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

2015

Open to Public Inspection

For calendar year 2015 or tax year beginning

, and ending

|                                                                                                                                                                                                                                                                                                                 |                                                                                                                                                  |                                                                                                                                                                            |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Name of foundation<br><b>ANONYMOUS TRUST</b><br><b>U/A DATED 2-4-2008</b>                                                                                                                                                                                                                                       |                                                                                                                                                  | A Employer identification number<br><b>26-6220561</b>                                                                                                                      |
| Number and street (or P.O. box number if mail is not delivered to street address)<br><b>PO BOX 31143</b>                                                                                                                                                                                                        | Room/suite                                                                                                                                       | B Telephone number<br><b>(919) 571-3332</b>                                                                                                                                |
| City or town, state or province, country, and ZIP or foreign postal code<br><b>RALEIGH, NC 27622</b>                                                                                                                                                                                                            |                                                                                                                                                  | C If exemption application is pending, check here <input type="checkbox"/>                                                                                                 |
| G Check all that apply:<br><input type="checkbox"/> Initial return<br><input type="checkbox"/> Final return<br><input type="checkbox"/> Address change<br><input type="checkbox"/> Initial return of a former public charity<br><input type="checkbox"/> Amended return<br><input type="checkbox"/> Name change |                                                                                                                                                  | D 1 Foreign organizations, check here <input type="checkbox"/><br>2 Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/> |
| H Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation<br><input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation                                                               |                                                                                                                                                  | E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>                                                              |
| I Fair market value of all assets at end of year (from Part II, col (c), line 16)<br>\$ <b>182,344,281.</b>                                                                                                                                                                                                     | J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual<br><input type="checkbox"/> Other (specify) _____ | F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>                                                           |

| Part I Analysis of Revenue and Expenses<br>(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 <input checked="" type="checkbox"/> if the foundation is not required to attach Sch. B                                                      |  |                                    |                           |                         |                                                             |
| 3 Interest on savings and temporary cash investments                                                                                                |  |                                    |                           |                         |                                                             |
| 4 Dividends and interest from securities                                                                                                            |  | 5,799,480.                         | 3,852,159.                |                         | STATEMENT 1                                                 |
| 5a Gross rents                                                                                                                                      |  |                                    |                           |                         |                                                             |
| b Net rental income or (loss)                                                                                                                       |  |                                    |                           |                         |                                                             |
| 6a Net gain or (loss) from sale of assets not on line 10                                                                                            |  | 683,037.                           |                           |                         |                                                             |
| b Gross sales price for all assets on line 6a <b>9,357,253.</b>                                                                                     |  |                                    |                           |                         |                                                             |
| 7 Capital gain net income (from Part IV, line 2)                                                                                                    |  |                                    | 683,037.                  |                         |                                                             |
| 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                                                                                                                     |  | 6,482,517.                         | 4,535,196.                |                         |                                                             |
| 13 Compensation of officers, directors, trustees, etc                                                                                               |  | 45,709.                            | 0.                        |                         | 45,709.                                                     |
| 14 Other employee salaries and wages                                                                                                                |  |                                    |                           |                         |                                                             |
| 15 Pension plans, employee benefits                                                                                                                 |  |                                    |                           |                         |                                                             |
| 16a Legal fees STMT 2                                                                                                                               |  | 9,450.                             | 0.                        |                         | 9,450.                                                      |
| b Accounting fees STMT 3                                                                                                                            |  | 14,725.                            | 0.                        |                         | 14,725.                                                     |
| c Other professional fees STMT 4                                                                                                                    |  | 156,253.                           | 118,210.                  |                         | 0.                                                          |
| 17 Interest                                                                                                                                         |  |                                    |                           |                         |                                                             |
| 18 Taxes STMT 5                                                                                                                                     |  | 89,135.                            | 0.                        |                         | 0.                                                          |
| 19 Depreciation and depletion                                                                                                                       |  |                                    |                           |                         |                                                             |
| 20 Occupancy                                                                                                                                        |  | 1,375.                             | 0.                        |                         | 1,375.                                                      |
| 21 Travel, conferences, and meetings                                                                                                                |  |                                    |                           |                         |                                                             |
| 22 Printing and publications                                                                                                                        |  |                                    |                           |                         |                                                             |
| 23 Other expenses STMT 6                                                                                                                            |  | 5,428.                             | 0.                        |                         | 5,428.                                                      |
| 24 Total operating and administrative expenses Add lines 13 through 23                                                                              |  | 322,075.                           | 118,210.                  |                         | 76,687.                                                     |
| 25 Contributions, gifts, grants paid                                                                                                                |  | 8,986,120.                         |                           |                         | 8,986,120.                                                  |
| 26 Total expenses and disbursements Add lines 24 and 25                                                                                             |  | 9,308,195.                         | 118,210.                  |                         | 9,062,807.                                                  |
| 27 Subtract line 26 from line 12:                                                                                                                   |  |                                    |                           |                         |                                                             |
| a Excess of revenue over expenses and disbursements                                                                                                 |  | -2,825,678.                        |                           |                         |                                                             |
| b Net investment income (if negative, enter -0-)                                                                                                    |  |                                    | 4,416,986.                |                         |                                                             |
| c Adjusted net income (if negative, enter -0-)                                                                                                      |  |                                    |                           | N/A                     |                                                             |

76-49

| <b>Part II Balance Sheets</b> 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 |
| <b>Assets</b>                                                                                                                 | 1 Cash - non-interest-bearing                                                             |                   |                |                       |
|                                                                                                                               | 2 Savings and temporary cash investments                                                  | 5,523,360.        | 4,792,783.     | 4,792,783.            |
|                                                                                                                               | 3 Accounts receivable ▶                                                                   |                   |                |                       |
|                                                                                                                               | Less: allowance for doubtful accounts ▶                                                   |                   |                |                       |
|                                                                                                                               | 4 Pledges receivable ▶                                                                    |                   |                |                       |
|                                                                                                                               | Less: allowance for doubtful accounts ▶                                                   |                   |                |                       |
|                                                                                                                               | 5 Grants receivable                                                                       |                   |                |                       |
|                                                                                                                               | 6 Receivables due from officers, directors, trustees, and other disqualified persons      |                   |                |                       |
|                                                                                                                               | 7 Other notes and loans receivable ▶                                                      |                   |                |                       |
|                                                                                                                               | Less: allowance for doubtful accounts ▶                                                   |                   |                |                       |
|                                                                                                                               | 8 Inventories for sale or use                                                             |                   |                |                       |
|                                                                                                                               | 9 Prepaid expenses and deferred charges                                                   |                   |                |                       |
|                                                                                                                               | 10a Investments - U.S. and state government obligations <b>STMT 9</b>                     | 41,837,807.       | 42,157,029.    | 46,863,157.           |
|                                                                                                                               | b Investments - corporate stock <b>STMT 10</b>                                            | 64,317,034.       | 64,960,379.    | 114,769,174.          |
|                                                                                                                               | c Investments - corporate bonds <b>STMT 11</b>                                            | 11,447,010.       | 10,452,404.    | 10,751,767.           |
|                                                                                                                               | 11 Investments - land, buildings, and equipment basis ▶                                   |                   |                |                       |
| Less: accumulated depreciation ▶                                                                                              |                                                                                           |                   |                |                       |
| 12 Investments - mortgage loans                                                                                               |                                                                                           |                   |                |                       |
| 13 Investments - other <b>STMT 12</b>                                                                                         | 6,524,521.                                                                                | 5,424,161.        | 5,167,400.     |                       |
| 14 Land, buildings, and equipment: basis ▶                                                                                    |                                                                                           |                   |                |                       |
| Less: accumulated depreciation ▶                                                                                              |                                                                                           |                   |                |                       |
| 15 Other assets (describe ▶)                                                                                                  |                                                                                           |                   |                |                       |
| 16 <b>Total assets</b> (to be completed by all filers - see the instructions. Also, see page 1, item I)                       | 129,649,732.                                                                              | 127,786,756.      | 182,344,281.   |                       |
| <b>Liabilities</b>                                                                                                            | 17 Accounts payable and accrued expenses                                                  |                   |                |                       |
|                                                                                                                               | 18 Grants payable                                                                         |                   |                |                       |
|                                                                                                                               | 19 Deferred revenue                                                                       |                   |                |                       |
|                                                                                                                               | 20 Loans from officers, directors, trustees, and other disqualified persons               |                   |                |                       |
|                                                                                                                               | 21 Mortgages and other notes payable                                                      |                   |                |                       |
|                                                                                                                               | 22 Other liabilities (describe ▶ <b>STATEMENT 13</b> )                                    | 2,285.            | 975,441.       |                       |
|                                                                                                                               | 23 <b>Total liabilities</b> (add lines 17 through 22)                                     | 2,285.            | 975,441.       |                       |
| <b>Net Assets or Fund Balances</b>                                                                                            | Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/>                   |                   |                |                       |
|                                                                                                                               | 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 ▶ <input checked="" type="checkbox"/> |                   |                |                       |
|                                                                                                                               | and complete lines 27 through 31.                                                         |                   |                |                       |
|                                                                                                                               | 27 Capital stock, trust principal, or current funds                                       | 129,647,447.      | 126,811,315.   |                       |
|                                                                                                                               | 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 <b>Total net assets or fund balances</b>                                                                                   | 129,647,447.                                                                              | 126,811,315.      |                |                       |
| 31 <b>Total liabilities and net assets/fund balances</b>                                                                      | 129,649,732.                                                                              | 127,786,756.      |                |                       |

**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<br>(must agree with end-of-year figure reported on prior year's return) | 1 | 129,647,447. |
| 2 Enter amount from Part I, line 27a                                                                                                                            | 2 | -2,825,678.  |
| 3 Other increases not included in line 2 (itemize) ▶ <b>SEE STATEMENT 7</b>                                                                                     | 3 | 162,279.     |
| 4 Add lines 1, 2, and 3                                                                                                                                         | 4 | 126,984,048. |
| 5 Decreases not included in line 2 (itemize) ▶ <b>SEE STATEMENT 8</b>                                                                                           | 5 | 172,733.     |
| 6 <b>Total net assets or fund balances at end of year</b> (line 4 minus line 5) - Part II, column (b), line 30                                                  | 6 | 126,811,315. |

## ANONYMOUS TRUST

Form 990-PF (2015)

U/A DATED 2-4-2008

26-6220561

Page 3

**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<br>P - Purchase<br>D - Donation | (c) Date acquired<br>(mo., day, yr.) | (d) Date sold<br>(mo., day, yr.) |
|------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------|--------------------------------------|----------------------------------|
| <b>1a PUBLICALLY TRADED SECURITIES</b>                                                                                             | <b>D</b>                                         | <b>VARIOUS</b>                       | <b>VARIOUS</b>                   |
| <b>b PUBLICALLY TRADED SECURITIES</b>                                                                                              | <b>P</b>                                         | <b>VARIOUS</b>                       | <b>VARIOUS</b>                   |
| <b>c CAPITAL GAINS DIVIDENDS</b>                                                                                                   |                                                  |                                      |                                  |
| <b>d</b>                                                                                                                           |                                                  |                                      |                                  |
| <b>e</b>                                                                                                                           |                                                  |                                      |                                  |

| (e) Gross sales price                                                                       | (f) Depreciation allowed<br>(or allowable) | (g) Cost or other basis<br>plus expense of sale | (h) Gain or (loss)<br>(e) plus (f) minus (g)                                              |
|---------------------------------------------------------------------------------------------|--------------------------------------------|-------------------------------------------------|-------------------------------------------------------------------------------------------|
| <b>a 8,480,048.</b>                                                                         |                                            | <b>8,365,053.</b>                               | <b>114,995.</b>                                                                           |
| <b>b 876,889.</b>                                                                           |                                            | <b>309,163.</b>                                 | <b>567,726.</b>                                                                           |
| <b>c 316.</b>                                                                               |                                            |                                                 | <b>316.</b>                                                                               |
| <b>d</b>                                                                                    |                                            |                                                 |                                                                                           |
| <b>e</b>                                                                                    |                                            |                                                 |                                                                                           |
| Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69 |                                            |                                                 | (i) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h)) |
| (i) F.M.V. as of 12/31/69                                                                   | (j) Adjusted basis<br>as of 12/31/69       | (k) Excess of col. (i)<br>over col. (j), if any |                                                                                           |
| <b>a</b>                                                                                    |                                            |                                                 | <b>114,995.</b>                                                                           |
| <b>b</b>                                                                                    |                                            |                                                 | <b>567,726.</b>                                                                           |
| <b>c</b>                                                                                    |                                            |                                                 | <b>316.</b>                                                                               |
| <b>d</b>                                                                                    |                                            |                                                 |                                                                                           |
| <b>e</b>                                                                                    |                                            |                                                 |                                                                                           |

|                                                                                                                                                                                        |                                                                                     |          |                 |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|----------|-----------------|
| <b>2</b> Capital gain net income or (net capital loss)                                                                                                                                 | { If gain, also enter in Part I, line 7<br>If (loss), enter -0- in Part I, line 7 } | <b>2</b> | <b>683,037.</b> |
| <b>3</b> Net short-term capital gain or (loss) as defined in sections 1222(5) and (6).<br>If gain, also enter in Part I, line 8, column (c).<br>If (loss), enter -0- in Part I, line 8 | { }                                                                                 | <b>3</b> | <b>N/A</b>      |

**Part V Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income**

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income.)

If section 4940(d)(2) applies, leave this part blank.

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?

☐ Yes ☒ No

If "Yes," the foundation does not qualify under section 4940(e). Do not complete this part.

**1** Enter the appropriate amount in each column for each year; see the instructions before making any entries.

| (a) Base period years<br>Calendar year (or tax year beginning in) | (b) Adjusted qualifying distributions | (c) Net value of noncharitable-use assets | (d) Distribution ratio<br>(col. (b) divided by col. (c)) |
|-------------------------------------------------------------------|---------------------------------------|-------------------------------------------|----------------------------------------------------------|
| 2014                                                              | 6,458,740.                            | 183,614,108.                              | .035176                                                  |
| 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                                                  |

|                                                                                                                                                                                       |          |                     |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|---------------------|
| <b>2</b> Total of line 1, column (d)                                                                                                                                                  | <b>2</b> | <b>.199507</b>      |
| <b>3</b> Average distribution ratio for the 5-year base period - divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years | <b>3</b> | <b>.039901</b>      |
| <b>4</b> Enter the net value of noncharitable-use assets for 2015 from Part X, line 5                                                                                                 | <b>4</b> | <b>186,932,251.</b> |
| <b>5</b> Multiply line 4 by line 3                                                                                                                                                    | <b>5</b> | <b>7,458,784.</b>   |
| <b>6</b> Enter 1% of net investment income (1% of Part I, line 27b)                                                                                                                   | <b>6</b> | <b>44,170.</b>      |
| <b>7</b> Add lines 5 and 6                                                                                                                                                            | <b>7</b> | <b>7,502,954.</b>   |
| <b>8</b> Enter qualifying distributions from Part XII, line 4                                                                                                                         | <b>8</b> | <b>9,062,807.</b>   |

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.

## ANONYMOUS TRUST

Form 990-PF (2015)

U/A DATED 2-4-2008

26-6220561

Page 4

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

|                                                                                                                                                                                                                                        |    |         |         |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----|---------|---------|
| 1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1.<br>Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions) |    |         |         |
| b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b                                                                           |    | 1       | 44,170. |
| 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       | 44,170. |
| 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       | 44,170. |
| 6 Credits/Payments:                                                                                                                                                                                                                    |    |         |         |
| a 2015 estimated tax payments and 2014 overpayment credited to 2015                                                                                                                                                                    | 6a | 40,000. |         |
| 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  | 40,000. |         |
| 8 Enter any penalty for underpayment of estimated tax. Check here <input checked="" type="checkbox"/> if Form 2220 is attached                                                                                                         | 8  | 57.     |         |
| 9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed                                                                                                                                                        | 9  | 4,227.  |         |
| 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 2016 estimated tax <input type="checkbox"/> Refunded <input checked="" type="checkbox"/>                                                                                             | 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)?<br>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:<br>(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?<br>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?<br>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:<br>• By language in the governing instrument, or<br>• By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?         | X   |    |
| 7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), and Part XV                                                                                                                                                                                                           | X   |    |
| 8a Enter the states to which the foundation reports or with which it is registered (see instructions) <input type="checkbox"/> NC                                                                                                                                                                                                            |     |    |
| 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 2015 or the taxable year beginning in 2015 (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

Form 990-PF (2015)

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

|                                                                                                                                                                                                                                                                                                                                    | Yes | No |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----|----|
| 11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)                                                                                                                                         |     | X  |
| 12 Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)                                                                                                                                        |     | X  |
| 13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application?<br>Website address ► <u>N/A</u>                                                                                                                                                                             | X   |    |
| 14 The books are in care of ► <u>THE NORTHERN TRUST COMPANY</u> Telephone no. ► <u>(312) 630-6000</u><br>Located at ► <u>50 SOUTH LASALLE STREET, CHICAGO, IL</u> ZIP+4 ► <u>60603</u>                                                                                                                                             |     |    |
| 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<br>► 15 <u>N/A</u>                                                                                                                          |     |    |
| 16 At any time during calendar year 2015, 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?<br>See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country ► |     | X  |

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

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

|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | Yes                                                                 | No |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------|----|
| 1a During the year did the foundation (either directly or indirectly):                                                                                                                                                                                                                                                                                                                                                                                                                           |                                                                     |    |
| (1) Engage in the sale or exchange, or leasing of property with a disqualified person?                                                                                                                                                                                                                                                                                                                                                                                                           | <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No |    |
| (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?                                                                                                                                                                                                                                                                                                                                                                                   | <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No |    |
| (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?                                                                                                                                                                                                                                                                                                                                                                                                       | <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No |    |
| (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?                                                                                                                                                                                                                                                                                                                                                                                                             | <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No |    |
| (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?                                                                                                                                                                                                                                                                                                                                                    | <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No |    |
| (6) Agree to pay money or property to a government official? (Exception Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)                                                                                                                                                                                                                                                   | <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No |    |
| b 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)?<br>Organizations relying on a current notice regarding disaster assistance check here                                                                                                                                                                                     | <u>N/A</u>                                                          |    |
| 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?                                                                                                                                                                                                                                                                                                        |                                                                     | X  |
| 2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):                                                                                                                                                                                                                                                                                                                 |                                                                     |    |
| a At the end of tax year 2015, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2015?<br>If "Yes," list the years ►                                                                                                                                                                                                                                                                                                                | <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No |    |
| b Are there any years listed in 2a for which the foundation is <b>not</b> 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.)                                                                                                                                                                               | <u>N/A</u>                                                          |    |
| c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.<br>►                                                                                                                                                                                                                                                                                                                                                                          |                                                                     |    |
| 3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?                                                                                                                                                                                                                                                                                                                                                                    | <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No |    |
| b If "Yes," did it have excess business holdings in 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) | <u>N/A</u>                                                          |    |
| 4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?                                                                                                                                                                                                                                                                                                                                                                               |                                                                     | X  |
| b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2015?                                                                                                                                                                                                                                                              |                                                                     | X  |

## ANONYMOUS TRUST

Form 990-PF (2015)

U/A DATED 2-4-2008

26-6220561

Page 6

**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)?

5b

X

Organizations relying on a current notice regarding disaster assistance check here

☐

c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?

N/A

☐ Yes ☐ No

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

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?

☐ Yes ☒ No

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

6b

X

If "Yes" to 6b, file Form 8870

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?

☐ Yes ☒ No

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

N/A

7b

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

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

| (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      | TRUSTEE                                                   |                                           |                                                                       |                                       |
| 207 N. CHESTNUT STREET |                                                           |                                           |                                                                       |                                       |
| CLINTON, NC 28328      | 0.00                                                      | 0.                                        | 0.                                                                    | 0.                                    |
| MARIA M. LYNCH         | TRUSTEE                                                   |                                           |                                                                       |                                       |
| PO BOX 30515           |                                                           |                                           |                                                                       |                                       |
| RALEIGH, NC 27622      | 0.00                                                      | 0.                                        | 0.                                                                    | 0.                                    |
| MARGARET TURLINGTON    | SCHOLARSHIP COORDINATOR                                   |                                           |                                                                       |                                       |
| P.O. BOX 2087          |                                                           |                                           |                                                                       |                                       |
| CLINTON, NC 28329      | 28.00                                                     | 45,709.                                   | 0.                                                                    | 0.                                    |
|                        |                                                           |                                           |                                                                       |                                       |
|                        |                                                           |                                           |                                                                       |                                       |
|                        |                                                           |                                           |                                                                       |                                       |

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

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

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

0

Form 990-PF (2015)

**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.

Form 990-PF (2015)

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

|          |                                                                                                             |           |              |
|----------|-------------------------------------------------------------------------------------------------------------|-----------|--------------|
| <b>1</b> | Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes: |           |              |
| <b>a</b> | Average monthly fair market value of securities                                                             | <b>1a</b> | 189,778,935. |
| <b>b</b> | Average of monthly cash balances                                                                            | <b>1b</b> |              |
| <b>c</b> | Fair market value of all other assets                                                                       | <b>1c</b> |              |
| <b>d</b> | <b>Total</b> (add lines 1a, b, and c)                                                                       | <b>1d</b> | 189,778,935. |
| <b>e</b> | Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)   | <b>1e</b> | 0.           |
| <b>2</b> | Acquisition indebtedness applicable to line 1 assets                                                        | <b>2</b>  | 0.           |
| <b>3</b> | Subtract line 2 from line 1d                                                                                | <b>3</b>  | 189,778,935. |
| <b>4</b> | Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)   | <b>4</b>  | 2,846,684.   |
| <b>5</b> | <b>Net value of noncharitable-use assets</b> Subtract line 4 from line 3. Enter here and on Part V, line 4  | <b>5</b>  | 186,932,251. |
| <b>6</b> | <b>Minimum investment return</b> Enter 5% of line 5                                                         | <b>6</b>  | 9,346,613.   |

**Part XI****Distributable Amount** (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ☐ and do not complete this part.)

|           |                                                                                                           |           |            |
|-----------|-----------------------------------------------------------------------------------------------------------|-----------|------------|
| <b>1</b>  | Minimum investment return from Part X, line 6                                                             | <b>1</b>  | 9,346,613. |
| <b>2a</b> | Tax on investment income for 2015 from Part VI, line 5                                                    | <b>2a</b> | 44,170.    |
| <b>b</b>  | Income tax for 2015. (This does not include the tax from Part VI.)                                        | <b>2b</b> |            |
| <b>c</b>  | Add lines 2a and 2b                                                                                       | <b>2c</b> | 44,170.    |
| <b>3</b>  | Distributable amount before adjustments. Subtract line 2c from line 1                                     | <b>3</b>  | 9,302,443. |
| <b>4</b>  | Recoveries of amounts treated as qualifying distributions                                                 | <b>4</b>  | 0.         |
| <b>5</b>  | Add lines 3 and 4                                                                                         | <b>5</b>  | 9,302,443. |
| <b>6</b>  | Deduction from distributable amount (see instructions)                                                    | <b>6</b>  | 0.         |
| <b>7</b>  | <b>Distributable amount</b> as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1 | <b>7</b>  | 9,302,443. |

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

|          |                                                                                                                                   |           |            |
|----------|-----------------------------------------------------------------------------------------------------------------------------------|-----------|------------|
| <b>1</b> | Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:                                        |           |            |
| <b>a</b> | Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26                                                     | <b>1a</b> | 9,062,807. |
| <b>b</b> | Program-related investments - total from Part IX-B                                                                                | <b>1b</b> | 0.         |
| <b>2</b> | Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes                         | <b>2</b>  |            |
| <b>3</b> | Amounts set aside for specific charitable projects that satisfy the:                                                              |           |            |
| <b>a</b> | Suitability test (prior IRS approval required)                                                                                    | <b>3a</b> |            |
| <b>b</b> | Cash distribution test (attach the required schedule)                                                                             | <b>3b</b> |            |
| <b>4</b> | <b>Qualifying distributions</b> Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4                  | <b>4</b>  | 9,062,807. |
| <b>5</b> | Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b | <b>5</b>  | 44,170.    |
| <b>6</b> | <b>Adjusted qualifying distributions</b> Subtract line 5 from line 4                                                              | <b>6</b>  | 9,018,637. |

**Note** The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years.

**Part XIII** Undistributed Income (see instructions)

|                                                                                                                                                                            | (a)<br>Corpus | (b)<br>Years prior to 2014 | (c)<br>2014 | (d)<br>2015 |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------|----------------------------|-------------|-------------|
| 1 Distributable amount for 2015 from Part XI, line 7                                                                                                                       |               |                            |             | 9,302,443.  |
| 2 Undistributed income, if any, as of the end of 2015                                                                                                                      |               |                            |             |             |
| a Enter amount for 2014 only                                                                                                                                               |               |                            | 8,485,148.  |             |
| b Total for prior years:                                                                                                                                                   |               | 0.                         |             |             |
| 3 Excess distributions carryover, if any, to 2015:                                                                                                                         |               |                            |             |             |
| a From 2010                                                                                                                                                                |               |                            |             |             |
| b From 2011                                                                                                                                                                |               |                            |             |             |
| c From 2012                                                                                                                                                                |               |                            |             |             |
| d From 2013                                                                                                                                                                |               |                            |             |             |
| e From 2014                                                                                                                                                                |               |                            |             |             |
| f Total of lines 3a through e                                                                                                                                              | 0.            |                            |             |             |
| 4 Qualifying distributions for 2015 from Part XII, line 4: ► \$ 9,062,807.                                                                                                 |               |                            |             |             |
| a Applied to 2014, but not more than line 2a                                                                                                                               |               |                            | 8,485,148.  |             |
| 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 2015 distributable amount                                                                                                                                     |               |                            |             | 577,659.    |
| e Remaining amount distributed out of corpus                                                                                                                               | 0.            |                            |             |             |
| 5 Excess distributions carryover applied to 2015 (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 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                                                              |               |                            |             | 8,724,784.  |
| 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 2010 not applied on line 5 or line 7                                                                                                 | 0.            |                            |             |             |
| 9 Excess distributions carryover to 2016. Subtract lines 7 and 8 from line 6a                                                                                              | 0.            |                            |             |             |
| 10 Analysis of line 9:                                                                                                                                                     |               |                            |             |             |
| a Excess from 2011                                                                                                                                                         |               |                            |             |             |
| b Excess from 2012                                                                                                                                                         |               |                            |             |             |
| c Excess from 2013                                                                                                                                                         |               |                            |             |             |
| d Excess from 2014                                                                                                                                                         |               |                            |             |             |
| e Excess from 2015                                                                                                                                                         |               |                            |             |             |



## ANONYMOUS TRUST

Form 990-PF (2015)

U/A DATED 2-4-2008

26-6220561 Page 11

**Part XV** Supplementary Information (continued)**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

| Recipient<br>Name and address (home or business)                              | If recipient is an individual,<br>show any relationship to<br>any foundation manager<br>or substantial contributor | Foundation<br>status of<br>recipient | Purpose of grant or<br>contribution                 | Amount     |
|-------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------|--------------------------------------|-----------------------------------------------------|------------|
| <b>a Paid during the year</b>                                                 |                                                                                                                    |                                      |                                                     |            |
| SEE ATTACHED STATEMENT 15                                                     |                                                                                                                    |                                      |                                                     | 8,986,120. |
|                                                                               |                                                                                                                    |                                      |                                                     |            |
|                                                                               |                                                                                                                    |                                      |                                                     |            |
|                                                                               |                                                                                                                    |                                      |                                                     |            |
|                                                                               |                                                                                                                    |                                      |                                                     |            |
|                                                                               |                                                                                                                    |                                      |                                                     |            |
| <b>Total</b>                                                                  |                                                                                                                    |                                      | <b>3a</b>                                           | 8,986,120. |
| <b>b Approved for future payment</b>                                          |                                                                                                                    |                                      |                                                     |            |
| NC MUSEUM OF HISTORY FOUNDATION<br>5 EAST EDENTON STREET<br>RALEIGH, NC 27601 |                                                                                                                    | PUBLIC CHARITY                       | CHALLENGE GRANT FOR<br>GENERAL OPERATING<br>SUPPORT | 1,000,000. |
| THE MADEIRA SCHOOL<br>8328 GEORGETOWN PIKE<br>MCLEAN, VA 22102                |                                                                                                                    | EDUCATIONAL<br>INSTITUTION           | DORM RENOVATION<br>PROJECT                          | 4,000,000. |
| IPAS<br>PO BOX 9990<br>CHAPEL HILL, NC 27515                                  |                                                                                                                    | PUBLIC CHARITY                       | GENERAL OPERATING<br>SUPPORT                        | 100,000.   |
| <b>Total</b>                                                                  |                                                                                                                    |                                      | <b>3b</b>                                           | 5,400,000. |

SEE CONTINUATION SHEET(S)

Form 990-PF (2015)

**Part XVI-A Analysis of Income-Producing Activities**

Enter gross amounts unless otherwise indicated.

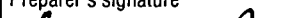
|                                                            | Unrelated business income |               | Excluded by section 512, 513, or 514 |               | (e)<br>Related or exempt<br>function income |
|------------------------------------------------------------|---------------------------|---------------|--------------------------------------|---------------|---------------------------------------------|
|                                                            | (a)<br>Business<br>code   | (b)<br>Amount | (c)<br>Exclu-<br>sion<br>code        | (d)<br>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                                   | 5,799,480.    |                                             |
| 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                                   | 683,037.      |                                             |
| 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.            |                                      | 6,482,517.    | 0.                                          |
| 13 Total. Add line 12, columns (b), (d), and (e)           |                           |               |                                      |               | 13 6,482,517.                               |

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

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

Line No. Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes).

NOT APPLICABLE

|                                       |                                                              |                                                                                     |         |                                                            |           |
|---------------------------------------|--------------------------------------------------------------|-------------------------------------------------------------------------------------|---------|------------------------------------------------------------|-----------|
| <b>Paid<br/>Preparer<br/>Use Only</b> | Print/Type preparer's name                                   | Preparer's signature                                                                | Date    | Check <input checked="" type="checkbox"/> if self-employed | PTIN      |
|                                       | SEREITA M. POWERS                                            |  | 3/18/16 |                                                            | P01200944 |
|                                       | Firm's name ▶ SEREITA M. POWERS                              |                                                                                     |         | Firm's EIN ▶                                               |           |
|                                       | Firm's address ▶ 300 ALLAN LANE<br>MELBOURNE BEACH, FL 32951 |                                                                                     |         | Phone no. 321-914-4935                                     |           |

26-6220561

### 3 Grants and Contributions Approved for Future Payment (Continuation)

523635  
04-01-15

| FORM 990-PF                                              |                 | DIVIDENDS AND INTEREST FROM SECURITIES |                             |                                   | STATEMENT                     | 1 |
|----------------------------------------------------------|-----------------|----------------------------------------|-----------------------------|-----------------------------------|-------------------------------|---|
| SOURCE                                                   | GROSS<br>AMOUNT | CAPITAL<br>GAINS<br>DIVIDENDS          | (A)<br>REVENUE<br>PER BOOKS | (B)<br>NET INVEST-<br>MENT INCOME | (C)<br>ADJUSTED<br>NET INCOME |   |
| RAYMOND JAMES                                            | 1,204,304.      | 0.                                     | 1,204,304.                  | 1,204,304.                        |                               |   |
| THE NORTHERN TRUST<br>COMPANY                            | 4,418,534.      | 316.                                   | 4,418,218.                  | 2,470,897.                        |                               |   |
| THE NORTHERN TRUST<br>COMPANY ACCRUED<br>MARKET DISCOUNT | 176,958.        | 0.                                     | 176,958.                    | 176,958.                          |                               |   |
| TO PART I, LINE 4                                        | 5,799,796.      | 316.                                   | 5,799,480.                  | 3,852,159.                        |                               |   |

| FORM 990-PF                |                              | LEGAL FEES                        |                               |                               | STATEMENT | 2 |
|----------------------------|------------------------------|-----------------------------------|-------------------------------|-------------------------------|-----------|---|
| DESCRIPTION                | (A)<br>EXPENSES<br>PER BOOKS | (B)<br>NET INVEST-<br>MENT INCOME | (C)<br>ADJUSTED<br>NET INCOME | (D)<br>CHARITABLE<br>PURPOSES |           |   |
| LEGAL FEES                 | 9,450.                       | 0.                                |                               | 9,450.                        |           |   |
| TO FM 990-PF, PG 1, LN 16A | 9,450.                       | 0.                                |                               | 9,450.                        |           |   |

| FORM 990-PF                  |                              | ACCOUNTING FEES                   |                               |                               | STATEMENT | 3 |
|------------------------------|------------------------------|-----------------------------------|-------------------------------|-------------------------------|-----------|---|
| DESCRIPTION                  | (A)<br>EXPENSES<br>PER BOOKS | (B)<br>NET INVEST-<br>MENT INCOME | (C)<br>ADJUSTED<br>NET INCOME | (D)<br>CHARITABLE<br>PURPOSES |           |   |
| ACCOUNTING FEES              | 4,475.                       | 0.                                |                               | 4,475.                        |           |   |
| BOOKKEEPING FEES             | 10,250.                      | 0.                                |                               | 10,250.                       |           |   |
| TO FORM 990-PF, PG 1, LN 16B | 14,725.                      | 0.                                |                               | 14,725.                       |           |   |

| FORM 990-PF                   | OTHER PROFESSIONAL FEES      |                                   |                               | STATEMENT                     | 4  |
|-------------------------------|------------------------------|-----------------------------------|-------------------------------|-------------------------------|----|
| DESCRIPTION                   | (A)<br>EXPENSES<br>PER BOOKS | (B)<br>NET INVEST-<br>MENT INCOME | (C)<br>ADJUSTED<br>NET INCOME | (D)<br>CHARITABLE<br>PURPOSES |    |
| FIDUCIARY FEES NORTHERN TRUST | 91,991.                      | 53,948.                           |                               |                               | 0. |
| FIDUCIARY FEES RAYMOND JAMES  | 64,262.                      | 64,262.                           |                               |                               | 0. |
| TO FORM 990-PF, PG 1, LN 16C  | 156,253.                     | 118,210.                          |                               |                               | 0. |

| FORM 990-PF                     | TAXES                        |                                   |                               | STATEMENT                     | 5  |
|---------------------------------|------------------------------|-----------------------------------|-------------------------------|-------------------------------|----|
| DESCRIPTION                     | (A)<br>EXPENSES<br>PER BOOKS | (B)<br>NET INVEST-<br>MENT INCOME | (C)<br>ADJUSTED<br>NET INCOME | (D)<br>CHARITABLE<br>PURPOSES |    |
| FOREIGN TAXES PAID ON DIVIDENDS | 12,198.                      | 0.                                |                               |                               | 0. |
| EXCISE TAX                      | 76,937.                      | 0.                                |                               |                               | 0. |
| TO FORM 990-PF, PG 1, LN 18     | 89,135.                      | 0.                                |                               |                               | 0. |

| FORM 990-PF                   | OTHER EXPENSES               |                                   |                               | STATEMENT                     | 6      |
|-------------------------------|------------------------------|-----------------------------------|-------------------------------|-------------------------------|--------|
| DESCRIPTION                   | (A)<br>EXPENSES<br>PER BOOKS | (B)<br>NET INVEST-<br>MENT INCOME | (C)<br>ADJUSTED<br>NET INCOME | (D)<br>CHARITABLE<br>PURPOSES |        |
| POSTAGE, MAILING SERVICE      | 170.                         | 0.                                |                               |                               | 170.   |
| OFFICE EXPENSE                | 186.                         | 0.                                |                               |                               | 186.   |
| TELEPHONE                     | 582.                         | 0.                                |                               |                               | 582.   |
| TRAVEL AND MEETINGS           | 1,099.                       | 0.                                |                               |                               | 1,099. |
| SCHOLARSHIP COMMITTEE EXPENSE | 3,391.                       | 0.                                |                               |                               | 3,391. |
| TO FORM 990-PF, PG 1, LN 23   | 5,428.                       | 0.                                |                               |                               | 5,428. |

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|-------------|------------------------------------------------|-----------|---|
| FORM 990-PF | OTHER INCREASES IN NET ASSETS OR FUND BALANCES | STATEMENT | 7 |
|-------------|------------------------------------------------|-----------|---|

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| DESCRIPTION                                      | AMOUNT   |
|--------------------------------------------------|----------|
| INTEREST AND DIVIDENDS RECEIVED IN 2015 FOR 2014 | 162,279. |
| TOTAL TO FORM 990-PF, PART III, LINE 3           | 162,279. |

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|-------------|------------------------------------------------|-----------|---|
| FORM 990-PF | OTHER DECREASES IN NET ASSETS OR FUND BALANCES | STATEMENT | 8 |
|-------------|------------------------------------------------|-----------|---|

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| DESCRIPTION                                      | AMOUNT   |
|--------------------------------------------------|----------|
| INTEREST AND DIVIDENDS RECEIVED IN 2016 FOR 2015 | 167,671. |
| 2015 ACCRUED INTEREST PAID REDUCING 2016 INCOME  | 5,062.   |
| TOTAL TO FORM 990-PF, PART III, LINE 5           | 172,733. |

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|             |                                            |           |   |
|-------------|--------------------------------------------|-----------|---|
| FORM 990-PF | U.S. AND STATE/CITY GOVERNMENT OBLIGATIONS | STATEMENT | 9 |
|-------------|--------------------------------------------|-----------|---|

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| DESCRIPTION                                      | U.S.<br>GOV'T | OTHER<br>GOV'T | BOOK VALUE  | FAIR MARKET<br>VALUE |
|--------------------------------------------------|---------------|----------------|-------------|----------------------|
| SEE ATTACHED SCHEDULE                            |               | X              | 42,157,029. | 46,863,157.          |
| TOTAL U.S. GOVERNMENT OBLIGATIONS                |               |                |             |                      |
| TOTAL STATE AND MUNICIPAL GOVERNMENT OBLIGATIONS |               |                | 42,157,029. | 46,863,157.          |
| TOTAL TO FORM 990-PF, PART II, LINE 10A          |               |                | 42,157,029. | 46,863,157.          |

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|-------------|-----------------|-----------|----|
| FORM 990-PF | CORPORATE STOCK | STATEMENT | 10 |
|-------------|-----------------|-----------|----|

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| DESCRIPTION                             | BOOK VALUE  | FAIR MARKET<br>VALUE |
|-----------------------------------------|-------------|----------------------|
| SEE ATTACHED SCHEDULE                   | 64,960,379. | 114,769,174.         |
| TOTAL TO FORM 990-PF, PART II, LINE 10B | 64,960,379. | 114,769,174.         |

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| FORM 990-PF                             | CORPORATE BONDS | STATEMENT 11      |
|-----------------------------------------|-----------------|-------------------|
| DESCRIPTION                             | BOOK VALUE      | FAIR MARKET VALUE |
| SEE ATTACHED SCHEDULE                   | 10,452,404.     | 10,751,767.       |
| TOTAL TO FORM 990-PF, PART II, LINE 10C | 10,452,404.     | 10,751,767.       |

| FORM 990-PF                            | OTHER INVESTMENTS |            | STATEMENT 12      |
|----------------------------------------|-------------------|------------|-------------------|
| DESCRIPTION                            | VALUATION METHOD  | BOOK VALUE | FAIR MARKET VALUE |
| SEE ATTACHED SCHEDULE                  | COST              | 5,424,161. | 5,167,400.        |
| TOTAL TO FORM 990-PF, PART II, LINE 13 |                   | 5,424,161. | 5,167,400.        |

| FORM 990-PF                            | OTHER LIABILITIES | STATEMENT 13 |
|----------------------------------------|-------------------|--------------|
| DESCRIPTION                            | BOY AMOUNT        | EOY AMOUNT   |
| OUTSTANDING CHECKS(NET)                | 1,040.            | 973,950.     |
| PAYROLL LIABILITIES                    | 1,245.            | 1,491.       |
| TOTAL TO FORM 990-PF, PART II, LINE 22 | 2,285.            | 975,441.     |

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

FORM AND CONTENT OF APPLICATIONS

APPLICANTS SHOULD SUBMIT THE PERSONAL INFORMATION FORM (AVAILABLE AT THE WEBSITE [HTTP://WWW.SIMPLEGIFTSFUND.ORG](http://WWW.SIMPLEGIFTSFUND.ORG)), A DESCRIPTION OF THE PROPOSED PROJECT THAT MUST INCLUDE A TITLE AND SUMMARY OF 50 WORDS OR LESS, A NARRATIVE OF 500 WORDS OR LESS THAT EXPLAINS THE NUMBER OF STUDENTS SERVED, WHAT THE STUDENTS WILL LEARN, HOW AND WHERE THE STUDENTS WILL LEARN, WHY THE PROJECT IS NEEDED, WHEN THE STUDENTS WILL LEARN (A TIME LINE), HOW THE PROJECT'S SUCCESS WILL BE EVALUATED AND HOW THE PROJECT IMPROVES THE STUDENT'S KNOWLEDGE AND SKILLS. IN ADDITION, A LINE ITEM BUDGET FOR THE PROPOSED GRANT MUST BE SUBMITTED. IF EDUCATOR STIPENDS ARE INCLUDED IN THE GRANT, TWO SEPARATE AMOUNTS SHOULD BE INDICATED IN THE BUDGET AND TWO CHECKS WILL BE ISSUED (ONE TO THE GRANTEE AND ONE TO THE FISCAL AGENT). THE EDUCATOR WILL RECEIVE AN IRS INCOME REPORTING 1099MISC FOR THE STIPEND. ANY ADDITIONAL SUPPORT PROVIDED FOR THE PROJECT MUST BE IDENTIFIED.

ANY SUBMISSION DEADLINES

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

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. \$129,625 TOTAL GRANTS WERE AWARDED IN 2015.

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. \$228,850 IN SCHOLARSHIPS WERE PAID IN 2015.

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 \$32,000 WERE PAID IN 2015.

ANONYMOUS TRUST U/A DATED 2-4-2008  
BALANCE SHEET ATTACHMENTS  
TAX YEAR: 2015

| 990PF<br>PAGE 2<br>LINE | 10a | INVESTMENTS- U S AND<br>STATE GOVERNMENT OBLIGATIONS | BEGINNING OF YEAR |                |                          | END OF YEAR |  |
|-------------------------|-----|------------------------------------------------------|-------------------|----------------|--------------------------|-------------|--|
|                         |     |                                                      | (a) BOOK VALUE    | (b) BOOK VALUE | (c) FAIR MARKET<br>VALUE |             |  |
|                         |     | ADMINISTRATORS OF THE TULANE EDL FD LA REV 5 0%      | 450,000           | 450,000        | 489,350                  |             |  |
|                         |     | ALBEMARLE NC HOSP AUTH HEALTH CARE                   | 1,565,681         | 1,565,681      | 1,864,934                |             |  |
|                         |     | ARIZONA BRD REGENTS CTFS PARTN 3 09%                 | -                 | 246,800        | 243,597                  |             |  |
|                         |     | BALDWIN CNTY ALA 4 25%                               | 494,675           | 494,675        | 508,130                  |             |  |
|                         |     | BRISTOL VA 4.888%                                    | 506,727           | 506,651        | 514,350                  |             |  |
|                         |     | CHICAGO ILL BRD ED 4 882%                            | 200,000           | 200,000        | 184,024                  |             |  |
|                         |     | CHICAGO ILL BRD ED 5 082%                            | 600,000           | 600,000        | 546,726                  |             |  |
|                         |     | COLUMBUS-FRANKLIN CNTY OHIO FIN AUTH 3 3%            | -                 | 496,250        | 490,505                  |             |  |
|                         |     | CORPUS CHRISTI TEX REGL TRANSN AUTH SYS REV 6.1%     | 770,805           | 770,805        | 870,293                  |             |  |
|                         |     | DUNDEE TWP ILL PK DIST 6.0%                          | 132,707           | 132,707        | 165,131                  |             |  |
|                         |     | FLORIDA HURRICANE CATASTROPHE FD 2.995%              | -                 | 309,506        | 304,236                  |             |  |
|                         |     | FLORIDA ST BRD GOVERNORS FLA INTL UNIV               | 100,000           | -              | -                        |             |  |
|                         |     | FORT LAUDERDALE FL SPL OBLIG 5.143%                  | 745,005           | 745,005        | 798,120                  |             |  |
|                         |     | FULTON CNTY GA DEV AUTH REV 5 21%                    | 508,026           | 507,704        | 512,670                  |             |  |
|                         |     | GRAND PRAIRIE TEX SALES TAX REV 4.0%                 | -                 | 480,384        | 471,668                  |             |  |
|                         |     | GUILFORD CNTY NC PUB FACS CORP 4.564%                | 329,833           | 329,833        | 362,568                  |             |  |
|                         |     | HAGERSTOWN MD 5.2%                                   | 253,440           | 253,440        | 275,365                  |             |  |
|                         |     | HEALTH CARE AUTH FOR BAPTIST HEALTH ALA 5.5%         | 237,033           | 237,033        | 252,123                  |             |  |
|                         |     | ILLINOIS ST 5.727%                                   | 513,057           | 511,424        | 531,200                  |             |  |
|                         |     | JACKSON OHIO CITY SCH DIST 2.35%                     | -                 | 433,795        | 425,125                  |             |  |
|                         |     | MADISON CNTY ILL CMNTY UNIT SCH DIST 2.9%            | -                 | 494,525        | 488,555                  |             |  |
|                         |     | MISSISSIPPI ST 3 429%                                | -                 | 250,000        | 242,740                  |             |  |
|                         |     | MISSISSIPPI ST 3 529%                                | -                 | 250,000        | 238,070                  |             |  |
|                         |     | MONTGOMERY CNTY NC CTFS PARTN PUB FACS               | 439,061           | 439,811        | 473,814                  |             |  |
|                         |     | MONTGOMERY CNTY NC CTFS PARTN PUB FACS               | 434,839           | 435,912        | 473,814                  |             |  |
|                         |     | NC CAPS FACS FIN AGY EDL FACSREV                     | 494,845           | -              | -                        |             |  |
|                         |     | NC CAPS FACS FIN AGY EDL FACSREV                     | 197,860           | 199,059        | 215,126                  |             |  |
|                         |     | NC CAPS FACS FIN AGY FIN AGY STUDENT                 | 53,951            | -              | -                        |             |  |
|                         |     | NC EASTN MUN PWR AGY PWR SYS REV SER                 | 443,489           | 444,851        | 491,609                  |             |  |
|                         |     | NC EASTN MUN PWR AGY PWR SYS REV SER                 | 509,850           | 511,831        | 556,437                  |             |  |
|                         |     | NC MED CARE COMMN HEALTH CARE EXTRAS                 | 694,715           | -              | -                        |             |  |
|                         |     | NC MED CARE COMMN HEALTH CARE FACS                   | 493,420           | -              | -                        |             |  |
|                         |     | NC MED CARE COMMN HEALTH CARE FACS                   | 978,110           | -              | -                        |             |  |

ANONYMOUS TRUST U/A DATED 2-4-2008  
BALANCE SHEET ATTACHMENTS  
TAX YEAR 2015

990PF

PAGE 2

| LINE                                        | BEGINNING OF YEAR |                | END OF YEAR           |  |
|---------------------------------------------|-------------------|----------------|-----------------------|--|
|                                             | (a) BOOK VALUE    | (b) BOOK VALUE | (c) FAIR MARKET VALUE |  |
| NC MED CARE COMMN HEALTH CARE FACS          | 1,515,723         | 1,515,723      | 1,662,755             |  |
| NC MED CARE COMMN HEALTH CARE FACS          | 512,300           | 513,440        | 545,000               |  |
| NC MED CARE COMMN HEALTH CARE FACS          | 3,340,721         | 3,348,394      | 3,648,715             |  |
| NC MED CARE COMMN HEALTH CARE FACS          | 3,229,301         | 3,233,902      | 3,647,303             |  |
| NC MED CARE COMMN HEALTH CARE FACS          | 1,444,824         | 1,444,824      | 1,810,674             |  |
| NC MED CARE COMMN HEALTH CARE FACS          | 900,000           | 901,186        | 1,000,000             |  |
| NC MED CARE COMMN HEALTH CARE FIRST         | 221,894           | -              | -                     |  |
| NC MED CARE COMMN HEALTH CARE FIRST         | 197,000           | -              | -                     |  |
| NC MED CARE COMMN HEALTH CARE FIRST         | 131,078           | 131,674        | 142,827               |  |
| NC MED CARE COMMN HEALTH CARE FIRST         | 527,456           | 527,456        | 545,000               |  |
| NC MED CARE COMMN HEALTH CARE FIRST         | 502,213           | 500,000        | 500,000               |  |
| NC MED CARE COMMN HEALTH CARE FIRST         | 211,466           | 211,962        | 242,631               |  |
| NC MED CARE COMMN HEALTH CARE FIRST         | 338,500           | 338,500        | 502,285               |  |
| NC MED CARE COMMN HEALTH CARE FIRST         | 448,490           | 448,490        | 507,845               |  |
| NC MED CARE COMMN HEALTH CARE FIRST         | 963,390           | 963,766        | 1,072,620             |  |
| NC MED CARE COMMN RETIREMENT FACS           | 426,644           | -              | -                     |  |
| NC MED CARE COMMN RETIREMENT FACS           | 394,272           | 396,131        | 456,337               |  |
| NC MED CARE COMMN RETIREMENT FACS           | 1,006,965         | 1,006,965      | 1,557,045             |  |
| NC MED CARE COMMN RETIREMENT FACS           | 2,999,912         | 3,003,776      | 3,592,585             |  |
| NC MED CARE COMMN RETIREMENT FIRST          | 700,360           | -              | -                     |  |
| NC MED CARE COMMN RETIREMENT FIRST          | 1,070,454         | 1,070,454      | 1,135,849             |  |
| NC MED CARE COMMN RETIREMENT FIRST          | 453,000           | -              | -                     |  |
| NC MED CARE COMMN RETIREMENT FIRST          | 350,000           | 350,000        | 515,535               |  |
| NC MED CARE COMMN RETIREMENT FIRST          | 2,126,396         | 2,126,396      | 2,528,415             |  |
| NC MED CARE COMMN RETIREMENT FIRST          | 1,969,124         | 1,969,124      | 2,221,288             |  |
| NC STATE UNIV NC RALEIGH REV 2 573%         | -                 | 869,759        | 863,030               |  |
| NEW JERSEY ECONOMIC DEV AUTH REV 2.321%     | -                 | 248,828        | 250,917               |  |
| OAKLAND CALIF PENSION OBLIG 3.6%            | -                 | 516,163        | 502,485               |  |
| PEORIA CNTY ILL SCH DIST NO 150 5 35%       | 250,000           | 250,000        | 272,042               |  |
| PEORIA CNTY ILL SCH DIST NO 150 5.45%       | 160,000           | 160,000        | 173,845               |  |
| PERRY CNTY KY SCH DIST FIN CORP 5 0%        | 312,557           | 312,245        | 309,906               |  |
| PHENIX CITY ALA 5.25%                       | 160,000           | 160,000        | 166,173               |  |
| PHENIX CITY ALA 5.25%                       | 337,667           | 337,667        | 347,664               |  |
| RALEIGH DURHAM NC ARPT AUTH ARPT REV        | 509,170           | 510,206        | 538,324               |  |
| READING PA 5 53%                            | 526,586           | 526,586        | 519,750               |  |
| SOUTHWEST HIGHER ED AUTH INC TEX REV 4.156% | 444,375           | 444,375        | 506,670               |  |

990PF  
PAGE 2  
LINE

| 10b | INVESTMENTS-CORPORATE STOCK           | END OF YEAR<br>SHARES HELD |
|-----|---------------------------------------|----------------------------|
|     | ABBOTT LABORATORIES                   | 35,200                     |
|     | ANADARKO PETE CORPORATION             | 16,900                     |
|     | APPLE INCORPORATED                    | 18,000                     |
|     | CARDINAL HEALTH, INC                  | 21,200                     |
|     | CATEPILLAR INC DEL                    | 15,050                     |
|     | CHEVRON CORPORATION                   | 13,000                     |
|     | COCA-COLA COMPANY                     | 32,800                     |
|     | COSTCO WHOLESALE CORPORATION          | 10,000                     |
|     | DEERE & COMPANY                       | 14,700                     |
|     | DISCOVER FINL SVCS COM                | 7,380                      |
|     | DOLLAR GENERAL CORP                   | 21,000                     |
|     | EXPRESS SCRIPTS HLDG CO               | 194                        |
|     | EXXON MOBIL CORPORATION               | 16,000                     |
|     | FIRST CITIZENS BANCSHARES INC NC CL A | 75,516                     |
|     | FREEMPORT-MCMORAN COPPER & GOLD       | 40,000                     |
|     | GENERAL ELECTRIC CO                   | 19,262                     |
|     | INTL BUSINESS MACHINES CORP           | 6,800                      |
|     | JPMORGAN CHASE & COMPANY              | 15,000                     |
|     | JOHNSON & JOHNSON                     | 13,400                     |
|     | KANSAS CITY SOUTHERN COM NEW          | 12,000                     |
|     | KRAFT HEINZ COMPANY                   | 16,800                     |
|     | LINCOLN NATIONAL CORP                 | 288,500                    |
|     | LINNCO LLC COM SHS                    | 70,000                     |
|     | MCDONALDS CORP                        | 12,000                     |
|     | MERCK & CO INC NEW                    | 2,312                      |

ANONYMOUS TRUST U/A DATED 2-4-2008  
BALANCE SHEET ATTACHMENTS  
TAX YEAR. 2015

990PF

PAGE 2

| LINE           |                                                | BEGINNING OF YEAR |                | END OF YEAR           |  |
|----------------|------------------------------------------------|-------------------|----------------|-----------------------|--|
|                |                                                | (a) BOOK VALUE    | (b) BOOK VALUE | (c) FAIR MARKET VALUE |  |
| 58,990         | MFC ISHARES TR SELECT DIVID ETF FD             | 3,436,035         | 3,436,035      | 4,433,098             |  |
| 63,453         | MFC ISHARES TR MSCI EAFE ETF FD                | 3,428,958         | 3,428,958      | 3,727,864             |  |
| 41,233         | MFC ISHARES TR MSCI EMERGING MKTS INDEX FD ETF | 1,721,698         | 1,721,698      | 1,327,290             |  |
| 41,258         | MFC ISHARES TR RUSSELL 2000 ETF FD             | 3,425,046         | 3,425,046      | 4,641,938             |  |
| 37,972         | MFC SPDR S&P MIDCAP 400 ETF TR UNIT SER        | 6,830,238         | 6,830,238      | 9,648,305             |  |
| 14,760         | MORGAN STANLEY COM                             | 57,276            | 57,276         | 469,516               |  |
| 18,000         | MOTOROLA SOLUTIONS, INC                        | 1,031,638         | 1,031,638      | 1,232,100             |  |
| 18,200         | NORFOLK SOUTHERN CORP                          | 1,248,855         | 1,248,855      | 1,539,538             |  |
| 5,000          | NUCOR CORP                                     | 163,786           | 163,786        | 201,500               |  |
| 44,200         | PFIZER INC                                     | 1,172,031         | 1,172,031      | 1,426,776             |  |
| 100            | PRINCIPAL FINL GROUP INC                       |                   |                | 4,498                 |  |
| 15,000         | PROCTER & GAMBLE CO                            | 1,085,349         | 1,085,349      | 1,191,150             |  |
| 10,000         | SOUTHERN COMPANY                               | 444,516           | 444,516        | 467,900               |  |
| 106,944        | SPDR S&P 500 ETF TRUST                         | 15,453,876        | 15,453,876     | 21,804,812            |  |
| 19,800         | UNITED PARCEL SVC INC CL B                     | 1,471,599         | 1,471,599      | 1,905,354             |  |
| 20,700         | VERIZON COMMUNICATIONS INC                     | 907,630           | 907,630        | 956,754               |  |
| 27,600         | VISA, INC COM CLASS A                          | 1,088,408         | 1,088,408      | 2,140,380             |  |
| 9              | YADKIN VY CO COM NEW                           | 506               | 506            | 55,575                |  |
| TOTAL LINE 10b |                                                | 64,317,034        | 64,960,379     | 114,769,174           |  |

10c

| INVESTMENTS-CORPORATE BONDS             |         |
|-----------------------------------------|---------|
| ALCOA INC 5 72%                         | 490,230 |
| ALCOA INC 6 75%                         | 247,500 |
| APPLE INC 2.4%                          | -       |
| AUTOZONE INC 5 75%                      | 106,654 |
| BANK AMER CORP SR INTERNOTES 6 0%       | 500,000 |
| BARCLAYS BK PLC MEDIUM TERM NTS 5%      | 250,000 |
| BERKSHIRE HATHAWAY INC 3.0%             | 300,099 |
| BOSTON UNIV 5.2%                        | 253,669 |
| BOTTLING GROUP LLC 5.5%                 | 394,665 |
| CITIGROUP INC MEDIUM TERM SR NTS VAR RT | 250,000 |
| COMCAST CORP NEW 5 9%                   | 308,784 |
| COMCAST CORP NEW 6.5%                   | 110,230 |
|                                         | 490,230 |
|                                         | 247,500 |
|                                         | 246,125 |
|                                         | -       |
|                                         | 500,000 |
|                                         | 250,000 |
|                                         | 300,085 |
|                                         | 253,669 |
|                                         | 387,253 |
|                                         | -       |
|                                         | -       |
|                                         | -       |
|                                         | 518,175 |
|                                         | 268,425 |
|                                         | 243,592 |
|                                         | -       |
|                                         | 530,800 |
|                                         | 249,572 |
|                                         | 305,663 |
|                                         | 288,211 |
|                                         | 364,048 |

ANONYMOUS TRUST U/A DATED 2-4-2008  
BALANCE SHEET ATTACHMENTS  
TAX YEAR· 2015

990PF

PAGE 2

| LINE                                     | BEGINNING OF YEAR | END OF YEAR    | (c ) FAIR MARKET |
|------------------------------------------|-------------------|----------------|------------------|
|                                          | (a) BOOK VALUE    | (b) BOOK VALUE | VALUE            |
| DEERE & CO 2 6%                          | -                 | 250,599        | 246,501          |
| DEERE JOHN CAP CORP CORENOTES 3 25%      | 250,000           | 250,000        | 251,115          |
| DEERE JOHN CAP CORP CORENOTES 5 25%      | 400,000           | -              | -                |
| GENERAL ELEC CAP CORP INTERNOTES 5 0%    | 500,000           | 500,000        | 527,450          |
| GENERAL ELEC CAP CORP INTERNOTES 5 3%    | 500,000           | -              | -                |
| GEORGIA PWR CO 4.25%                     | 502,933           | 502,601        | 533,700          |
| GOLDMAN SACHS GROUP INC MEDIUM TERM 5 4% | 500,000           | -              | -                |
| GOLDMAN SACHS GROUP INC NT VAR RT        | 250,000           | 250,000        | 249,805          |
| GOLDMAN SACHS GROUP INC VAR RT           | 250,000           | 250,000        | 251,908          |
| JOHNSON CONTROLS INC 5 5%                | 176,164           | 173,651        | 165,179          |
| LABORATORY CORP AMER HLDGS 5 625%        | 84,999            | -              | -                |
| MERRILL LYNCH & CO INC 6.05%             | 500,000           | 500,000        | 508,246          |
| MISSION HEALTH SYS INC 4.424%            | 260,700           | 260,700        | 281,407          |
| MONDELEZ INTERNATIONAL INC 6 5%          | 163,355           | 161,196        | 161,196          |
| MORGAN STANLEY MEDIUM TERM 4.0%          | -                 | 255,693        | 251,102          |
| NEW JERSEY BELL TEL CO 8 0%              | 309,808           | 302,898        | 304,065          |
| PROTECTIVE LIFE CORP 7.375%              | 512,063           | 510,712        | 578,396          |
| QUEST DIAGNOSTICS INC 4.25%              | 507,564           | 506,894        | 514,932          |
| RYDER SYS INC MEDIUM TERM NTS 5.85%      | 93,470            | 93,470         | 103,659          |
| SHELL INTL FIN B V 4.3%                  | 504,513           | 504,008        | 532,900          |
| SUNOCO INC NT 5 75%                      | 236,175           | 236,175        | 251,288          |
| THOMSON REUTERS 3.95%                    | 263,707           | 261,927        | 258,140          |
| TOYOTA MTR CR CORP MEDIUM TERM NTS       | 250,000           | 250,000        | 245,708          |
| UNITED TECHNOLOGIES CORP 4.5%            | 265,714           | 265,089        | 284,523          |
| VIACOM INC NEW 6 125%                    | 108,458           | 107,117        | 106,463          |
| WELLS FARGO & CO MEDIUM TERM NTS VAR RT  | 250,000           | 250,000        | 249,718          |
| WELLS FARGO & CO MEDIUM TERM NTS VAR RT  | 500,000           | 500,000        | 493,075          |
| WHIRLPOOL CORP MEDIUM TERM NTS 4 7%      | -                 | 539,256        | 531,884          |
| XEROX CORP 6 4%                          | 95,556            | 95,556         | 100,921          |
| TOTAL LINE 10c                           | 11,447,010        | 10,452,404     | 10,751,767       |

ANONYMOUS TRUST U/A DATED 2-4-2008  
BALANCE SHEET ATTACHMENTS  
TAX YEAR 2015

990PF

PAGE 2

LINE

| 990PF<br>PAGE 2<br>LINE             | END OF YEAR<br>SHARES HELD | BEGINNING OF YEAR |                | END OF YEAR               |  |
|-------------------------------------|----------------------------|-------------------|----------------|---------------------------|--|
|                                     |                            | (a) BOOK VALUE    | (b) BOOK VALUE | (c ) FAIR MARKET<br>VALUE |  |
| 13 INVESTMENTS-OTHER                |                            |                   |                |                           |  |
|                                     | 20,000                     | 528,942           | 528,942        | 533,200                   |  |
| AFFILIATED MANAGERS GROUP INC SR NT | 20,000                     | 515,984           | 515,984        | 517,200                   |  |
| AMERICAN FINL GROUP INC OHIO SR NT  | 20,000                     | 540,714           | 540,714        | 512,000                   |  |
| ENTERGY LA LLC IST MTG BD 6%        | 20,000                     | 502,406           | 502,406        | 490,200                   |  |
| EQUITY COMMWLTH SR NT               | 20,000                     | 541,592           | -              | -                         |  |
| GOLDMAN SACHS GROUP INC NT          | 20,000                     | 589,989           | 589,989        | 529,400                   |  |
| KKR FINL HLDGS LLC 8 375%           | 20,000                     | 558,767           | -              | -                         |  |
| LLOYDS BKG GROUP PLC                | 20,000                     | 529,546           | 529,546        | 525,000                   |  |
| PROTECTIVE LIFE CORP SUB DEB        | 20,000                     | 540,577           | 540,577        | 519,600                   |  |
| QWEST CORP NT                       | 20,000                     | 564,526           | 564,526        | 533,200                   |  |
| RAYMOND JAMES FINL INC SR NT        | 20,000                     | 554,382           | 554,382        | 502,800                   |  |
| TELEPHONE & DATA SYS INC PFD        | 20,000                     | 557,096           | 557,095        | 504,800                   |  |
| UNITED STATES CELLULAR CORP SR NT   | 20,000                     |                   |                |                           |  |
| TOTAL LINE 13                       |                            | 6,524,521         | 5,424,161      | 5,167,400                 |  |

ANONYMOUS TRUST U/A DATED 2-4-2008  
TAX YEAR: 2015

26-6220561  
STATEMENT 15

GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

IF RECIPIENT IS AN  
INDIVIDUAL, SHOW  
ANY RELATIONSHIP  
TO ANY FOUNDATION  
MANAGER OR  
SUBSTANTIAL  
CONTRIBUTOR

| RECIPIENT<br>NAME AND ADDRESS (HOME OR BUSINESS)                                                    | FOUNDATION<br>STATUS OF<br>RECIPIENT | PURPOSE OF GRANT OR<br>CONTRIBUTION                                                   | AMOUNT  |
|-----------------------------------------------------------------------------------------------------|--------------------------------------|---------------------------------------------------------------------------------------|---------|
| BIG BROTHERS BIG SISTERS OF THE TRIANGLE<br>808 AVIATION PARKWAY, SUITE 90<br>MORRISVILLE, NC 27560 | PUBLIC<br>CHARITY                    | GENERAL OPERATING SUPPORT INCLUDING<br>THE MENTORING CHILDREN OF PRISONERS<br>PROGRAM | 50,000  |
| BLAIR ACADEMY<br>PO BOX 600<br>BLAIRSTOWN, NJ 07825                                                 | EDUCATIONAL<br>INSTITUTION           | GIFT TO THE CENTER FOR INNOVATION AND<br>COLLABORATION                                | 50,000  |
| BOYS & GIRLS CLUB<br>721 N. RALEIGH BOULEVARD<br>RALEIGH, NC 27610                                  | PUBLIC<br>CHARITY                    | CHALLENGE GRANT FOR THE "BE THE ONE"<br>CAMPAIGN                                      | 500,000 |
| CAROLINA BALLET<br>3401 131 ATLANTIC AVENUE<br>RALEIGH, NC 27604                                    | PUBLIC<br>CHARITY                    | GENERAL OPERATING SUPPORT                                                             | 5,000   |
| CLINTON CITY SCHOOLS<br>300 WESTOVER ROAD<br>CLINTON, NC 28328                                      | EDUCATIONAL<br>INSTITUTION           | TEACH FOR AMERICA CORPS MEMBERS                                                       | 15,000  |
| DUKE UNIVERSITY<br>BOX 90581<br>DURHAM, NC 27708                                                    | EDUCATIONAL<br>INSTITUTION           | TRINITY COLLEGE ANNUAL FUND                                                           | 310,000 |

GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

| RECIPIENT<br>NAME AND ADDRESS (HOME OR BUSINESS)                                                               | IF RECIPIENT IS AN<br>INDIVIDUAL, SHOW<br>ANY RELATIONSHIP<br>TO ANY FOUNDATION<br>MANAGER OR<br>SUBSTANTIAL<br>CONTRIBUTOR | FOUNDATION<br>STATUS OF<br>RECIPIENT | PURPOSE OF GRANT OR<br>CONTRIBUTION                                                                                                                             | AMOUNT    |
|----------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------|--------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------|
|                                                                                                                |                                                                                                                             |                                      |                                                                                                                                                                 |           |
| ENVIRONMENTAL DEFENSE FUND<br>4000 WESTCHASE BOULEVARD<br>RALEIGH, NC 27607                                    |                                                                                                                             | PUBLIC<br>CHARITY                    | GENERAL OPERATING SUPPORT TO HELP BRING<br>LASTING SOLUTIONS TO THE MOST SERIOUS<br>ENVIRONMENTAL PROBLEMS AFFECTING THE<br>AGRICULTURAL SOUTHEASTERN LANDSCAPE | 2,000,000 |
| HEARTS & HANDS FOR HAITI<br>6612 CREEDMOOR ROAD<br>RALEIGH, NC 27613                                           |                                                                                                                             | PUBLIC<br>CHARITY                    | GENERAL OPERATING SUPPORT                                                                                                                                       | 100,000   |
| THE HISTORIC PRESERVATION<br>FOUNDATION OF NC, INC.<br>220 FAYETTEVILLE STREET, SUITE 200<br>RALEIGH, NC 27611 |                                                                                                                             | PUBLIC<br>CHARITY                    | NEIGHBORHOOD REVITALIZATION FUND<br>AND ITS WORK IN GOLDSBORO, NORTH<br>CAROLINA                                                                                | 5,000     |
| HOLLINS UNIVERSITY<br>PO BOX 9629<br>ROANOKE, VA 24020                                                         |                                                                                                                             | EDUCATIONAL<br>INSTITUTION           | PAULA P. BROWNLEE ENDOWED<br>PROFESSORSHIP IN SCIENCE                                                                                                           | 325,000   |
| INTERACT OF WAKE COUNTY<br>1012 OBERLIN ROAD<br>RALEIGH, NC 27605                                              |                                                                                                                             | PUBLIC<br>CHARITY                    | GENERAL OPERATING SUPPORT                                                                                                                                       | 50,000    |
| INTERFAITH PRISON MINISTRY FOR WOMEN<br>112 SOUTH SALISBURY STREET<br>RALEIGH, NC 27601                        |                                                                                                                             | PUBLIC<br>CHARITY                    | GENERAL OPERATING SUPPORT TO HELP<br>PROVIDE CRITICAL CHAPLAINCY SERVICES AND<br>TRANSITIONAL EDUCATION/SUPPORT FOR<br>WOMEN IN PRISON                          | 50,000    |

ANONYMOUS TRUST U/A DATED 2-4-2008  
TAX YEAR: 2015

26-6220561  
STATEMENT 15

GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

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INDIVIDUAL, SHOW  
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TO ANY FOUNDATION  
MANAGER OR  
SUBSTANTIAL  
CONTRIBUTOR

| RECIPIENT<br>NAME AND ADDRESS (HOME OR BUSINESS)                                   | FOUNDATION<br>STATUS OF<br>RECIPIENT | PURPOSE OF GRANT OR<br>CONTRIBUTION                                                                           | AMOUNT    |
|------------------------------------------------------------------------------------|--------------------------------------|---------------------------------------------------------------------------------------------------------------|-----------|
| IPAS<br>PO BOX 9990<br>CHAPEL HILL, NC 27515                                       | PUBLIC<br>CHARITY                    | GENERAL OPERATING SUPPORT TO HELP<br>IMPROVE WOMEN'S REPRODUCTIVE HEALTH<br>CARE AND FAMILY PLANNING SERVICES | 100,000   |
| KIPP ENC COLLEGE PREP PUBLIC SCHOOLS<br>320 PLEASANT HILL ROAD<br>GASTON, NC 27832 | EDUCATIONAL<br>INSTITUTION           | KIPP COLLEGE PREP PUBLIC SCHOOL<br>HALIFAX                                                                    | 250,000   |
| THE MADEIRA SCHOOL<br>8328 GEORGETOWN PIKE<br>MCLEAN, VA 22102                     | EDUCATIONAL<br>INSTITUTION           | DORM RENOVATION PROJECT                                                                                       | 1,000,000 |
| NC MUSEUM OF ART FOUNDATION<br>4630 MAIL SERVICE CENTER<br>RALEIGH, NC 27699       | PUBLIC<br>CHARITY                    | ART ALL AROUND UD: EARLY CHILDHOOD<br>EDUCATION PILOT PROGRAM                                                 | 73,645    |
| NC MUSEUM OF HISTORY FOUNDATION<br>5 EAST EDENTON STREET<br>RALEIGH, NC 27601      | PUBLIC<br>CHARITY                    | ENDOWMENT FUND                                                                                                | 1,000,000 |
| NORTH CAROLINA OPERA<br>612 WADE AVENUE, SUITE 100<br>RALEIGH, NC 27605            | PUBLIC<br>CHARITY                    | GENERAL OPERATING SUPPORT                                                                                     | 5,000     |
| NORTH CAROLINA SYMPHONY<br>3700 GLENWOOD AVENUE, SUITE 130<br>RALEIGH, NC 27612    | PUBLIC<br>CHARITY                    | SUPPORT FOR THE STATEWIDE MUSIC<br>EDUCATION PROGRAM                                                          | 5,000     |

ANONYMOUS TRUST U/A DATED 2-4-2008  
TAX YEAR: 2015

26-6220561  
STATEMENT 15

GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

| RECIPIENT<br>NAME AND ADDRESS (HOME OR BUSINESS)                                | IF RECIPIENT IS AN<br>INDIVIDUAL, SHOW<br>ANY RELATIONSHIP<br>TO ANY FOUNDATION<br>MANAGER OR<br>SUBSTANTIAL<br>CONTRIBUTOR | FOUNDATION<br>STATUS OF<br>RECIPIENT | PURPOSE OF GRANT OR<br>CONTRIBUTION                                                                                                                                        | AMOUNT  |
|---------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------|--------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------|
|                                                                                 |                                                                                                                             |                                      |                                                                                                                                                                            |         |
| NORTH CAROLINA SYMPHONY<br>3700 GLENWOOD AVENUE, SUITE 130<br>RALEIGH, NC 27612 |                                                                                                                             | PUBLIC<br>CHARITY                    | BRINGING SYMPHONY TO SAMPSON COUNTY                                                                                                                                        | 7,000   |
| NORTH CAROLINA SYMPHONY<br>3700 GLENWOOD AVENUE, SUITE 130<br>RALEIGH, NC 27612 |                                                                                                                             | PUBLIC<br>CHARITY                    | BRINGING SYMPHONY TO SAMPSON COUNTY                                                                                                                                        | 7,000   |
| PENLAND SCHOOL OF CRAFTS<br>PO BOX 37<br>PENLAND, NC 28765                      |                                                                                                                             | PUBLIC<br>CHARITY                    | ANNUAL FUND DRIVE TO SUPPORT MISSION<br>TO FURTHER INDIVIDUAL AND ARTISTIC<br>GROWTH THROUGH CRAFT EDUCATION                                                               | 10,000  |
| PLANNED PARENTHOOD SOUTH ATLANTIC<br>100 S. BOYLAN AVENUE<br>RALEIGH, NC 27603  |                                                                                                                             | PUBLIC<br>CHARITY                    | "CARE. NO MATTER WHAT" CAPITAL<br>CAMPAIGN. TO HELP INSURE THAT WOMEN IN<br>CHAPEL HILL GET HIGH-QUALITY HEALTH CARE<br>DELIVERED WITH COMPASSION AND WITHOUT<br>JUDGMENT. | 650,000 |
| PLANNED PARENTHOOD SOUTH ATLANTIC<br>100 S. BOYLAN AVENUE<br>RALEIGH, NC 27603  |                                                                                                                             | PUBLIC<br>CHARITY                    | "CARE. NO MATTER WHAT" CAPITAL<br>CAMPAIGN. TO HELP INSURE THAT WOMEN IN<br>CHAPEL HILL GET HIGH-QUALITY HEALTH CARE<br>DELIVERED WITH COMPASSION AND WITHOUT<br>JUDGMENT. | 350,000 |
| RAVENS CROFT<br>7409 FALLS OF NEUSE ROAD<br>RALEIGH, NC 27615                   |                                                                                                                             | EDUCATIONAL<br>INSTITUTION           | GENERAL OPERATING SUPPORT                                                                                                                                                  | 12,000  |

ANONYMOUS TRUST U/A DATED 2-4-2008  
TAX YEAR: 2015

26-6220561  
STATEMENT 15

GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

| RECIPIENT                                                                       |  | IF RECIPIENT IS AN<br>INDIVIDUAL, SHOW<br>ANY RELATIONSHIP<br>TO ANY FOUNDATION<br>MANAGER OR<br>SUBSTANTIAL<br>CONTRIBUTOR | FOUNDATION<br>STATUS OF<br>RECIPIENT | PURPOSE OF GRANT OR<br>CONTRIBUTION                                               | AMOUNT    |
|---------------------------------------------------------------------------------|--|-----------------------------------------------------------------------------------------------------------------------------|--------------------------------------|-----------------------------------------------------------------------------------|-----------|
| NAME AND ADDRESS (HOME OR BUSINESS)                                             |  |                                                                                                                             |                                      |                                                                                   |           |
| SAMPSON COUNTY ARTS COUNCIL<br>709 COLLEGE STREET<br>CLINTON, NC 28328          |  |                                                                                                                             | PUBLIC<br>CHARITY                    | ADMINISTRATIVE SUPPORT                                                            | 25,000    |
| SAMPSON COUNTY SCHOOLS<br>PO BOX 439<br>CLINTON, NC 28329                       |  |                                                                                                                             | EDUCATIONAL<br>INSTITUTION           | TEACH FOR AMERICA CORPS MEMBERS                                                   | 40,000    |
| TEACH FOR AMERICA<br>324 BLACKWELL STREET, BAY 11, STE 1160<br>DURHAM, NC 27701 |  |                                                                                                                             | EDUCATIONAL<br>INSTITUTION           | TO FUND THE EXPANSION OF TEACH FOR<br>AMERICA TO SOUTHEASTERN NC                  | 1,596,000 |
| THE UNIVERSITY OF NC AT CHAPEL HILL<br>PO BOX 309<br>CHAPEL HILL, NC 27514      |  |                                                                                                                             | EDUCATIONAL<br>INSTITUTION           | ARTS EXPENDABLE FUND FOR THE CAROLINA<br>PERFORMING ARTS                          | 5,000     |
| TOTAL AWARDS, GRANTS AND GIFTS                                                  |  |                                                                                                                             |                                      |                                                                                   | 8,595,645 |
| LOVE OF LEARNING GRANTS                                                         |  |                                                                                                                             |                                      |                                                                                   |           |
| CLEMENT ELEMENTARY SCHOOL<br>3220 MAXWELL ROAD<br>AUTRYVILLE, NC 28318          |  |                                                                                                                             | EDUCATIONAL<br>INSTITUTION           | REACHING FIRST GRADERS LEARNING NEEDS:<br>WORKSHOP FOR TEAM TO LEARN NEW SKILLS   | 2,277     |
| CLEMENT ELEMENTARY SCHOOL<br>3220 MAXWELL ROAD<br>AUTRYVILLE, NC 28318          |  |                                                                                                                             | EDUCATIONAL<br>INSTITUTION           | HANDS ON DISCOVERY OF YELLOWSTONE:<br>DISCOVERY BOX FOR SCIENCE OF<br>YELLOWSTONE | 3,000     |

ANONYMOUS TRUST U/A DATED 2-4-2008  
TAX YEAR: 2015

26-6220561  
STATEMENT 15

GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

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|------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------|--------------------------------------|---------------------------------------------------------------------------------------------------------|--------|
|                                                                  |                                                                                                                             |                                      |                                                                                                         |        |
| CLINTON HIGH SCHOOL<br>340 INDIAN TOWN ROAD<br>CLINTON, NC 28328 |                                                                                                                             | EDUCATIONAL<br>INSTITUTION           | SHAKESPEARE BROUGHT TO LIFE:<br>FUNDS TO ATTEND PLAY                                                    | 650    |
| CLINTON HIGH SCHOOL<br>340 INDIAN TOWN ROAD<br>CLINTON, NC 28328 |                                                                                                                             | EDUCATIONAL<br>INSTITUTION           | BEACHY SCIENCE: HANDS ON SCIENCE<br>AT UNCW                                                             | 2,237  |
| CLINTON HIGH SCHOOL<br>340 INDIAN TOWN ROAD<br>CLINTON, NC 28328 |                                                                                                                             | EDUCATIONAL<br>INSTITUTION           | ENCORE!!: FUNDS FOR SERIES OF LITERATURE<br>PLAYS                                                       | 3,000  |
| CLINTON HIGH SCHOOL<br>340 INDIAN TOWN ROAD<br>CLINTON, NC 28328 |                                                                                                                             | EDUCATIONAL<br>INSTITUTION           | TECHNOLOGY STUDENTS TAKING STEM BY THE<br>TEXAS LONGHORN: FUNDS FOR NATIONAL<br>TSA CONVENTION IN TEXAS | 3,000  |
| CLINTON HIGH SCHOOL<br>340 INDIAN TOWN ROAD<br>CLINTON, NC 28328 |                                                                                                                             | EDUCATIONAL<br>INSTITUTION           | WOMEN'S COLLEGE ROAD TOUR: FUNDS FOR<br>COLLEGE TOUR                                                    | 705    |
| CLINTON HIGH SCHOOL<br>340 INDIAN TOWN ROAD<br>CLINTON, NC 28328 |                                                                                                                             | EDUCATIONAL<br>INSTITUTION           | AHOY! ALL ABOARD THE BATTLESHIP!<br>FUNDS TO VISIT NC BATTLESHIP                                        | 2,900  |
| CLINTON HIGH SCHOOL<br>340 INDIAN TOWN ROAD<br>CLINTON, NC 28328 |                                                                                                                             | EDUCATIONAL<br>INSTITUTION           | JUNTOS LEADERSHIP CAMP:<br>FUNDS FOR CAMP                                                               | 750    |

ANONYMOUS TRUST U/A DATED 2-4-2008  
TAX YEAR: 2015

26-6220561  
STATEMENT 15

GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

IF RECIPIENT IS AN  
INDIVIDUAL, SHOW  
ANY RELATIONSHIP  
TO ANY FOUNDATION  
MANAGER OR  
SUBSTANTIAL  
CONTRIBUTOR

| RECIPIENT<br>NAME AND ADDRESS (HOME OR BUSINESS)                                                  | FOUNDATION<br>STATUS OF<br>RECIPIENT | PURPOSE OF GRANT OR<br>CONTRIBUTION                                                                         | AMOUNT |
|---------------------------------------------------------------------------------------------------|--------------------------------------|-------------------------------------------------------------------------------------------------------------|--------|
| CLINTON HIGH SCHOOL<br>340 INDIAN TOWN ROAD<br>CLINTON, NC 28328                                  | EDUCATIONAL<br>INSTITUTION           | FOR THE LAB OF SCIENCE: FUNDS FOR<br>SCIENCE EXPERIMENTS FOR AP BIOLOGY                                     | 1,016  |
| CLINTON HIGH SCHOOL<br>340 INDIAN TOWN ROAD<br>CLINTON, NC 28328                                  | EDUCATIONAL<br>INSTITUTION           | EXPERIENTIAL DAY OF LEARNING SPANISH<br>FROM INSIDE A LATIN AMERICAN SHOW:<br>FUNDS TO ATTEND LATIN PROGRAM | 2,380  |
| CLINTON HIGH SCHOOL<br>340 INDIAN TOWN ROAD<br>CLINTON, NC 28328                                  | EDUCATIONAL<br>INSTITUTION           | A BIRDS EYE VIEW OF LIFE IN THE BIG CITY.<br>FUNDS TO ATTEND STATE WORKSHOP                                 | 2,208  |
| FRIENDS OF THE MUSEUM EDUCATOR<br>OF EXCELLENCE FUND<br>11 WEST JONES STREET<br>RALEIGH, NC 27601 | PUBLIC<br>CHARITY                    | MEGAN FUSSELL & FRANCES PATE<br>EDUCATOR FUNDS                                                              | 3,900  |
| HOBBTON ELEMENTARY SCHOOL<br>12361 HOBBTON HWY<br>NEWTON GROVE, NC 28366                          | EDUCATIONAL<br>INSTITUTION           | DR. SEUSS FAMILY FUN NIGHT: GRANT FOR<br>FAMILY READING NIGHT                                               | 1,310  |

ANONYMOUS TRUST U/A DATED 2-4-2008  
TAX YEAR: 2015

26-6220561  
STATEMENT 15

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SUBSTANTIAL  
CONTRIBUTOR

| RECIPIENT<br>NAME AND ADDRESS (HOME OR BUSINESS)                         | FOUNDATION<br>STATUS OF<br>RECIPIENT | PURPOSE OF GRANT OR<br>CONTRIBUTION                                                                                                                                                                                                                                                                                                                            | AMOUNT |
|--------------------------------------------------------------------------|--------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------|
| HOBBDTON HIGH SCHOOL<br>12201 HOBBDTON HIGHWAY<br>NEWTON GROVE, NC 28366 | EDUCATIONAL<br>INSTITUTION           | ART BEHIND THE SCENES II: GRANT TO HELP<br>INTRODUCE ART STUDENTS TO IMPORTANCE OF<br>VISUAL ART IN THE REAL WORLD. MANY<br>ARTISTS IN THE WORLD WORK BEHIND THE<br>SCENES OF LARGER PRODUCTIONS. MOST<br>STUDENTS ARE NOT AWARE OF HOW MUCH<br>THIS IS TAKING PLACE-TWO FIELD TRIPS IN<br>THE SPRING AND FALL (DURHAM DPAC, EUE<br>SCREEN GEMS IN WILMINGTON) | 900    |
| HOBBDTON HIGH SCHOOL<br>12201 HOBBDTON HIGHWAY<br>NEWTON GROVE, NC 28366 | EDUCATIONAL<br>INSTITUTION           | HOSA "LEAD" IN ANAHEIM, CALIFORNIA:<br>GRANT FOR HOSA AND TRAVEL TO CALIFORNIA                                                                                                                                                                                                                                                                                 | 3,000  |
| HOBBDTON HIGH SCHOOL<br>12201 HOBBDTON HIGHWAY<br>NEWTON GROVE, NC 28366 | EDUCATIONAL<br>INSTITUTION           | BREATHING FIRE INTO LITERATURE:<br>GRANT TO HELP INTRODUCE STUDENTS TO<br>PLAYS                                                                                                                                                                                                                                                                                | 2,205  |
| HOBBDTON HIGH SCHOOL<br>12201 HOBBDTON HIGHWAY<br>NEWTON GROVE, NC 28366 | EDUCATIONAL<br>INSTITUTION           | HITCHING OUR WAGONS TO HISTORY: GRANT<br>FOR NC HISTORICAL SITES                                                                                                                                                                                                                                                                                               | 3,000  |
| HOBBDTON HIGH SCHOOL<br>12201 HOBBDTON HIGHWAY<br>NEWTON GROVE, NC 28366 | EDUCATIONAL<br>INSTITUTION           | FCCLA "ALL ABOARD FOR WASHINGTON, DC!!!"<br>FAMILY, CAREER & COMMUNITY LEADERS OF<br>AMERICA MEMBERS WILL TRAVEL TO DC TO<br>PARTICIPATE IN THE CONFERENCES AND<br>COMPETITIONS                                                                                                                                                                                | 3,000  |

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|------------------------------------------------------------------------|--------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------|
| HOBBDON HIGH SCHOOL<br>12201 HOBBDON HIGHWAY<br>NEWTON GROVE, NC 28366 | EDUCATIONAL<br>INSTITUTION           | POSITIVE GROWTH THROUGH STEM: GRANT TO<br>HELP TSA STUDENTS ATTEND NATIONAL TSA<br>CONVENTION IN DALLAS, TEXAS TO PURSUE<br>INTERESTS AND LEADERSHIP GROWTH<br>THROUGH THE MANY COMPETITIONS               | 3,000  |
| HOBBDON HIGH SCHOOL<br>12201 HOBBDON HIGHWAY<br>NEWTON GROVE, NC 28366 | EDUCATIONAL<br>INSTITUTION           | FFA NATIONAL CONVENTION- GRANT TO HELP<br>FFA STUDENTS ATTEND NATIONAL<br>CONVENTION IN LOUISVILLE, KY. PROVIDED<br>OPPORTUNITIES TO LEARN ABOUT CAREERS<br>AND AGRIBUSINESSES FROM AROUND THE<br>COUNTRY. | 3,000  |
| HOBBDON HIGH SCHOOL<br>12201 HOBBDON HIGHWAY<br>NEWTON GROVE, NC 28366 | EDUCATIONAL<br>INSTITUTION           | THE POWER OF ART: GRANT TO HELP<br>INTRODUCE ART STUDENTS TO IMPORTANCE<br>OF ART IN FOOD AND BUILDINGS IN RURAL<br>NC THROUGH TWO FIELD TRIPS IN THE FALL<br>AND SPRING                                   | 3,000  |
| HOBBDON HIGH SCHOOL<br>12201 HOBBDON HIGHWAY<br>NEWTON GROVE, NC 28366 | EDUCATIONAL<br>INSTITUTION           | HHS RISING STOCKS: A CULTURAL EXPERIENCE<br>GRANT FOR TRAVEL TO NYC                                                                                                                                        | 3,000  |
| HOBBDON HIGH SCHOOL<br>12201 HOBBDON HIGHWAY<br>NEWTON GROVE, NC 28366 | EDUCATIONAL<br>INSTITUTION           | HITTING THE ROAD TO EXPLORE AMERICAN<br>HISTORY-GRANT TO VISIT VA HISTORICAL SITES                                                                                                                         | 3,000  |

ANONYMOUS TRUST U/A DATED 2-4-2008  
TAX YEAR: 2015

26-6220561  
STATEMENT 15

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|--------------------------------------------------------------------------|--------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------|
| HOBBDON HIGH SCHOOL<br>12201 HOBBDON HIGHWAY<br>NEWTON GROVE, NC 28366   | EDUCATIONAL<br>INSTITUTION           | 76 TROMBONES! BRINGING THE STAGE TO LIFE:<br>GRANT TO HELP INTRODUCE STUDENTS TO<br>PLAY                                                                            | 1,900  |
| HOBBDON HIGH SCHOOL<br>12201 HOBBDON HIGHWAY<br>NEWTON GROVE, NC 28366   | EDUCATIONAL<br>INSTITUTION           | ARRIVE ALIVE SAFE TEEN DRIVING: GRANT<br>FOR SIMULATOR OPPORTUNITY                                                                                                  | 2,500  |
| HOBBDON HIGH SCHOOL<br>12201 HOBBDON HIGHWAY<br>NEWTON GROVE, NC 28366   | EDUCATIONAL<br>INSTITUTION           | PRINTING SINCE THE BEGINNING                                                                                                                                        | 3,000  |
| LANGDON C KERR ELEMENTARY<br>505 SUNSET AVENUE<br>CLINTON, NC 28328      | EDUCATIONAL<br>INSTITUTION           | DYNAMIC DUO AUTHOR VISIT: OPPORTUNITY<br>TO HAVE CHILDRENS AUTHORS VISIT SCHOOL<br>FOR A DAY                                                                        | 3,000  |
| LANGDON C KERR ELEMENTARY<br>505 SUNSET AVENUE<br>CLINTON, NC 28328      | EDUCATIONAL<br>INSTITUTION           | NYC SATURDAY REUNION: OPPORTUNITY TO<br>GO TO NYC TO COLUMBIA UNIVERSITY'S<br>TEACHERS COLLEGE DAY                                                                  | 3,000  |
| LAKEWOOD HIGH SCHOOL<br>245 LAKEWOOD SCHOOL ROAD<br>SALEMBOURG, NC 28385 | EDUCATIONAL<br>INSTITUTION           | HISTORY GETS YOU MOVING: STUDENTS WILL<br>EXPLORE THE US BATTLESHIP IN WILMINGTON,<br>MEET WITH EXPERT DOCENTS AND HELP<br>MAKE HISTORY COME ALIVE FOR THE STUDENTS | 2,924  |

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|-----------------------------------------------------------------------------|--------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------|--------|
| MIDWAY HIGH SCHOOL<br>15274 SPIVEY'S CORNER ROAD<br>NEWTON GROVE, NC 28366  | EDUCATIONAL<br>INSTITUTION           | ROCK STARS OF THE EDUCATIONAL ARTS<br>WORLD- GRANT FOR DANCE PROFESSIONALS<br>TO PRESENT AT SCHOOL                                        | 1,700  |
| MIDWAY MIDDLE SCHOOL<br>1115 ROBERT'S GROVE ROAD<br>DUNN, NC 28334          | EDUCATIONAL<br>INSTITUTION           | BRINGING INSPIRATION INTO THE CLASSROOM:<br>CLINICIANS INTO MIDWAY MIDDLE AND HIGH<br>BAND CLASSES                                        | 3,000  |
| N C MUSEUM OF NATURAL SCIENCES<br>11 WEST JONES STREET<br>RALEIGH, NC 27601 | PUBLIC<br>CHARITY                    | EDUCATOR FEE TO FUND EDUCATOR TREKS<br>THAT TEACHERS WENT ON FOR THE<br>SCHOOL YEAR. TO FOCUS ON HIGH QUALITY<br>PROFESSIONAL DEVELOPMENT | 350    |
| N C MUSEUM OF NATURAL SCIENCES<br>11 WEST JONES STREET<br>RALEIGH, NC 27601 | PUBLIC<br>CHARITY                    | EDUCATOR FEE TO FUND EDUCATOR TREKS<br>THAT TEACHERS WENT ON FOR THE<br>SCHOOL YEAR. TO FOCUS ON HIGH QUALITY<br>PROFESSIONAL DEVELOPMENT | 340    |
| N C MUSEUM OF NATURAL SCIENCES<br>11 WEST JONES STREET<br>RALEIGH, NC 27601 | PUBLIC<br>CHARITY                    | EDUCATOR FEE TO FUND EDUCATOR TREKS<br>THAT TEACHERS WENT ON FOR THE<br>SCHOOL YEAR. TO FOCUS ON HIGH QUALITY<br>PROFESSIONAL DEVELOPMENT | 340    |
| N C MUSEUM OF NATURAL SCIENCES<br>11 WEST JONES STREET<br>RALEIGH, NC 27601 | PUBLIC<br>CHARITY                    | EDUCATOR FEE TO FUND EDUCATOR TREKS<br>THAT TEACHERS WENT ON FOR THE<br>SCHOOL YEAR. TO FOCUS ON HIGH QUALITY<br>PROFESSIONAL DEVELOPMENT | 185    |

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|--------------------------------------------------------------------------------------|--------------------------------------|--------------------------------------------------------------------------------------------------|--------|
| N C MUSEUM OF NATURAL SCIENCES<br>11 WEST JONES STREET<br>RALEIGH, NC 27601          | PUBLIC<br>CHARITY                    | YELLOWSTONE INSTITUTE                                                                            | 2,700  |
| NC STATE EDUCATION ASSISTANCE<br>AUTHORITY (NCSEAA)<br>PO BOX 14002<br>RTP, NC 27709 | EDUCATIONAL<br>INSTITUTION           | NATIONAL BOARD CERTIFICATION PROGRAM:<br>GRANT FOR REIMBURSEMENT FOR<br>SUCCESSFUL CERTIFICATION | 1,949  |
| ROSEBORO-SALEMBURG MIDDLE SCHOOL<br>305 WEST PLEASANT STREET<br>ROSEBORO, NC 28382   | EDUCATIONAL<br>INSTITUTION           | TEACH TOWN- ACTIVITIES FOR THE EC<br>CHILDREN                                                    | 3,000  |
| SAMPSON COUNTY SCHOOL SYSTEM<br>PO BOX 439<br>CLINTON, NC 28329                      | EDUCATIONAL<br>INSTITUTION           | COLLEGE GEAR UP: FUNDS FOR COLLEGE<br>QUICK OFF AT SCC                                           | 3,000  |
| SAMPSON COUNTY SCHOOL SYSTEM<br>PO BOX 439<br>CLINTON, NC 28329                      | EDUCATIONAL<br>INSTITUTION           | WOMEN'S COLLEGE ROAD TOUR: FUNDS FOR<br>COLLEGE TOUR                                             | 1,332  |
| SAMPSON COUNTY SCHOOL SYSTEM<br>PO BOX 439<br>CLINTON, NC 28329                      | EDUCATIONAL<br>INSTITUTION           | NC SYMPHONY WORKSHOP                                                                             | 263    |

ANONYMOUS TRUST U/A DATED 2-4-2008  
TAX YEAR: 2015

26-6220561  
STATEMENT 15

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|-------------------------------------------------------------------------------|--------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------|
| SAMPSON MIDDLE SCHOOL<br>1201 W. ELIZABETH STREET<br>CLINTON, NC 28328        | EDUCATIONAL<br>INSTITUTION           | MEET THE COMPOSER· HAVE A COMPOSER<br>WRITE A PIECE TO BE PLAYED IN THE SPRING<br>CONCERT                                                                                                                                                                                         | 3,000  |
| SAMPSON MIDDLE SCHOOL<br>1201 W. ELIZABETH STREET<br>CLINTON, NC 28328        | EDUCATIONAL<br>INSTITUTION           | PROFESSIONALS IN THE CLASSROOM: THREE<br>PROFESSIONAL COMPOSERS WILL VISIT WITH<br>BAND STUDENTS FOR FIVE DAYS THROUGHOUT<br>THE SCHOOL YEAR. THEY WILL PROVIDE<br>PERFORMANCES, INSTRUMENT INSTRUCTION<br>AND SHARE THEIR EXPERTISE IN SMALL GROUP<br>SETTINGS AND THE CLASSROOM | 3,000  |
| SAMPSON MIDDLE SCHOOL<br>1201 W. ELIZABETH STREET<br>CLINTON, NC 28328        | EDUCATIONAL<br>INSTITUTION           | NATIONAL JUNIOR BETA CONVENTION:<br>FUNDING FOR MUSEUM VISITS FOR STUDENTS<br>AT THE NATIONAL CONVENTION                                                                                                                                                                          | 3,000  |
| SUNSET AVENUE/BUTLER AVENUE SCHOOLS<br>505 SUNSET AVENUE<br>CLINTON, NC 28328 | EDUCATIONAL<br>INSTITUTION           | READING & WRITING, NOT JUST FOR AUTHORS!<br>OPPORTUNITY TO HAVE A REAL-LIVE, IN<br>PERSON AUTHOR, KELLY STARLING LYONS,<br>COME VISIT OUR SCHOOL                                                                                                                                  | 1,900  |
| SUNSET AVENUE SCHOOL<br>505 SUNSET AVENUE<br>CLINTON, NC 28328                | EDUCATIONAL<br>INSTITUTION           | FREEDOM TRAIN: OPPORTUNITY TO SEE<br>PROGRAM ON BLACK HISTORY MONTH                                                                                                                                                                                                               | 2,200  |

ANONYMOUS TRUST U/A DATED 2-4-2008  
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|---------------------------------------------------------------------------|--------------------------------------|---------------------------------------------------------------------------------------------------------------|--------|
| SUNSET AVENUE SCHOOL<br>505 SUNSET AVENUE<br>CLINTON, NC 28328            | EDUCATIONAL<br>INSTITUTION           | BACK IN THE DAY- GRANT TO BRING EC<br>STUDENTS TO A COLONIAL DAY EXPERIENCE                                   | 2,779  |
| UNION ELEMENTARY SCHOOL<br>10400 TAYLORS BRIDGE HWY<br>CLINTON, NC 28328  | EDUCATIONAL<br>INSTITUTION           | PATHWAYS OF DISCOVERY- GRANT TO EXPOSE<br>PRESCHOOL STUDENTS TO NC MUSEUMS                                    | 1,014  |
| UNION ELEMENTARY SCHOOL<br>10400 TAYLORS BRIDGE HWY<br>CLINTON, NC 28328  | EDUCATIONAL<br>INSTITUTION           | CONTINUING ART AND CLASSROOM<br>COLLABORATION: GRANT TO CONTINUE ART<br>OF COLLABORATION FOR STUDENTS TO NCMA | 2,000  |
| UNION ELEMENTARY SCHOOL<br>10400 TAYLORS BRIDGE HWY<br>CLINTON, NC 28328  | EDUCATIONAL<br>INSTITUTION           | ART CLASSROOM COLLABORATION- GRANT<br>FOR BUSES TO TAKE STUDENTS TO NCMA                                      | 446    |
| UNION INTERMEDIATE SCHOOL<br>1190 EDMOND MATHIS ROAD<br>CLINTON, NC 28328 | EDUCATIONAL<br>INSTITUTION           | JUMPING FOR JOY/JUMPING FOR FITNESS:<br>GRANT FOR SCHOOL WELLNESS DAY                                         | 1,485  |
| UNION INTERMEDIATE SCHOOL<br>1190 EDMOND MATHIS ROAD<br>CLINTON, NC 28328 | EDUCATIONAL<br>INSTITUTION           | STEAM TO GO BRINGING STEAM TO UNION<br>INTERMEDIATE SCHOOL: GRANT FOR<br>SCIENCE PROGRAM                      | 2,934  |
| UNION INTERMEDIATE SCHOOL<br>1190 EDMOND MATHIS ROAD<br>CLINTON, NC 28328 | EDUCATIONAL<br>INSTITUTION           | LET'S PUT THE "A" IN STEAM-ART OF REUSE-<br>GRANT FOR ART RECYCLE PROGRAM                                     | 984    |

## ANONYMOUS TRUST U/A DATED 2-4-2008

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CONTRIBUTION

AMOUNT

CHRISTY BULLARD  
590 MARTIN ROAD  
GODWIN, NC 28344STIPEND FOR DOCUMENTED CLASSES AND  
EXPENSES RELATED TO NATIONAL BOARD  
CERTIFICATION

3,095

AMANDA BYRD  
1166 OLD WARSAW ROAD  
CLINTON, NC 28328JR. BETA CLUB NATIONAL CONVENTION  
STIPEND

500

PAULA DARDEN  
512 CONCORD SCHOOL ROAD  
CLINTON, NC 28328JR BETA CLUB NATIONAL CONVENTION  
STIPEND

500

BAMBI DOVE  
102 SMITH'S MILL POND  
GARLAND, NC 28441

WOMEN'S COLLEGE ROAD TOUR STIPEND

400

MEGAN FUSSELL  
1606 UNION SCHOOL ROAD  
CLINTON, NC 28328

STIPEND

556

JAIME HARPER  
409-C W ELIZABETH STREET  
CLINTON, NC 28328JR. BETA CLUB NATIONAL CONVENTION  
STIPEND

500

LEASA K. HODGES  
26 OLD US 421  
DUNN, NC 28334

STIPEND

877

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AMOUNT

|                                                             |      |            |                                               |       |
|-------------------------------------------------------------|------|------------|-----------------------------------------------|-------|
| JENNIFER JACKSON<br>535 RENFROW ROAD<br>CLINTON, NC 28328   | NONE | INDIVIDUAL | NC MUSEUM OF NATURAL SCIENCE<br>REIMBURSEMENT | 35    |
| SUSAN KENNEDY<br>186 CANDLEWICK CT<br>WALLACE, NC 28466     | NONE | INDIVIDUAL | STIPEND                                       | 1,000 |
| GWEN LEE<br>5316 MAXWELL ROAD<br>AUTRYVILLE, NC 28318       | NONE | INDIVIDUAL | SYMPHONY STIPEND                              | 100   |
| MARY MALPASS<br>5071 OLD WARSOW ROAD<br>TURKEY, NC 28328    | NONE | INDIVIDUAL | JR. BETA CLUB NATIONAL CONVENTION<br>STIPEND  | 510   |
| DEBBIE MCDUFFIE<br>777 MILLER ROAD<br>BENSON, NC 27504      | NONE | INDIVIDUAL | JR. BETA CLUB NATIONAL CONVENTION<br>STIPEND  | 500   |
| TANYA ROBINSON-FREEMAN<br>PO BOX 1315<br>ROSEBORO, NC 28382 | NONE | INDIVIDUAL | STIPEND                                       | 858   |
| AMY SARP<br>517 CONCORD SCHOOL ROAD<br>CLINTON, NC 28328    | NONE | INDIVIDUAL | WOMEN'S COLLEGE ROAD TOUR STIPEND             | 400   |

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|----------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------|--------------------------------------|-------------------------------------------------------------------------------------------|---------|
|                                                                      |                                                                                                                             |                                      |                                                                                           |         |
| TIM THOMPSON<br>301 MOUNT MORIAH CHURCH ROAD<br>CLINTON, NC 28328    | NONE                                                                                                                        | INDIVIDUAL                           | STIPEND TO COVER ADDITIONAL EXPENSES<br>FOR EDUCATOR FOR POSITIVE GROWTH<br>THROUGH STEM  | 1,000   |
| CONNIE THORTON<br>40 FRIDAY ROAD<br>NEWTON GROVE, NC 28366           | NONE                                                                                                                        | INDIVIDUAL                           | STIPEND                                                                                   | 1,000   |
| CANDACE WARREN<br>4107 ROSIN HILL ROAD<br>NEWTON GROVE, NC 28366     | NONE                                                                                                                        | INDIVIDUAL                           | STIPEND FOR DOCUMENTED CLASSES AND<br>EXPENSES RELATED TO NATIONAL BOARD<br>CERTIFICATION | 1,131   |
| CAROLYN WILLIAMS-MONK<br>805 BROWNS CHURCH ROAD<br>CLINTON, NC 28328 | NONE                                                                                                                        | INDIVIDUAL                           | PATHWAYS STIPEND                                                                          | 1,000   |
| TOTAL LOVE OF LEARNING GRANTS                                        |                                                                                                                             |                                      |                                                                                           | 129,625 |
| SIMPLE GIFTS SCHOLARSHIPS:                                           |                                                                                                                             |                                      |                                                                                           |         |
| AGNES SCOTT COLLEGE<br>141 E. COLLEGE AVE<br>DECATUR, GA 30030       | NONE                                                                                                                        | INDIVIDUAL                           | SCHOLARSHIP FOR MADISON BRYANT                                                            | 28,611  |
| BENEDICT COLLEGE<br>1600 HARDEN STREET<br>COLUMBIA, SC 29204         | NONE                                                                                                                        | INDIVIDUAL                           | SCHOLARSHIP FOR JOHN LANGLEY                                                              | 3,500   |

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|                                                                              |      |            |                                 |        |
|------------------------------------------------------------------------------|------|------------|---------------------------------|--------|
| BRIDGEWATER COLLEGE<br>402 EAST COLLEGE STREET<br>BRIDGEWATER, VA 22812      | NONE | INDIVIDUAL | SCHOLARSHIP FOR RYAN E. WUESTER | 14,000 |
| BRIDGEWATER COLLEGE<br>402 EAST COLLEGE STREET<br>BRIDGEWATER, VA 22812      | NONE | INDIVIDUAL | SCHOLARSHIP FOR MARC LOPEZ      | 14,000 |
| BRIDGEWATER COLLEGE<br>402 EAST COLLEGE STREET<br>BRIDGEWATER, VA 22812      | NONE | INDIVIDUAL | SCHOLARSHIP FOR ISAI CRUZ       | 14,400 |
| HARVARD UNIVERSITY<br>MASSACHUSETTS HALL<br>CAMBRIDGE, MA 02138              | NONE | INDIVIDUAL | SCHOLARSHIP FOR AARON VISER     | 20,000 |
| HOLLINS UNIVERSITY<br>PO BOX 9658<br>ROANOKE, VA 24020                       | NONE | INDIVIDUAL | SCHOLARSHIP FOR DANIELLE SAWYER | 17,725 |
| HOLLINS UNIVERSITY<br>PO BOX 9658<br>ROANOKE, VA 24020                       | NONE | INDIVIDUAL | SCHOLARSHIP FOR CAMILLE MONROE  | 15,910 |
| NEW YORK UNIVERSITY<br>105 EAST 17TH STREET, 3RD FLOOR<br>NEW YORK, NY 10003 | NONE | INDIVIDUAL | SCHOLARSHIP FOR CASEY H. YANG   | 17,000 |

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|-------------------------------------|--------------------------------------|-------------------------------------|--------|

REGENT UNIVERSITY  
1000 REGENT UNIVERSITY DRIVE  
VIRGINIA BEACH, VA 23464

SCHOLARSHIP FOR SHANTELE RAIMMELL

17,525

RHODES COLLEGE  
2000 NORTH PARKWAY  
MEMPHIS, TN 38112

SCHOLARSHIP FOR AVERY BLANKENSHIP

25,741

UNIVERSITY OF THE PACIFIC  
3601 PACIFIC AVENUE  
STOCKTON, CA 95211

SCHOLARSHIP FOR MONICA ODEH

29,600

WASHINGTON & LEE UNIVERSITY  
204 WEST WASHINGTON STREET  
LEXINGTON, VA 24450

SCHOLARSHIP FOR WILLIAM FESTUS  
TURLINGTON, JR

7,500

KELLY JOHNSON

DUKE DIVINITY INTERVIEW EXPENSE

138

CAMILLE MONROE  
102 EAST PINWOOD STREET  
ROSEBORO, NC 28382

SUMMER INTERSHIP

3,200

TOTAL SIMPLE GIFTS SCHOLARSHIPS

228,850

ANONYMOUS TRUST U/A DATED 2-4-2008  
TAX YEAR: 2015

26-6220561  
STATEMENT 15

GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

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

RECIPIENT  
NAME AND ADDRESS (HOME OR BUSINESS)

TEACHER GRANTS.

|                                                                      |      |            |               |       |
|----------------------------------------------------------------------|------|------------|---------------|-------|
| LESLEY B. ALLEN<br>2268 STRAW POND SCHOOL ROAD<br>ROSEBORO, NC 28382 | NONE | INDIVIDUAL | TEACHER GRANT | 8,000 |
|----------------------------------------------------------------------|------|------------|---------------|-------|

|                                                                    |      |            |               |       |
|--------------------------------------------------------------------|------|------------|---------------|-------|
| DAVID G. BASS<br>2100 SOUTH SALEMBOURG HWY<br>SALEMBOURG, NC 28385 | NONE | INDIVIDUAL | TEACHER GRANT | 8,000 |
|--------------------------------------------------------------------|------|------------|---------------|-------|

|                                                             |      |            |               |       |
|-------------------------------------------------------------|------|------------|---------------|-------|
| CAREN LONG<br>467 BELVIN MAYNARD ROAD<br>HARRELLS, NC 28444 | NONE | INDIVIDUAL | TEACHER GRANT | 8,000 |
|-------------------------------------------------------------|------|------------|---------------|-------|

|                                                               |      |            |               |       |
|---------------------------------------------------------------|------|------------|---------------|-------|
| JENNIFER K. ZIGMONT<br>8384 N US HWY 421<br>CLINTON, NC 28328 | NONE | INDIVIDUAL | TEACHER GRANT | 8,000 |
|---------------------------------------------------------------|------|------------|---------------|-------|

TOTAL TEACHER GRANTS

32,000

TOTAL QUALIFYING GRANTS AND  
CONTRIBUTIONS

8,986,120