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For calendar year 2016, or tax year beginning 01-01-2016, and ending 12-31-2016

Name of foundation LOCKWOOD PARTNERS FOUNDATION INC		A Employer identification number 58-2634947	
% CECIL M CHEVES			
Number and street (or P O box number if mail is not delivered to street address) 6867 MOUNTAINBROOK DRIVE Suite STE		Room/suite	B Telephone number (see instructions) (706) 243-8133
City or town, state or province, country, and ZIP or foreign postal code COLUMBUS, GA 31904			
G Check all that apply ☐ Initial return ☐ Initial return of a former public charity ☐ Final return ☐ Amended return ☐ Address change ☐ Name change		D 1. Foreign organizations, check here 2. Foreign organizations meeting the 85% test, check here and attach computation	
H Check type of organization ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here	
I Fair market value of all assets at end of year (from Part II, col (c), line 16) \$ 19,765,138		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here	
J Accounting method ☒ Cash ☐ Accrual ☐ Other (specify) (Part I, column (d) must be on cash basis)			

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)	662,564			
	2 Check ☐ if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities . . .	477,476	477,476		
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	1,969,984			
	b Gross sales price for all assets on line 6a 2,588,733				
	7 Capital gain net income (from Part IV, line 2) . . .		1,969,984		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
Operating and Administrative Expenses	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)	-5,906	-5,906		
	12 Total. Add lines 1 through 11	3,104,118	2,441,554		
	13 Compensation of officers, directors, trustees, etc	0			
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)	3,524			3,524
	b Accounting fees (attach schedule)	10,250	5,125		5,125
	c Other professional fees (attach schedule)	19	19		
	17 Interest	104	104		
	18 Taxes (attach schedule) (see instructions) . . .	16,570	70		
	19 Depreciation (attach schedule) and depletion . . .				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	22,434	16,717		5,717
	24 Total operating and administrative expenses. Add lines 13 through 23	52,901	22,035		14,366
	25 Contributions, gifts, grants paid	3,170,921			3,170,921
	26 Total expenses and disbursements. Add lines 24 and 25	3,223,822	22,035		3,185,287
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	-119,704			
	b Net investment income (if negative, enter -0-)		2,419,519		
c Adjusted net income(if negative, enter -0-) . . .					

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions.)		
		Beginning of year (a) Book Value	End of year (b) Book Value (c) Fair Market Value	
Assets	1 Cash—non-interest-bearing			
	2 Savings and temporary cash investments	266,748	424,974	424,974
	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 (attach schedule) (see instructions)			
	7 Other notes and loans receivable (attach schedule) ▶ _____ 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 (attach schedule)			
	b Investments—corporate stock (attach schedule)	3,870,196	3,574,311	19,003,112
	c Investments—corporate bonds (attach schedule)			
	11 Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12 Investments—mortgage loans			
	13 Investments—other (attach schedule)	322,547	337,052	337,052
	14 Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
15 Other assets (describe ▶ _____)				
16 Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	4,459,491	4,336,337	19,765,138	
Liabilities	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 (attach schedule)			
	22 Other liabilities (describe ▶ _____)			
	23 Total liabilities (add lines 17 through 22)	0	0	
	Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ ☐ and complete lines 24 through 26 and lines 30 and 31.		
24 Unrestricted				
25 Temporarily restricted				
26 Permanently restricted				
Foundations that do not follow SFAS 117, check here ▶ ☒ and complete lines 27 through 31.				
27 Capital stock, trust principal, or current funds				
28 Paid-in or capital surplus, or land, bldg , and equipment fund				
29 Retained earnings, accumulated income, endowment, or other funds		4,459,491	4,336,337	
30 Total net assets or fund balances (see instructions)		4,459,491	4,336,337	
31 Total liabilities and net assets/fund balances (see instructions) .		4,459,491	4,336,337	

Part III Analysis of Changes in Net Assets or Fund Balances

1 Total net assets or fund balances at beginning of year—Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	4,459,491
2 Enter amount from Part I, line 27a	2	-119,704
3 Other increases not included in line 2 (itemize) ▶ _____	3	
4 Add lines 1, 2, and 3	4	4,339,787
5 Decreases not included in line 2 (itemize) ▶ _____	5	3,450
6 Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30 .	6	4,336,337

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
1a See Additional Data Table			
b			
c			
d			
e			

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a See Additional Data Table			
b			
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) 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 as of 12/31/69	(k) Excess of col (i) over col (j), if any	
a See Additional Data Table			
b			
c			
d			
e			

2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	1,969,984
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8	3	

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 instructions before making any entries

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2015	1,493,974	19,779,936	0 07553
2014	1,481,512	19,791,307	0 074857
2013	1,752,083	18,846,568	0 092966
2012	2,282,369	17,142,214	0 133143
2011	993,506	17,432,262	0 056992

2 Total of line 1, column (d)	2	0 433488
3 Average distribution ratio for the 5-year base period—divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	0 086698
4 Enter the net value of noncharitable-use assets for 2016 from Part X, line 5	4	20,219,477
5 Multiply line 4 by line 3	5	1,752,988
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	24,195
7 Add lines 5 and 6	7	1,777,183
8 Enter qualifying distributions from Part XII, line 4	8	3,185,287

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

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

1a	Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1 Date of ruling or determination letter _____ (attach copy of letter if necessary—see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☒ and enter 1% of Part I, line 27b	1	24,195
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	
3	Add lines 1 and 2.	3	24,195
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5	24,195
6	Credits/Payments		
a	2016 estimated tax payments and 2015 overpayment credited to 2016	6a	15,131
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	15,131
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	9,064
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 2017 estimated tax ▶ Refunded ▶	11	

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a	No
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for definition)? <i>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</i>	1b	No
c Did the foundation file Form 1120-POL for this year?	1c	No
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation ▶ \$ _____ (2) On foundation managers ▶ \$ _____		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ▶ \$ _____		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If "Yes," attach a detailed description of the activities</i>	2	No
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? <i>If "Yes," attach a conformed copy of the changes</i>	3	No
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a	No
b If "Yes," has it filed a tax return on Form 990-T for this year?	4b	
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If "Yes," attach the statement required by General Instruction T</i>	5	No
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	Yes
7 Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col (c), and Part XV</i>	7	Yes
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ GA _____		
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? <i>If "No," attach explanation</i> .	8b	Yes
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 2016 or the taxable year beginning in 2016 (see instructions for Part XIV)? <i>If "Yes," complete Part XIV</i>	9	No
10 Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses</i>	10	No

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions).	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► N/A	13	Yes	
14	The books are in care of ► CECIL M CHEVES Telephone no ► (706) 243-8133			

Located at **►** 6867 MOUNTAINBROOK DRIVE STE 107 COLUMBUS GA ZIP+4 **►** 31904

15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here ☐ and enter the amount of tax-exempt interest received or accrued during the year ► 15			
16	At any time during calendar year 2016, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See instructions for exceptions and filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR) If "Yes," enter the name of the foreign country ►	16	Yes	No

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.

1a	During the year did the foundation (either directly or indirectly)		Yes	No
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☒ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☒ No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☒ No			
	(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days). ☐ Yes ☒ No			
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? ☐ Organizations relying on a current notice regarding disaster assistance check here. ► ☐	1b		
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2016?	1c		No
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 2016, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2016? ☐ Yes ☒ No If "Yes," list the years ► 20____, 20____, 20____, 20____			
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions).	2b		
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ► 20____, 20____, 20____, 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☒ No			
b	If "Yes," did it have excess business holdings in 2016 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 2016).	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
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 2016?	4b		No

5a	During the year did the foundation pay or incur any amount to			
	(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	☐ Yes ☒ No		
	(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?	☐ Yes ☒ No		
	(3) Provide a grant to an individual for travel, study, or other similar purposes?	☒ Yes ☐ No		
	(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? (see instructions).	☐ Yes ☒ No		
	(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?	☐ Yes ☒ No		
b	If any answer is "Yes" to 5a(1)–(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?	☐ Yes ☒ No	5b	No
	Organizations relying on a current notice regarding disaster assistance check here. ►	☐		
c	If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?	☐ Yes ☐ No		
	<i>If "Yes," attach the statement required by Regulations section 53.4945-5(d)</i>			
6a	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	☐ Yes ☒ No		
	b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?	☐ Yes ☒ No	6b	No
	<i>If "Yes" to 6b, file Form 8870</i>			
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?	☐ Yes ☒ No	7b	

1 List all officers, directors, trustees, foundation managers and their compensation (see instructions).

[illegible][illegible]Form **990-PF** (2016)

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

3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE".

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
Total number of others receiving over \$50,000 for professional services. ►		

Part IX-A Summary of Direct Charitable Activities

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

	Expenses
1	
2	
3	
4	

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

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1	
2	
All other program-related investments. See instructions.	
3	
Total. Add lines 1 through 3 ►	

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
a	Average monthly fair market value of securities.	1a	18,544,427
b	Average of monthly cash balances.	1b	1,653,161
c	Fair market value of all other assets (see instructions).	1c	329,800
d	Total (add lines 1a, b, and c).	1d	20,527,388
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	
2	Acquisition indebtedness applicable to line 1 assets.	2	0
3	Subtract line 2 from line 1d.	3	20,527,388
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	307,911
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4.	5	20,219,477
6	Minimum investment return. Enter 5% of line 5.	6	1,010,974

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

1	Minimum investment return from Part X, line 6.	1	1,010,974
2a	Tax on investment income for 2016 from Part VI, line 5.	2a	24,195
b	Income tax for 2016 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	24,195
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	986,779
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	986,779
6	Deduction from distributable amount (see instructions).	6	
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1.	7	986,779

Part XII Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes		
a	Expenses, contributions, gifts, etc.—total from Part I, column (d), line 26.	1a	3,185,287
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	0
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required).	3a	0
b	Cash distribution test (attach the required schedule).	3b	0
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4.	4	3,185,287
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b (see instructions).	5	24,195
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	3,161,092

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

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2015	(c) 2015	(d) 2016
1 Distributable amount for 2016 from Part XI, line 7				986,779
2 Undistributed income, if any, as of the end of 2016				
a Enter amount for 2015 only.			0	
b Total for prior years 2014, 2013, 2012		0		
3 Excess distributions carryover, if any, to 2016				
a From 2011. 145,787				
b From 2012. 1,439,590				
c From 2013. 820,607				
d From 2014. 504,190				
e From 2015. 519,948				
f Total of lines 3a through e.	3,430,122			
4 Qualifying distributions for 2016 from Part XII, line 4 ▶ \$ <u>3,185,287</u>				
a Applied to 2015, but not more than line 2a			0	
b Applied to undistributed income of prior years (Election required—see instructions).				
c Treated as distributions out of corpus (Election required—see instructions).				
d Applied to 2016 distributable amount.				986,779
e Remaining amount distributed out of corpus	2,198,508			
5 Excess distributions carryover applied to 2016 (If an amount appears in column (d), the same amount must be shown in column (a))				
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	5,628,630			
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.				
d Subtract line 6c from line 6b Taxable amount—see instructions		0		
e Undistributed income for 2015 Subtract line 4a from line 2a Taxable amount—see instructions			0	
f Undistributed income for 2016 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2017				0
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).				
8 Excess distributions carryover from 2011 not applied on line 5 or line 7 (see instructions).	145,787			
9 Excess distributions carryover to 2017. Subtract lines 7 and 8 from line 6a	5,482,843			
10 Analysis of line 9				
a Excess from 2012. 1,439,590				
b Excess from 2013. 820,607				
c Excess from 2014. 504,190				
d Excess from 2015. 519,948				
e Excess from 2016. 2,198,508				

Part XIV Private Operating Foundations (see instructions and Part VII-A, question 9)

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2016, enter the date of the ruling. ▶

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

	Tax year	Prior 3 years			(e) Total
	(a) 2016	(b) 2015	(c) 2014	(d) 2013	
2a Enter the lesser of the adjusted net income from Part I or the minimum 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					
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)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii).					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

Part XV Supplementary Information (Complete this part only if the organization had \$5,000 or more in assets at any time during the year—see instructions.)

1 Information Regarding Foundation Managers:

a List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000) (See section 507(d)(2))
See Additional Data Table

b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest

2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:

Check here ☒ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. (see instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d

a The name, address, and telephone number or email address of the person to whom applications should be addressed

b The form in which applications should be submitted and information and materials they should include

c Any submission deadlines

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

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

Recipient Name and address (home or business)	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
a <i>Paid during the year</i> See Additional Data Table				
Total			▶ 3a	3,170,921
b <i>Approved for future payment</i>				
Total			▶ 3b	

Enter gross amounts unless otherwise indicated

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

Form **990-PF** (2016)

Part XVII

- d** If the answer to any of the above is "Yes," complete the following schedule. Column **(b)** should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column **(d)** the value of the goods, other assets, or services received.

[illegible]

- 2a** Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? ☐ Yes ☒ No

- | b If "Yes," complete the following schedule | | |
|---|--------------------------|---------------------------------|
| (a) Name of organization | (b) Type of organization | (c) Description of relationship |
| | | |
| | | |
| | | |
| | | |

Sign Here Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

***** 2017-05-02 *****

Signature of officer or trustee Date Title

May the IRS discuss this return with the preparer shown below (see instr. 12) ☒ Yes ☐ No

Paid Preparer Use Only	Print/Type preparer's name	Preparer's Signature	Date	Check if self-employed ☐	PTIN P00365531
	Firm's name ▶ HENDERSON BRADY LLP				Firm's EIN ▶
	Firm's address ▶ PO BOX 724495 ATLANTA, GA 31139				Phone no (404) 419-7121

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

List and describe the kind(s) of property sold (e g , real estate, (a) 2-story brick warehouse, or common stock, 200 shs MLC Co)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
AFLAC		2016-01-19	2016-01-19
AFLAC		2016-12-16	2016-12-16
AFLAC		2016-11-11	2016-11-11
AFLAC		2010-12-15	2016-01-19
AFLAC		2011-03-15	2016-01-19
AFLAC		2014-09-03	2016-12-21

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
30,687			30,687
30,693			30,693
		17,861	-17,861
11,260		12,076	-816
2,240,787		355,758	1,885,029
266,743		233,054	33,689

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) 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 as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			30,687
			30,693
			-17,861
			-816
			1,885,029
			33,689

Form 990PF Part VIII Line 1 - List all officers, directors, trustees, foundation managers and their compensation

(a) Name and address	Title, and average hours per week (b) devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
CECIL M CHEVES	CHAIRMAN OF THE BOARD 0	0	0	0
211 N LINTON ROAD COLUMBUS, GA 31904				
BETTYE A CHEVES	PRESIDENT, SECRETARY, TREASURER 0	0	0	0
211 N LINTON ROAD COLUMBUS, GA 31904				
AVERY C WOLFF	BOARD MEMBER 0	0	0	0
45 CASCADE ROAD COLUMBUS, GA 31904				
LUTHER H WOLFF III	BOARD MEMBER 0	0	0	0
45 CASCADE ROAD COLUMBUS, GA 31904				
OLIVIA C BLANCHARD	BOARD MEMBER 0	0	0	0
227 SUNSET ROAD COLUMBUS, GA 31904				
WILLIAM R BLANCHARD	BOARD MEMBER 0	0	0	0
227 SUNSET ROAD COLUMBUS, GA 31904				
ELIZABETH C MEEKS	BOARD MEMBER 0	0	0	0
105 MORGAN DRIVE LAGRANGE, GA 30240				
RYAN L MEEKS	BOARD MEMBER 0	0	0	0
105 MORGAN DRIVE LAGRANGE, GA 30240				

Form 990PF Part XV Line 1a - List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000).

BETTYE A CHEVES
CECIL M CHEVES
ELIZABETH C MEEKS

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
ALS ASSOCIATION OF GEORGIA 1955 CLIFF VALLEY WAY SUITE 116 ATLANTA, GA 30329		PC	TO FUND PATIENT ASSISTANCE AND RESEARCH	2,000
BROOKSTONE SCHOOL 440 BRADLEY PARK DRIVE COLUMBUS, GA 31904		PC	TO FUND LOCAL EDUCATION	405,493
CUMBERLAND LAW SCHOOL 800 LAKESHORE DRIVE BIRMINGHAM, AL 35229		PC	TO FUND COLLEGE SCHOLARSHIPS	50,000
PASTORAL INSTITUTE 2022 FIFTEENTH AVENUE COLUMBUS, GA 31901		PC	TO FUND CHRISTIAN COUNSELING AND EDUCATION	10,000
CAMPUS CRUSADE FOR CHRIST 100 LAKE HART DRIVE ORLANDO, FL 32832		PC	TO FUND COLLEGE CHRISTIAN MINISTRIES	11,410
GEORGIA HISTORICAL SOCIETY 104 W GASTON STREET SAVANNAH, GA 31401		PC	TO FUND YOUTH RELATED ACTIVITIES	2,500
AMERICAN CANCER SOCIETY 233 12TH STREET 710 SUITE 710 COLUMBUS, GA 31901		PC	TO FUND HEALTH RELATED CHARITIES	5,000
KATE'S CLUB 1190 W DRUID HILLS DRIVE NE ATLANTA, GA 30329		PC	TO FUND CHARACTER BUILDING ACTIVITIES	250
UNITED WAY OF THE CHATTAHOOCHEE VALLEY PO BOX 1157 COLUMBUS, GA 31902		PC	TO FUND LOCAL COMMUNITY SERVICES	27,500
SOLDIER MARATHON 800 TIMBER CREEK COURT COLUMBUS, GA 31904		PC	TO PROMOTE COMMUNITY ATHLETICS	15,000
NATIONAL INFANTRY FOUNDATION 1775 LEGACY WAY SUITE 220 COLUMBUS, GA 31903		PC	TO FUND LOCAL MUSEUM	500,000
YOUNG LIFE COLUMBUS 1137 LOCKWOOD AVE COLUMBUS, GA 31906		PC	TO FUND CHRISTIAN YOUTH MINISTRY	25,000
WYNNNTON UNITED METHODIST CHURCH PO BOX 5469 COLUMBUS, GA 31906		PC	TO PROMOTE COMMUNITY ATHLETICS	2,500
UPTOWN COLUMBUS PO BOX 1237 COLUMBUS, GA 31902		PC	TO SUPPORT THE CITY OF COLUMBUS, GA	100,000
TWIN CEDARS CASA 18 NINTH STREET SUITE 504 COLUMBUS, GA 31901		PC	TO SPONSOR COMMUNITY ATHLETICS	500
Total ► 3a				3,170,921

Form 990FP Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
SOLID ROCK ASSEMBLY OF GOD 6959 WARM SPRINGS ROAD MIDLAND, GA 31820		PC	TO PRODUCE CHRISTIAN FILM	5,000
COLUMBUS ROAD RUNNERS INC PO BOX 9734 COLUMBUS, GA 31908		PC	TO FUND COMMUNITY ATHLETICS	1,000
RALLY FOUNDATION FOR CHILDHOOD CANCER 5775 GLENRIDGE DRIVE BUIDLING B SUITE 370 SANDY SPRINGS, GA 30328		PC	TO FUND RESEARCH FOR CHILDHOOD CANCER	25,000
YMCA 24 14TH STREET COLUMBUS, GA 31901		PC	TO PROMOTE COMMUNITY ATHLETICS	2,305
COLUMBUS STATE UNIVERSITY FOUNDATION 4225 UNIVERSITY AVENUE COLUMBUS, GA 31907		PC	TO FUND ATHLETIC SCHOLARSHIPS	10,000
COLUMBUS LEDGER-ENQUIRER PO BOX 711 COLUMBUS, GA 31902		PC	TO FUND COMMUNITY ECONOMIC DEVELOPMENT	24,000
CHATTAHOOCHEE BOY SCOUTS OF AMERICA 1237 1ST AVENUE COLUMBUS, GA 31901		PC	TO FUND COMMUNITY YOUTH TRAINING	10,000
SAMARC FOUNDATION 2504 BEECH TREE COURT SW CONYERS, GA 30094		PC	TO PROMOTE COMMUNIY ATHLETICS	10,000
COLUMBUS REGIONAL HEALTH FOUNDATION 707 CENTER STREET COLUMBUS, GA 31901		PC	TO FUND MEDICAL CARE	500,000
HISTORIC WESTVILLE DEVELOPMENT OFFICE 1222 BROADWAY SUITE 114 COLUMBUS, GA 31901		PC	TO FUND HISTORICAL RESTORATION	10,000
AMERICAN HEART ASSOCIATION 1639 BRADLEY PARK DRIVE SUITE 500 COLUMBUS, GA 31904		PC	TO FUND HEALTH RELATED CHARITIES	10,000
MERCYMED OF COLUMBUS PO BOX 1491 COLUMBUS, GA 31902		PC	TO FUND CHRISTIAN MEDICAL MINISTRY	50,000
RIVER CENTER INC PO BOX 2425 COLUMBUS, GA 31902		PC	TO PROMOTE PERFORMANCE ARTS	10,000
COLUMBUS BOTANICAL GARDEN 3603 WEEMS ROAD COLUMBUS, GA 31909		PC	TO FUND COMMUNITY ENVIRONMENTAL ENHANCEMENT	1,000
COLUMBUS SYMPHONY ORCHESTRA PO BOX 1499 COLUMBUS, GA 31902		PC	TO FUND MUSIC AND THE ARTS	7,500
Total ►				3,170,921
3a				

Form 990FP Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
EASTER SEALS OF WEST GEORGIA 2515 DOUBLE CHURCHES ROAD COLUMBUS, GA 31909		PC	TO HELP THE MEDICALLY DISABLED	500,000
HARVESTERS INTERNATIONAL MISSION INC PO BOX 22549 HILTON HEAD, SC 29925		PC	TO FUND CHRISTIAN MINISTRY IN AFRICA	10,000
JESUS FILM PROJECT 100 LAKE HART DRIVE ORLANDO, FL 32832		PC	TO FUND CHRISTIAN FILM PROJECT	83,480
TRUTH SPRING INC 3314 5TH AVENUE COLUMBUS, GA 31904		PC	TO FUND CHRISTIAN SCHOOL	15,000
PIONEERS 10123 WILLIAM CAREY DRIVE ORLANDO, FL 32827		PC	TO FUND CHRISTIAN MINISTRIES	8,500
CARTER MAULDIN 1515 CATHERINE DRIVE PHENIX CITY, AL 36867		I	COLLEGE SCHOLARSHIP	4,000
MEGAN O'CONNOR 51 OSAGE LANE STATEN ISLAND, NY 10312		I	COLLEGE SCHOLARSHIP	5,000
LUCAS TESTIN 2012 6TH AVENUE COLUMBUS, GA 31904		I	COLLEGE SCHOLARSHIP	4,000
SEAN WILLARD 3500 MASSEE LANE APT 212 COLUMBUS, GA 31909		I	COLLEGE SCHOLARSHIP	4,000
YAKIRA COCHRAN 707 LEE ROAD 334 SALEM, AL 36874		I	COLLEGE SCHOLARSHIP	4,000
HELENA SANDERS 4548 CARNOUSTIE LANE COLUMBUS, GA 31909		I	COLLEGE SCHOLARSHIP	1,000
CAYMUS PRICE 4 HILTON WOODS COURT COLUMBUS, GA 31906		I	COLLEGE SCHOLARSHIP	1,000
EDWARD XIE 215 THAMESMAR LANE JOHNS CREEK, GA 30024		I	COLLEGE SCHOLARSHIP	1,000
TRAVIS HANNAN 21 LEAF BROOK COURT MIDLAND, GA 31820		I	COLLEGE SCHOLARSHIP	1,000
CAITLYN JORDAN 1325 15TH STREET COLUMBUS, GA 31901		I	COLLEGE SCHOLARSHIP	1,000
Total ► 3a				3,170,921

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
NAEISHA MCCLAIN 1811 41ST STREET COLUMBUS, GA 31904		I	COLLEGE SCHOLARSHIP	1,000
HALEIGH SMITH 4 RED OAK TRAIL SHARPSBURG, GA 30277		I	COLLEGE SCHOLARSHIP	1,000
SETH DIXON 396 WAGON WHEEL DRIVE ELLERSLIE, GA 31807		I	COLLEGE SCHOLARSHIP	1,000
MARY KATHRYN DICKSON 1017 LIGHTHOUSE ROAD CHAPIN, SC 29036		I	COLLEGE SCHOLARSHIP	1,000
ABIGAIL WHITE 17 BLUEBIRD TRAIL FORTSON, GA 31808		I	COLLEGE SCHOLARSHIP	1,000
SHIVANI UPADHAYAY 8057 ADELAIDE DRIVE COLUMBUS, GA 31909		I	COLLEGE SCHOLARSHIP	2,000
JONATHAN CODY CLARK 4206 TIMBALIER DRIVE COLUMBUS, GA 31907		I	COLLEGE SCHOLARSHIP	2,000
CHANDLER T JOHNSON 520 LEE ROAD 419 OPELIKA, AL 36804		I	COLLEGE SCHOLARSHIP	2,000
JOSE BLANCO 16 CLEAR CREEK FORT MITCHELL, AL 36856		I	COLLEGE SCHOLARSHIP	2,000
JZALYNN GREEN 11 DUNNOCK COURT COLUMBIS, SC 29229		I	COLLEGE SCHOLARSHIP	2,000
ANN JOHNSON 8620 CREEKRISE DRIVE COLUMBUS, GA 31904		I	COLLEGE SCHOLARSHIP	3,000
LINDSAY WEATHERS 122 ROBERTSON ROAD LAGRANGE, GA 30241		I	COLLEGE SCHOLARSHIP	3,000
CARA L WHITE 2320 MIDWAY DRIVE PHENIX CITY, AL 36869		I	COLLEGE SCHOLARSHIP	3,000
SARAH C GOODROE 5042 WELLINGTON WAY MIDLAND, GA 31820		I	COLLEGE SCHOLARSHIP	3,000
YOUNG LIFE ATHENS 920 BAXTER STREET ATHENS, GA 30606		PC	TO FUND CHRISTIAN CAMPUS YOUTH MINISTRY	5,000
Total ► 3a				3,170,921

Form 990FP Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
RACE ROSTER 500 SANSOME STREET 4TH FLOOR SAN FRANCISCO, CA 94104		I	TO SPONSOR RUNNERS FOR CHARITY	10,000
STEWART COUNTY HISTORICAL SOCIETY PO BOX 818 LUMPKIN, GA 31815		PC	TO PROMOTE COMMUNITY ATHLETICS	2,000
TEEN ADVISORS PO BOX 5305 COLUMBUS, GA 31906		PC	TO FUND CHRISTIAN YOUTH MINISTRY	10,000
FELLOWSHIP OF CHRISTIANS UNITED IN SERVICE 232 HAMILTON SQUARE STREET PO BOX 524 HAMILTON, GA 31811		PC	TO FUND CHRISTIAN MINISTRY TO AID THE UNDERPRIVILEGED	10,000
CRU-CAMPUS CRUSADE FOR CHRIST 100 LAKE HART DRIVE ORLANDO, FL 32832		PC	TO FUND CHRISTIAN CAMPUS MINISTRY	3,000
YOUNG LIFE LAGRANGE 300 MOOTY BRIDGE ROAD SUITE 204 LAGRANGE, GA 30240		PC	TO FUND CHRISTIAN CAMPUS MINISTRY	1,000
COLUMBUS STATE UNIVERSITY FOUNDATION 4225 UNIVERSITY AVENUE COLUMBUS, GA 31907		PC	TO BUILD ART CENTER	500,000
TAGGART PRICE 4 HILTON WOODS COURT COLUMBUS, GA 31906		I	COLLEGE SCHOLARSHIP	3,000
YOUNG LIFE LAGRANGE 300 MOOTY BRIDGE ROAD SUITE 201 LAGRANGE, GA 30240		PC	TO FUND CHRISTIAN CAMPUS MINISTRY	39,500
YOUNG LIFE COLUMBUS 1137 LOCKWOOD AVENUE COLUMBUS, GA 31906		PC	TO FUND CHRISTIAN CAMPUS MINISTRY	5,000
CORNERSTONE CHURCH 2123 HAMILTON ROAD AUBURN, AL 36830		PC	TO FUND CHRISTIAN CHURCH	1,408
TREES COLUMBUS 303 12TH STREET COLUMBUS, GA 31901		PC	TO PROMOTE ENVIRONMENTAL PRESERVATION	250
GLOBAL TEEN CHALLENGE 15 W 10TH STREET COLUMBUS, GA 31901		PC	TO FUND CHRISTIAN MINISTRY TO AID ADDICTION	700
UNIVERSITY OF GEORGIA FOUNDATION 394 SOUTH MILLEDGE AVENUE ATHENS, GA 30602		PC	SUPPORT FOR TEACHERS, OUTREACH AND RESEARCH	100
SWEETLAND AMPHITHEATRE 110 SMITH STREET LAGRANGE, GA 30240		PC	TO SUPPORT HISTORIC PRESERVATION	2,500
Total ►				3,170,921
3a				

Form 990FP Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
LAGRANGE SYMPHONY ORCHESTRA 301 CHURCH STREET LAGRANGE, GA 30240		PC	TO PROMOTE MUSIC APPRECIATION	600
LAGRANGE BLUE SOX INC 516 NORTH GREENWOOD STREET LAGRANGE, GA 30240		PC	TO FUND SCHOOL BASEBALL CAMP	300
KENYA PARTNERS 609 QUAKER LANE HIGH POINT, NC 27262		PC	TO PROVIDE HEALTHCARE, EDUCATION TO THE UNDERPRIVILEGED	100
BROOKSTONE SCHOOL 440 BRADLEY PARK DRIVE COLUMBUS, GA 31904		PC	TO FUND LOCAL EDUCATION	5,000
GARDNER NEWMAN MIDDLE SCHOOL 101 SOUTH SHANNON DRIVE LAGRANGE, GA 30240		PC	TO FUND SCHOOL-PARENT ORGANIZATION	250
WOUNDED WARRIOR PROJECT PO BOX 758517 TOPEKA, KS 66675		PC	TO PROVIDE HELP TO WOUNDED VETERANS	100
CROSSPOINTE CHURCH 2301 AIRPORT THRUWAY B COLUMBUS, GA 31904		PC	TO FUND CHRISTIAN CHURCH	5,150
FOOD FOR THE POOR 6401 LYONS ROAD COCONUT CREEK, FL 33073		PC	TO PROVIDE FOOD AND GOSPEL TO THE UNDERPRIVILEGED	300
FOUNTAIN CHURCH 109 MALLORY DRIVE LAGRANGE, GA 30241		PC	TO FUND CHRISTIAN CHURCH	1,000
YOUNG LIFE GREATER ATHENS 920 BAXTER STREET ATHENS, GA 30606		PC	TO FUND CHRISTIAN CAMPUS MINISTRY	225
SMILE TRAIN 41 MADISON AVENUE 28TH FLOOR NEW YORK, NY 10010		PC	TO PROVIDE MEDICAL CARE	350
SAMARITANS PURSE PO BOX 3000 BOONE, NC 28607		PC	TO PROVIDE HELP TO REFUGEES	200
YOUNG LIFE AUBURN-OPELIKA POB OX 1336 AUBURN, AL 36831		PC	TO FUND CHRISTIAN CAMPUS MINISTRY	1,000
LAFAYETTE SOCIETY FOR PERFORMING ARTS 214 BULL STREET LAGRANGE, GA 30240		PC	TO PROMOTE CULTURAL AWARENESS	100
HILLSIDE MONTESSORI OF LAGRANGE 525 PARK AVENUE LAGRANGE, GA 30240		PC	TO FUND LOCAL ELEMENTARY SCHOOL	500
Total ► 3a				3,170,921

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
POLICE FAMILY SURVIVORS FUND 6350 HORIZON DRIVE TITUSVILLE, FL 32780		PC	TO HELP FAMILIES OF FALLEN POLICE OFFICERS	100
FELLOWSHIP OF CHRISTIAN ATHLETES 8701 LEEDS ROAD KANSAS CITY, MO 64129		PC	TO FUND CHRISTIAN YOUTH MINISTRY	2,000
TRUTH SPRING INC 3314 5TH AVENUE COLUMBUS, GA 31904		PC	TO FUND CHRISTIAN SCHOOL FOR THE UNDERPRIVILEGED	1,000
ALZHEIMERS ASSOCIATION 5156 RIVER ROAD COLUMBUS, GA 31904		PC	TO SUPPORT RESEARCH FOR DEMENTIA PATIENTS	250
COLUMBUS STATE UNIVERSITY FOUNDATION 4225 UNIVERSITY AVENUE COLUMBUS, GA 31907		PC	TO FUND EDUCATION	300
NATIONAL CIVIL WAR NAVAL MUSEUM 1002 VICTORY DRIVE COLUMBUS, GA 31901		PC	TO FUND HISTORIC PRESERVATION	200
SOUND CHOICES PREGNANCY CLINIC 1316 WYNNTON CT B COLUMBUS, GA 31906		PC	TO EDUCATE WOMEN REGARDING HEALTH ISSUES	150
QUEST CHURCH 5001 GATEWAY BOULEVARD GROVETOWN, GA 30813		PC	TO FUND CHRISTIAN CHURCH	2,000
DOUBLE IMPACT 22-24 FRIAR LANE NOTTINGHAM NG1 6DQ UK		PC	TO HELP RECOVERING SUBSTANCE ABUSERS	250
HOPE HARBOUR PO BOX 4182 COLUMBUS, GA 31914		PC	TO SUPPORT SURVIVORS OF DOMESTIC VIOLENCE	100
MISSION TO THE WORLD 1600 N BROWN ROAD LAWRENCEVILLE, GA 30043		PC	TO SUPPORT CHRISTIAN WORLDWIDE MINISTRY	3,000
SOLID ROCK 920 BAXTER STREET ATHENS, GA 30606		PC	TO FUND CHRISTIAN CHURCH	5,000
COLUMBUS STATE UNIVERSITY FOUNDATION 4225 UNIVERSITY AVENUE COLUMBUS, GA 31907		PC	TO SUPPORT LOCAL UNIVERSITY	20,000
BROOKSTONE SCHOOL 440 BRADLEY PARK DRIVE COLUMBUS, GA 31904		PC	TO FUND LOCAL EDUCATION	5,000
YOUNG LIFE GREATER COLUMBUS 1137 LOCKWOOD AVENUE COLUMBUS, GA 31906		PC	TO FUND CHRISTIAN CAMPUS MINISTRY	20,000
Total ► 3a				3,170,921

Note: To capture the full content of this document, please select landscape mode (11" x 8.5") when printing.

TY 2016 Depreciation Schedule

Name: LOCKWOOD PARTNERS FOUNDATION INC

EIN: 58-2634947

TY 2016 Investments Corporate Stock Schedule**Name:** LOCKWOOD PARTNERS FOUNDATION INC**EIN:** 58-2634947

Name of Stock	End of Year Book Value	End of Year Fair Market Value
MORGAN STANLEY SMITH BARNEY	3,574,311	19,003,112

TY 2016 Investments - Other Schedule

Name: LOCKWOOD PARTNERS FOUNDATION INC

EIN: 58-2634947

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
JORDAN CAPITAL PARTNERS		337,052	337,052

TY 2016 Other Decreases Schedule

Name: LOCKWOOD PARTNERS FOUNDATION INC
EIN: 58-2634947

Description	Amount
BASIS ADJUSTMENT	3,450

TY 2016 Other Expenses Schedule**Name:** LOCKWOOD PARTNERS FOUNDATION INC**EIN:** 58-2634947**Other Expenses Schedule**

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
OFFICE EXPENSES	22,289	16,717		5,572
REGISTRATION FEES	145			145

TY 2016 Other Income Schedule**Name:** LOCKWOOD PARTNERS FOUNDATION INC**EIN:** 58-2634947**Other Income Schedule**

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
JORDAN CAPITAL PARTNERS K-1	1,180	1,180	
JORDAN CAPITAL PARTNERS K-1	-7,086	-7,086	

TY 2016 Other Professional Fees Schedule**Name:** LOCKWOOD PARTNERS FOUNDATION INC**EIN:** 58-2634947

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT FEES	19	19		

TY 2016 Taxes Schedule**Name:** LOCKWOOD PARTNERS FOUNDATION INC**EIN:** 58-2634947

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FEDERAL TAXES	16,500			
FOREIGN TAXES	70	70		

Schedule B (Form 990, 990-EZ, or 990-PF) Department of the Treasury Internal Revenue Service	Schedule of Contributors ▶ Attach to Form 990, 990-EZ, or 990-PF ▶ Information about Schedule B (Form 990, 990-EZ, or 990-PF) and its instructions is at www.irs.gov/form990	OMB No 1545-0047 2016
	Name of the organization LOCKWOOD PARTNERS FOUNDATION INC	Employer identification number 58-2634947

Organization type (check one)

Filers of:	Section:
Form 990 or 990-EZ	☐ 501(c)() (enter number) organization
	☐ 4947(a)(1) nonexempt charitable trust not treated as a private foundation
	☐ 527 political organization
Form 990-PF	☒ 501(c)(3) exempt private foundation
	☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation
	☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.
Note. Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

General Rule

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

Special Rules

☐ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33¹/₃% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.

☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I, II, and III.

☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Do not complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling \$5,000 or more during the year. ▶ \$ _____

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

Name of organization
LOCKWOOD PARTNERS FOUNDATION INC

Employer identification number
58-2634947

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

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	OLIVIA D AMOS CHARITABLE LEAD TRUST	\$ 297,065	Person ☒
	6867 MOUNTAINBROOK DRIVE SUITE 107		Payroll ☐
	COLUMBUS, GA 31904		Noncash ☐ (Complete Part II for noncash contributions)
2	ELIZABETH CHEVES MEEKS	\$ 81,000	Person ☒
	105 MORGAN DRIVE		Payroll ☐
	LAGRANGE, GA 30240		Noncash ☐ (Complete Part II for noncash contributions)
3	OLIVIA D AMOS CHARITABLE LEAD TRUST	\$ 274,499	Person ☒
	6867 MOUNTAINBROOK DRIVE SUITE 107		Payroll ☐
	COLUMBUS, GA 31904		Noncash ☒ (Complete Part II for noncash contributions)
4	CECIL M CHEVES	\$ 10,000	Person ☒
	211 N LINTON ROAD		Payroll ☐
	COLUMBUS, GA 31904		Noncash ☐ (Complete Part II for noncash contributions)
-		\$	Person ☐
			Payroll ☐
			Noncash ☐ (Complete Part II for noncash contributions)
-		\$	Person ☐
			Payroll ☐
			Noncash ☐ (Complete Part II for noncash contributions)

Name of organization LOCKWOOD PARTNERS FOUNDATION INC	Employer identification number 58-2634947
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Part II Noncash Property			
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
3	3,800 SHARES OF AFLAC COMMON STOCK	\$ 265 715	2016-12-20
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
3	125 SHARES OF AFLAC COMMON STOCK	\$ 8 784	2016-12-21
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	

Name of organization LOCKWOOD PARTNERS FOUNDATION INC	Employer identification number 58-2634947
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Part III	Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of exclusively religious, charitable, etc., contributions of \$1,000 or less for the year. (Enter this information once. See instructions.) ▶ \$ _____ Use duplicate copies of Part III if additional space is needed
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(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	_____	_____	_____
	_____	_____	_____
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	
	_____	_____	_____
	_____	_____	_____
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	
	_____	_____	_____
	_____	_____	_____
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	
	_____	_____	_____
	_____	_____	_____
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	
	_____	_____	_____
	_____	_____	_____
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	
	_____	_____	_____
	_____	_____	_____
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	
	_____	_____	_____
	_____	_____	_____
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	