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Form **990-PF** Department of the Treasury Internal Revenue Service

Return of Private Foundation

OMB No 1545-0052

or Section 4947(a)(1) Trust Treated as Private Foundation Do not enter social security numbers on this form as it may be made public. ▶ Information about Form 990-PF and its separate instructions is at www.lrs.gov/form990pf.

Ford	alen	dar year 2015 or tax year beginning			, and e	iiuiiig		
Nar	ne of	foundation					A Employer identificatio	n number
т	нЕ	ROE FOUNDATION					23-7011541	L
		nd street (or P O box number if mail is not delivered to street	t addr	ess)		Room/suite	B Telephone number	
3	01	N. MAIN STREET				1735	(864) 242-	-5007
		own, state or province, country, and ZIP or foreign p	osta	l code			C If exemption application is	pending, check here
		ENVILLE, SC 29601						
		all that apply: Initial return		Initial return of a fo	rmer public (charity	D 1. Foreign organization	s, check here
		Final return	[Amended return				
		Address change	[Name change			Foreign organizations m check here and attach c	eeting the 85% test, omputation
H C	heck	type of organization: X Section 501(c)(3) e.	xemp	t private foundation			E If private foundation sta	atus was terminated
	3 Se	ction 4947(a)(1) nonexempt charitable trust	Othe	er taxable private founda	ition		under section 507(b)(1)(A), check here
I Fa	ır ma	rket value of all assets at end of year J Account	ıng n	nethod: X Cash	Accr	rual	F If the foundation is in a	60-month termination
		Part II, col (c), line 16)	ther	(specify)			under section 507(b)(1)(B), check here
_	\$	28,375,386. (Part I, colu	ımn	(d) must be on cash b	pasis)			
Pa	<u>rt I</u>	Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not		(a) Revenue and		vestment	(c) Adjusted net	(d) Disbursements for charitable purposes
		necessarily equal the amounts in column (a))	<u> </u>	expenses per books	Inco	ome	income	(cash basis only)
		Contributions, gifts, grants, etc., received	<u></u>				N/A	
	2	Check X If the foundation is not required to attach Sch. B						
	3	Interest on savings and temporary cash investments		128.		128.		STATEMENT 1
	4	Dividends and interest from securities	-	410,362.	41	0,362.		STATEMENT 2
	5a	Gross rents	\vdash					
	b	Net rental income or (loss)	+	670 600				
ą	6a	Net gain or (loss) from sale of assets not on line 10 Gross sales price for all	L	679,608.		-		
ēn	_ b	assets on line 6a	\mathbb{H}		67	9,608.		
Revenue		Capital gain net income (from Ram (Crie.2) VED	 		0 /	9,000	<u> </u>	
	8	Net short-term capital-gain	8					
	9	Income modifications Gross sales less returns MAY 1 2016	S					
		and anowances		-			<u> </u>	
		Gross profit or (loss)						
	11	Other income	\vdash					
	12	Total. Add lines 1 through 11		1,090,098.	1.09	0,098.		
	13	Compensation of officers, directors, trustees, etc		3,000.		600.		2,400.
	14	Other employee salaries and wages		49,426.		9,885.		39,541.
	1	Pension plans, employee benefits						
es Ses	16a	Legal fees						
ë	ь	Accounting fees STMT 3		1,650.		330.		1,320.
쯦	C	Other professional fees STMT 4		98,234.	9	8,234.	,	0.
ě	17	Interest	<u> </u>	· · · · · · · · · · · · · · · · · · ·				
Operating and Administrative Expenses	18	Taxes STMT 5	\perp	17,132.		791.		2,889.
nist	19	Depreciation and depletion	\vdash	877.		877.		
Ē	20	Occupancy	<u></u>	18,620.		3,724		14,896.
١٩٥	21	Travel, conferences, and meetings	<u></u>	2,740.		718.	•	2,022.
and	22	Printing and publications	<u></u>			2 4 2 2		10.50=
<u>B</u> u	23	Other expenses STMT 6	—	13,607.		3,100.	•	10,507.
rati	24	Total operating and administrative		005 006	4.4	0 050		72 575
De		expenses. Add lines 13 through 23	-	205,286.	<u></u>	.8,259	· 	73,575.
,	25	Contributions, gifts, grants paid	_	1,934,500.				1,934,500.
	26	Total expenses and disbursements.		2 120 706	11	Q 2E0		2,008,075.
	-	Add lines 24 and 25	+-	2,139,786.		<u>.8,259</u>		4,000,073.
•	27			<1,049,688.				
Ž	1	Excess of revenue over expenses and disbursements	\vdash	<u> , 0 4 3 , 0 0 0 •</u>		1,839		
>	ı	Net investment income (if negative, enter -0-) Adjusted net income (if negative, enter -0-)	-		<i>,</i>	-,000	N/A	
5235		Autorea ner meante (n negativa, enter -0-)	. 		'			Form 990-PE (2015)

11-24-15 LHA For Paperwork Reduction Act Notice, see instructions.

838.

27,746,838. Form **990-PF** (2015)

4

4 Add lines 1, 2, and 3

5 Decreases not included in line 2 (itemize)

		of property sold (e.g amon stock, 200 sh			(D -	ow acquired Purchase Donation	(c) Date acqu mo., day, y	ured /r.)	(d) Date sold (mo., day, yr.)
1a										
b SEE ATTACHED	STATEM	ENT						<u> </u>		
<u>c</u>				 			_			
d			 -		-		-			
е	(f) Depres	ation allowed	(a) Cos	st or other basis	<u> Т</u>			(h) Gain c	or (loss)	
(e) Gross sales price		llowable)		xpense of sale			(e) plus (f)))
a	<u> </u>									
b										
C										
d	<u> </u>									670 600
e 8,010,446. Complete only for assets show		n (h) and owned by		7,330,83	88.		//\ C	nuna (Cal. (679,608
Complete only for assets snowl		usted basis	T	cess of col. (I)				ains (Col. (), but not le		
(i) F.M.V. as of 12/31/69		12/31/69		col. (j), if any			Ĺ	osses (fro	m col. (h))
a										
b										
C										
d										
е	<u> </u>		L.,							679,608
		∫ If gain, also ente	r in Part I, line	7] [670 600
2 Capital gain net income or (net c		If (loss), enter -0		7	가	2			-	679,608
Net short-term capital gain or (lo		sections 1222(5) ai	nd (6):		٦					
If gain, also enter in Part I, line 8 If (loss), enter -0- in Part I, line 8					}	3			N/A	
Part V Qualification	Jnder Secti	on 4940(e) for	Reduced	Tax on Net	Inve	stment	Inco	ne		
Vas the foundation liable for the se f "Yes," the foundation does not quite Enter the appropriate amount in	alify under section	n 4940(e). Do not co each year; see the i	omplete this pa	ırt	entries.	·				Yes X No
(a) Base period years	Nagura) Ad	(b) Justed qualifying dis	stributions	Net value of no	(c) oncharit	able-use as	sets	(col	Distribu	(d) ition ratio ded by col. (c))
Calendar year (or tax year beginn 2014	iirig iiri)		4,012.		31.	729,1	78.	(001.	(6) (1)	.06284
2013			3,859.	****		839,4				.05557
2012			1,258.			641,3				.053684
2011			2,643.		30,	326,5	62.			.05284
2010		1,49	7,682.		<u>29,</u>	<u>516,8</u>	44.			.050740
										27560
2 Total of line 1, column (d)	. F	and advivida the testes.	an line O hij E	ar by the number	r of woo	ro		2		.275689
3 Average distribution ratio for the the foundation has been in exist			on line 2 by 5,	or by the number	oi yeai	15		3		.05513
the foundation has been in exist	ence n iess man	J years						-		.03313
4 Enter the net value of noncharita	able-use assets fo	or 2015 from Part X.	line 5					4	29	528,605
		·							-	•
5 Multiply line 4 by line 3								5	1	L,628,148
										0.710
6 Enter 1% of net investment inco	ome (1% of Part I	, line 27b)						6		9,718
7 Add lines Food C								7	1	L,637,866
7 Add lines 5 and 6										2,007,000
8 Enter qualifying distributions fro	om Part XII. line 4							8	2	2,008,075
If line 8 is equal to or greater that		ne box in Part VI, line	e 1b, and com	lete that part usin	ng a 1%	tax rate.				
See the Part VI instructions.	<u>, </u>		·	•						

Tal Exempt operating from dathors described in section 4940(s)(2), check here ▶ □ and enter **W* on line 1. Date of Yuling or determination letter:	Form 990-PF (2015) THE ROE FOUNDATION Part VI Excise Tax Based on Investment Income (Section 4940)	(a), 4940(b), 4940(e).	23-' or 4948 -	7011541 see instr	uctio	Page 4
Date of Juling or determination letter:			00 .0	000 111001		,
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here						
of Part I, line 27b c. All other domestic poundations 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-) 3 Add lines 1 and 2 4 Subtlet & (nicrone) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) 5 Tax based on investment income. Subtract line 4 from line 3.1 zero or lies, enter -0- 5 Tax based on investment income. Subtract line 4 from line 3.1 zero or lies, enter -0- 5 Credistry-prinents: a 2015 estimated tax payments and 2014 overpayment credide to 2015 5 Exempt foreign organizations - tax withheld at source 6 By Exempt foreign organizations - tax withheld at Source 6 By Exempt foreign organizations - tax withheld at Source 6 By Exempt foreign organizations - tax withheld at Source 6 By Exempt foreign organizations - tax withheld at Source 6 By Exempt foreign organizations - tax withheld at Source 6 By Exempt foreign organizations - tax withheld at Source 6 By Exempt foreign organizations - tax withheld at Source 7 To located and payments. Add lines 6 at through 68 8 Exiter any pearity for underpayment of satimated tax Check here IXI if form 2220 is attached 8 Tax die. If the total of lines 5 and 8 is more than line 7, enter amount owned 9 Tax die. If the total of lines 5 and 8 is more than line 7, enter amount owned 9 Tax die. If the total of lines 5 and 8 is more than line 10 and the source of the 10 and 11 lines 10 and			1		9 7	18
c All other domestic foundations enter 2% of I line 27b, Exempt foreign organizations enter 4% of Part, I, line 12, col. (b). 2 Tax under section \$11 (dimestic section \$4947(a)(1) trusts and taxable foundations only. Others enter -0-) 3 defines 1 and 2 4 Subolite A (incrore) lax (domestic section \$4947(a)(1) trusts and taxable foundations only. Others enter -0-) 5 Tax based on investment incrome. Subtract tine 4 from line 3. If zer or riess, enter -0- 6 CrediscPayments: 2 2015 estimated tax payments and 2014 overpayment credited to 2015 6 Exempt foreign organizations - Tax withheld at source 7 Total credits and pipicitizant for extension of time to file (Form 8588) 6 Backup withholding erronaously withheld 8 Enter any penalty for underpayment of estimated tax. Check here □ I form 2220 is attached 8 Enter any penalty for underpayment of estimated tax. Check here □ I form 2220 is attached 9 Tax due. If the total of lines 5 and 8 is met than line 7, enter amount owed 10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid 11 Clief the amount of line 10 to be: Credited to 2016 estimated tax. 12 During the tax year, dut the foundation attempt to influence any national, state, or local legislation or did it participate or interviene in any political campaign? 1a During the tax year, dut the foundation in connection with the activities. 1a During the tax year, dut the foundation in connection with the activities. 1b of a spend more than \$100 during the year (either directly or inderectly) for political purposes (see instructions for the definition)? 1 the answer is 'ves' to lar or 1p. attach a detailed description of the activities. 1 During the tax return on Form 990-T for this year? 1 During the tax return on Form 990-T for this year? 2 Has the foundation near paged in any activities that have not previously been reported to the IRS? 1 'Yes,' statch a detailed description of the activities. 2 Life the manument of the powering instrument of the year? 3 Li	•••	and critici 170	'		<u> ، , ر</u>	10.
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) 3 Add lines 1 and 2 4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) 5 Tax based on investment income. Subtract line 4 from line 5. If zero or less, enter -0- 5 Credits-Pyrments: a 2016 stimited tax payments and 2014 overpayment credited to 2015 6 Exempt foreign organizations - Lax withheld at source 6 Tax paid with application for extension of time to life (Form 8868) 6 Each organization of the statement of the stimulated tax Check here X if Form 2220 is attached 7 Total credits and payments. Add lines 6a through 6d 8 Icities any penalty founderpayment of estimated tax. Check here X if Form 2220 is attached 9 Tax dise. If the folial of lines 5 and 8, enter the amount overpaid 10 overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid 10 overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid 11 Enter the amount of line 10 to be redited to 2015 estimated tax. 12 During the tax year, did the brundation attempt to influence any national, state, or local legislation or did it participate or intervene in appotition are than 5100 during the year (either directly or indirectly) for political purposes (see instructions for the definition)? 13 If the answer is "less" to 7 a or 16, attach a defailed description of the activities. 14 During the tax year, did the brundation attempt to influence any national, state, or local legislation or did it participate or intervene in apposition or than 5 to 7 a or 16, attach a defailed description of the activities. 15 During the time than 5 to 7 a or 16, attach a defailed description of the activities. 16 During the time than 5 to 7 a or 16, attach a defailed description of the activities. 17 On the changes of the changes of the changes 18 Has the foundation the Form 1120-Pol. for this year? 19 Has the foundation have unrelated business goes acc		of Part Lline 12 col (h)	li			
3 9,718. Subtile A (income) tax (domestic section 4947(a)(1) irusis and taxable foundations only. Others enter -0-) Tax based on investment income. Subtract line 4 from line 3. if zero or less, enter -0- Tax based on investment income. Subtract line 4 from line 3. if zero or less, enter -0- Tax based on investment income. Subtract line 4 from line 3. if zero or less, enter -0- Tax based on investment income. Subtract line 4 from line 3. if zero or less, enter -0- Example of which application for extension of time to line (Form 8869) Example of the service of the			, ,			Λ.
4 Subtile 4 (income) lax (domestic section 4947(a)(1) irusis and taxable foundations only, Others enter -0 - 5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0 - 5 Gedis-Psymenis: a 2015 stimated tax payments and 2014 overpayment credited to 2015		ora cintor o y			9.7	18.
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10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid 11 Enter the amount of line 10 to be: Credited to 2016 estimated tax ▶ Refunded		ieu			2 7	10
11 Eiter the amount of line 10 to be: Credited to 2018 estimated tax ▶ Refunded ▶ 11 Part VII-A Statements Regarding Activities 12 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?			-		4,1	10.
Part VII-A Statements Regarding Activities		المار ما ما				
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 campagin? 1a X 1b IX 1b Did at speed more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for the definition)? 11 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. 1a X 1b X 1b X 1c Did the foundation in Form 1120-Pol to this year? 2d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. ▶ \$ O. (2) On foundation managers. ▶ \$ O. (2) 2e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ \$ O. (2) 2h last the foundation engaged in any activities that have not previously been reported to the IRS? 1f "Yes," attach a detailed description of the activities. 3 Has the foundation engaged in any activities that have not previously been reported to the IRS? 1f "Yes," attach a detailed description of the activities. 3 Has the foundation have unrelated business gross income of \$1,000 or more during the year? 1f "Yes," has it filed a tax return on Form 990-T for this year? 1f "Yes," attach the statement required by General Instruction T. 2 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: 2 By language in the governing instrument, or 2 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, or 2 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, or 2 By state legislation that effectively amends the governing instrument so that no m		Retunde				
any political campaign? 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. c Did the foundation file Form 1120-PQL for this year? d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation habour 1 (if any) paid by the foundation during the year for political expenditure tax imposed 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. l Has the foundation nagaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities. 3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes 4a Did the foundation have unrelated business gross income of \$1,000 or more during the year? If "Yes," has it flied a tax return on Form 990-T for this year? If "Yes," has it flied a tax return on Form 990-T for this year? If "Yes," attach the statement required by General Instruction 7. 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? 7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV 7 X 8a Enter the states to which the foundation furnished a copy of Form 990-PF to the Attorney General (or desi		tion or did it portionate or into	r) (0.00.0 LD		Vac	No
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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 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 2015 or the taxable year beginning in 2015 (see instructions for Part XIV)? If "Yes," complete Part XIV 10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses 10 X	· · · · · · · · · · · · · · · · · · ·	s) >				
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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 2015 or the taxable year beginning in 2015 (see instructions for Part XIV)? If "Yes," complete Part XIV 10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses 10 X			nt:Mt::Xtr:	0		· ·
year 2015 or the taxable year beginning in 2015 (see instructions for Part XIV)? If "Yes," complete Part XIV 10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses 10 X						
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses 10 X			r calendar		1	₹.
	· · · · · · · · · · · · · · · · · · ·					
	10 DIO any persons decome substantial contributors during the tax year? If "Yes," attach a schedule	listing their names and addresses			0-PF	

	990-PF (2015) THE ROE FOUNDATION 23-7011	541		Page 5
Pa	rt VII-A Statements Regarding Activities (continued)			
			Yes	No
11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of			
	section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		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?	13	Х	
. •	Website address ► N/A			
14	The books are in care of ► SHIRLEY W. ROE Telephone no. ► (864)	242	-50	07
	Located at ▶ 301 N. MAIN ST., STE. 1735, GREENVILLE, SC ZIP+4 ▶29			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here		_	\Box
	and enter the amount of tax-exempt interest received or accrued during the year	N	/A	
16	At any time during calendar year 2015, did the foundation have an interest in or a signature or other authority over a bank,		Yes	No
10	securities, or other financial account in a foreign country?	16		X
	See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the	'''		
	foreign country			
Pa	irt VII-B Statements Regarding Activities for Which Form 4720 May Be Required	.l -	'	
		T	Yes	No
	File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.	 	103	110
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 X No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? Yes X No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?			
	(5) Transfer any income or assets to a disqualified person (or make any of either available			
	for the benefit or use of a disqualified person)?			
	(6) Agree to pay money or property to a government official? (Exception. Check "No"			
	If the foundation agreed to make a grant to or to employ the official for a period after			
	termination of government service, if terminating within 90 days.)			
b	If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations			
	section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)?	1b		<u>X</u>
	Organizations relying on a current notice regarding disaster assistance check here			
C	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected		.	
	before the first day of the tax year beginning in 2015?	1c		<u> </u>
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)):			
а	At the end of tax year 2015, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning			
	before 2015?		.	
	If "Yes," list the years \blacktriangleright			
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?			
b	If "Yes," did it have excess business holdings in 2015 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 2015.) N/A	3ь		
42	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		X
	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 2015?	4b		X
	Fo	m 99 0)-PF	

•				
Form 990-PF (2015) THE ROE FOUNDATION Part VII-B Statements Regarding Activities for Which I	Form 4720 May Be I	Required (contin	23-70115	41 Page
5a During the year did the foundation pay or incur any amount to:		(00		 -
(1) Carry on propaganda, or otherwise attempt to influence legislation (section	n 4945(e))?		es X No	1 1
(2) Influence the outcome of any specific public election (see section 4955); of	• • • •		100	
any voter registration drive?	is to carry only an outly or man		es X No	
(3) Provide a grant to an individual for travel, study, or other similar purposes	?		es X No	
(4) Provide a grant to an organization other than a charitable, etc., organization				
4945(d)(4)(A)? (see instructions)			es X No	
(5) Provide for any purpose other than religious, charitable, scientific, literary,	or educational purposes, or	· · · · · · · · · · · · · · · · · · ·		
the prevention of cruelty to children or animals?	or addamanar par poots, or		es 🗓 No	
b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify uni	der the exceptions described			
section 53.4945 or in a current notice regarding disaster assistance (see instru		riogaianono	N/A	5b
Organizations relying on a current notice regarding disaster assistance check h	•			
c If the answer is "Yes" to question 5a(4), does the foundation claim exemption fi		uned		
expenditure responsibility for the grant?		√A 🔲 Y€	es No	
If "Yes," attach the statement required by Regulations section 53.494		1/22	,, III	
6a Did the foundation, during the year, receive any funds, directly or indirectly, to	• •			
a personal benefit contract?	pay premiums on		es 🗓 No	
b Did the foundation, during the year, pay premiums, directly or indirectly, on a p	arconal hanafit contract?	۱۱ لــــا	f	6b X
If "Yes" to 6b, file Form 8870.	ersonal deficit contract:		<u> </u>	N A
7a At any time during the tax year, was the foundation a party to a prohibited tax s	halter transaction?		es X No	
		10		7b
Part VIII Information About Officers, Directors, Trust		nagers Highly		70
Paid Employees, and Contractors	ees, i ouridation wit	inagers, riigini	,	
1 List all officers, directors, trustees, foundation managers and their	compensation.	 		
	(b) Title, and average hours per week devoted	(c) Compensation	(d) Contributions to employee benefit plans and deferred	(e) Expense account, other
(a) Name and address	hours per week devoted to position	(If not paid, enter -0-)	and deferred compensation	account, other allowances
			, , , , , , , , , , , , , , , , , , , ,	
		1		
SEE STATEMENT 10		3,000.	٥.	О.
2- 0		7	<u>_</u>	
	·	'		
				İ
2 Compensation of five highest-paid employees (other than those inc	luded on line 1). If none,	enter "NONE."	<u> </u>	I
	(b) Title, and average		(d) Contributions to employee benefit plans	(e) Expense account, other
(a) Name and address of each employee paid more than \$50,000	hours per week devoted to position	(c) Compensation	and deferred compensation	account, other allowances
NONE	dovoted to position	-	compensation	unowanios.
NONE				
	<u> </u>			
		 		
		 		
Total number of other employees paid over \$50,000	L	<u> </u>	<u> </u>	C
Total number of other employees paid over \$50,000				

Form 990-PF (2015) THE ROE FOUNDATION	23-7	7 011541 Page 7
Part VIII Information About Officers, Directors, Trustees, Foundation Paid Employees, and Contractors (continued)	ation Managers, Highly	
3 Five highest-paid independent contractors for professional services. If none, enter	er "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 station number of organizations and other beneficiaries served, conferences convened, research papers pro	stical information such as the iduced, etc.	Expenses
1 N/A		
2		· · · · · · · · · · · · · · · · · · ·
3		
3		
	<u> </u>	
4		
Det IV B o		
Part IX-B Summary of Program-Related Investments Describe the two largest program-related investments made by the foundation during the tax year or	lines 1 and 2.	Amount
1		
2		
All other program-related investments. See instructions.		·
3 NONE		
		0.
Total, Add lines 1 through 3	<u> </u>	0.

Form **990-PF** (2015)

Page 8

P	Minimum Investment Return (All domestic foundations must complete this part. Foreign four	ndations,	see instructions.)
1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:	·	
а	Average monthly fair market value of securities	1a	29,922,844.
	Average of monthly cash balances	1b	55,435.
	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	29,978,279.
	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	29,978,279.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	449,674.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	29,528,605.
6	Minimum investment return. Enter 5% of line 5	6	1,476,430.
Р	art XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations are foreign organizations check here and do not complete this part.)	d certain	
1	Minimum investment return from Part X, line 6	1	1,476,430.
	Tax on investment income for 2015 from Part VI, line 5		
b	Income tax for 2015. (This does not include the tax from Part VI.)		
_	Add lines 2a and 2b	2c	9,718.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	1,466,712.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	1,466,712.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	1,466,712.
P	Qualifying Distributions (see instructions)		
1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		0 000 055
а		1a	2,008,075.
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:		
а	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	2,008,075.
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	9,718.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	1,998,357.
	Note. The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation (4940(e) reduction of tax in those years.	qualifies fo	or the section

Part XIII Undistributed Income (see instructions)

•	(a) Corpus	(b) Years prior to 2014	(c) 2014	(d) 2015
Distributable amount for 2015 from Part XI,				1,466,712.
Undistributed income, if any, as of the end of 2015				1,400,712.
a Enter amount for 2014 only			230,918.	
b Total for prior years:			230/3100	
b rotal for prior yours.		0.		
Excess distributions carryover, if any, to 2015	:		· · · · · · · · · · · · · · · · · · ·	
a From 2010				
b From 2011	-		į	
c From 2012	-			
d From 2013				
e From 2014				
f Total of lines 3a through e	o.l			
Qualifying distributions for 2015 from				
Part XII, line 4: ► \$ 2,008,075				
a Applied to 2014, but not more than line 2a	1		230,918.	
b Applied to undistributed income of prior				
years (Election required - see instructions)		0.		
c Treated as distributions out of corpus		<u> </u>		
(Election required - see instructions)	0.			
d Applied to 2015 distributable amount		**** ****		1,466,712.
e Remaining amount distributed out of corpus	310,445.			
Excess distributions carryover applied to 2015	0.			0.
(If an amount appears in column (d), the same amount must be shown in column (a))				
Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	310,445.			
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 2014. Subtract line				
4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2015. Subtract				
lines 4d and 5 from line 1. This amount must				
be distributed in 2016				0.
Amounts treated as distributions out of				
corpus to satisfy requirements imposed by	İ			
section 170(b)(1)(F) or 4942(g)(3) (Election				
may be required - see instructions)	0.			
Excess distributions carryover from 2010				
not applied on line 5 or line 7	0.			•
Excess distributions carryover to 2016.				
Subtract lines 7 and 8 from line 6a	310,445.			
Analysis of line 9:				
a Excess from 2011				
b Excess from 2012				
c Excess from 2013				
d Excess from 2014				
e Excess from 2015 310,445	•	<u> </u>		Form 000- PE (2015)

	FOUNDATION)11541 Page 1
Part XIV Private Operating F	oundations (see in	structions and Part V	II-A, question 9)	<u>N/A</u>	
1 a If the foundation has received a ruling of	or determination letter tha	t it is a private operating			
foundation, and the ruling is effective fo	or 2015, enter the date of	the ruling	▶	, <u> </u>	
b Check box to indicate whether the found		ng foundation described		4942(j)(3) or 49	942(j)(5)
2 a Enter the lesser of the adjusted net	Tax year		Prior 3 years	1	<u> </u>
income from Part I or the minimum	(a) 2015	(b) 2014	(c) 2013	(d) 2012	(e) Total
investment return from Part X for					
each year listed					
b 85% of line 2a				<u> </u>	
 Qualifying distributions from Part XII, 					
line 4 for each year listed		 			
d Amounts included in line 2c not					
used directly for active conduct of					
exempt activities		<u> </u>		<u> </u>	
e Qualifying distributions made directly	ĺ				
for active conduct of exempt activities.					
Subtract line 2d from line 2c		 			
3 Complete 3a, b, or c for the alternative test relied upon:					
a "Assets" alternative test - enter:					
(1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test - enter					
2/3 of minimum investment return shown in Part X, line 6 for each year listed					
c "Support" alternative test - enter:					<u> </u>
(1) Total support other than gross					
investment income (interest,					
dividends, rents, payments on	}				
securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public			······································		
and 5 or more exempt					
organizations as provided in section 4942(j)(3)(B)(iii)					
(3) Largest amount of support from					
an exempt organization					
(4) Gross investment income					
Part XV Supplementary Info	rmation (Comple	te this part only	if the foundation	n had \$5,000 or me	ore in assets
at any time during	the year-see inst	ructions.)			
1 Information Regarding Foundation	on Managers:				
a List any managers of the foundation wh		than 2% of the total cor	tributions received by the	e foundation before the clo	se of any tax
year (but only if they have contributed r	more than \$5,000). (See s	ection 507(d)(2).)			
NONE					
b List any managers of the foundation who other entity) of which the foundation had			(or an equally large porti	on of the ownership of a p	artnership or
NONE					
2 Information Regarding Contribut	ion, Grant, Gift, Loan	Scholarship, etc., F	rograms:		
Check here ► ☐ If the foundation of the foundation makes gifts, grants, etc.	only makes contributions (see instructions) to indi	to preselected charitable viduals or organizations	e organizations and does under other conditions, c	not accept unsolicited requ omplete items 2a, b, c, and	iests for funds. If d d.
a The name, address, and telephone num	ber or e-mail address of	the person to whom app	lications should be addre	ssed:	
SEE STATEMENT 11 b The form in which applications should	he submitted and informa	tion and materials they	should include:		
c Any submission deadlines:					
d Any restrictions or limitations on award	ls, such as by geographic	al areas, charitable fields	s, kinds of institutions, or	other factors:	

Part XV Supplementary Information (continued) 3 Grants and Contributions Paid During the Year or Approved for Future Payment If recipient is an individual, show any relationship to any foundation manager or substantial contributor Recipient Purpose of grant or contribution Foundation Amount status of Name and address (home or business) recipient a Paid during the year SEE ATTACHED STATEMENT SEE ATTACHED STATEMENT SEE ATTACHED STATEMENT 1,934,500, GREENVILLE, SC 29601 **▶** 3a 1,934,500, **b** Approved for future payment NONE **▶** 3b Total

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.	Unrelate	ed business income		ded by section 512, 513, or 514	(e)
9	(a) Business	(b)	(C) Exclu- sion	(d)	Related or exempt
1 Program service revenue:	code	Amount	code	Amount	function income
a					
b					
C					
d					
e			ļ		
g Fees and contracts from government agencies					
g Fees and contracts from government agencies 2 Membership dues and assessments					
3 Interest on savings and temporary cash					
investments			14	128.	
4 Dividends and interest from securities			14	410,362.	
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	679,608.	
9 Net income or (loss) from special events			<u>.</u>		
10 Gross profit or (loss) from sales of inventory					
11 Other revenue:					
a					
b					
C			ļ		
d	-				
e				1 000 000	
12 Subtotal. Add columns (b), (d), and (e)	<u></u>	0.		1,090,098.	
13 Total. Add line 12, columns (b), (d), and (e) (See worksheet in line 13 instructions to verify calculations.)				13	1,030,030.
	a tha Ass	amplishment of Ex		t Burnasas	
Part XVI-B Relationship of Activities to	o the Acco		emp	t Fulposes	
Line No. Explain below how each activity for which income			contrib	outed importantly to the accon	plishment of
the foundation's exempt purposes (other than l	by providing fu	nds for such purposes).			
N/A					
					
					
					_
					
	<u> </u>				
			<u>-</u>	···	
					· · ·
					5 000 PE (0045)

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Form 990-PF (2015)

THE ROE FOUNDATION

Part XVII

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

Exempt Organizations

1	Did the org	ganization directly or indir	ectly engage in any	of the followin	g with any other organization	on described in section	on 501(c) of		Yes	No
the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?								Ì		
a Transfers from the reporting foundation to a noncharitable exempt organization of:									l	
	(1) Cash							1a(1)		_X_
	(2) Other	assets						1a(2)		_X_
b	Other trans	sactions:								
	(1) Sales	of assets to a noncharitat	ole exempt organizat	ion				1b(1)		_X_
	(2) Purch	ases of assets from a nor	ncharitable exempt o	rganization				1b(2)		X
	(3) Renta	l of facilities, equipment, o	or other assets					1b(3)		X X X
	(4) Reimb	oursement arrangements						1b(4)		_X
	(5) Loans	or loan guarantees						1b(5)		<u>X</u>
	(6) Perfor	rmance of services or mei	mbership or fundrais	sing solicitatio	ns			1b(6)		X
C	Sharing of	facilities, equipment, mai	iling lists, other asse	ts, or paid em	ployees			1c		<u> X</u>
d					dule. Column (b) should alv				ets,	
	or services	s given by the reporting fo	oundation. If the four	ndation receive	ed less than fair market valu	e in any transaction	or sharing arrangement, sh	ow in		
	column (d) the value of the goods, o	other assets, or serv	ices received.		· • · · ·				
a)L	ine no	(b) Amount involved	(c) Name of	noncharitable	exempt organization	(d) Description	of transfers, transactions, and sh	aring arr	angeme	nts
				N/A			 			
							 			
			··				 			
					· · · · · · · · · · · · · · · · · · ·					
					, , ,,. .					
										
										
			<u> </u>							
										
							<u>.</u>			
2a	Is the four	ndation directly or indirect	tly affiliated with, or i	elated to, one	or more tax-exempt organiz	zations described		_		_
	in section	501(c) of the Code (other	than section 501(c)	(3)) or in sect	ion 527?			Yes	X	No
b	If "Yes," co	implete the following sche	edule.			 				
		(a) Name of org	anization		(b) Type of organization	(c) Description of relationshi	p		
		N/A								
						L				
					g accompanying schedules and n taxpayer) is based on all inform		I IVIAY I	he IRS d	iscuss t	his
Si	gn∣、	eller, it restrue, correct, and cop	inplete Declaration of pr	eparer (other than	taxpayer) is based on an inform	ation of which prepare		with the	prepar	er tr)?
He	ere	8 YXUEY W	. Noc. Ly	EUM Pr	V 9/12/16	OFFICE	R X	Yes		No
	Sign	nature of officer of trustee			Date	Title				
		Print/Type preparer's na	ime	Preparer's si	gnature	Date	Check if PTIN			_
				Λ ·		الماليات	self- employed			
	aid	CAROLINE I	NMAN	Warol	me annon	2111/6	P01			
Pr	eparer	Firm's name ► DIX		GOODM	AN LLP		Firm's EIN ▶ 56-07	479	81	
Us	se Only									
		Firm's address ▶ PO	ST OFFICE	BOX 2	5849					
			EENVILLE,				Phone no. 864-28	<u>8 – 5</u>	<u>544</u>	
				-						(2015)

Name	Amount	Purpose
1851 Centr for Constitutional Law	5,000.00	General operating expense
Acton Institute	5,000.00	General operating expense
Advance Arkansas Institute	15,000.00	General operating expense
Alabama Family Alliance	25,000.00	General operating expense
American Legislative Exchange Council	1,000.00	General operating expense
America's Future Foundation	5,000.00	General operating expense
Artisphere	5,000.00	General operating expense
Atlas Economic Research Foundation	10,000.00	General operating expense
Bastiat Society	1,000.00	General operating expense
Beacon Center of Tennessee	25,000.00	General operating expense
Beacon Hill Institute	5,000.00	General operating expense
Bluegrass Institute	15,000.00	General operating expense
Buckeye Institute	25,000.00	General operating expense
Caesar Rodney Institute	15,000.00	General operating expense
California Policy Center	10,000.00	General operating expense
Cascade Policy Institute	20,000.00	General operating expense
Cato Institute	2,500 00	General operating expense
Center of the American Experiment	10,000 00	General operating expense
Christ Church Episcopal School	125,000.00	General operating expense
Civitas Institute	20,000.00	General operating expense
Clare Boothe Luce	1,000.00	General operating expense
Claremont Institute-Golden State Center	1,000.00	General operating expense
Commonwealth Foundation	25,000.00	General operating expense
Empire Center for State Policy	15,000.00	General operating expense
Ethan Allen Institute	10,000.00	General operating expense
Exponent Philanthropy	1,500.00	General operating expense
Federalist Society	5,000.00	General operating expense
Fidelity Charitable Gift Fund	215,000.00	General operating expense
Foundation for Economic Education	5,000.00	General operating expense
Foundation for Government Accountability	25,000.00	General operating expense
Foundation for Teaching Economics	2,500 00	General operating expense
Freedom Foundation	25,000.00	General operating expense
Freedom Foundation of Minnesota	20,000.00	General operating expense
Fund for American Studies	2,500.00	General operating expense
Georgia Center of Opportunity	10,000.00	General operating expense
Georgia Public Policy Foundation	15,000.00	General operating expense
Goldwater Institute	25,000.00	General operating expense
Grassroot Institute of Hawaii	15,000.00	General operating expense
Greenville Symphony Association	25,000.00	General operating expense
Greenville Symphony Association	20,000.00	General operating expense
Heritage Foundation	100,000.00	General operating expense
Idaho Freedom Foundation	20,000.00	General operating expense
Illinois Policy Institute	25,000.00	General operating expense

Name	Amount	Purpose
Independence Institute	25,000.00	General operating expense
Indiana Policy Review Foundation	20,000.00	General operating expense
Institute for Humane Studies	5,000.00	General operating expense
Institute for Justice	10,000.00	General operating expense
Intercollegiate Studies Institute	15,000.00	General operating expense
James Madison Institute	25,000.00	General operating expense
John Locke Foundation	20,000.00	General operating expense
Josiah Bartlett Center for Public Policy	20,000.00	General operating expense
Kansas Policy Research Institute	20,000.00	General operating expense
Liberalni Institut	10,000.00	General operating expense
Liberty Foundation	5,000.00	General operating expense
Loaves and Fishes	5,000 00	General operating expense
Lucy Burns Institute	10,000.00	General operating expense
Mackinac Center for Public Policy	25,000.00	General operating expense
Maine Heritage Policy Center	25,000 00	General operating expense
Maryland Public Policy Institute	25,000.00	General operating expense
Media Research Center	2,500.00	General operating expense
Mercatus Center	2,500.00	General operating expense
Miracle Hill Ministnes	30,000.00	General operating expense
Mississippi Center for Public Policy	25,000 00	General operating expense
Mont Pelerin Society	10,000.00	General operating expense
Neighborhood Focus	2,500.00	General operating expense
Network of Enlightened Women	1,000.00	General operating expense
Nevada Policy Research Institute	20,000.00	General operating expense
New Criterion	1,000.00	General operating expense
Oklahoma Council of Public Affairs	25,000.00	General operating expense
Open the Books	1,000 00	General operating expense
Pacific Research Institute	20,000.00	General operating expense
Peace Center for the Performing Arts	15,000.00	General operating expense
Pelican Institute for Public Policy	20,000.00	General operating expense
Philadelphia Society	10,000.00	General operating expense
Philanthropic Enterprise	1,000.00	General operating expense
Philanthropy Roundtable	2,500.00	General operating expense
Piedmont Women's Center	5,000.00	General operating expense
Pioneer Institute for Public Policy Found	20,000.00	General operating expense
Platte Institute for Economic Research	15,000.00	General operating expense
Reason Foundation	5,000.00	General operating expense
Rhode Island Center	15,000 00	General operating expense
Rio Grande Foundation	15,000.00	General operating expense
Show-Me Institute	20,000.00	General operating expense
South Carolina Policy Council	150,000.00	General operating expense
Spark Freedom	5,000.00	General operating expense
State Policy Network	125,000 00	General operating expense

Name	Name Amount	
Steamboat Institute	2,500.00	General operating expense
StudentNewsDaily.com	2,500.00	General operating expense
Sutherland Institue	25,000.00	General operating expense
Talent Market	10,000.00	General operating expense
Texas Justice Foundation	25,000.00	General operating expense
Thomas Jefferson Institute	15,000.00	General operating expense
Virginia Institute for Public Policy	15,000.00	General operating expense
Washington Institute Foundation	25,000.00	General operating expense
Wyoming Liberty Group	10,000.00	General operating expense
Yankee Institute	20,000.00	General operating expense
Young America's Foundation	2,500 00	General operating expense
Total	1,934,500	

THE ROE FOUNDATION PAGE OF Part IV | Capital Gains and Losses for Tax on Investment Income (b) How acquired P - Purchase D - Donation (a) List and describe the kind(s) of property sold, e.g., real estate, (c) Date acquired (d) Date sold 2-story brick warehouse; or common stock, 200 shs. MLC Co. (mo., day, yr.) (mo., day, yr.) P 01/01/1512/31/15 1a BLACKROCK P 01/01/1512/31/15 b IR&M c MAINSTAY P 01/01/1512/31/15 01/01/1512/31/15 d PIMCO P 01/01/1512/31/15 e PRIMECAP P P 01/01/1512/31/15 fRICE, HALL, JAMES 01/01/1512/31/15 g SOUTH STATE BANK P h TEMPLETON P 01/01/1512/31/15 WEDGE P 01/01/1512/31/15 OTHER P 01/01/1512/31/15 k CAPITAL GAINS DIVIDENDS 1 m n 0 (g) Cost or other basis (f) Depreciation allowed (h) Gain or (loss) (e) Gross sales price (or allowable) plus expense of sale (e) plus (f) minus (g) 152,201 177,238. 25,037. а 10,334. 10,634. 300. b <65,662.> 2,192,528. 2,258,190. C 2,777,801. 26,551. 2,804,352. d 22,442. 22,442. 920,071. 104,602. 1,024,673. 10,755. 10,755. g <16,935.> 166,935. 150,000. h 1,045,306. 350,626. 1,395,932. 4,575. 4,575. 217,317. 217,317. m n 0 Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69 (I) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), (k) Excess of col. (i) (i) Adjusted basis but not less than "-0-") (i) F.M.V. as of 12/31/69 as of 12/31/69 over col. (j), if any 25,037. а 300. h <65,662.> C 26,551. d 22,442. е 104,602. f 10,755. g <16,935.> h 350,626. **4**,575. 217,317. k ĺ m n 0 { If gain, also enter in Part I, line 7 If (loss), enter "-0-" in Part I, line 7 }

2

679,608.

N/A

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

2 Capital gain net income or (net capital loss)

FORM 990-PF · INTERES	ST ON SAVI	NGS AND TEM	PORARY CA	SH IN	VESTMENTS	STATEMENT 1	
SOURCE VARIOUS TOTAL TO PART I, LINE 3		(A REVEI PER BO	NUE N	(B) NET INVESTMENT INCOME		(C) ADJUSTED NET INCOME	
			128.		128.		
		128.		128.			
FORM 990-PF	DIVIDEND	S AND INTER	EST FROM	SECUR	ITIES	STATEMENT 2	
SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A REVE S PER B	NUE	(B) NET INVES MENT INCC		
VARIOUS -	627,679	. 217,31	7. 410	,362.	410,36	52.	
TO PART I, LINE 4	627,679	217,31	7. 410	,362.	410,36	<u> </u>	
FORM 990-PF		ACCOUNTI	NG FEES			STATEMENT 3	
DESCRIPTION		(A) EXPENSES PER BOOKS	(B) NET INVE MENT INC		(C) ADJUSTED NET INCOM		
ACCOUNTING FEES		1,650.		330.		1,320.	
TO FORM 990-PF, PG	1, LN 16B	1,650.		330.		1,320.	
FORM 990-PF	0	THER PROFES	SIONAL FE	ES		STATEMENT 4	
DESCRIPTION		(A) EXPENSES PER BOOKS	(B) NET INVE MENT INC		(C) ADJUSTED NET INCOM		
INVESTMENT MANAGERS INVESTMENT COUNSELOR FIDUCIARY FEES	 RS	56,385. 31,373. 10,476.	31,	385. 373. 476.		0. 0. 0.	
TO FORM 990-PF, PG	1, LN 16C	98,234.	98,	234.		0.	

FORM 990-PF ·	TAX	ES	STATEMENT 5			
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOM			
PAYROLL TAXES FOREIGN TAXES FEDERAL EXCISE TAXES	3,611. 69. 13,452.	722. 69. 0.		2,889. 0. 0.		
TO FORM 990-PF, PG 1, LN 18	17,132.	791.		2,889.		
FORM 990-PF	OTHER E	XPENSES		STATEMENT 6		
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOM	(D) CHARITABLE PURPOSES		
INSURANCE OFFICE EXPENSE POSTAGE TELEPHONE SUBSCRIPTIONS	2,603. 5,187. 826. 4,401. 590.	165.		2,082. 4,149. 661. 3,521. 94.		
TO FORM 990-PF, PG 1, LN 23	13,607.	3,100.		10,507.		
FORM 990-PF	CORPORAT	E STOCK		STATEMENT 7		
DESCRIPTION		во	OK VALUE	FAIR MARKET VALUE		
FIRST UNION - WEDGE RICE, HALL JAMES DODGE & COX WESTWOOD MANNING & NAPIER PRIMECAP CREDIT SUISSE COMMODITY IRM PRUDENTIAL JENNISON NATURAL TEMPLETON BLACKROCK 2 WESTERN ASSET			2,285,601. 1,231,169. 2,143,289. 2,122,059. 2,141,216. 1,266,127. 914,202. 4,413,919. 880,000. 3,492,911. 3,088,259. 2,804,352.	2,954,727. 1,499,749. 2,083,888. 2,395,298. 1,969,544. 2,466,895. 435,322. 4,548,182. 446,590. 2,972,888. 2,914,198. 2,724,371.		
TOTAL TO FORM 990-PF, PART I	I, LINE 10B	2	6,783,104.	27,411,652.		

	NNING OF	END OF YEAR	
	OK VALUE	BOOK VALUE	FAIR MARKET VALUE
LESS ACCUMULATED AMORTIZATION	18,292. <18,292.>	18,292. <18,292.>	18,292. <18,292.
TO FORM 990-PF, PART II, LINE 15	0.	0.	0.

EXPLANATION

IN PRIOR YEARS, THE SC ATTORNEY GENERAL'S OFFICE REQUESTED A COPY OF THE FEDERAL 990-PF. AT THIS POINT IN TIME, THE ATTORNEY GENERAL'S OFFICE NO LONGER REQUESTS THE ANNUAL FILING. HOWEVER, THE ATTORNEY GENERAL'S OFFICE MAINTAINS THE RIGHT TO REQUEST THE 990-PF SHOULD NEED ARISE. THE ROE FOUNDATION WILL COMPLY WITH ANY SUCH REQUESTS AS APPLICABLE.

FORM 990-PF PART VIII - LIS TRUSTEES ANI		STAT	EMENT 10	
NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN CONTRIB	
SHIRLEY W. ROE 301 N. MAIN STREET, SUITE 1735 GREENVILLE, SC 29601	CHAIRMAN 10.00	500.	0.	0.
EDWIN J. FEULNER, JR. 301 N. MAIN STREET, SUITE 1735 GREENVILLE, SC 29601	VICE CHAIRMAN 0.50	500.	0.	0.
CARL O. HELSTROM, III 301 N. MAIN STREET, SUITE 1735 GREENVILLE, SC 29601	DIRECTOR 0.50	500.	0.	0.
TRACIE SHARP 301 N. MAIN STREET, SUITE 1735 GREENVILLE, SC 29601	DIRECTOR 0.50	500.	0.	0.
THOMAS L. WILLCOX 301 N. MAIN STREET, SUITE 1735 GREENVILLE, SC 29601	DIRECTOR 0.50	500.	0.	0.
BYRON S. LAMM 301 N. MAIN STREET, SUITE 1735 GREENVILLE, SC 29601	DIRECTOR 0.50	500.	0.	0.
TOTALS INCLUDED ON 990-PF, PAGE 6	, PART VIII	3,000.	0.	0.

23-7011541

FORM 990-PF GRANT APPLICATION SUBMISSION INFORMATION PART XV, LINES 2A THROUGH 2D

STATEMENT 11

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

MS. SHIRLEY W. ROE 301 N. MAIN ST., SUITE 1735 GREENVILLE, SC 29601

TELEPHONE NUMBER

(864)242-5007

FORM AND CONTENT OF APPLICATIONS

LIST OF DIRECTORS, LATEST AUDITED FINANCIAL STATEMENTS, DESCRIPTION OF ORGANIZATION

ANY SUBMISSION DEADLINES

OCTOBER 31

RESTRICTIONS AND LIMITATIONS ON AWARDS

PUBLIC POLICY ORGANIZATION SUPPORTIVE OF A FREE MARKET AND INSTITUTIONS IN GREENVILLE