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

Return of Private Foundation

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

▶ Do not enter social security numbers on this form as it may be made public. ▶ Information about Form 990-PF and its separate instructions is at www.irs.gov/form990pf.

| Forc | alei | ndar year 2015 or tax year beginning | | , and ending | | |
|--------------------------------------|-----------|--|------------------------------------|---------------------------|--|---|
| | | foundation | | | A Employer identification | ı number |
| | | LUCYLE LOVE FOUNDATION | 1 | | | |
| _C, | <u>/0</u> | D R MCALISTER | 57-0902382 | ! ! | | |
| Num | ber a | and street (or P O box number if mail is not delivered to stree | t address) | Room/suite | B Telephone number | |
| _2 | 4 | RAIN FLOWER DRIVE | | | (864)675-0 | 1445 |
| Cıty | or t | own, state or province, country, and ZIP or foreign [| oostal code | | C If exemption application is p | pending, check here |
| _GI | RE | ENVILLE, SC 29615 | | | | |
| G CI | heck | call that apply Initial return | Initial return of a fo | ormer public charity | D 1 Foreign organization: | s, check here |
| | | Final return | Amended return | | 2 Foreign organizations me | noting the 9594 test |
| | | Address change | Name change | · | Foreign organizations me check here and attach co | ening the 85% test, emputation |
| H CI | ٦. | type of organization X Section 501(c)(3) e | | | E If private foundation sta | tus was terminated |
| | Se | | Other taxable private founda | ation | under section 507(b)(1 |)(A), check here $ ightharpoonup$ |
| I Fai | r m | · — | ıng method: LX Cash | Accrual | F If the foundation is in a | |
| | | Part II, col (c), line 16) | ther (specify) | | under section 507(b)(1) |)(B), check here $ ightharpoonup$ |
| | | 1,912,005. (Part I, cold | ımn (d) must be on cash t | oasis) | | T (1) |
| Pa | rt I | Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a)) | (a) Revenue and expenses per books | (b) Net investment income | (c) Adjusted net income | (0) Disbursements for charitable purposes (cash basis only) |
| | 1 | Contributions, gifts, grants, etc , received | | | | |
| | 2 | Check X if the foundation is not required to attach Sch. B | | , | | |
| | 3 | Interest on savings and temporary cash investments | | | | |
| | 4 | Dividends and interest from securities | 55,402. | 54,231 | • | STATEMENT 1 |
| İ | 5a | Gross rents | | | | |
| ľ | b | Net rental income or (loss) | | <u></u> | | |
| یو | 6a | Net gain or (loss) from sale of assets not on line 10 | 9,799. | | | |
| eun | b | Gross sales price for all assets on line 6a 371,216. | | | | |
| OZNINKOR Bevenue | 7 | Capital gain net income (from Part IV, line 2) | | 9,799 | • | ļ |
| (C) | 8 | Net short-term capital gain | | | | |
| | 9 | Income modifications Gross sales less returns | | | | |
| Z | 10a | and allowances | | | | |
| | | Less Cost of goods sold | | | | |
| , | | Gross profit or (loss) | | | | |
| | 11 | Other income | 65,201. | 64,030 | | |
| | 12 | Total Add lines 1 through 11 | 30,000. | 15,000 | | 15,000. |
| _ | 13 | Compensation of officers, directors, trustees, etc | 30,000. | 13,000 | • | 15,000. |
| - 1 | 14 | Other employee salaries and wages Pension plans, employee benefits | | | | |
| ⊋ γ. | | Legal fees | | | | |
| ્રાક્ | | Accounting fees STMT 2 | 8,150. | 4,075 | . 0. | 4,075. |
| ă | | Other professional rescale (SIVED | 0,150. | 1,0,5 | - | ±,0/3. |
| e E | 17 | | | | | |
| at l | 18 | Taxes S JUL 0 5 28 FMT 3 | 3,592. | 362 | . 0. | 0. |
| str | 19 | Taxes S JUL 0 5 28 FMT S Depreciation and depletion | · | | • | |
| 듩 | 20 | Occupancy | | | | |
| Ad | 21 | Travel, conference Sand meeting 1 | | | | |
| 밑 | 22 | Printing and publications | | " - 1 | | |
| g a | 23 | Other expenses STMT 4 | 13,456. | 13,456 | 0. | 0. |
| att | 24 | Total operating and administrative | | - | | |
| Operating and Administrative Expense | | expenses Add lines 13 through 23 | 55,198. | 32,893 | 0. | 19,075. |
| 0 | 25 | Contributions, gifts, grants paid | 76,010. | | | 76,010. |
| | 26 | Total expenses and disbursements. | } | | | |
| | | Add lines 24 and 25 | 131,208. | 32,893 | 0. | 95,085. |
| 2 | 27 | Subtract line 26 from line 12: | | | | |
| | a | Excess of revenue over expenses and disbursements | <66,007. | | | |
| | b | Net investment income (if negative, enter -0-) | | 31,137 | | |
| 522501 | C | Adjusted net income (if negative, enter -0-) | | | 0. | |
| 523501 11-24- | 15 | LHA For Paperwork Reduction Act Notice, see | instructions | | $\alpha \cap$ | Form 990-PF (2015) |

| Fo | rm 9 | 90-PF (2015) C/O D R MCALISTER | D | | 0902382 Page 2 |
|-----------------------------|-------|--|-------------------|----------------|---|
| F | art | Balance Sheets Attached schedules and amounts in the description column should be for end of-year amounts only | Beginning of year | End o | |
| _ | | | (a) Book Value | (b) Book Value | (c) Fair Market Value |
| | 1 | Cash*- non-interest-bearing | 70 110 | 40.000 | 40.000 |
| | 2 | Savings and temporary cash investments | 72,118. | 40,989. | 40,989. |
| | 3 | Accounts receivable | 1 | | |
| | ١. | Less: allowance for doubtful accounts | | | |
| | 4 | | - | | |
| | _ | Less. allowance for doubtful accounts | | | |
| | 5 | Grants receivable | | | |
| | 6 | Receivables due from officers, directors, trustees, and other | | | |
| | | disqualified persons | | | |
| | 7 | | | | |
| sts | ĺ | Less: allowance for doubtful accounts | | | |
| | 8 | Inventories for sale or use | | | |
| Assets | 9 | Prepaid expenses and deferred charges | | | |
| 4 | 10a | Investments - U.S and state government obligations | | | |
| | b | Investments - corporate stock STMT 5 | | 1,107,377. | 1,444,314. |
| | 0 | Investments - corporate bonds STMT 6 | 459,967. | 416,008. | 412,488. |
| | 11 | Investments - land, buildings, and equipment basis | | | |
| | | Less accumulated depreciation | | | |
| | 12 | Investments - mortgage loans | | | |
| | 13 | Investments - other STMT 7 | 12,299. | 12,299. | 14,214. |
| | 14 | Land, buildings, and equipment: basis ▶ | | | |
| | | Less accumulated depreciation | | | |
| | 15 | Other assets (describe ►) | | | |
| | 16 | Total assets (to be completed by all filers - see the | | | |
| _ | | instructions. Also, see page 1, item I) | 1,642,676. | 1,576,673. | 1,912,005. |
| | 17 | Accounts payable and accrued expenses | | | |
| | 18 | Grants payable | | | |
| S | 19 | Deferred revenue | | | |
| Liabilities | 20 | Loans from officers, directors, trustees, and other disqualified persons | | | |
| ā | 21 | Mortgages and other notes payable | | | |
| J | 22 | Other liabilities (describe) | | | |
| | | | | | |
| | 23 | Total liabilities (add lines 17 through 22) | 0. | 0. | |
| | | Foundations that follow SFAS 117, check here | | | |
| | | and complete lines 24 through 26 and lines 30 and 31. | | | |
| Ses | 24 | Unrestricted | | | |
| au | 25 | Temporarily restricted | | | |
| Ва | 26 | Permanently restricted | | | |
| pur | | Foundations that do not follow SFAS 117, check here | | | |
| 乓 | ĺ | and complete lines 27 through 31 | | | |
| S | 27 | Capital stock, trust principal, or current funds | 0 | 0. | |
| set | 28 | Paid-in or capital surplus, or land, bldg, and equipment fund | 0. | 0. | |
| As | 29 | Retained earnings, accumulated income, endowment, or other funds | 1,642,676. | 1,576,673. | |
| Net Assets or Fund Balances | 30 | Total net assets or fund balances | 1,642,676. | 1,576,673. | |
| | | | | | |
| _ | 31 | Total liabilities and net assets/fund balances | 1,642,676. | 1,576,673. | |
| P | art | Analysis of Changes in Net Assets or Fund B | alances | | |
| _ | | | 20 | | |
| | | net assets or fund balances at beginning of year - Part II, column (a), line | 30 | | 1 (4) (7) |
| | | t agree with end-of-year figure reported on prior year's return) | | 1 | 1,642,676. |
| | | amount from Part I, line 27a | E ADTIICMMDAM | 2 | <u><66,007.</u> > |
| | | increases not included in line 2 (itemize) FUND BALANC | E ADOUGHMENT | 3 | 1 576 673 |
| | | ines 1, 2, and 3 | | 4 | 1,576,673. |
| | | eases not included in line 2 (itemize) | olumn (h) line 20 | 5 | 1 576 673 |
| <u>6</u> | rotal | net assets or fund balances at end of year (line 4 minus line 5) - Part II, co | numm (u), inte su | 6 | 1,576,673. Form 990-PF (2015) |
| | | | | | romi 330-F F (2015) |

| (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 - Purchase - Donation | | acquired lay, yr.) | (d) Date sold (mo , day, yr.) | | |
| 1a FIDELITY INVESTMENTS - ST | | P | | | | | |
| b FIDELITY INVESTMENTS - LT | | | | | | | |
| c FIDELITY INVESTMENTS - LT | | P | | | | | |
| d CAPITAL GAINS DIVIDENDS | | | | | | | |
| e | | | | | | | |
| (e) Gross sales price (f) Depreciation allowed (g) Cost or oth plus expense | | | | (h) Gain or (loss) (e) plus (f) minus (g) | | | |
| a 12,176. | 11,793. | | , | | 383. | | |
| | 15,564. | | | | <3,961. | | |
| | 34,060. | - | | | 13,174. | | |
| d 203. | | | | | 203. | | |
| | | | | - | | | |
| e Complete only for assets showing gain in column (h) and owned by the foundation on 12/ | /31/69 | , | I) Gaine (C | Col. (h) gain | minue | | |
| | | CO | I. (k), but | not less thar | 11-0-) or | | |
| (i) F M.V. as of 12/31/69 (j) Adjusted basis (k) Excess of as of 12/31/69 over col. (j), | | | Losses | (from col. (I | h)) | | |
| 43 01 12/0 1/03 | , it dily | | | | | | |
| a | | | | | 383. | | |
| b | | | | | <3,961. | | |
| c | | | | | 13,174. | | |
| d | | | | | 203. | | |
| е | | | | | | | |
| 2 Capital gain net income or (net capital loss) If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 | $\stackrel{\longleftarrow}{\bullet}$ | 2 | | | 9,799. | | |
| 3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): | 5 | | | | | | |
| If gain, also enter in Part I, line 8, column (c). | l l | | | | | | |
| If (loss), enter -0- in Part I, line 8 | | 3 | | N/A | | | |
| Part V Qualification Under Section 4940(e) for Reduced Tax | on Net Inv | estment Inc | come | | | | |
| (For optional use by domestic private foundations subject to the section 4940(a) tax on net inv | actment incom | | | | | | |
| , | resument incom | €.) | | | | | |
| | resument incom | e.) | | | | | |
| If section 4940(d)(2) applies, leave this part blank. | restinent incom | 9.) | | | | | |
| | | e.) | | | Yes X No | | |
| Was the foundation liable for the section 4942 tax on the distributable amount of any year in the | | e.) | | | Yes X No | | |
| Was the foundation liable for the section 4942 tax on the distributable amount of any year in the fi "Yes," the foundation does not qualify under section 4940(e). Do not complete this part. | ne base period? | | | | Yes X No | | |
| Was the foundation liable for the section 4942 tax on the distributable amount of any year in the 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 ma | ne base period? aking any entries | j. | | | | | |
| Was the foundation liable for the section 4942 tax on the distributable amount of any year in the 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 material to the period years. (a) Base period years Advicted application distributions. | ne base period? aking any entries (c) | 5. | | | (d) ution ratio | | |
| Was the foundation liable for the section 4942 tax on the distributable amount of any year in the 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 material Base period years Calendar year (or tax year beginning in) Adjusted qualifying distributions Net we have the foundation liable for the section 4942 tax on the distributable amount of any year in the Instruction of the part of the section 4940(e). Do not complete this part. 1 Enter the appropriate amount in each column for each year; see the instructions before material the part of th | ne base period? sking any entries (c) value of noncha | s. ritable-use assets | | | (d) ution ratio ded by col. (c)) | | |
| Was the foundation liable for the section 4942 tax on the distributable amount of any year in the lif "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 material to the period years (a) Calendar year (or tax year beginning in) Adjusted qualifying distributions Net with the foundation liable for the section 4942 tax on the distributable amount of any year in the life "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 material to the life "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 material to the life "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 material to the life "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 material to the life "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 material to the life "Yes," the foundation does not part to the life "Yes," the foundation does not part to the life "Yes," the foundation does not part to the life "Yes," the foundation does not part to the life "Yes," the foundation does not part to the life "Yes," the foundation does not part to the life "Yes," the life "Y | ne base period? aking any entries (c) value of nonchal | s. ritable-use assets , 971 , 639 |). | | (d) ulion ratio ided by col. (c)) . 0 6 0 4 5 5 | | |
| Was the foundation liable for the section 4942 tax on the distributable amount of any year in the lif "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 material to the period years are colored as a period year (or tax year beginning in) 2014 2013 Adjusted qualifying distributions Net verify the foundation liable for the section 4940(e). Do not complete this part. (b) Adjusted qualifying distributions Net verify the foundation liable for the section 4940(e). Do not complete this part. 1 Enter the appropriate amount in each column for each year; see the instructions before material to the period years are colored as a period years. Adjusted qualifying distributions 1 19, 195. | ne base period? sking any entries (c) value of nonchal 1 | , 11able-use assets , 971 , 639 |). | | (d) ution ratio ided by col. (c)) .060455 .073864 | | |
| Was the foundation liable for the section 4942 tax on the distributable amount of any year in the lif "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 material to the appropriate amount in each column for each year; see the instructions before material to the latest part of 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 material to the latest part of 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 material to the latest part of 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 material to the latest part of the la | ne base period? sking any entries (c) value of nonchai 1 1 | s. , 971 , 639 , 924 , 300 , 976 , 721 |). | | (d) ution ratio ided by col. (c)) . 060455 . 073864 . 108426 | | |
| Was the foundation liable for the section 4942 tax on the distributable amount of any year in the 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 material Base period years Calendar year (or tax year beginning in) 2014 2013 119,195. 142,137. | ne base period? sking any entries (c) value of nonchai 1 1 2 | s. , 971 , 639 , 924 , 300 , 976 , 721 , 107 , 811 |). | | (d) ultion ratio ided by col. (c)) . 0 6 0 4 5 5 . 0 7 3 8 6 4 . 1 0 8 4 2 6 . 0 8 4 7 1 9 | | |
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| Was the foundation liable for the section 4942 tax on the distributable amount of any year in the lif "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 material and the limit of the part of | ne base period? sking any entries (c) value of nonchai 1 1 2 2 | , 971 , 639 , 974 , 300 , 976 , 721 , 107 , 811 , 069 , 510 | 2 | (col. (b) divi | (d) ulion ratio ided by col. (c)) . 060455 . 073864 . 108426 . 084719 . 062815 . 390279 . 078056 1,923,353. | | |
| Was the foundation liable for the section 4942 tax on the distributable amount of any year in the lif "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 material and the limit of the part of | ne base period? sking any entries (c) value of nonchai 1 1 2 2 | , 971 , 639 , 974 , 300 , 976 , 721 , 107 , 811 , 069 , 510 | 2 | (col. (b) divi | (d) ulion ratio ided by col. (c)) . 060455 . 073864 . 108426 . 084719 . 062815 . 390279 . 078056 | | |
| Was the foundation liable for the section 4942 tax on the distributable amount of any year in the 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 material to the period years are depining in the calculation of the section 4940(e). Do not complete this part. 1 Enter the appropriate amount in each column for each year; see the instructions before material to the calculation of the seed of th | ne base period? sking any entries (c) value of nonchai 1 1 2 2 | , 971 , 639 , 974 , 300 , 976 , 721 , 107 , 811 , 069 , 510 | 2 3 4 | (col. (b) divi | (d) ulion ratio ided by col. (c)) . 060455 . 073864 . 108426 . 084719 . 062815 . 390279 . 078056 1,923,353. 150,129. | | |
| Was the foundation liable for the section 4942 tax on the distributable amount of any year in the 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 material to the period years are depining in the calculation of the section 4940(e). Do not complete this part. 1 Enter the appropriate amount in each column for each year; see the instructions before material to the calculation of the seed of th | ne base period? sking any entries (c) value of nonchai 1 1 2 2 | , 971 , 639 , 974 , 300 , 976 , 721 , 107 , 811 , 069 , 510 | 2 | (col. (b) divi | (d) ulion ratio ided by col. (c)) . 060455 . 073864 . 108426 . 084719 . 062815 . 390279 . 078056 1,923,353. | | |
| Was the foundation liable for the section 4942 tax on the distributable amount of any year in the 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 material Base period years (or tax year beginning in) 2014 2014 119, 195. 2013 2012 2014 119, 195. 2011 178, 571. 2010 2010 129, 997. 2 Total of line 1, column (d) 3 Average distribution ratio for the 5-year base period - divide the total on line 2 by 5, or by the foundation has been in existence if less than 5 years 4 Enter the net value of noncharitable-use assets for 2015 from Part X, line 5 5 Multiply line 4 by line 3 6 Enter 1% of net investment income (1% of Part I, line 27b) | ne base period? sking any entries (c) value of nonchai 1 1 2 2 | , 971 , 639 , 974 , 300 , 976 , 721 , 107 , 811 , 069 , 510 | 2 3 4 5 6 | (col. (b) divi | (d) ulion ratio ided by col. (c)) . 060455 . 073864 .108426 .084719 .062815 .390279 .078056 1,923,353. 150,129. 311. | | |
| Was the foundation liable for the section 4942 tax on the distributable amount of any year in the 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 material Base period years (or tax year beginning in) 2014 2014 119, 195. 2013 2012 2014 119, 195. 2011 178, 571. 2010 2010 129, 997. 2 Total of line 1, column (d) 3 Average distribution ratio for the 5-year base period - divide the total on line 2 by 5, or by the foundation has been in existence if less than 5 years 4 Enter the net value of noncharitable-use assets for 2015 from Part X, line 5 5 Multiply line 4 by line 3 6 Enter 1% of net investment income (1% of Part I, line 27b) | ne base period? sking any entries (c) value of nonchai 1 1 2 2 | , 971 , 639 , 974 , 300 , 976 , 721 , 107 , 811 , 069 , 510 | 2 3 4 | (col. (b) divi | (d) ulion ratio ided by col. (c)) . 060455 . 073864 . 108426 . 084719 . 062815 . 390279 . 078056 1,923,353. 150,129. | | |
| Was the foundation liable for the section 4942 tax on the distributable amount of any year in the 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 material to the property of the property of the seed of the property of the seed of the instructions before material to the seed of the seed of the instructions before material to the seed of the instructions before material to the instructions before material to the instructio | ne base period? sking any entries (c) value of nonchai 1 1 2 2 | , 971 , 639 , 974 , 300 , 976 , 721 , 107 , 811 , 069 , 510 | 2 3 4 5 | (col. (b) divi | (d) ulion ratio uded by col. (c)) . 060455 . 073864 . 108426 . 084719 . 062815 . 390279 . 078056 1,923,353. 150,129. 311. 150,440. | | |
| Was the foundation liable for the section 4942 tax on the distributable amount of any year in the 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 material Base period years (or tax year beginning in) 2014 2014 119, 195. 2013 2012 2014 119, 195. 2011 178, 571. 2010 2010 129, 997. 2 Total of line 1, column (d) 3 Average distribution ratio for the 5-year base period - divide the total on line 2 by 5, or by the foundation has been in existence if less than 5 years 4 Enter the net value of noncharitable-use assets for 2015 from Part X, line 5 5 Multiply line 4 by line 3 6 Enter 1% of net investment income (1% of Part I, line 27b) | ne base period? sking any entries (c) value of nonchai 1 1 2 2 | , 971 , 639 , 974 , 300 , 976 , 721 , 107 , 811 , 069 , 510 | 2 3 4 5 6 | (col. (b) divi | (d) ulion ratio ided by col. (c)) . 060455 . 073864 .108426 .084719 .062815 .390279 .078056 1,923,353. 150,129. 311. | | |

| | n 990-PF (2015) C/O D R MCALISTER Int VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 49 | <u>57-0</u> | 090238 see inst | 2 ructi | Page 4 |
|----|---|-------------|--------------------|--------------|----------|
| | Exempt operating foundations described in section 4940(d)(2), check here and enter "N/A" on line 1. | | | | |
| | Date of ruling or determination letter. (attach copy of letter if necessary-see instructions) | | | | |
| b | Domestic foundations that meet the section 4940(e) requirements in Part V, check here and enter 1% | 1 | | | 623. |
| | of Part I, line 27b | | | | |
| С | All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b). | | | | |
| | Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) | 2 | | | 0. |
| | Add lines 1 and 2 | 3 | | | 623. |
| 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 | | | 623. |
| | Credits/Payments: | | | | |
| а | 2015 estimated tax payments and 2014 overpayment credited to 2015 6a 2,560. | | | | |
| b | Exempt foreign organizations - tax withheld at source 6b | ŀ | | | |
| C | Tax paid with application for extension of time to file (Form 8868) | | | | |
| d | Backup withholding erroneously withheld 6d | | | | |
| 7 | Total credits and payments. Add lines 6a through 6d | 7 | | 2, | 560. |
| 8 | Enter any penalty for underpayment of estimated tax. Check here if Form 2220 is attached | 8 | | | |
| 9 | Tax due If the total of lines 5 and 8 is more than line 7, enter amount owed | 9 | | | |
| 10 | Overpayment If line 7 is more than the total of lines 5 and 8, enter the amount overpaid | 10 | | 1, | 937. |
| 11 | Enter the amount of line 10 to be: Credited to 2016 estimated tax | 11 | | | 0. |
| Pa | rt VII-A Statements Regarding Activities | | | | |
| 1a | During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene i | n | | Ye | s No |
| | any political campaign? | | 1a | | X |
| b | Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for the definition) | 7 | <u>1b</u> | | X |
| | If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published | d or | | | 1 |
| | distributed by the foundation in connection with the activities. | | | | |
| C | Did the foundation file Form 1120-POL for this year? | | 1c | | X |
| đ | Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: | | | | ŀ |
| | (1) On the foundation. ▶ \$ 0 . (2) On foundation managers. ▶ \$ | | | İ | |
| е | 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? | | 2 | | X |
| | If "Yes," attach a detailed description of the activities | | ļ | | |
| 3 | Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or | | | | |
| | bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes | | 3 | | X |
| 4a | Did the foundation have unrelated business gross income of \$1,000 or more during the year? | | 4a | | X |
| | If "Yes," has it filed a tax return on Form 990-T for this year? | N/ | /A 4b | | |
| 5 | Was there a liquidation, termination, dissolution, or substantial contraction during the year? | | 5 | _ | X |
| | If "Yes," attach the statement required by General Instruction T | | | | ļ |
| 6 | Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: | | | | ļ |
| | By language in the governing instrument, or | | | - | |
| | • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state l | aw | | | |
| | remain in the governing instrument? | | 6 | 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 | | 7 | X | |
| | | | | | |
| 8a | Enter the states to which the foundation reports or with which it is registered (see instructions) | | | | |
| | SC | | | | |
| 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 SEE STATEME | | 8 <u>8b</u> | | <u>X</u> |
| 9 | Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendarion | dar | | | |
| | year 2015 or the taxable year beginning in 2015 (see instructions for Part XIV)? If "Yes," complete Part XIV | | 9 | | X |
| 10 | Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses | | 10 | | X |
| | | | Form 99 | }0-PF | = (2015) |

had not been removed from jeopardy before the first day of the tax year beginning in 2015?

C/O D R MCALISTER 57-0902382 Page 5 Part VII-A | Statements Regarding Activities (continued) Yes No 11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions) 11 Х 12 Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? 12 If "Yes," attach statement (see instructions) 13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? 13 Website address \triangleright N/A The books are in care of ightharpoonup ightharpoonuTelephone no. > 864 - 675 - 0445Located at ▶ 24 RAINFLOWER DR, GREENVILLE, SC ZIP+4 ▶29615 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 N/A Yes No At any time during calendar year 2015, did the foundation have an interest in or a signature or other authority over a bank, 16 securities, or other financial account in a foreign country? 16 Х See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country Part VII-B | Statements Regarding Activities for Which Form 4720 May Be Required Yes No File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. 1a During the year did the foundation (either directly or indirectly): Yes X No (1) Engage in the sale or exchange, or leasing of property with a disqualified person? (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) Yes X No a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? Yes X No (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? X Yes (5) Transfer any income or assets to a disqualified person (or make any of either available Yes X No for the benefit or use of a disqualified person)? (6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after Yes X No termination of government service, if terminating within 90 days.) b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations X section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? 1b Organizations relying on a current notice regarding disaster assistance check here c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected X before the first day of the tax year beginning in 2015? 1c 2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)) a At the end of tax year 2015, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2015? If "Yes," list the years ▶ b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach N/A 2b statement - see instructions.) c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. 3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time Yes X No during the year? b If "Yes," did it have excess business holdings in 2015 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, N/A Form 4720, to determine if the foundation had excess business holdings in 2015) 3ь Х 4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 4a b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that

THE LUCYLE LOVE FOUNDATION Form 990-PF (2015) C/O D R MCALISTER 57-0902382 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: Yes X No (1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? (2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, Yes X No any voter registration drive? (3) Provide a grant to an individual for travel, study, or other similar purposes? (4) Provide a grant to an organization other than a charitable, etc., organization described in section Yes X No 4945(d)(4)(A)? (see instructions) (5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for Yes X No the prevention of cruelty to children or animals? 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 Х 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 N/A Yes No expenditure responsibility for the grant? 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 Yes X No a personal benefit contract? 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 Yes X No 7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? 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. (d) Contributions to employee benefit plans and deferred compensation (b) Title, and average hours per week devoted to position (c) Compensation (e) Expense account, other (If not paid, (a) Name and address enter -0-) allowances DAVID VICKERY TRUSTEE 308 BELMONT AVE. GREENVILLE, SC 29601 2.00 15,000 0. 0. TRUSTEE DON MCALISTER 24 RAIN FLOWER DRIVE 0. 2.00 15,000. 0. GREENVILLE, SC 29615 2 Compensation of five highest-paid employees (other than those included on line 1). If none, enter "NONE." (d) Contributions to employee benefit plans and deferred compensation (b) Title, and average hours per week devoted to position (e) Expense account, other allowances (a) Name and address of each employee paid more than \$50,000 (c) Compensation NONE

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

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|--|---|--|
| Part VIII Information About Officers, Directors, Trustees, Founds Paid Employees, and Contractors (continued) | ation Managers, Highly | - |
| 3 Five highest-paid independent contractors for professional services. If none, enter | er "NONE." | |
| (a) Name and address of each person paid more than \$50,000 | (b) Type of service | (c) Compensation |
| NONE | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| Total number of others receiving over \$50,000 for professional services | | ▶ 0 |
| Part IX-A Summary of Direct Charitable Activities | | |
| List the foundation's four largest direct charitable activities during the tax year. Include relevant statis number of organizations and other beneficiaries served, conferences convened, research papers pro | stical information such as the iduced, etc. | Expenses |
| 1 N/A | | ······································ |
| | | |
| | | |
| 2 | | |
| | | |
| | | |
| 3 | | |
| | | |
| | | |
| 4 | | |
| | | |
| | | |
| Part IX-B Summary of Program-Related Investments | | |
| Describe the two largest program-related investments made by the foundation during the tax year or | illies I and 2. | Amount |
| 1 <u>N/A</u> | | |
| | | |
| | | |
| 2 | | |
| | | |
| All other program-related investments. See instructions. | | |
| | | |
| 3 | | |
| | | |
| Total. Add lines 1 through 3 | > | 0. |
| reserve moet integrite | | |

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C/O D R MCALISTER

| <u> </u> | Minimum Investment Return (All domestic foundations must complete this part. Foreign four | ndations, | see instructions) |
|----------|--|-------------|--------------------|
| 1 | Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes: | | |
| а | Average monthly fair market value of securities | 1a | 1,908,505. |
| | Average of monthly cash balances | 1b | 44,138. |
| C | The state of the s | 1c | 0. |
| d | Total (add lines 1a, b, and c) | 1d | 1,952,643. |
| | Reduction claimed for blockage or other factors reported on lines 1a and | | |
| | 1c (attach detailed explanation) 1e 0 • | | |
| 2 | Acquisition indebtedness applicable to line 1 assets | 2 | 0. |
| 3 | Subtract line 2 from line 1d | 3 | 1,952,643. |
| 4 | Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions) | 4 | 29,290. |
| 5 | Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4 | 5 | 1,923,353. |
| 6 | Minimum investment return Enter 5% of line 5 | 6 | 96,168. |
| P | art XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and foreign organizations check here and do not complete this part) | d certain | |
| 1 | Minimum investment return from Part X, line 6 | 1 | 96,168. |
| 2a | Tax on investment income for 2015 from Part VI, line 5 | | |
| b | Income tax for 2015 (This does not include the tax from Part VI) | | |
| C | Add lines 2a and 2b | 2c | 623. |
| 3 | Distributable amount before adjustments. Subtract line 2c from line 1 | 3 | 95,545. |
| 4 | Recoveries of amounts treated as qualifying distributions | 4 | 0. |
| 5 | Add lines 3 and 4 | 5 | 95,545. |
| 6 | Deduction from distributable amount (see instructions) | 6 | 0. |
| 7_ | Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1 | 7 | 95,545. |
| P | Qualifying Distributions (see instructions) | | |
| 1 | Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes: | | |
| а | Expenses, contributions, gifts, etc total from Part I, column (d), line 26 | 1a | 95,085. |
| b | Program-related investments - total from Part IX-B | 1b | 0. |
| 2 | Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes | 2 | |
| 3 | Amounts set aside for specific charitable projects that satisfy the: | | |
| а | Suitability test (prior IRS approval required) | 3a | |
| b | Cash distribution test (attach the required schedule) | 3b | |
| 4 | Qualifying distributions Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4 | 4 | 95,085. |
| 5 | Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment | 1 | |
| | income. Enter 1% of Part I, line 27b | 5 | 0. |
| 6 | Adjusted qualifying distributions Subtract line 5 from line 4 | 6 | 95,085. |
| | Note The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation of | ualifies fo | r the section |

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THE LUCYLE LOVE FOUNDATION C/O D R MCALISTER

Part XIII Undistributed Income (see instructions)

| , | (a) Corpus | (b) Years prior to 2014 | (c) 2014 | (d) 2015 |
|--|---------------|----------------------------|-------------|---------------------------|
| Distributable amount for 2015 from Part XI, line 7 | | | | 95,545. |
| 2 Undistributed income, if any, as of the end of 2015 | | , | _ | |
| a Enter amount for 2014 only | | | 0. | ···· |
| b Total for prior years: | | 0. | | |
| 3 Excess distributions carryover, if any, to 2015: | | 0. | | |
| a From 2010 | | | | |
| b From 2011 67,764. | | | | |
| c From 2012 116,998. | | | | |
| d From 2013 48,344. | | | | |
| e From 2014 23, 161. | | | | |
| f Total of lines 3a through e | 256,267. | | | |
| 4 Qualifying distributions for 2015 from | | | | |
| Part XII, line 4: ► \$ 95,085. | | | · | |
| a Applied to 2014, but not more than line 2a | | | 0. | |
| b Applied to undistributed income of prior | | _ | | |
| years (Election required - see instructions) | | 0. | | |
| c Treated as distributions out of corpus | | | | |
| (Election required - see instructions) | 0. | | | |
| d Applied to 2015 distributable amount | | | | 95,085. |
| e Remaining amount distributed out of corpus | 0. | | | 4.6.0 |
| 5 Excess distributions carryover applied to 2015 (If an amount appears in column (d), the same amount must be shown in column (a)) | 460. | | | 460. |
| 6 Enter the net total of each column as indicated below: | | | | |
| 2 Corpus Add lines 3f, 4c, and 4e Subtract line 5 | 255,807. | | | |
| 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 | | | | 0 |
| be distributed in 2016 | | | | 0. |
| 7 Amounts treated as distributions out of | | | | |
| corpus to satisfy requirements imposed by | | | | |
| section 170(b)(1)(F) or 4942(g)(3) (Election | 0. | | | |
| may be required - see instructions) 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 | 255,807. | | | |
| 10 Analysis of line 9 | 233,0371 | | | |
| a Excess from 2011 67,304. | | | | |
| b Excess from 2012 116, 998. | | | | |
| c Excess from 2013 48,344. | Ì | | | |
| d Excess from 2014 23, 161. | | _ | | |
| e Excess from 2015 | | | | |
| 522581 11.24 15 | | | | Form 990-PF (2015) |

| Form 990-PF (2015) C/O D R | MCALISTER | | | | 02382 Page 1 |
|--|-----------------------------|-----------------------------|-----------------------------|-----------------------------|---------------|
| Part XIV Private Operating F | | | II-A, question 9) | N/A | |
| 1 a If the foundation has received a ruling o | r determination letter that | t it is a private operating | | | |
| foundation, and the ruling is effective fo | r 2015, enter the date of | the ruling | ▶ | | |
| b Check box to indicate whether the found | | ng foundation described | | 4942(j)(3) or 49 | 42(j)(5) |
| 2 a Enter the lesser of the adjusted net | Tax year | | Prior 3 years | -1 | |
| income from Part I or the minimum | (a) 2015 | (b) 2014 | (c) 2013 | (d) 2012 | (e) Total |
| investment return from Part X for | | | | | |
| each year listed | | | | | |
| b 85% of line 2a | | | | | |
| c Qualifying distributions from Part XII, | | | | | |
| line 4 for each year listed | | | | | |
| d Amounts included in line 2c not | | | | | |
| used directly for active conduct of | | | | | |
| exempt activities | | | | | |
| e Qualifying distributions made directly | | | | | |
| for active conduct of exempt activities. | | | | | |
| Subtract line 2d from line 2c | | | 1 | | |
| 3 Complete 3a, b, or c for the | | | | | |
| alternative test relied upon: | | | | | |
| a "Assets" alternative test - enter:(1) Value of all assets | | | | | |
| ` ' | | | | | |
| (2) Value of assets qualifying under section 4942(j)(3)(B)(i) | • | | | | |
| b "Endowment" alternative test - enter | | | | | |
| 2/3 of minimum investment return | | | • | | |
| shown in Part X, line 6 for each year listed | | | | | |
| c "Support" alternative test - enter | | | | | |
| (1) Total support other than gross | | | | | |
| investment income (interest, | | | | | |
| dividends, rents, payments on | | | | | |
| securities loans (section | | | | | |
| 512(a)(5)), or royalties) | | | | 1 | |
| (2) Support from general public and 5 or more exempt | | | | | |
| organizations as provided in | | | | | |
| section 4942(j)(3)(B)(iii) | | | | | |
| (3) Largest amount of support from | | <u> </u> | | | |
| an exempt organization | | | | | |
| (4) Gross investment income | | ta this work and | if the formulation | h = 1 &E 000 av == | |
| Part XV Supplementary Info | | | if the foundation | nad \$5,000 or mo | ore in assets |
| at any time during t | ne year-see insti | ructions.) | | | |
| 1 Information Regarding Foundation | | | | | |
| a List any managers of the foundation wh | | | tributions received by the | foundation before the clos | se of any tax |
| year (but only if they have contributed n | tore than \$5,000) (See s | ection 507(a)(2).) | | | |
| NONE | | | | | |
| b List any managers of the foundation wh | | | (or an equally large porti- | on of the ownership of a pa | irtnership or |
| other entity) of which the foundation has | s a 10% or greater interes | St. | | | |
| NONE | | | | | |
| 2 Information Regarding Contributi | on, Grant, Gift, Loan, | Scholarship, etc., P | rograms: | | |
| | | | | not accept unsolicited requ | |
| the foundation makes gifts, grants, etc. | (see instructions) to indiv | riduals or organizations i | under other conditions, c | omplete items 2a, b, c, and | d |
| a The name, address, and telephone num | ber or e-mail address of t | he person to whom app | lications should be addre | ssed: | |
| SEE ATTACHED STATEME | NT 10 | | | | |
| | | | | | |
| b The form in which applications should b | | tion and materials they s | hould include: | | |
| SEE ATTACHED STATEME | NT 10 | | | | |
| c Any submission deadlines: | | | | | |
| SEE ATTACHED STATEME | | | | | |
| d Any restrictions or limitations on awards | | al areas, charitable fields | , kinds of institutions, or | other factors: | |
| SEE ATTACHED STATEME | NT 10 | | | | |

57-0902382 Page 11

Part XV | Supplementary Information (continued) 3 Grants and Contributions Paid During the Year or Approved for Future Payment If recipient is an individual, Recipient show any relationship to any foundation manager or substantial contributor Foundation Purpose of grant or Amount status of contribution Name and address (home or business) recipient a Paid during the year UNIVERSITY OF GEORGIA - WILLIAM M N/A N/A SCHOLARSHIP 1070 STRATFORD DRIVE ATHENS GA 30677 7,500. WINTHROP UNIVERSITY - CHAPMAN N/A N/A SCHOLARSHIP HARMSTAD 107 LEEWOOD TERRACE GREER SC 29650 5 000. N/A N/A FURMAN UNIVERSITY - BEN HARTMAN SCHOLARSHIP 3300 POINSETT HWY GREENVILLE, SC 29613 1,500. FURMAN UNIVERSITY - LEYLY BAGHERDF N/A N/A SCHOLARSHIP 3300 POINSETT HWY GREENVILLE SC 29616 1,500. PRESBYTERIAN COLLEGE - HANNAH TAYLOR N/A N/A SCHOLARSHIP 503 S BROAD ST CLINTON SC 29325 3 000. SEE CONTINUATION SHEET(S) <u>3a</u> Total 76,010. b Approved for future payment NONE Total

| Part XVI-A | Analysis of Income-Producing Activities |
|------------|--|
| I GILVAL- | Analysis of income-i roudeing Activities |

| Enter gross amounts unless otherwise indicated. | Unrelated business income | | | ided by section 512, 513, or 514 | (e) | | |
|--|---------------------------|---------------------------------------|-------------------------------|----------------------------------|--|--|--|
| • | (a) Business code | (b) Amount | (C) Exclu- sion code | (d) Amount | Related or exempt function income | | |
| 1 Program service revenue: | code | | Code | | | | |
| a | | | | | | | |
| b | | · · · · · · · · · · · · · · · · · · · | | | | | |
| C | | | - | | | | |
| d | | | | | | | |
| e | | | ļ | | | | |
| f | | | <u> </u> | | | | |
| g Fees and contracts from government agencies | | | <u> </u> | | | | |
| 2 Membership dues and assessments | | | ļ | | | | |
| 3 Interest on savings and temporary cash | | | | | | | |
| investments | | | | | | | |
| 4 Dividends and interest from securities | | | 14 | 55,402. | | | |
| 5 Net rental income or (loss) from real estate. | | | ļ | | | | |
| 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 | 9,799. | | | |
| 9 Net income or (loss) from special events | | | 1.0 | 5,155. | ··· · · · · · · · · · · · · · · · · · · | | |
| , , | | | | | | | |
| Office representations of Gross profit or (loss) from sales of inventory | | | | | | | |
| 1 Other revenue: | | | | | | | |
| a | | | | | | | |
| b | ļ | | | | | | |
| C | ļ | | | | | | |
| d | | | | | | | |
| е | | | | | | | |
| 2 Subtotal. Add columns (b), (d), and (e) | L | 0. | | 65,201. | | | |
| 3 Total Add line 12, columns (b), (d), and (e) | | | | 13 | 65,201. | | |
| See worksheet in line 13 instructions to verify calculations.) | | <u> </u> | | | | | |
| Part XVI-B Relationship of Activities to | o the Acc | omplishment of Ex | cemp | t Purposes | | | |
| | | | _ | | · · · · · · · · · · · · · · · · · · · | | |
| Line No Explain below how each activity for which incor | | | contri | outed importantly to the accom | plishment of | | |
| the foundation's exempt purposes (other than b | by providing tu | nds for such purposes). | | | | | |
| | | | | | · · · · · · · · · · · · · · · · · · · | | |
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Form 990-PF (2015

C/O D R MCALISTER

57-0902382

Page 13

| Part | XVII | Information Re Exempt Organ | • | sters 10 a | and Transactions | and Relations | nips With Nonch | aritable | 9 | |
|--------------|----------|------------------------------------|---------------------------|--------------------|--|---------------------------------------|--------------------------------|--|--------------|------|
| 1 Di | d the or | | | of the followin | ig with any other organizat | ion described in sect | on 501(c) of | \neg | Yes | No |
| | | • | | | 27, relating to political orga | | 011 30 1(0) 01 | ĺ | 103 | 140 |
| | | from the reporting found | | | | 11124110113 | | | | |
| |) Cash | non the reporting found | ation to a noncharitat | old exempt of | gamzanom on. | | | 1a(1) | | v |
| • |) Other | accate | | | | | | | | X |
| • | , | assets sactions: | | | | | | 1a(2) | | |
| | _ | | hla avamnt organizat | tion | | | | 15/1 | | |
| • | • | of assets to a noncharita | | | | | | 1b(1) | | X |
| • | • | ases of assets from a no | • | n yanızanılı | | | | 1b(2) | | X |
| • | • | l of facilities, equipment, | | | | | | 1b(3) | | X |
| • | • | oursement arrangements | ı | | | | | 1b(4) | | X |
| • | • | or loan guarantees | | | | | | 1b(5) | | X |
| • | | rmance of services or me | • | - | | | | 1b(6) | | X |
| | - | facilities, equipment, ma | = | | | decorate above the face of | | 1c | | X |
| or | service | s given by the reporting f | oundation. If the four | ndation receiv | edule Column (b) should a ed less than fair market va | | - | | seis, | |
| | |) the value of the goods, | ., | | a avampt arganization | (4) = | | | | |
| (a) Line | no | (b) Amount involved | (c) Name of | | e exempt organization | (0) Description | of transfers, transactions, ar | d sharing ari | rangeme | nts |
| | | | | N/A | | | | | | |
| | - | | | | | | | | | |
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| | | | <u></u> | | | | | | | |
| ın | section | 501(c) of the Code (othe | r than section 501(c) | | or more tax-exempt organ tion 527? | nizations described | | Yes | X |] No |
| <u> </u> | Yes, co | mplete the following sch | | | (b) Type of organization | 1 | c) Description of relation | | | |
| | | (a) Name of org | Janizanon - | | (b) Type of Organization | · · · · · · · · · · · · · · · · · · · | c) Description of relation | | | |
| | | N/A | | | | | | | | |
| | | | | | | | | | | |
| | | | | | | | | | | |
| | | | _ | | | | | | | |
| | 111-4 | | About I bearing and the | e sature include | ng accompanying schedules an | d statements, and to the | heat of multi-suitable | | | |
| Sign Here | and be | lief, it is true, correct, and cor | mplete Declaration of pre | | n taxpayer) is based on all infor ter 6 - 7 - 16 | mation of which preparer | has any knowledge | May the IRS deturn with the hown below X Yes | prepare | er |
| | Laigh | ature of officer or trustee | | / Droc ass-1- | Date | Title | Chook Total | | | |
| | | Print/Type preparer's na | | Preparer's s | ignature | Date | Check I If PTIN | 1 | | |
| Detel | | FRANCES M. | | 1 | P041 | 1/2/11 | self- employed | | | |
| Paid | | PATTERSON | | ~~~u | J VC Drun | 14/ 5/10 | | 00445 | | |
| Prep Use | | Firm's name ► ELL | IOTT DAVI | S DECO | SIMO, LLC/PI | LLC | Firm's EIN ► 57-(|)3815 | 82 | |
| | | Firm's address ▶ PC | BOX 6286 | | | | | | | |
| | | | REENVILLE, | | 606-6286 | | Phone no 864-2 | 242-3 | 370 | |

| Part XV Supplementary Information | | | | |
|--|--|----------------------|----------------------------------|-------------|
| 3 Grants and Contributions Paid During the Y | | 1 | | |
| Recipient | If recipient is an individual, show any relationship to any foundation manager | Foundation status of | Purpose of grant or contribution | Amount |
| Name and address (home or business) | or substantial contributor | recipient | | |
| UNIVERSITY OF SOUTH CAROLINA - | N/A | N/A | SCHOLARSHIP | |
| PATRICIA HARRIS | N/A | W/ A | SCHOLARSHIP | |
| 108 BLOSSOM BRANCH EXT | | | | |
| PIEDMONT, SC 29673 | | | | 3,000 |
| | | | | |
| ART INSTITUTE OF ATLANTA - LEVI HAGAN | N/A | N/A | SCHOLARSHIP | |
| 208 TRAYNHAM BLVD | ,,,, | | | |
| GREENVILLE, SC 29609 | | | | 3,000 |
| | | | | |
| ERSKINE SEMINARY - JOE CARVAJAL | N/A | N/A | SCHOLARSHIP | |
| 210 S MAIN ST | N/A | W/A | Behobakshir | |
| DUE WEST , SC 29639 | | | | 2,500. |
| | | | | |
| GENERAL SYNOD ARP CHURCH | N/A | PUBLIC | TO FURTHER THE | |
| 1 CLEVELAND ST #110 | ,,,, | | ORGANIZATIONS EXEMPT | |
| GREENVILLE SC 29601 | | | PROGRAMS | 3,000. |
| | | | | · |
| FIRST PRESBYTERIAN CHURCH | N/A | PUBLIC | TO FURTHER THE | |
| 200 W WASHINGTON ST | N/A | | ORGANIZATIONS EXEMPT | |
| GREENVILLE, SC 29601 | | <u> </u> | PROGRAMS | 1,000. |
| | | | | |
| GREENVILLE CHORALE | N/A | PUBLIC | TO FURTHER THE | |
| PO BOX 16851 | [,, == | | ORGANIZATIONS EXEMPT | |
| GREENVILLE, SC 29606 | | | PROGRAMS | 11,910. |
| | | | | |
| NET MINISTRIES | N/A | PUBLIC | TO FURTHER THE | |
| 110 CRUSADER AVE W | | | ORGANIZATIONS EXEMPT | |
| WEST ST PAUL, MN 55118 | | | PROGRAMS | 500. |
| | | | | |
| ERSKINE COLLEGE OF MUSIC | N/A | PUBLIC | TO FURTHER THE | |
| 2 WASHINGTON ST | | | ORGANIZATIONS EXEMPT | |
| DUE WEST , SC 29639 | | | PROGRAMS | 10,000. |
| | | | | |
| BONCLARKEN | N/A | PUBLIC | TO FURTHER THE | |
| 500 PINE DR | | | ORGANIZATIONS EXEMPT | |
| FLAT ROCK, NC 28731 | | | PROGRAMS | 5,000. |
| | | | | |
| SC CHRISTIAN FOUNDATION | N/A | PUBLIC | TO FURTHER THE | |
| 7 BOYCE AVE | | | ORGANIZATIONS EXEMPT | |
| GREENVILLE, SC 29601 | <u> </u> | | PROGRAMS | 5,000. |
| Total from continuation sheets | | | | 57,510. |

Part XV Supplementary Information Grants and Contributions Paid During the Year (Continuation) Recipient If recipient is an individual, Foundation status of Purpose of grant or show any relationship to Amount any foundation manager contribution Name and address (home or business) recipient or substantial contributor N/A PUBLIC TO FURTHER THE CHRISTIANITY EXPLORED OF NORTH AMERICA ORGANIZATIONS EXEMPT 1 CLEVELAND ST #110 PROGRAMS GREENVILLE, SC 29601 5,000. PUBLIC TO FURTHER THE LAKE FOREST ELEMENTARY N/A 16 BERKSHIRE AVE ORGANIZATIONS EXEMPT PROGRAMS GREENVILLE, SC 29615 3,000. ERSKINE COLLEGE N/A PUBLIC TO FURTHER THE ORGANIZATIONS EXEMPT 2 WASHINGTON ST DUE WEST SC 29639 PROGRAMS 1,000. AMERICAN RED CROSS N/A PUBLIC TO FURTHER THE PO BOX 9035 ORGANIZATIONS EXEMPT GREENVILLE SC 29604 PROGRAMS 2,500. PUBLIC TO FURTHER THE SAGAMAN ORPHANS ED FUND N/A ORGANIZATIONS EXEMPT 400 BELMONT AVE PROGRAMS GREENVILLE SC 29601 1,100. Total from continuation sheets

| FORM 990-PF | DIVIDENDS | AND INTER | EST | FROM SECUR | ITIES ST | ATEMENT 1 |
|--|-----------------|------------------------------|---|-------------------------------|-----------------------------------|-------------------------------|
| SOURCE | GROSS AMOUNT | CAPITAL GAINS DIVIDEND | | (A) REVENUE PER BOOKS | (B) NET INVEST- MENT INCOME | (C) ADJUSTED NET INCOME |
| FIDELITY INVESTMENT - OID FIDELITY INVESTMENTS | 112. | | 0. | 112. | 112. | 112. |
| ACCRUED INTEREST FIDELITY INVESTMENTS- BOND | <844. | > | 0. | <844. | > <844.> | <844. |
| INVESIMENTS- BOND AMORTIZATION FIDELITY INVESTMENTS- | <3,114. | > | 0. | <3,114. | > <3,114.> | <3,114. |
| DIVIDENDS FIDELITY INVESTMENTS- | 33,372. | 20 | 3. | 33,169. | 32,002. | 33,169. |
| INVESTMENTS INTEREST FIDELITY INVESTMENTS- TAX | 26,075. | | 0. | 26,075. | 26,075. | 26,075. |
| EXEMPT INTEREST | 4. | | 0. | 4. | 0. | 4. |
| TO PART I, LINE 4 | 55,605. | 20 | 3 · ==================================== | 55,402. | 54,231. | 55,402. |
| FORM 990-PF | | ACCOUNTI | NG I | FEES | ST | ATEMENT 2 |
| DESCRIPTION | | (A) EXPENSES PER BOOKS | | (B) T INVEST- NT INCOME | (C) ADJUSTED NET INCOME | (D) CHARITABLE PURPOSES |
| ACCOUNTING FEES | - | 8,150. | | 4,075. | 0. | 4,075. |
| TO FORM 990-PF, PG | 1, LN 16B | 8,150. | | 4,075. | 0. | 4,075. |

| FORM 990-PF | TAX | ES | | STATEMENT | 3 |
|----------------------------------|------------------------------|-----------------------------------|------------------------------|----------------------|-----|
| DESCRIPTION | (A) EXPENSES PER BOOKS | (B) NET INVEST- MENT INCOME | (C) ADJUSTED NET INCOM | | |
| FOREIGN TAXES FEDERAL EXCISE TAX | 362. 3,230. | 362. | | 0. | 0. |
| TO FORM 990-PF, PG 1, LN 18 | 3,592. | 362. | | 0. | 0. |
| FORM 990-PF | OTHER E | XPENSES | | STATEMENT | 4 |
| DESCRIPTION | (A) EXPENSES PER BOOKS | (B) NET INVEST- MENT INCOME | (C) ADJUSTED NET INCOM | | |
| INVESTMENT MANAGEMENT FEES | 13,456. | 13,456. | | 0. | 0. |
| TO FORM 990-PF, PG 1, LN 23 | 13,456. | 13,456. | - | 0. | 0. |
| FORM 990-PF | CORPORAT | E STOCK | | STATEMENT | 5 |
| DESCRIPTION | | ВО | OK VALUE | FAIR MARKET | r |
| CORP STOCK - SEE ATTACHED STA | ATEMENT 9 | - | 1,107,377. | 1,444,31 | L4. |
| TOTAL TO FORM 990-PF, PART 13 | , LINE 10B | | 1,107,377. | 1,444,31 | L4. |
| FORM 990-PF | CORPORAT | E BONDS | | STATEMENT | 6 |
| DESCRIPTION | | ВО | OK VALUE | FAIR MARKET VALUE | ľ |
| BOND FUNDS - SEE ATTACHED STA | улемеил 9 | | 416,008. | 412,48 | 88. |
| BOND FUNDS - SEE ATTACHED STA | | | • | • | |

| FORM 990-PF OTHER | R INVESTMENTS | - | STATEMENT | 7 |
|--|---------------------|------------|----------------------|----|
| DESCRIPTION | VALUATION METHOD | BOOK VALUE | FAIR MARKET VALUE | ı |
| OTHER INVESTMENTS - SEE ATTACHED STATEMENT 9 | FMV | 12,299. | 14,21 | 4. |
| TOTAL TO FORM 990-PF, PART II, LINE | 12,299. | 14,21 | 4. | |
| FORM 990-PF EXPLANATION CONCERNIN | NG PART VII-A, | LINE 8B | STATEMENT | 8 |

EXPLANATION

NOT REQUIRED

MR_CE_BBPTLMBBBBXBK_BBBBC 20161231

2320 3 920 2250

1.980

728.00



7 m 1

Account # 636-610682

TRUST: UNDER AGREEMENT

INVESTMENT REPORT December 1, 2015 - December 31, 2015

Holdings

Core Account

858.00 350.00 250.00 Est. Annual 270.00 \$440.00 Income (EAI) **-\$4,365.36** -17,048.42 -2,537 33 21,829.48 18,827 72 187.32 13,747.06 237.94 12,348.42 -14,090.98 Unrealized \$8,236.20 \$46,465.78 Unrealized Gain/Loss 12,890.13 29,740.00 Gain/Loss 16.582.11 \$14,773.35 23,973.92 24,226.68 30,415.52 7,101.00 Total 34,833 33 21,956.39 Total 23,303.69 10,417.98 10,450 17 25,208 48 9,171,94 \$32,378.70 \$136,280.87 Cost Basis Cost Bash \$10,408.00 52,245.00 35,524.65 Market Value \$24,142.50 Total Total 37,050,75 8,834.00 11,117,50 32,296.00 38,538.50 22.766.40 23,340.30 \$182,746.65 36,841.00 Market Value 24,414.00 Price 139.320 110.110 44.910 89.340 \$32 190 58 720 Price 15.390 758.880 44.470 81.380 105.260 338,330 Per Chit \$52,040 778.010 Per Unit 30.000 375.000 200.000 450.000 300.000 30.000 550.000 350,000 825.000 100.000 350.000 Quantity Quantity 750.000 Total Exchange Traded Products (10% of account holdings) Exchange Traded Products E(e.g. ETF, ETN) SHARES CORE SAP SMALL-CAP ETF(UR) E CHECK POINT SOFTWARE TECHNOLOGIES ORD AGRIUM INC COM NPV ISIN #CA0089161081 Description ISHARES MSCI EMERGING MARKETS ETF ISHARES CORE SAP MID CAP ETF(IJH) E ISHARES NASDAO BIOTECHNOLOGY ALPHABET INC CAP STK CL AGOOGL) SEDOL #2213538 (AGU) ALPHABET INC CAP STK CL C(GOOG) EATON CORP PLC COM(ETN) ENSCO PLC COM USDO.10 A(ESV) SHARES MSCI EAFE ETF (EFA) E ILSO.01 (CHKP)
ABBOTT LABORATORIES(ABT) APACHE CORP(APA) APPLE INC(AAPL) Common Stock ETF (188) E Description Stocks EEM) E

Est. Yield

වී

3.900

008487 FIDS2A01 054235



ATTACHMENT TO 2015 FORM 990PF EIN 57-0902382 STATEMENT 9

INVESTMENT REPORT December 1, 2015 - December 31, 2015

Holdings (continued)

Stocks (continued)

Account # 636-610682 TRUST: UNDER AGREEMENT

| | | Price | Total | Total | Unrealized | Est. Annual | Est.Yield |
|--|----------|----------------|--------------|------------|------------|--------------|------------------|
| Description | Quantity | Per Unit | Market Value | Cost Basis | Gain/Loss | Income (EAI) | (EY |
| Common Stock (continued) | | | | | | | |
| ARCHER DANIELS MEDLAND(ADM) | 200.000 | 36.680 | 18,340.00 | 24,645.72 | -6,305.72 | 560.00 | 3.050 |
| BB & T CORP(BBT) | 500,000 | 37.810 | 18,905.00 | 16,616.55 | 2,288.45 | 540.00 | 2.860 |
| BAXALTA INC COM (BXLT) | 250.000 | 39.030 | 9,757.50 | 8,207.62 | 1,549.88 | 70.07 | 0.720 |
| BAXTER INTL INC(BAX) | 250 000 | 38.150 | 9,537.50 | 10,125.33 | -587.83 | 115.00 | 1.210 |
| BOEING CO(BA) | 150.000 | 144,590 | 21,688.50 | 17,214,45 | 4,474.05 | 654.00 | 3.020 |
| CELANESE CORP DEL COM SER A(CE) | 250,000 | 67.330 | 16,832.50 | 13,409.38 | 3,423.12 | 300.00 | 1 780 |
| CISCO SYS INC COM ISIN #US17275R1023 | 800,000 | 27.155 | 21,724.00 | 20,043.55 | 1,680.45 | 672 00 | 3 090 |
| SEDOL #2198163 (CSCO) POSTITO WILDIFSATI E COBRECOSTI | 225 000 | 161 500 | 36 237 50 | 24 484 78 | 11 850 79 | 36.00 | 000 |
| DEERE & COMPANY (DE) | 200,000 | 76.270 | 15 254 00 | 7 948 91 | 7.305.09 | 480 00 | 3 150 |
| DISNEY WALT CO (DIS) | 400.000 | 105.080 | 42,032.00 | 8,811.00 | 33,221.00 | 568.00 | 1.350 |
| DUKE ENERGY CORP NEW COM NEW | 166.000 | 71.390 | 11,850.74 | 8,313.67 | 3,537.07 | 547.80 | 4 620 |
| ISIN #US26441C2044 SEDOL #B7JZSK0 (DUK) | | | | | | | |
| ENTERGY CORP NEW (ETR) | 200.000 | 68.360 | 13,672.00 | 14,036.70 | -364.70 | 680.00 | 4.970 |
| EXPRESS SCRIPTS HLDG CO COM(ESRX) | 400.000 | 87.410 | 34,964,00 | 25,282.93 | 9,681.07 | • | , |
| EXXÓN MÓBIL CORP(XÓM) | 300.000 | 77.950 | 23,385.00 | 19,798.38 | 3,586.62 | 876 00 | 3.750 |
| GOLDMAN SACHS GROUP INC(GS) | 100:000 | 180.230 | 18,023.00 | 16,392.06 | 1,630.94 | 260.00 | 1.440 |
| HOLLYFRONTIER CORPORATION COM | 300.000 | 39 890 | 11,967.00 | 13,634.49 | -1,667.49 | 396 00 | 3310 |
| USD0.01 (HFC) | 333 333 | | | | | | |
| SEDOL #2434209 (HD) | 200:000 | 132.230 | 26,450.00 | 18,416.85 | 8,033.15 | 472.00 | £. |
| INTL BUSINESS MACH(IBM) | 150.000 | 137.620 | 20,643.00 | 23,424.92 | -2,781.92 | 780.00 | 3.780 |
| JPNORGAN CHASE & CO(JPM) | 375.000 | 66.030 | 24,761.25 | 15,687.21 | 9,074.04 | 00 099 | 2.670 |
| JOHNSON & JOHNSON(JINJ) | 300.000 | 102.720 | 30,816.00 | 16,966.22 | 13,849.78 | 00 006 | 2.920 |
| MANPOWERGROUP INC COM(MAN) | 200.000 | 84.290 | 16,858.00 | 15,504.95 | 1,353.05 | 320.00 | 1.800 |
| MICROSOFT CORP (MSFT) | 700.000 | 55.480 | 38,836.00 | 16,237.13 | 22,598.87 | 1,008.00 | 2.600 |
| NIKE INC CLASS B(NKE) | 600.000 | 62.500 | 37,500.00 | 13,460.51 | 24,039.49 | 768.00 | 2.050 |
| NORFOLK SOUTHERN CRP(NSC) | 200 000 | 84 590 | 16,918.00 | 21,695.95 | 4,777.95 | 472.00 | 2 790 |
| ORACLE CORP COM ISIN #US68389X1054 | 700.000 | 36 530 | 25,571.00 | 15,477.32 | 10,093 68 | 420 00 | 1.640 |
| SELOL #2661568 (OHCL) | A 0.00 | | | | | | |
| FINC FINE SVCS GROUP(PNC) | 250.000 | 25 .310 | 23,827.50 | 14,812.35 | 9,015.15 | 510.00 | 2.140 |
| PANEHA BHEAD CO CL A ISIN #US69840W1080 | 150,000 | 194.780 | 29,217.00 | 26,271.45 | 2,945.55 | • | • |
| SEDOL #2063034 (PNRA) | | | | | | | |
| PEPSICO INC(PEP) | 250.000 | 98.920 | 24,980.00 | 15,878.37 | 9,101.63 | 702.50 | 2810 |
| PFIZEK WC (PFE) | 200,000 | 32,280 | 16.140,00 | 14,882,95 | 1,257.05 | 00'009 | 3,720 |







INVESTMENT REPORT December 1, 2015 - December 31, 2015

Account # 636-610682 . TRUST: UNDER AGREEMENT

Holdings (continued)

| Stocks (continued) | | ä | | , | | | N. C. | |
|---|------------------------|-------------------|---|---------------------|-------------------------|-----------------------------|---|---------------|
| Description | Quantity | Per Unit | Market Value | Cost Basis | Gain/Loss | - 1 | | |
| Common Stock (continued) | | | | | | | | |
| PROCTER & GAMBLE CO (PG) | 350.000 | 79.410 | 27,783.50 | 20,268.50 | 7,525.00 | 958.06 | 3 340 | |
| QUALCOMM INC(QCOM) | 200:000 | 49.985 | 24,992 50 | 31,250.85 | -6,258.35 | 00 096 | 3 840 | |
| SCHLUMBERGER LINITED COM USDO.OT | 300:000 | 69.750 | 20,925.00 | 15,874 26 | 5,050 74 | 00.009 | 2.870 | |
| TARGET CORP COM ISIN #US87612E1084 SEDOL #2259101 (TGT) | 200.000 | 72.610 | 14,522.00 | 12,127.13 | 2,394.87 | 448.00 | 3.080 | 536 |
| TYSON FOODS INC CL. A ISIN #US9024941034 | 34 750.000 | 53.330 | 39,997.50 | 29,660.48 | 10,337.02 | 450.00 | 1.130 | 1790 |
| UNION PACIFIC CORP(UNP) | 350,000 | 78.200 | 27,370 00 | 18,202 12 | 9,167.88 | 00.077 | 2.810 | 10 A S |
| UNÍTED TECHINOLOGIES CORP(UTX) | 200 000 | 96.070 | 19,214.00 | 10,018.48 | 9, 195.52 | 512,00 | 2.660 | sa |
| UNITEDHEALTH GROUP(UNH) | 300,000 | 117 640 | 35,292,00 | 21,765 24 | 13,526.76 | 00.009 | 1.700 | 13 2 |
| VERIZON COMMUNICATIONS (VZ) | 400.000 | 46.220 | 18,488.00 | 14,831.91 | 3,656.09 | 904.00 | 4.890 | 818 |
| VISA INC COM CL A(V) | 400.000 | 77.550 | 31,020.00 | 7,413.21 | 23,606.79 | 224.00 | 0.720 | 900 |
| WASTE MANAGEMENT INC(WM) | 250.000 | 53.370 | 13,342,50 | 10,180.43 | 3,162.07 | • | • | |
| WHIRLPOOL CORP(WHR) | 100.000 | 146.870 | 14,687.00 | 20,760 95 | -6,073.95 | 360.00 | 2.450 | |
| Total Common Stock (60% of account holdings) | | | \$1,126,229.44 | \$838,662.47 | \$287,566.97 | \$24,343.36 | | Ь |
| Preferred Stock | | | | | | | | |
| HARTFORD FINANCIAL SERVICES GRP INC 7.875% 04/16/2042 PFD (HGH) | 2,250.000 | \$31.600 | \$71,100.00 | \$68,686 05 | \$2,413.95 | • | • | 31 |
| PINC FINIL BYCS GROUP INC 6.125%, 12/31/2049 PFD (PNCPRP) | 2,250.000 | 28.550 | 64,237.50 | 63,183.25 | 1,044.25 | | • | SISIO |
| Total Preferred Stock (7% of account holdings) | | | \$135,337.50 | \$131,879 30 | \$3,458.20 | 1 | | BC S |
| Total Stocks (67% of account holdings) | | | \$1,261,566.94 | \$970,541.77 | \$291,025.17 | \$24,343.36 | | 888 |
| SPDR Gold Tr Gold | | | | 554.35 | | | | '8K |
| Bonds | | | | \$971,096 12 | | | | K888 |
| Description Maturity | by Quantity | Price Per Unit | Total Market Value Accrued Interest (Al) | Total Cost Bashs | Unrealized Gain/Loss | Est. Annual Income (EAI) | Coupon Rate | ראפנ |
| Corporate Bonds | | | | | | | | T988 |
| CITIGROUP INC NOTE 01/07/16 | 000'000'09 91 | \$100,013 | \$60,007 80 \$1,537.00 | \$60,017.85 B B | \$10.05 | \$1,590.000 | 5.300% | 3 30 E |
| FIXED COUPON MOODYS Baa1 S&P BBB+ SEMIANNUALLY CUSIP- 172967DE8 | SEMIANNUALLY CUSIP- 17 | 72967DE8 | • | | | | | JAN. |



Holdings (continued)

Account # 636-610682 · TRUST: UNDER AGREEMENT

| Bonds (continued) | | | 1 | Total State of Males | Į. | laren la esta | 4 | |
|--|----------------------------|---------------------------------------|--------------|---|--------------------------|---|--|-------|
| Description | Maturity | Quantity | | Accrued Interest (AI) | Cost Brais | Gain/Loss | Income (EAI) | Rate |
| Corporate Bonds (continued) | | | | | | | | |
| LOEWS CORP NOTE CALL MAKE WHOLE | 03/15/16 | 50,000.000 | 100.826 | 50,413.00 772.92 | 50,018.00 BB | 395.00 | 1,312.500 | 5.250 |
| FIXED COUPON MOODYS A2 S&P | A+ SEMIANNUAL | LLY MAKE WHOLE CA! | L CUSIP: 5 | | | , | | |
| 1 | 03/22/17 | 03/22/17 50,000.000 103.582 | 103.582 | 51,781.00 653.12 | 50,828.58 ^{B B} | 962.42 | 2,375.000 | 4.750 |
| FIXED COUPON MOODYS A3 S&P | S&P A- SEMIANNUALLY CUSIP: | LY CUSIP: 61747YDT9 | | | | : | | |
| ONEOK PARTNERS LP NOTE CALL 10/01/17 | 10/01/17 | 25,000.000 | 95.519 | 23,879.75 | 24,756.25 BB | -876.50 | 200,000 | 2.000 |
| FIXED COUPON MOODYS Baa2 S& | P BBB SEMIANN | UALLY NEXT CALL DA | TE 09/01/20 | 17 CONT CALL 09/01/2017 | MAKE WHOLE CALL CU | SIP: 68268NAH6 | | |
| TOTAL SYS SYCS INC NOTE CALL 06/01/18 25,000.000 98.961 24,740,25 25,017.24 ^{BB} -276.99 MAKE WHOLE | 06/01/18 | 25,000.000 | 98.961 | 24,740.25 | 25,017.24 BB | -276.99 | 593.740 | 2.375 |
| FIXED COUPON MOODY'S Baas S&P BBB+ SEMIANNUALLY MAKE WHOLE CALL CUSIP: 891906AA7 | P BBB+ SEMIANI | NUALLY MAKE WHOLE | CALL CUS | _ | | | | |
| BAIDU INC NOTE | 08/06/18 | 10,000.000 | 101.281 | 10,128.10 | 10,355.60 | -227.50 | | 3 250 |
| FIXED COUPON MOODYS A3 SEMI, | ANNUALLY MAKE | WHOLE CALL CUSIP: | 056752AC; | ' | | | | |
| SPECTRA ENERGY PARTNERS LP 09/25/18 25,000.000 98.256 NOTE | 09/25/18 | 25,000.000 | 98.256 | 24,564.00 196.67 | 25,393,56 ^{BB} | -829.56 | 737.500 | 2 950 |
| FIXED COUPON MOODYS Baa2 S& | P BBB SEMIANN | UALLY NEXT CALL DA | TE 08/25/20 | 18 CONT CALL 08/25/2018 | MAKE WHOLE CALL CU | SIP: 84756NAC3 | | |
| ALTERA CORP NOTE CALL MAKE 11/15/18 9,000.00 | 11/15/18 | 000.000,6 | 100.817 | 9,000.000 100.817 9,073.53 9,092.27 BB -18.74 | 9,092.27 ^{BB} | -18.74 | 225.000 | 2.500 |
| FIXED COUPON MOODYS Baa1 S&P A-SEMIANNUALLY MAKE | P A- SEMIANNU | ILLY MAKE WHOLE CALL CUSIP: 021441AE0 | LL CUSIP: | | | | | |
| VORNADO REALTY LP NT | 06/30/19 | 20,000.000 | 88.484 | 19,696.80 139 | 19,978,00 BB | -281 20 | 200:000 | 2 500 |
| FIXED COUPON MOODYS Baa2 S&P BBB SEMIANNUALLY NE) | P BBB SEMIANN | UALLY NEXT CALL DA | TE 05/30/20 | ALLY NEXT CALL DATE 05/30/2019 CONT CALL 05/30/2019 MAKE WHOLE CALL CUSIP 929043AH0 | MAKE WHOLE CALL CU | SIP: 929043AH0 | | |
| WALGREENS BOOTS ALLIANCE INC | 11/18/19 | 25,000 000 | 99.812 | 24,953.00 80.63 | 25,137.85 ^{B B} | -184.85 | 675 000 | 2.700 |
| N | P BBB SEMIANN | UALLY NEXT CALL DA | TE 10/18/20 | 19 CONT CALL 10/18/2019 | MAKE WHOLE CALL CU | SIP: 931427AA6 | : | |
| YUM BRANDS INC NOTE CALL MAKE WHOLE | 11/01/20 | 45,000.000 | 98.222 | 11/01/20 45,000.000 98.222 44,199.90 46,787.08 ^{BB} -2,587.18 | 46,787.08 ^{B B} | -2,587,18 | 1,743.740 | 3.875 |
| FIXED COUPON MOODYS B1 S&F | S&P BB SEMIANNUALLY NEXT | ILY NEXT CALL DATE | 08/01/2020 | CONT CALL 08/01/2020 M/ | AKE WHOLE CALL CUSIF | 2: 988498AG6 | | |
| JPMORGAN CHASE &CO NOTE | 05/01/23 | 50,000.000 | 98.282 | 50,000.000 98.282 49,141.00 48,479.50 ^B 661.50 281.25 | 48,479.50 BB | 66150 | 1,687.500 | 3.375 |
| FIXED COUPON MOODYS Baa1 S&P BBB+ SEMIANNUALLY CO | P BBB+ SEMIAN | NUALLY CUSIP: 46625HJJ0 | 4 ₩ 0 | | | | | |
| GOLDMAN SACHS GROUP INC | 12/31/49 | 10,000.000 | 99.375 | 9,837.50 | 10,071.20 BB | -133 70 | • | 5 375 |
| FLOATING COUPON MOODYS Bat | S&P BB SEMIANNUALLY N | INUALLY NEXT CALL D | ATE 05/10/ | EXT CALL DATE 05/10/2020 CONT CALL 05/10/2020 CUSIP: 38148BABA | 20 CUSIP: 38148BAB4 | dan dan germa ni lina o ya - dan selah manjadahan pengananan Gare | - The state of the | |



ATTACHMENT TO 2015 FORM 990PF EIN 57-0902382 STATEMENT 9

MR_CE_BBPTLMBBBBX8K_BBBBC 20151231

INVESTMENT REPORT December 1, 2015 - December 31, 2015

Holdings (continued)

Account # 636-610682 TRUST: UNDER AGREEMENT

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| Bonds (continued) | | | | | | | | | |
|---|--------------|---------------------------------------|-------------------|--|--------------------------|-------------------------|--|-------------------|---------------|
| Description | Maturity | Quantity | Price Per Unit | Price Total Market Value Per Unit Accrued Interest (AI) | Total Cost Basis | Unrealized Gain/Loss | Est. Amusi Income (EAI) | Coupon Rate | |
| Corporate Bonds (continued) JPMORGAN CHASE & CO PERP NT 12/31/49 | 12/31/49 | 10,000 000 | 99.625 | 9,962.50 | 10,075 00 ^{8 B} | -112.50 | • | 5 300 | |
| FLOATING COUPON MOODY'S Baa3 S&P BBB- SEMIANNUALLY NEXT CALL DATE 05/01/2020 CUSIP; 46625HKK5 | S&P BBB-SE | EMIANNUALLY NEXT CA | IL DATE 05/ | - 01/2020 CUSIP: 46625HK | R | | | | |
| Total Corporate Bonds (22% of account holdings) | it holdings) | | | \$412,488.13 | \$416,007.98 | -\$3,519.85 | \$11,939.980 | | |
| Total Bonds (22% of account holdings) | (68) | | | \$412,488.13 | \$416,007.98 | 43,519.85 | \$11,939.980 | | 7621 3 |
| Other | | | | | | | | | 30 10A |
| Description | | Quantity | Price Per Calt | Total Market Value Accrued Interest (Al) | Total Cost Besis | Unrealized Gain/Loss | Est. Annual Est. Yield Income (EAI) (EY) | Est.Yield (EY) | :ID25 |
| BIOMED RLTY TR INC (BMR) | | 900:009 | | \$14,214.00 | \$12,299.13 | \$1,914.87 | \$624.00 | 4.390% | 184 |
| Total Other (1% of account holdings) | | | | \$14,214.00 | \$12,298.13 | \$1,914.87 | \$624.00 | | 800 |
| Total Holdings | | | | \$1,876,264.27 | \$1,535,129.75 | \$335,885.97 | \$36,907.34 | | ď |
| | | Accrued Interest (AI) | | 4,016.83 | 554 35 | | | | |
| | | Total Including Accrued Interest (AI) | Interest (AI) | \$1,880,281.10 | \$1,535,684 10 | | | | 1 |

All positions held in cash account unless otherwise indicated

Cost Basis - the original amount pard for a security, including the amount of reinvested dividends and capital gains, plus or minus certain adjustments. See last page of statement for details. Total Cost Basis does not include the cost basis on core, money market or other positions where cost basis is unknown or not applicable.

Estimated Annual Income (EAI) & Estimated Yield (EY)- EAI is an estimate of annual income for a specific security position over the next rolling 12 months EY is calculated by dwding the informational purposes only and should not be relied on for making investment, trading, or tax decisions. There is no guarantee that you investments will actually generate the EAI or EY processing the processing of the end of guorantes reflect the actual insome and yield might be higher or lower. EAI and EY should not be confused with a security's 30-day Yield of provided, as such yield quotations reflect the actual information, including calculation details, refer to the "Additional Information and Endnotes" section at the end of your current EAI for a security position by its statement closing date market value. EY reflects only the income generated by an investment; it does not reflect changes in its price, which may fluctuate. For certain types of securities, EAI and EY could include the return of principal or capital gains which would render them overstated. EAI and EY are estimates provided for statement. & EY



ATTACHMENT TO 2015 FORM 990PF EIN 57-0902382 STATEMENT 9

Application for Educational Assistance Established under The Lucyle S. Love Poundation

| | to | |
|--|----|--|
| | | |

The Foundation will award scholarships to one or more high school, college or graduate school students (not limited to any particular high school, college or graduate school in any particular locality). These scholarships are intended to enable the recipient to complete an undergraduate or graduate education in the field of his choice at the college or graduate school or his choice. The Foundation will make the availability of its scholarships known by oral or written communication each year.

In order to receive a scholarship, an eligible recipient must file an application with the Selection Committee. All applications will be reviewed by the Selection Committee who will then select the recipient from those names submitted. The children of members of the Selection Committee are not eligible to apply for these scholarships. The basic criteria for selection shall be acceptable academic achievement in high school or college, performance on tests designed to measure ability and aptitude for college or graduate work and recommendations. Financial need will be considered but is not required.

The scholarship program will be conducted with a view to providing objectivity and nondiscrimination in the awarding of scholarships. All children will be eligible recipients of the scholarships, regardless of race or employment status.

The scholarships will be paid by the Foundation directly to the education institution for the use of the scholarship recipient. Accordingly, the requirements of supervision provided by Regs. 53.4945-4(c) (5) are satisfied. Nevertheless, the Selection Committee will maintain a file on each scholarship awarded, including the original application, any recommendations received, a record of action taken on the application, and any reports on the recipient received from the institution which the recipient attends. If these reports or any other information indicate that all or any part of a scholarship is not being used in the furtherance of the purposes of such scholarship, the Foundation will take all reasonable steps to recover the diverted funds and withold any further payments to such educational institution until it has assurances that future diversions will not occur. It will also insure that any remaining funds in the hands of the educational institution will be properly used for scholarship purposes.

PLEASE TYPE ALL INFORMATION

I. PERSONAL INFORMATION

| 1. | Name: | 1 | |
|----|---------------|-------|--------|
| | Last | First | Middle |
| 2. | Home Address: | | |
| | | | |

| 3 | • Social Security Number: |
|-------|---|
| 4 | . Marital Status of Applicant: |
| | Single Married Separated Divorced |
| 5 . | Number of Childred (if married). |
| 6. | Parent(s) or Guardian with whom you live: |
| II. P | INANCIAL NEED |
| 1. | Why do you need financial assistance in order to further your education? |
| | |
| | |
| 2. | Total number of family members living at home: |
| 3. | Number of dependent children in your parents' family including yourself: |
| | Ages: |
| | Number attending High School: |
| | Number attending college: |
| 4. | How much assistance do you expect to receive from other scholar- ship and financial aid? |
| 5. | What are your anticipated annual college costs (include tuition, room, board, book and supplies, travel if commuter)? |
| 6. | Occupation of parents or guardian: |
| | |

III. EDUCATIONAL BACKGROUND 1. Name of high schools and colleges or other schools

| 1. | Name of high sch attended: | core and cor | leder or or | HET POHOOTE | | |
|---------------|--|--------------------------|-------------------|---------------------------------------|--|--|
| <u>School</u> | Address & Tele | phone No.: | Years Attended | Degree or Diploma | | |
| | | | | | | |
| | | | | | | |
| 2. | Present class statu | | | | | |
| 3. | Anticipated date of | graduation | | · · · · · · · · · · · · · · · · · · · | | |
| 4. | Anticipated major _ | | | | | |
| 5. | School preference: | (a) Institut | ion | | | |
| | | Major Study A | rea | | | |
| | Alternate: | (b) Institut | ion | | | |
| | | Major Study 7 | rea | · | | |
| | Do you plan to be | a boarding stud | lent? Yes | No | | |
| 6. | Offices held in school or college, including student student government: | | | | | |
| | | | | | | |
| 7. | Principal school clubs, band, sport | activities: s, etc.): | (e.g. honor | societies, | | |
| | | | | | | |

| 8. | What special interest and/or hobbies do you have outside of school? |
|---------|--|
| | |
| 9. | List your special talents (singing, playing musical instrument, etc.): |
| V. WOR | X EXPERIENCE |
| | List chronologically your part-time and summer employment: Job: No. Hrs. /Wk.: |
| | |
| . DESIR | E FOR EDUCATION |
| | Describe your career goals and how your major will contribute |

| VIII. | Please attach y this application | our most | recent | academic | transcript | t |
|----------------------|---|--------------|-------------------------|----------------------------|----------------------------|-----------|
| | | | • | | | |
| | | | | | • | |
| | | (Signature) | | | | |
| | | Date: | | | | |
| PERSONAL Do Not J | REFERENCES (names | , address | es & occ | upations) | | |
| Name: | A | Address | | Occupation | | |
| | | | | | | <u></u> - |
| | | | | | , | |
| Note: Ple | ease send this Applicat n R. Lever, Jr., Susan S. Greenville, S.C. 29 | ion to The : | Lucyle S. onald R. M | Love Founda cAlister, P | tion, c/o . O. Box 1004 | 5, |