGRESS AND OTHER PLACES
TO EXPOSE STUDENTS TO CAREERS THEY MAY
NOT BE AWARE OF

3,000

ANONYMOUS TRUST U/A DATED 2-4-2008
TAX YEAR: 2014

26-6220561
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NAME AND ADDRESS (HOME OR BUSINESS)	RECIPIENT	MANAGER OR SUBSTANTIAL CONTRIBUTOR	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
HOBBDON HIGH SCHOOL 12201 HOBBDON HIGHWAY NEWTON GROVE, NC 28366			EDUCATIONAL INSTITUTION	FCCLA "TOGETHER WE ARE" READY TO TRAVEL! FAMILY, CAREER AND COMMUNITY LEADERS OF AMERICA (FCCLA) MEMBERS WILL TRAVEL TO NJ AND NC TO PARTICIPATE IN CONFERENCES AND COMPETITIONS	3,000
HOBBDON HIGH SCHOOL 12201 HOBBDON HIGHWAY NEWTON GROVE, NC 28366			EDUCATIONAL INSTITUTION	GROWING A FUTURE WITH STEM: GRANT TO HELP TSA STUDENTS ATTEND NC TSA CONVENTION IN GREENSBORO TO PURSUE INTERESTS AND LEADERSHIP GROWTH BY PARTICIPATION IN THE COMPETITIONS	3,000
HARGROVE ELEMENTARY SCHOOL 7725 FAISON HIGHWAY FAISON, NC 28341			EDUCATIONAL INSTITUTION	VOYAGE TO STUDENT SUCCESS: GRANT ALLOWING TEACHERS TO ATTEND THE DAILY 5 WORKSHOP THAT TEACHES HOW TO IMPLEMENT ELA AND MATH PROGRAMS THAT PROMOTE RIGOR, STUDENT ENGAGEMENT, ACCOUNTABILITY AND CRITICAL THINKING	2,200
LAKEWOOD HIGH SCHOOL 245 LAKEWOOD SCHOOL ROAD SALEMBURG, NC 28385			EDUCATIONAL INSTITUTION	FFA NATIONAL CONVENTION: GRANT FOR FFA STUDENTS TO ATTEND NATIONAL CONVENTION IN LOUISVILLE, KY. AND HAVE OPPORTUNITIES TO LEARN ABOUT CAREERS AND AGRI-BUSINESSES FROM AROUND THE COUNTRY	3,000

ANONYMOUS TRUST U/A DATED 2-4-2008
TAX YEAR: 2014

26-6220561
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GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

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RECIPIENT NAME AND ADDRESS (HOME OR BUSINESS)	FOUNDATIONAL STATUS OF RECIPIENT	CONTRIBUTOR SUBSTANTIAL MANAGER OR	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
KAREN TYLER 3707 ROANOKE ROAD NEWTON GROVE, NC 28366	INDIVIDUAL	NONE	STIPEND TO COVER ADDITIONAL EDUCATOR EXPENSES FOR FCCLA "TOGETHER WE ARE" READY TO TRAVEL!	1,000
AMY SMITH JOHNSON 3000 HOLLY GROVE ROAD BENSON, NC 27504	INDIVIDUAL	NONE	STIPEND TO COVER ADDITIONAL EDUCATOR EXPENSES FOR FCCLA "TOGETHER WE ARE" READY TO TRAVEL!	1,000
UNION MIDDLE SCHOOL 455 RIVER ROAD CLINTON, NC 28328	EDUCATIONAL INSTITUTION		NC WATER EXPLORATION: GRANT TO TAKE ALL 8TH GRADE STUDENTS TO EXPLORE VARIOUS AQUATIC ECOSYSTEMS AND LEARN HANDS ON SCIENCE BEHIND HOW WATER QUALITY AFFECTS BIODIVERSITY WITHIN THE REGION	3,000
SAMPSON MIDDLE SCHOOL 1201 W. ELIZABETH STREET CLINTON, NC 28328	EDUCATIONAL INSTITUTION		CHOO CHOO! MONUMENTS & MUSEUMS: THREE PROFESSORS FROM UNC-PEMBROKE WILL VISIT WITH THE BAND FOR FIVE DAYS THROUGHOUT THE SCHOOL YEAR PROVIDING PERFORMANCES, INSTRUMENT INSTRUCTION AND THEIR EXPERTISE WITH BAND STUDENTS IN SMALL GROUP SETTINGS AND THE CLASSROOM	3,000
SAMPSON MIDDLE SCHOOL 1201 W. ELIZABETH STREET CLINTON, NC 28328	EDUCATIONAL INSTITUTION		DUKE TIP SUMMER STUDIES: PROGRAM TO ASSIST DUKE TIP IDENTIFIED STUDENTS TO ATTEND SUMMER STUDIES PROGRAMS UP TO \$1,000 PER STUDENT.	3,000

ANONYMOUS TRUST U/A DATED 2-4-2008
TAX YEAR: 2014

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NAME AND ADDRESS (HOME OR BUSINESS)	RECIPIENT STATUS OF RECIPIENT	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTOR	CONTRIBUTION	AMOUNT
SAMPSON MIDDLE SCHOOL 1201 W. ELIZABETH STREET CLINTON, NC 28328	EDUCATIONAL INSTITUTION		MANAGER OR SUBSTANTIAL CONTRIBUTOR	PROFESSORS IN THE CLASSROOM: THREE PROFESSORS FROM UNC-PEMBROKE WILL VISIT THE BAND STUDENTS FOR FIVE DAYS THROUGHOUT THE SCHOOL YEAR. THE PROFESSORS WILL PROVIDE PERFORMANCES, INSTRUMENT INSTRUCTION AND SHARE EXPERTISE WITH BAND STUDENTS IN SMALL GROUP SETTINGS AND CLASSROOMS.	3,000
SAMPSON EARLY COLLEGE HIGH SCHOOL PO BOX 318 CLINTON, NC 28329	EDUCATIONAL INSTITUTION			ROCKIN THE BETA CONVENTION: GRANT TO HELP BETA STUDENTS ATTEND NC CONVENTION IN GREENSBORO PROVIDING OPPORTUNITIES TO PURSUE INTERESTS AND LEADERSHIP GROWTH THROUGH COMPETITIONS	3,000
SAMPSON EARLY COLLEGE HIGH SCHOOL PO BOX 318 CLINTON, NC 28329	EDUCATIONAL INSTITUTION			HISTORY IN NC FROM FELLOWSHIP EXPERIENCE: GRANT TO FURTHER THE SUMMER EXPERIENCES WITH STUDENT FIELD TRIP	600
CLINTON HIGH SCHOOL 340 INDIAN TOWN ROAD CLINTON, NC 28328	EDUCATIONAL INSTITUTION			COLLEGE POWER UP: A HANDS ON SEMINAR FOR RISING SENIORS IN CLINTON CITY AND SAMPSON COUNTY SCHOOLS SHARING INFORMATION ON THE COLLEGE APPLICATION, FINANCIAL AID AND SCHOLARSHIP PROCESS. STUDENTS WILL MEET WITH SCHOLARSHIP PROVIDERS, COLLEGE ADMISSIONS OFFICERS, CFNC AND COLLEGE BOARD EXPERTS, RECEIVE SAMPLE ESSAYS AND RESUMES	2,000

ANONYMOUS TRUST U/A DATED 2-4-2008
TAX YEAR: 2014

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TO ANY FOUNDATION

RECIPIENT NAME AND ADDRESS (HOME OR BUSINESS)	IF RECIPIENT IS AN INDIVIDUAL, SHOW ANY RELATIONSHIP TO ANY FOUNDATION	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
CLINTON HIGH SCHOOL 340 INDIAN TOWN ROAD CLINTON, NC 28328	MANAGER OR SUBSTANTIAL CONTRIBUTOR	EDUCATIONAL INSTITUTION	A SPRING MUSICAL EVENT: A CHANCE FOR THE STUDENTS FROM THE MIDDLE SCHOOL TO WORK WITH THE HIGH SCHOOL STUDENTS TO PRODUCE THE MUSICAL ANNIE JR. IT IS A COOPERATIVE ACTIVITY OFFERING THE PERFECT VEHICLE TO COMBINE CREATING, EVALUATING, APPLYING, UNDERSTANDING AND REMEMBERING FROM THE REVISED BLOOMS TAXONOMY THAT AS TEACHERS WE USE TO MAKE SURE THERE IS RIGOR IN LEARNING	1,470
CLINTON HIGH SCHOOL 340 INDIAN TOWN ROAD CLINTON, NC 28328		EDUCATIONAL INSTITUTION	A ROLLING SCIENCE ADVENTURE: AN OPPORTUNITY FOR AP STUDENTS TO EXPLORE NC STATE, THE HUNT MEDIA CENTER AND UNCW AND BIOLOGY PROGRAMS	2,482
NC STATE EDUCATION ASSISTANCE AUTHORITY (NCSEAA) PO BOX 14002 RTP, NC 27709		EDUCATIONAL INSTITUTION	NATIONAL BOARD CERTIFICATION PROGRAM: GRANT FOR REIMBURSEMENT FOR SUCCESSFUL CERTIFICATION	2,000
LUANNE ROSE 13423 HOBBS TOWN HWY NEWTON GROVE, NC 28366	NONE	TEACHER	STIPEND FOR DOCUMENTED CLASSES AND EXPENSES RELATED TO NATIONAL BOARD CERTIFICATION	400
MIDWAY MIDDLE SCHOOL 1115 ROBERT'S GROVE ROAD DUNN, NC 28334		EDUCATIONAL INSTITUTION	SCIENCE OLYMPIAD: OPPORTUNITY TO ENTER TEAMS IN THE SCIENCE OLYMPIAD COMPETITIONS	1,196

ANONYMOUS TRUST U/A DATED 2-4-2008
TAX YEAR: 2014

26-6220561
STATEMENT 15

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IF RECIPIENT IS AN
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RECIPIENT NAME AND ADDRESS (HOME OR BUSINESS)	MANAGER OR SUBSTANTIAL CONTRIBUTOR	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
LAKEWOOD HIGH SCHOOL 245 LAKEWOOD SCHOOL ROAD SALEMBURG, NC 28385		EDUCATIONAL INSTITUTION	AQUATIC TURTLE POPULATION- GRANT TO DO FIELD WORK WITH THE AQUATIC TURTLE PROJECT TO TRAP AND MARK TURTLES AND RECORD PHYSICAL OBSERVATIONS OF THE TURTLES AND THEIR ENVIRONMENT IN A LOCAL LAKE AT CAMP ROCKFISH IN HOPE MILLS. COLLECTED DATA WILL BE ENTERED INTO THE CAROLINA HERP ATLAS	2,122
SUNSET AVENUE SCHOOL 505 SUNSET AVENUE CLINTON, NC 28328		EDUCATIONAL INSTITUTION	READING & WRITING, NOT JUST FOR AUTHORS! OPPORTUNITY TO HAVE A REAL-LIVE, IN PERSON AUTHOR, ANN MCGOVERN, COME TO VISIT OUR SCHOOL. SHE IS THE AUTHOR OF OVER 50 CHILDREN'S BOOKS, INCLUDING STONE SOUP, SHARK LADY AND MANY OF THE IF YOU LIVED HISTORY SERIES	2,050
SUNSET AVENUE SCHOOL 505 SUNSET AVENUE CLINTON, NC 28328		EDUCATIONAL INSTITUTION	PETER & THE STARCATCHERS: GRANT TO TAKE THE AFTERSCHOOL BOOK CLUB "PAGETURNERS" TO THE PETER & THE STARCATCHERS IN THE SPRING AS A CELEBRATION FOR THE STUDENTS	2,991
SUNSET AVENUE SCHOOL 505 SUNSET AVENUE CLINTON, NC 28328		EDUCATIONAL INSTITUTION	AUTHOR BOOKS- GRANT TO BRING BOOKS TO THE CLASSROOM IN PREPARATION FOR THE AUTHOR VISIT	2,765

ANONYMOUS TRUST U/A DATED 2-4-2008
TAX YEAR: 2014

26-6220561
STATEMENT 15

GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

NAME AND ADDRESS (HOME OR BUSINESS)	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
				NC SYMPHONY WORKSHOP STIPEND	CONTRIBUTION	
ALEISHA PITTMAN 6670 HIGH HOUSE ROAD SALEMBURG, NC 28385		NONE	INDIVIDUAL	NC SYMPHONY WORKSHOP STIPEND		100
ADAM COX 6408 STRAWFIELD DRIVE WILMINGTON, NC 28405		NONE	INDIVIDUAL	NC SYMPHONY WORKSHOP STIPEND		100
MEREDITH JONES 80 NORTHGATE LANE CLINTON, NC 28328		NONE	INDIVIDUAL	NC SYMPHONY WORKSHOP STIPEND		100
PLAIN VIEW ELEMENTARY 4140 PLAIN VIEW HIGHWAY DUNN, NC 28334			EDUCATIONAL INSTITUTION	ALL THE PLACES WE WILL GO . VARIOUS FIELD TRIPS FOR THE EC STUDENTS TO EXPOSE THEM TO THEATER, RESTAURANTS AND CAMPS		1,000
CARMELIA OATES PO BOX 145 NEWTON GROVE, NC 28366		NONE	INDIVIDUAL	NC SYMPHONY WORKSHOP STIPEND		100
GWEN LEE 5316 MAXWELL ROAD AUTRYVILLE, NC 28318		NONE	INDIVIDUAL	NC SYMPHONY WORKSHOP STIPEND		100
PANDORA TYNDALL 2119 FEED MILL ROAD ROSEBORO, NC 28382		NONE	INDIVIDUAL	NC SYMPHONY WORKSHOP STIPEND		100

ANONYMOUS TRUST U/A DATED 2-4-2008
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TO ANY FOUNDATION

MANAGER OR
SUBSTANTIAL
CONTRIBUTOR

FOUNDATION
STATUS OF
RECIPIENT

RECIPIENT

NAME AND ADDRESS (HOME OR BUSINESS)

PURPOSE OF GRANT OR
CONTRIBUTION

AMOUNT

TIM THOMPSON	NONE	INDIVIDUAL	STIPEND FOR ADDITIONAL EXPENSES FOR EDUCATOR FOR GROWING A FUTURE WITH STEM PROGRAM	500
301 MOUNT MORIAH CHURCH ROAD CLINTON, NC 28328				

VEVLYN LOWE	NONE	INDIVIDUAL	STIPEND TO COVER INVESTIGATIVE TRIP FOR CHOO CHOO! MONUMENTS & MUSEUMS	1,000
907 LAKEVIEW DRIVE CLINTON, NC 28328				

KRISTEN HALES	NONE	INDIVIDUAL	STIPEND TO COVER EXPENSES FOR WORLD WAR II AND THE HOLOCAUST: THE FRONT LINES	1,000
108 WILLA CHASE COURT BENSON, NC 27504				

TOTAL LOVE OF LEARNING GRANTS

69,696

SIMPLE GIFTS SCHOLARSHIPS:
REGENT UNIVERSITY
1000 REGENT UNIVERSITY DRIVE
VIRGINIA BEACH, VA 23464

INDIVIDUAL	SCHOLARSHIP FOR CHRISTIAN NOLAND	350
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UNC-CHAPEL HILL
209 SOUTH ROAD
CHAPEL HILL, NC 27599

INDIVIDUAL	SCHOLARSHIP FOR EMILY HARRISON	1,000
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UNC-CHAPEL HILL
209 SOUTH ROAD
CHAPEL HILL, NC 27599

INDIVIDUAL	SCHOLARSHIP FOR ALLIE GREEN	1,000
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ANONYMOUS TRUST U/A DATED 2-4-2008
TAX YEAR: 2014

26-6220561
STATEMENT 15

GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

IF RECIPIENT IS AN
INDIVIDUAL, SHOW
ANY RELATIONSHIP
TO ANY FOUNDATION

RECIPIENT	IF RECIPIENT IS AN INDIVIDUAL, SHOW ANY RELATIONSHIP TO ANY FOUNDATION	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
NAME AND ADDRESS (HOME OR BUSINESS)	MANAGER OR SUBSTANTIAL CONTRIBUTOR	INDIVIDUAL	SCHOLARSHIP FOR SHANTELE RAMMELL	1,000
CUMBERLAND UNIVERSITY MEMORIAL HALL, ROOM 103 1 CUMBERLAND SQUARE LEBANON, TN 37087-3408	NONE	INDIVIDUAL	SCHOLARSHIP FOR KELLY NELMS	1,000
FURMAN UNIVERSITY 3300 POINSETT HWY GREENVILLE, SC 29613	NONE	INDIVIDUAL	SCHOLARSHIP FOR ROSS STRICKLAND	1,000
ROANOKE COLLEGE 221 COLLEGE LANE SALEM, VA 24153	NONE	INDIVIDUAL	SCHOLARSHIP FOR FREDDY BATH	1,000
UNC-WILMINGTON 601 SOUTH COLLEGE ROAD WILMINGTON, NC 28403-5951	NONE	INDIVIDUAL	SCHOLARSHIP FOR MATTHEW RAYNOR	1,000
APPALACHIAN STATE UNIVERSITY ASU BOX 32059 BOONE, NC 28608-2059	NONE	INDIVIDUAL	SCHOLARSHIP FOR LILLIE TURLINGTON	1,000
WAKE FOREST UNIVERSITY PO BOX 890701 CHARLOTTE, NC 28289-0701	NONE	INDIVIDUAL	SCHOLARSHIP FOR CINDY TINOCO	1,000
EAST CAROLINA UNIVERSITY OLD CAFETERIA COMPLEX GREENVILLE, NC 27858	NONE	INDIVIDUAL		

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RECIPIENT	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
NAME AND ADDRESS (HOME OR BUSINESS)	MANAGER OR SUBSTANTIAL CONTRIBUTOR		
MICROSOFT OFFICE	NONE	EXPENSES FOR CAMILLE MONROE	86
BENEDICT COLLEGE 1600 HARDEN STREET COLUMBIA, SC 29204	NONE	SCHOLARSHIP FOR JOHN LANGLEY	3,000
FUND FOR AMERICAN STUDIES 1621 NEW HAMPSHIRE AVE., NW WASHINGTON, DC 20009	NONE	SCHOLARSHIP FOR MADISON BRYANT	12,995
LAURA PATLAN 2564 CARROLL A BRITT ROAD FAISON, NC 28341	NONE	TRAVEL AND LIVING EXPENSES FOR COLLEGE ABROAD	3,589
AGNES SCOTT COLLEGE 141 E. COLLEGE AVE DECATUR, GA 30030	NONE	SCHOLARSHIP FOR CONNOR DAY	26,652
EMORY & HENRY COLLEGE PO BOX 947 EMORY, VA 24327	NONE	SCHOLARSHIP FOR KELLY JOHNSON	13,000
HOLLINS UNIVERSITY PO BOX 9658 ROANOKE, VA 24020	NONE	SCHOLARSHIP FOR CAMILLE MONROE	14,420

ANONYMOUS TRUST U/A DATED 2-4-2008
TAX YEAR: 2014

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IF RECIPIENT IS AN
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ANY RELATIONSHIP
TO ANY FOUNDATION

RECIPIENT NAME AND ADDRESS (HOME OR BUSINESS)	MANAGER OR SUBSTANTIAL CONTRIBUTOR	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
WASHINGTON & LEE UNIVERSITY 204 WEST WASHINGTON STREET LEXINGTON, VA 24450	NONE	INDIVIDUAL	SCHOLARSHIP FOR WILLIAM FESTUS TURLINGTON, JR.	7,500
RHODES COLLEGE 2000 NORTH PARKWAY MEMPHIS, TN 38112	NONE	INDIVIDUAL	SCHOLARSHIP FOR AVERY BLANKENSHIP	24,620
AGNES SCOTT COLLEGE 141 E. COLLEGE AVE DECATUR, GA 30030	NONE	INDIVIDUAL	SCHOLARSHIP FOR MADISON BRYANT	13,576
NEW YORK UNIVERSITY 105 EAST 17TH STREET, 3RD FLOOR NEW YORK, NY 10003	NONE	INDIVIDUAL	SCHOLARSHIP FOR CASEY H. YANG	17,000
BRIDGEWATER COLLEGE 402 EAST COLLEGE STREET BRIDGEWATER, VA 22812	NONE	INDIVIDUAL	SCHOLARSHIP FOR RYAN E. WUESTER	14,000
REGENT UNIVERSITY 1000 REGENT UNIVERSITY DRIVE VIRGINIA BEACH, VA 23464	NONE	INDIVIDUAL	SCHOLARSHIP FOR SHANTELE RAMMELL	17,520

GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

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TO ANY FOUNDATION

RECIPIENT NAME AND ADDRESS (HOME OR BUSINESS)	MANAGER OR SUBSTANTIAL CONTRIBUTOR	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
SWEET BRIAR COLLEGE PO BOX 1052 SWEET BRIAR, VA 24595	NONE	INDIVIDUAL	SCHOLARSHIP FOR LAURA PATLAN	15,713
TOTAL SIMPLE GIFTS SCHOLARSHIPS				193,021

TEACHER GRANTS:

SARAH J. CONE 909 EAST NICHOLSON STREET, APT. 3 CLINTON, NC 28328	NONE	INDIVIDUAL	TEACHER GRANT	7,400
KIMBERLY D. STROUD 503 LAFAYETTE STREET CLINTON, NC 28328	NONE	INDIVIDUAL	TEACHER GRANT	8,000
RHONDA S. DAVIS 3080 UNION SCHOOL ROAD CLINTON, NC 28328	NONE	INDIVIDUAL	TEACHER GRANT	8,000
DAVID T. AMEEN 1981 REEDSFORD ROAD CLINTON, NC 28328	NONE	INDIVIDUAL	TEACHER GRANT	8,000

TOTAL TEACHER GRANTS

31,400

TOTAL QUALIFYING GRANTS AND
CONTRIBUTIONS

6,382,541