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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 instructions is at *www.irs.gov/form990pf*.**

OMB No 1545-0052

2016

Open to Public Inspection

For calendar year 2016, or tax year beginning 07-01-2016 , and ending 06-30-2017

Name of foundation
JOHN WILLIAM POPE FOUNDATION

A Employer identification number
58-1691765

Number and street (or P O box number if mail is not delivered to street address)
4601 SIX FORKS ROAD SUITE 300

Room/suite

B Telephone number (see instructions)
(919) 861-6445

City or town, state or province, country, and ZIP or foreign postal code
RALEIGH, NC 27609

C If exemption application is pending, check here ▶ ☐

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)* ▶$ 186,020,018

J Accounting method ☑ Cash ☐ Accrual ☐ Other (specify) _____
(Part I, column (d) must be on cash basis)

F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ▶ ☐

Part I **Analysis of Revenue and Expenses** *(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (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)				
	2	Check ▶ ☑ if the foundation is **not** required to attach Sch B				
	3	Interest on savings and temporary cash investments	18,971	18,971		
	4	Dividends and interest from securities	2,331,206	2,331,206		
	5a	Gross rents	386,650	386,650		
	b	Net rental income or (loss) 194,831				
	6a	Net gain or (loss) from sale of assets not on line 10	2,500,096			
	b	Gross sales price for all assets on line 6a 11,183,524				
	7	Capital gain net income (from Part IV, line 2)		2,620,264		
	8	Net short-term capital gain				
	9	Income modifications				
	10a	Gross sales less returns and allowances				
	b	Less Cost of goods sold				
	c	Gross profit or (loss) (attach schedule)				
	11	Other income (attach schedule)	2,062			
	12	**Total.** Add lines 1 through 11	5,238,985	5,357,091		
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc	296,575	92,894		203,681
	14	Other employee salaries and wages	134,338	33,585		100,753
	15	Pension plans, employee benefits	68,995	15,151		53,844
	16a	Legal fees (attach schedule)	3,423	3,423		
	b	Accounting fees (attach schedule)	16,200	16,200		
	c	Other professional fees (attach schedule)	702	176		526
	17	Interest				
	18	Taxes (attach schedule) (see instructions)	50,764	10,946		
	19	Depreciation (attach schedule) and depletion				
	20	Occupancy				
	21	Travel, conferences, and meetings				
	22	Printing and publications				
	23	Other expenses (attach schedule)	711,800	665,894		45,906
	24	**Total operating and administrative expenses.** Add lines 13 through 23	1,282,797	838,269		404,710
	25	Contributions, gifts, grants paid	11,194,000			11,194,000
	26	**Total expenses and disbursements.** Add lines 24 and 25	12,476,797	838,269		11,598,710
	27	Subtract line 26 from line 12				
	a	**Excess of revenue over expenses and disbursements**	-7,237,812			
	b	**Net investment income** (if negative, enter -0-)		4,518,822		
	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	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash—non-interest-bearing	1,520,446	1,143,783	1,143,782
	2 Savings and temporary cash investments	13,903,395	13,312,765	13,312,765
	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)	942,268	942,268	5,563,601
	c Investments—corporate bonds (attach schedule)			
	11 Investments—land, buildings, and equipment basis ▶ 3,150,991			
	Less accumulated depreciation (attach schedule) ▶ 98,656	3,431,221	3,052,335	3,150,991
	12 Investments—mortgage loans			
	13 Investments—other (attach schedule)	153,139,915	147,248,282	162,848,879
	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)	172,937,245	165,699,433	186,020,018
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	
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	172,937,245	165,699,433	
	30 **Total net assets or fund balances** (see instructions)	172,937,245	165,699,433	
	31 **Total liabilities and net assets/fund balances** (see instructions)	172,937,245	165,699,433	

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	172,937,245
2	Enter amount from Part I, line 27a	2	-7,237,812
3	Other increases not included in line 2 (itemize) ▶	3	
4	Add lines 1, 2, and 3	4	165,699,433
5	Decreases not included in line 2 (itemize) ▶	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	165,699,433

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	2,620,264
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	2,479,975

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	10,272,237	187,290,663	0 054846
2014	9,555,385	168,293,244	0 056778
2013	7,462,049	196,165,520	0 038040
2012	9,841,966	178,351,345	0 055183
2011	9,485,739	143,604,096	0 066055

2	**Total** of line 1, column (d)	2	0 270902
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 054180
4	Enter the net value of noncharitable-use assets for 2016 from Part X, line 5	4	182,641,442
5	Multiply line 4 by line 3	5	9,895,513
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	45,188
7	Add lines 5 and 6	7	9,940,701
8	Enter qualifying distributions from Part XII, line 4	8	11,598,710

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	45,188
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	45,188
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	45,188
6	Credits/Payments		
a	2016 estimated tax payments and 2015 overpayment credited to 2016 — 6a: 111,599		
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	111,599
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	66,411
11	Enter the amount of line 10 to be **Credited to 2017 estimated tax** ▶ 66,411 **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)?	1b		No
	*If the answer is "Yes" to **1a** or **1b**, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities*			
c	Did the foundation file **Form 1120-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? *If "Yes," attach a detailed description of the activities*	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? *If "Yes," attach a conformed copy of the changes*	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? *If "Yes," attach the statement required by General Instruction T*	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? *If "Yes," complete Part II, col (c), and Part XV*	7	Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ NC, 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? *If "No," attach explanation* .	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)? *If "Yes," complete Part XIV*	9		No
10	Did any persons become substantial contributors during the tax year? *If "Yes," attach a schedule listing their names and addresses*	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	Yes	
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Yes	

Website address ▶ WWW JWPF ORG

14 The books are in care of ▶ JOHN HOOD PRESIDENT Telephone no ▶ (919) 861-6445

Located at ▶ 4601 SIX FORKS ROAD STE 300 RALEIGH NC ZIP+4 ▶ 27609

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		No

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)			
	(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)?	1b		No
	Organizations relying on a current notice regarding disaster assistance check here. ▶ ☐			
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2016?	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 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

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

5a	During the year did the foundation pay or incur any amount to				
	(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	☐ Yes	☑ No		
	(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?	☐ Yes	☑ No		
	(3) Provide a grant to an individual for travel, study, or other similar purposes?	☐ Yes	☑ No		
	(4) Provide a grant to an organization other than a charitable, etc , organization described in section 4945(d)(4)(A)? (see instructions)	☐ Yes	☑ No		
	(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?	☐ Yes	☑ No		
b	If any answer is "Yes" to 5a(1)–(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53 4945 or in a current notice regarding disaster assistance (see instructions)?			5b	
	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		
	If "Yes," attach the statement required by Regulations section 53 4945–5(d)				
6a	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	☐ Yes	☑ No		
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?			6b	No
	If "Yes" to 6b, file Form 8870				
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	☐ Yes	☑ No		
b	If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?			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 (see instructions).

(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	Expense account, (e) other allowances
See Additional Data Table				

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

(a) Name and address of each employee paid more than $50,000	Title, and average hours per week (b) devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances
LINDSAY ARANT 4601 SIX FORKS RD SUITE 300 RALEIGH, NC 27609	COMMUNICATIO 40 00	59,915	1,798	
CLARICE SMITH 4601 SIX FORKS RD SUITE 300 RALEIGH, NC 27609	PROGRAM OFFI 40 00	61,000		
Total number of other employees paid over $50,000 ▶				

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
NONE		

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 N/A	
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	169,994,306
b	Average of monthly cash balances	1b	12,277,487
c	Fair market value of all other assets (see instructions)	1c	3,150,991
d	**Total** (add lines 1a, b, and c)	1d	185,422,784
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	
3	Subtract line 2 from line 1d	3	185,422,784
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	2,781,342
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3 Enter here and on Part V, line 4	5	182,641,442
6	**Minimum investment return.** Enter 5% of line 5	6	9,132,072

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

1	Minimum investment return from Part X, line 6			1	9,132,072
2a	Tax on investment income for 2016 from Part VI, line 5	2a	45,188		
b	Income tax for 2016 (This does not include the tax from Part VI)	2b			
c	Add lines 2a and 2b			2c	45,188
3	Distributable amount before adjustments Subtract line 2c from line 1			3	9,086,884
4	Recoveries of amounts treated as qualifying distributions			4	
5	Add lines 3 and 4			5	9,086,884
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	9,086,884

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	11,598,710
b	Program-related investments—total from Part IX-B	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	**Qualifying distributions.** Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	11,598,710
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	45,188
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	11,553,522

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				9,086,884
2 Undistributed income, if any, as of the end of 2016				
a Enter amount for 2015 only.				
b Total for prior years 20___, 20___, 20___				
3 Excess distributions carryover, if any, to 2016				
a From 2011. 2,366,794				
b From 2012. 1,096,498				
c From 2013. 2,248,228				
d From 2014. 1,324,212				
e From 2015. 1,019,302				
f **Total** of lines 3a through e.	8,055,034			
4 Qualifying distributions for 2016 from Part XII, line 4 ▶ $ 11,598,710				
a Applied to 2015, but not more than line 2a				
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.				9,086,884
e Remaining amount distributed out of corpus	2,511,826			
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	10,566,860			
b Prior years' undistributed income Subtract line 4b from line 2b				
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				
e Undistributed income for 2015 Subtract line 4a from line 2a Taxable amount—see instructions				
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) . . .	2,366,794			
9 Excess distributions carryover to 2017. Subtract lines 7 and 8 from line 6a	8,200,066			
10 Analysis of line 9				
a Excess from 2012. . . . 1,096,498				
b Excess from 2013. . . . 2,248,228				
c Excess from 2014. . . . 1,324,212				
d Excess from 2015. . . . 1,019,302				
e Excess from 2016. . . . 2,511,826				

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))

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 e-mail address of the person to whom applications should be addressed

JOHN HOOD
4601 SIX FORKS RD STE 300
RALEIGH, NC 27609
(919) 861-6445

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

REQUEST FOR GRANT WITH REASONS FOR NEED

c Any submission deadlines

NO FORMAL SUBMISSION DEADLINES

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

NO FORMAL RESTRICTIONS THE FOUNDATION MADE A DISTRIBUTION TO A DONOR-ADVISED FUND (DAF) SPONSORING ORGANIZATION THAT WAS TREATED AS A QUALIFYING DISTRIBUTION THE DAF SPONSORING ORGANIZATION IS A 501(C)(3) TAX-EXEMPT ENTITY BY REASON OF 509(A)(1) THAT, PURSUANT TO ITS ORGANIZING DOCUMENTS, IS ORGANIZED AND OPERATED EXCLUSIVELY FOR RELIGIOUS, CHARITABLE, SCIENTIFIC, LITERARY, OR EDUCATIONAL PURPOSES AS REQUIRED BY ITS ORGANIZING AND GOVERNING DOCUMENTS, ALL CONTRIBUTIONS TO THE DAF SPONSORING ORGANIZATION THAT ARE PART OF ITS DONOR-ADVISED FUND PROGRAM ARE USED EXCLUSIVELY FOR RELIGIOUS, CHARITABLE, SCIENTIFIC, LITERARY, OR EDUCATIONAL PURPOSES AS A CONSEQUENCE, ALL DISTRIBUTIONS BY THE FOUNDATION TO THE DAF SPONSORING ORGANIZATION ARE USED TO ACCOMPLISH A PURPOSE DESCRIBED IN SECTION 170(C)(2)(B) UPON MAKING THE DISTRIBUTION TO THE DAF SPONSORING ORGANIZATION, THE FOUNDATION RELINQUISHED ALL LEGALLY ENFORCEABLE RIGHTS WITH RESPECT TO THE DISTRIBUTED ASSETS BECAUSE THE DAF SPONSORI

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 *Paid during the year* SEE ATTACHED SCHEDULE SEE ATTACHED SCHEDULE SEE ATTACHED SCHEDULE, NC 27609	NONE	501C ORGS	CHARITABLE PURPOSE	11,194,000
Total . . . . . ▶ **3a**				11,194,000
b *Approved for future payment*				
Total . . . . . ▶ **3b**				

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments. . . .					
3 Interest on savings and temporary cash investments			14	18,971	
4 Dividends and interest from securities. . . .			14	2,331,206	
5 Net rental income or (loss) from real estate					
a Debt-financed property.					
b Not debt-financed property.					194,831
6 Net rental income or (loss) from personal property					
7 Other investment income.					
8 Gain or (loss) from sales of assets other than inventory					2,500,096
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue					
a MISCELLANEOUS			14	2,062	
b					
c					
d					
e					
12 Subtotal Add columns (b), (d), and (e). .				2,352,239	2,694,927
13 **Total.** Add line 12, columns (b), (d), and (e).				13	5,047,166

(See worksheet in line 13 instructions to verify calculations)

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

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes) (See instructions)
3	THE FUNDS PROVIDED BY THESE ACTIVITIES ALLOW THE ORGANIZATION TO PROMOTE ITS PURPOSE
4	THE FUNDS PROVIDED BY THESE ACTIVITIES ALLOW THE ORGANIZATION TO PROMOTE ITS PURPOSE
8	THE FUNDS PROVIDED BY THESE ACTIVITIES ALLOW THE ORGANIZATION TO PROMOTE ITS PURPOSE
11B	THE FUNDS PROVIDED BY THESE ACTIVITIES ALLOW THE ORGANIZATION TO PROMOTE ITS PURPOSE

Part XVII **Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations**

			Yes	No
1	Did the organization directly or indirectly engage in any of the following with any other organization described in section 501 (c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?			
a	Transfers from the reporting foundation to a noncharitable exempt organization of			
	(1) Cash	1a(1)		No
	(2) Other assets	1a(2)		No
b	Other transactions			
	(1) Sales of assets to a noncharitable exempt organization	1b(1)		No
	(2) Purchases of assets from a noncharitable exempt organization	1b(2)		No
	(3) Rental of facilities, equipment, or other assets	1b(3)		No
	(4) Reimbursement arrangements	1b(4)		No
	(5) Loans or loan guarantees	1b(5)		No
	(6) Performance of services or membership or fundraising solicitations	1b(6)		No
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c		No

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

(a) Line No	(b) Amount involved	(c) Name of noncharitable exempt organization	(d) Description of transfers, transactions, and sharing arrangements

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

****** | 2017-11-07 | ******

Signature of officer or trustee | Date | Title

May the IRS discuss this return with the preparer shown below (see instr)? ☑ Yes ☐ No

Paid Preparer Use Only

Print/Type preparer's name	Preparer's Signature	Date	Check if self-employed ▶ ☐	PTIN
DOUG DREHER		2017-11-09		P00543597

Firm's name ▶ DREHER MARTIN CPAS PA — Firm's EIN ▶56-2344058

Firm's address ▶ 4101 LAKE BOONE TRL STE 215 RALEIGH, NC 27607 — Phone no (919) 510-9399

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)
ALTRIA GROUP	P	2016-04-14	2016-09-13
GLAXOSMITHKLINE	P	2015-02-02	2016-09-19
VENTAS	P	2016-02-10	2016-09-19
AMERICAN ELECTRIC	P	2016-04-14	2016-09-19
INTEL	P	2016-01-15	2016-09-19
VERIZON	P	2016-04-14	2016-09-13
APPLE	P	2016-01-20	2016-09-19
JOHNSON & JOHNSON	P	2016-01-08	2016-09-13
WP CAREY	P	2015-02-10	2016-09-19
AT&T	P	2014-05-14	2016-09-19

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

(e) Gross sales price	Depreciation allowed **(f)** (or allowable)	Cost or other basis **(g)** plus expense of sale	Gain or (loss) **(h)** (e) plus (f) minus (g)
64,057		61,712	2,345
215,475		231,854	-16,379
206,402		197,587	8,815
194,445		184,736	9,709
181,485		148,844	32,641
103,797		102,702	1,095
758,315		723,860	34,455
302,556		263,718	38,838
194,426		204,809	-10,383
240,985		217,740	23,245

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			Gains (Col (h) gain minus col (k), but not less than -0-) **or** **(l)** Losses (from col (h))
(i) F M V as of 12/31/69	Adjusted basis **(j)** as of 12/31/69	Excess of col (i) **(k)** over col (j), if any	
			2,345
			-16,379
			8,815
			9,709
			32,641
			1,095
			34,455
			38,838
			-10,383
			23,245

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)
KIMBERLY CLARK	P	2016-02-11	2016-09-13
WELLTOWER	P	2015-02-09	2016-09-13
BRISTOL MYERS	P	2014-05-14	2016-07-18
LIBERTY PROPERTY TRUST	P	2015-02-10	2016-09-19
ASTRAZENECA	P	2016-06-24	2017-03-30
CHEVRON	P	2015-02-02	2016-09-13
LOCKHEED MARTIN	P	2016-04-20	2016-09-19
ENNIS	P	2011-08-18	2017-05-09
CONOCOPHILLIPS	P	2014-10-15	2016-07-14
MCDONALDS	P	2015-08-24	2016-09-13

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

(e) Gross sales price	Depreciation allowed **(f)** (or allowable)	Cost or other basis **(g)** plus expense of sale	Gain or (loss) **(h)** (e) plus (f) minus (g)
122,935		118,985	3,950
74,126		77,059	-2,933
304,957		208,280	96,677
159,173		153,966	5,207
62,661		55,839	6,822
207,825		212,094	-4,269
239,162		227,467	11,695
17,498		14,331	3,167
86,081		129,202	-43,121
238,777		186,949	51,828

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			Gains (Col (h) gain minus col (k), but not less than -0-) **or** **(l)** Losses (from col (h))
(i) F M V as of 12/31/69	Adjusted basis **(j)** as of 12/31/69	Excess of col (i) **(k)** over col (j), if any	
			3,950
			-2,933
			96,677
			5,207
			6,822
			-4,269
			11,695
			3,167
			-43,121
			51,828

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)
SPARK NEW ZEALAND	P	2014-05-14	2017-04-05
CSX	P	2016-04-14	2016-09-13
MERCK & COMPANY	P	2014-12-15	2016-09-13
UNIVERSAL CORP	P	2015-02-02	2017-02-08
DOMINION ENERGY	P	2015-08-24	2016-09-19
MICROSOFT	P	2014-10-15	2016-09-19
FINANCIAL ASCENT TE LP	P	2016-07-01	2017-06-30
DUKE ENERGY	P	2015-08-24	2016-09-19
NORFOLK	P	2016-04-14	2016-09-19
FINANCIAL ASCENT TE LP	P	2016-07-01	2017-06-30

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

(e) Gross sales price	Depreciation allowed **(f)** (or allowable)	Cost or other basis **(g)** plus expense of sale	Gain or (loss) **(h)** (e) plus (f) minus (g)
37,736		34,500	3,236
174,055		157,174	16,881
125,275		114,662	10,613
81,720		40,236	41,484
298,612		293,928	4,684
227,014		187,603	39,411
2,087,936			2,087,936
318,915		300,706	18,209
183,655		165,405	18,250
		19,723	-19,723

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			Gains (Col (h) gain minus col (k), but not less than -0-) **or** **(l)** Losses (from col (h))
(i) F M V as of 12/31/69	Adjusted basis **(j)** as of 12/31/69	Excess of col (i) **(k)** over col (j), if any	
			3,236
			16,881
			10,613
			41,484
			4,684
			39,411
			2,087,936
			18,209
			18,250
			-19,723

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)
DUKE REALTY	P	2014-05-14	2016-07-18
PFIZER	P	2016-04-20	2016-09-13
VALUE PRESERVATION LP	P	2016-07-01	2017-06-30
ELI LILY	P	2015-08-25	2016-09-13
PHILLIP MORRIS	P	2014-12-10	2016-09-19
EXELON	P	2011-09-22	2016-09-19
PROCTER & GAMBLE	P	2015-08-21	2016-09-19
EXXON	P	2015-02-02	2016-09-13
SEAGATE TECHNOLOGY	P	2016-05-09	2016-08-17
GENERAL DYNAMICS	P	2016-04-15	2016-09-19

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

(e) Gross sales price	Depreciation allowed **(f)** (or allowable)	Cost or other basis **(g)** plus expense of sale	Gain or (loss) **(h)** (e) plus (f) minus (g)
246,172		156,254	89,918
102,927		98,413	4,514
		25,741	-25,741
318,251		315,756	2,495
99,226		86,002	13,224
168,212		210,835	-42,623
262,752		236,647	26,105
86,067		88,741	-2,674
1,211,951		996,701	215,250
303,498		271,255	32,243

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			Gains (Col (h) gain minus col (k), but not less than -0-) **or** **(l)** Losses (from col (h))
(i) F M V as of 12/31/69	Adjusted basis **(j)** as of 12/31/69	Excess of col (i) **(k)** over col (j), if any	
			89,918
			4,514
			-25,741
			2,495
			13,224
			-42,623
			26,105
			-2,674
			215,250
			32,243

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)
SPDR GOLD TRUST	P	2011-12-19	2016-08-31

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

(e) Gross sales price	Depreciation allowed **(f)** (or allowable)	Cost or other basis **(g)** plus expense of sale	Gain or (loss) **(h)** (e) plus (f) minus (g)
632,412		799,244	-166,832

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			Gains (Col (h) gain minus col (k), but not less than -0-) **or** **(l)** Losses (from col (h))
(i) F M V as of 12/31/69	Adjusted basis **(j)** as of 12/31/69	Excess of col (i) **(k)** over col (j), if any	
			-166,832

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	Expense account, (e) other allowances
JAMES ARTHUR POPE 4601 SIX FORKS RD STE 300 RALEIGH, NC 27609	CHAIRMAN 10 00	0	0	0
AMANDA J POPE 4601 SIX FORKS RD STE 300 RALEIGH, NC 27609	VP/ASST SEC/ 1 00	0	0	0
JOYCE L POPE 4601 SIX FORKS RD STE 300 RALEIGH, NC 27609	VP/SEC/TREAS 30 00	51,846	0	0
DAVID M STOVER 4601 SIX FORKS ROAD STE 300 RALEIGH, NC 27609	BOARD MEMBER 10 00	25,000	0	0
JOHN M HOOD 4601 SIX FORKS RD STE 300 RALEIGH, NC 27609	PRESIDENT 40 00	219,729	11,191	0

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TY 2016 Accounting Fees Schedule

Name: JOHN WILLIAM POPE FOUNDATION

EIN: 58-1691765

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INDIRECT ACCOUNTING FEES	16,200	16,200		

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

TY 2016 Gain/Loss from Sale of Other Assets Schedule

Name: JOHN WILLIAM POPE FOUNDATION

EIN: 58-1691765

Name	Date Acquired	How Acquired	Date Sold	Purchaser Name	Gross Sales Price	Basis	Basis Method	Sales Expenses	Total (net)	Accumulated Depreciation
OAK RIDGE RD, NC - LAND	2015-11	PURCHASE	2017-04		33,000	40,000		2,466	-9,466	
OAK RIDGE RD, NC - LAND	2015-11	PURCHASE	2017-06		15,000	18,000		1,359	-4,359	
NC 56 HWY EAST SALE		PURCHASE	2017-04		49,000	65,000		3,543	-17,128	2,415
121-123 CRONLY ST, NC - LAND	2015-11	PURCHASE	2017-05		25,000	71,000		2,161	-48,161	
302 N PINE ST SALE		PURCHASE	2017-01		120,000	153,800		9,803	-41,054	2,549

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TY 2016 Investments Corporate Stock Schedule

Name: JOHN WILLIAM POPE FOUNDATION

EIN: 58-1691765

Name of Stock	End of Year Book Value	End of Year Fair Market Value
CDI CORPORATION	274,238	2,957,766
WAL-MART SHARES	2,286	1,473,338
BANK OF AMERICA SHARES	333,065	800,580
BBT - PFD	250,000	256,300
CATO SHARES	2,300	5,277
DOLLAR TREE	80,379	70,340

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TY 2016 Investments - Land Schedule

Name: JOHN WILLIAM POPE FOUNDATION

EIN: 58-1691765

Category/ Item	Cost/Other Basis	Accumulated Depreciation	Book Value	End of Year Fair Market Value
BUILDING	2,330,901	96,424	2,234,477	2,330,901
LAND	816,190		816,190	816,190
LAND IMPROVEMENTS	3,900	2,232	1,668	3,900

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TY 2016 Investments - Other Schedule

Name: JOHN WILLIAM POPE FOUNDATION

EIN: 58-1691765

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
FINANCIAL ASCENT LP	AT COST	33,487,733	38,049,097
VALUE PRESERVATION	AT COST	24,577,713	24,210,146
VANGUARD	AT COST	89,182,836	100,589,636

efile GRAPHIC print - DO NOT PROCESS	As Filed Data -	DLN: 93491313001117

TY 2016 Legal Fees Schedule

Name: JOHN WILLIAM POPE FOUNDATION

EIN: 58-1691765

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LEGAL	3,423	3,423		

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TY 2016 Other Expenses Schedule

Name: JOHN WILLIAM POPE FOUNDATION

EIN: 58-1691765

Other Expenses Schedule

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
6171-77 SEWELLS PT RD				
INSURANCE	2,232	2,232		
PROPERTY TAX	3,602	3,602		
UTILITIES	828	828		
INVESTMENT DEPRECIATION	7,808	7,808		
205(203) N PARLER AVE				
INSURANCE	1,306	1,306		
TAXES	9,688	9,688		
INVESTMENT DEPRECIATION	3,000	3,000		
16 RIGBY ST				

Other Expenses Schedule

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INSURANCE	1,861	1,861		
MAINTENANCE	3,788	3,788		
TAXES	5,596	5,596		
INVESTMENT DEPRECIATION	6,380	6,380		
703-707 LIBERTY ST				
INSURANCE	1,491	1,491		
TAXES				
INVESTMENT DEPRECIATION	5,449	5,449		
115 LEE AVE				
INSURANCE	1,306	1,306		

Other Expenses Schedule

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
MAINTENANCE	16,081	16,081		
TAXES	6,109	6,109		
INVESTMENT DEPRECIATION	4,798	4,798		
104-106 W BROAD ST				
INSURANCE	1,121	1,121		
MAINTENANCE	13,167	13,167		
TAXES	3,126	3,126		
INVESTMENT DEPRECIATION	3,649	3,649		
106 E MAIN ST				
INSURANCE	1,676	1,676		

Other Expenses Schedule

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
TAXES	3,636	3,636		
INVESTMENT DEPRECIATION	6,912	6,912		
930 FRONT ST				
INSURANCE	3,662	3,662		
MAINTENANCE	2,140	2,140		
TAXES	4,443	4,443		
INVESTMENT DEPRECIATION	3,695	3,695		
115-117 E MAIN ST				
INSURANCE	751	751		
TAXES	1,763	1,763		

Other Expenses Schedule

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT DEPRECIATION	2,077	2,077		
112-114 N CENTER ST				
INSURANCE	1,251	1,251		
MAINTENANCE				
TAXES	1,786	1,786		
INVESTMENT DEPRECIATION	2,758	2,758		
1136 RUSSELL ST				
INSURANCE	936	936		
MAINTENANCE	389	389		
TAXES	2,946	2,946		

Other Expenses Schedule

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT DEPRECIATION	2,806	2,806		
323 COTTON AVE				
INSURANCE	751	751		
TAXES	1,718	1,718		
INVESTMENT DEPRECIATION	2,974	2,974		
706 BOLTON AVE				
INSURANCE	751	751		
MAINTENANCE	1,800	1,800		
TAXES	1,150	1,150		
INVESTMENT DEPRECIATION	1,641	1,641		

Other Expenses Schedule

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
117 N RAILROAD ST				
INSURANCE	880	880		
MAINTENANCE	1,263	1,263		
TAXES	1,226	1,226		
INVESTMENT DEPRECIATION	1,508	1,508		
OAK RIDGE RD (2 LOTS)				
TAXES	2,709	2,709		
NC 56 HWY EAST (1 LOT)				
MAINTENANCE	600	600		
TAXES	301	301		

Other Expenses Schedule

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT DEPRECIATION	105	105		
305 SPRING AVE (LOT)				
TAXES	398	398		
INVESTMENT DEPRECIATION	185	185		
121-123 CRONLY ST				
TAXES	1,088	1,088		
MAINTENANCE				
302 N PINE ST				
INSURANCE				
TAXES	3,483	3,483		

Other Expenses Schedule

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT DEPRECIATION	1,184	1,184		
126 MARKET ST				
INSURANCE	380	380		
TAXES	1,993	1,993		
INVESTMENT DEPRECIATION	1,072	1,072		
4610 CAROLINA HWY				
INSURANCE	380	380		
MAINTENANCE	9,946	9,946		
TAXES	1,594	1,594		
INVESTMENT DEPRECIATION	1,398	1,398		

Other Expenses Schedule

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
157 W MAIN ST				
INSURANCE	566	566		
MAINTENANCE	50	50		
TAXES	1,165	1,165		
INVESTMENT DEPRECIATION	1,547	1,547		
EXPENSES				
INSURANCE - LIABILITY AND D&O	7,098	1,775		5,323
UTILITIES	2,618	655		1,963
BANK CHARGES	63			63
MISCELLANEOUS	38,557			38,557

Other Expenses Schedule

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT EXPENSES	471,645	471,645		

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TY 2016 Other Income Schedule

Name: JOHN WILLIAM POPE FOUNDATION

EIN: 58-1691765

Other Income Schedule

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
MISCELLANEOUS	2,062		

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TY 2016 Other Professional Fees Schedule

Name: JOHN WILLIAM POPE FOUNDATION

EIN: 58-1691765

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
PAYROLL SERVICE FEE	702	176		526
COMPUTER				

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TY 2016 Taxes Schedule

Name: JOHN WILLIAM POPE FOUNDATION

EIN: 58-1691765

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOREIGN TAXES	10,946	10,946		
EXCISE TAX	39,818			

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5 000 00	5 30 2017	Acton Institute for the Study of Religion & Liberty	98 E Fulton Street	Grand Rapids	MI	49503	General Operating Expenses
10 000 00	6 2 2017	ACTS of Vance County Inc	305 S Chestnut Street	Henderson	NC	27536	General Operating Expenses
5 000 00	12 21 2016	Alice Aycock Poe Center for Health Education	224 Sunnybrook Rd	Raleigh	NC	27610	General Operating Expenses
20 000 00	11 30 2016	Alliance Medical Ministry	101 Donald Ross Drive	Raleigh	NC	27610	General Operating Expenses
5 000 00	5 30 2017	America's Future Foundation	1513 16th Street N W	Washington	DC	20036	General Operating Expenses
75 000 00	5 30 2017	American Enterprise Institute	1789 Massachusetts Avenue NW	Washington	DC	20036	General Operating Expenses
25 000 00	5 30 2017	American Legislative Exchange Council	2900 Crystal Drive Suite 600	Arlington	V A	22202	General Operating Expenses
15 000 00	5 30 2017	American Conservative Union Foundation	109 N Henry Street	Alexandria	V A	22314	Restricted-Family Prosperity Initiative
10 000 00	5 30 2017	American Studies Center - Radio America	1130 Connecticut Avenue NW Suite 425	Washington	DC	20036	Investigative Broadcast Journalism & Online News Bureau
150 000 00	8 25 2016	Americans for Prosperity Foundation	1310 N Courthouse Rd Ste 700	Arlington	V A	22201	General Operating Expenses
350 000 00	8 25 2016	Americans for Prosperity Foundation	1310 N Courthouse Rd Ste 700	Arlington	V A	22201	Restricted - NC
25 000 00	5 30 2017	Americans for Tax Reform Foundation	722 12th Street NW 3 Suite 400	Washington	DC	20005	General Operating Expenses
5 000 00	11 14 2016	Artspace	201 E Davie Street	Raleigh	NC	27601	General Operating Expenses
5 000 00	12 21 2016	Artsplosure	313 S Blount Street Suite 200-B	Raleigh	NC	27601	General Operating Expenses
25 000 00	5 30 2017	Ashbrook Center at Ashland University	401 College Avenue	Ashland	OH	44805	General Operating Expenses
200 000 00	11 30 2016	Asheville School	360 Asheville School Road	Asheville	NC	28806	Restricted - Western Civilization
42 500 00	12 21 2016	Asheville School	360 Asheville School Road	Asheville	NC	28806	General Operating Expenses
50 000 00	11 30 2016	Asheville School	360 Asheville School Road	Asheville	NC	28806	General Operating Expenses
20 000 00	5 30 2017	Atlas Network	1201 L St NW 2nd Fl	Washington	DC	20005	General Operating Expenses
7 500 00	5 30 2017	Atlas Network	9745 Kings Crown Court #102	Fairfax	V A	22031	Restricted - Econ Journal Watch
5 000 00	11 30 2016	Backstretch Employed Services Team, Inc (BEST)	2150 Hempstead Turnpike Gate 6 Cottage 28B	Elmont	NY	11003	General Operating Expenses
14 000 00	5 30 2017	Bastiat Society	180 Spring Street	Charleston	SC	29403	General Operating Expenses
10 000 00	5 30 2017	Benjamin Rush Institute	PO Box 3113	Half Moon Bay	CA	94019	General Operating Expenses
15 000 00	12 21 2016	BEST NC-NC Business Leaders For Education	100 SAS Campus Drive Building T	Cary	NC	27513	General Operating Expenses
5 000 00	2 20 2017	Better Yes Network	P O Box 3912	Cary	NC	27519	General Operating Expenses
10 000 00	11 30 2016	Blessed Sacrament School	515 Hillcrest Ave	Burlington	NC	27215	General Operating Expenses
10 000 00	11 30 2016	Boy Scouts of America Occoneechee Council	3231 Atlantic Ave	Raleigh	NC	27604	General Operating Expenses
40 000 00	5 30 2017	Boy Scouts of America Occoneechee Council	3231 Atlantic Ave	Raleigh	NC	27604	Restricted - Eagle Scout Scholarship
10 000 00	11 30 2016	Camp Corral	801 N West St	Raleigh	NC	27603	Restricted - Send 18 NC Children to Camp
50 000 00	5 30 2017	Capital Research Center	1513 16th Street NW	Washington	DC	20036	Restricted - Online Encyclopedia Project
50 000 00	12 21 2016	Carolina Ballet	3401-131 Atlantic Ave	Raleigh	NC	27604	General Operating Expenses
5 000 00	5 30 2017	Carolina Liberty Foundation	302 Pittsboro Street	Chapel Hill	NC	27516	General Operating Expenses
10 000 00	5 30 2017	Carolina Liberty Foundation	302 Pittsboro Street	Chapel Hill	NC	27516	General Operating Expenses
5 000 00	11 30 2016	CASA-Community Alternatives for Supportive Abodes	PO Box 12545	Raleigh	NC	27605	General Operating Expenses
50 000 00	5 30 2017	Cato Institute	1000 Massachusetts Ave N W	Washington	DC	20001	General Operating Expenses
15 000 00	5 30 2017	Cato Institute	1000 Massachusetts Ave N W	Washington	DC	20001	Restricted - 50 States Project
50 000 00	5 30 2017	Center for Competitive Politics	124 S West Street Suite 201	Alexandria	V A	22314	Restricted-First Amendment Political Speech Project
25 000 00	5 30 2017	Center for Education Reform	1901 L Street NW	Washington	DC	20036	General Operating Expenses
7 500 00	5 30 2017	Center for Equal Opportunity	7700 Leesburg Pike Suite 231	Falls Church	V A	22043	General Operating Expenses
9 000 00	7 19 2016	Center for Scholarship Administration	PO Box 1465	Taylors	SC	29687	2016 John William Pope Scholarship
10 000 00	5 30 2017	Center for Urban Renewal and Education	1317 F Street NW Suite 900	Washington	DC	20004	Restricted-Media Center
10 000 00	11 30 2016	Chuldren's Hope Alliance	Post Office Box 1	Barnum Springs	NC	28010	General Operating Expenses
98 500 00	7 1 2016	Civitas Institute Inc	805 Spring Forest Road Suite 100	Raleigh	NC	27609	General Operating Expenses
98 500 00	8 1 2016	Civitas Institute Inc	805 Spring Forest Road Suite 100	Raleigh	NC	27609	General Operating Expenses
98 500 00	9 1 2016	Civitas Institute Inc	805 Spring Forest Road Suite 100	Raleigh	NC	27609	General Operating Expenses
98 500 00	10 1 2016	Civitas Institute Inc	805 Spring Forest Road Suite 100	Raleigh	NC	27609	General Operating Expenses
98 500 00	11 1 2016	Civitas Institute Inc	805 Spring Forest Road Suite 100	Raleigh	NC	27609	General Operating Expenses
98 500 00	12 1 2016	Civitas Institute Inc	805 Spring Forest Road Suite 100	Raleigh	NC	27609	General Operating Expenses
98 500 00	1 1 2017	Civitas Institute Inc	805 Spring Forest Road Suite 100	Raleigh	NC	27609	General Operating Expenses
98 500 00	2 1 2017	Civitas Institute Inc	805 Spring Forest Road Suite 100	Raleigh	NC	27609	General Operating Expenses
98 500 00	3 1 2017	Civitas Institute Inc	805 Spring Forest Road Suite 100	Raleigh	NC	27609	General Operating Expenses
98 500 00	4 1 2017	Civitas Institute Inc	805 Spring Forest Road Suite 100	Raleigh	NC	27609	General Operating Expenses
98 500 00	5 1 2017	Civitas Institute Inc	805 Spring Forest Road Suite 100	Raleigh	NC	27609	General Operating Expenses
98 500 00	6 1 2017	Civitas Institute Inc	805 Spring Forest Road Suite 100	Raleigh	NC	27609	General Operating Expenses
25 000 00	5 30 2017	Clemson University Foundation - Institute for the Study of Capitalism	Clemson University 325 Sirrine Hall - Box 341310	Clemson	SC	29634-1310	Restricted - Clemson Institute for the Study of Capitalism
25 000 00	12 21 2016	College of Charleston Foundation	66 George Street	Charleston	SC	29424-0001	Restricted - Initiative for Public Choice and Market Process
5 000 00	3 22 2017	Community Music School	PO Box 2545	Raleigh	NC	27601	General Operating Expenses

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25 000 00	5 30 2017	Competitive Enterprise Institute	1310 L St NW 7th Floor	Washington	DC	20005	General Operating Expenses
150 000 00	8 25 2016	Concerned Veterans for America Institute	1405 Fern Street #197	Arlington	VA	22202	General Operating Expenses
40 000 00	12 21 2016	Conservatives for Criminal Justice Reform	200 West Morgan Street Suite 200	Raleigh	NC	27601	General Operating Expenses
6 000 00	12 21 2016	CORRAL Riding Academy	3620 Kildaire Farm Road	Cary	NC	27518	General Operating Expenses
10 000 00	11 30 2016	Daniel Center for Math and Science	112 S Blount Street Suite 103A	Raleigh	NC	27601	General Operating Expenses
100 000 00	11 23 2016	Donors Trust-Economic Freedom Fund	1800 Diagonal Road Suite 280	Alexandria	VA	22314	Restricted - Economic Freedom Fund
5 000 00	12 21 2016	Dix Park Conservancy	PO Box 28575	Raleigh	NC	27611	General Operating Expenses
10 000 00	11 14 2016	Dress for Success	1812 Tillery Place	Raleigh	NC	27604	General Operating Expenses
30 000 00	12 21 2016	Duke University	Sanford School of Public Policy Duke University Box 90239	Durham	NC	27708	Restricted - Sanford School - NC Leadership Forum
175 000 00	5 30 2017	Duke University Center for History of Political Economy (HOPE)	Duke University Box 90097	Durham	NC	27708	Restricted - HOPE Center
25 000 00	5 30 2017	Education NC	PO Box 1636	Raleigh	NC	27602	General Operating Expenses
35 000 00	12 21 2016	Embassy Cultural Center Foundation	PO Box 1333	Henderson	NC	27536	Restricted-Performing Arts Center
50 000 00	5 30 2017	Federalist Society for Law and Public Policy Studies	1776 I Street NW Suite 300	Washington	DC	20006	General Operating Expenses
25 000 00	10 14 2016	Food Bank of the Albermarle	109 Tidewater Way	Elizabeth City	NC	27909	Restricted - Hurricane Matthew
10 000 00	11 30 2016	Food Bank of Central and Eastern NC	1924 Capital Blvd	Raleigh	NC	27604	General Operating Expenses
25 000 00	10 14 2016	Food Bank of Central and Eastern NC	1924 Capital Blvd	Raleigh	NC	27604	Restricted - Hurricane Matthew
10 000 00	5 30 2017	Foundation for Economic Education	1718 Peachtree Street NW Suite 1048	Atlanta	GA	30309	General Operating Expenses
25 000 00	5 30 2017	Foundation for Government Accountability	15275 Collier Boulevard Suite 201-279	Naples	FL	34119	General Operating Expenses
45 000 00	5 30 2017	Foundation for Individual Rights in Education	510 Walnut Street Suite 1250	Philadelphia	PA	19106	General Operating Expenses
10 000 00	5 30 2017	Foundation for Teaching Economics	107 S West Street Suite 718	Alexandria	VA	22314	Restricted-Economics for Leaders program
350 000 00	8 25 2016	Freedom Partners Institute	2100 Wilson Blvd. Suite 500	Arlington	VA	22201	General Operating Expenses
20 000 00	5 30 2017	Free to Choose Network	2002 Filmore Avenue Suite #1	Erie	PA	16506	General Operating Expenses
5 000 00	5 30 2017	Free to Choose Network	2002 Filmore Avenue Suite #1	Erie	PA	16506	General Operating Expenses
25 000 00	11 30 2016	Full Gospel Tabernacle	5005 Willow Oak Drive	Lumberton	NC	28358	General Operating Expenses
20 000 00	5 30 2017	George Mason University Foundation Law & Economics Center	George Mason University School of Law	Arlington	VA	22201	Restricted - Law & Economics Center
5 000 00	11 14 2016	Godwin Presbyterian Church	P O Box 116	Godwin	NC	28344	General Operating Expenses
50 000 00	12 21 2016	Grayson-Jockey Club Research Foundation	812 Corporate Drive	Lexington	KY	40503	Restricted - Research Program
15 000 00	3 22 2017	H Leslie Perry Memorial Library Inc	205 Breckenridge St	Henderson	NC	27536	General Operating Expenses
20 000 00	11 30 2016	Habitat for Humanity of Wake County	2420 Raleigh Blvd	Raleigh	NC	27604	General Operating Expenses
5 000 00	11 30 2016	Helping Horse Therapeutic Riding Program	P O Box 99609	Raleigh	NC	27624	General Operating Expenses
5 200 00	11 30 2016	Henderson Family YMCA	380 Ruin Creek Rd	Henderson	NC	27536	General Operating Expenses
10 000 00	5 30 2017	Heritage Foundation, The	214 Massachusetts Ave NE	Washington	DC	20002	General Operating Expenses
10 000 00	12 21 2016	Hope Center at Pullen	1801 Hillsborough Street	Raleigh	NC	27605	Restricted - Career Development Program
10 000 00	12 21 2016	Hope Reins	P O Box 99152	Raleigh	NC	27624	General Operating Expenses
10 000 00	5 30 2017	Independent Institute	100 Swan Way	Oakland	CA	94621-1428	Restricted - The Independent Review
25 000 00	5 30 2017	Independent Women's Forum	1875 I Street NW Suite 500	Washington	DC	20006	General Operating Expenses
150 000 00	5 30 2017	Institute for Humane Studies	3434 Washington Boulevard MS 1C5	Arlington	VA	22201	General Operating Expenses
60 000 00	5 30 2017	Institute for Humane Studies	3434 Washington Boulevard MS 1C5	Arlington	VA	22201	Restricted - Pope NC Fund
125 000 00	5 30 2017	Institute for Humane Studies	3434 Washington Boulevard MS 1C5	Arlington	VA	22201	Restricted - Academic Leadership
40 000 00	5 30 2017	Institute for Humane Studies	3434 Washington Boulevard MS 1C5	Arlington	VA	22201	Restricted - SE Seminar
50 000 00	5 30 2017	Institute for Justice	901 North Glebe Road, Suite 900	Arlington	VA	22203	General Operating Expenses
50 000 00	5 18 2017	Institute of Political Leadership	2 New Bern Square	Greensboro	NC	27408	Restricted - Fellows Program
25 000 00	12 21 2016	Interfaith Prison Ministry for Women	112 South Salisbury Street	Raleigh	NC	27601	General Operating Expenses
80 000 00	12 21 2016	Interstate Policy Alliance Employment Policies Institute	1090 Vermont Avenue NW Suite 800	Washington	DC	20005	Restricted - Google Grants
5 000 00	3 13 2017	Jesse Helms Center Foundation	Post Office Box 247	Wingate	NC	28174	Restricted - Free Enterprise Heroes
20 000 00	4 3 2017	Jesse Helms Center Foundation	Post Office Box 247	Wingate	NC	28174	General Operating Expenses
25 000 00	5 30 2017	Jesse Helms Center Foundation	Post Office Box 247	Wingate	NC	28174	General Operating Expenses
226 250 00	7 1 2016	John Locke Foundation	200 West Morgan Street Suite 200	Raleigh	NC	27601	General Operating Expenses
226 250 00	8 1 2016	John Locke Foundation	200 West Morgan Street Suite 200	Raleigh	NC	27601	General Operating Expenses
226 250 00	9 1 2016	John Locke Foundation	200 West Morgan Street Suite 200	Raleigh	NC	27601	General Operating Expenses
226 250 00	10 1 2016	John Locke Foundation	200 West Morgan Street Suite 200	Raleigh	NC	27601	General Operating Expenses
226 250 00	11 1 2016	John Locke Foundation	200 West Morgan Street Suite 200	Raleigh	NC	27601	General Operating Expenses
226 250 00	12 1 2016	John Locke Foundation	200 West Morgan Street Suite 200	Raleigh	NC	27601	General Operating Expenses
226 250 00	1 1 2017	John Locke Foundation	200 West Morgan Street Suite 200	Raleigh	NC	27601	General Operating Expenses
226 250 00	2 1 2017	John Locke Foundation	200 West Morgan Street Suite 200	Raleigh	NC	27601	General Operating Expenses
226 250 00	3 1 2017	John Locke Foundation	200 West Morgan Street Suite 200	Raleigh	NC	27601	General Operating Expenses
226 250 00	4 1 2017	John Locke Foundation	200 West Morgan Street Suite 200	Raleigh	NC	27601	General Operating Expenses
226 250 00	5 1 2017	John Locke Foundation	200 West Morgan Street Suite 200	Raleigh	NC	27601	General Operating Expenses
226 250 00	6 1 2017	John Locke Foundation	200 West Morgan Street Suite 200	Raleigh	NC	27601	General Operating Expenses

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30 000 00	5 30 2017	John Locke Foundation	200 West Morgan Street Suite 200	Raleigh	NC	27601	General Operating Expenses
65 000 00	5 30 2017	John Locke Foundation	200 West Morgan Street Suite 200	Raleigh	NC	27601	Restricted - EA Morris Fellows Program
2 000 00	7 15 2016	John Locke Foundation	200 West Morgan Street Suite 200	Raleigh	NC	27601	Restricted - Children's Business Fair
40 000 00	4 13 2017	John Locke Foundation	200 West Morgan Street Suite 200	Raleigh	NC	27601	Restricted - Classical Liberals of the Carolinas
45 233 33	7 1 2016	Pope Center for Higher Ed	353 E Six Forks Road, Suite 200	Raleigh	NC	27609	General Operating Expenses
45 233 33	8 1 2016	Pope Center for Higher Ed	353 E Six Forks Road, Suite 200	Raleigh	NC	27609	General Operating Expenses
45 233 33	9 1 2016	Pope Center for Higher Ed	353 E Six Forks Road, Suite 200	Raleigh	NC	27609	General Operating Expenses
45 233 33	10 1 2016	Pope Center for Higher Ed	353 E Six Forks Road, Suite 200	Raleigh	NC	27609	General Operating Expenses
45 233 33	11 1 2016	Pope Center for Higher Ed	353 E Six Forks Road, Suite 200	Raleigh	NC	27609	General Operating Expenses
45 233 33	12 1 2016	Pope Center for Higher Ed	353 E Six Forks Road, Suite 200	Raleigh	NC	27609	General Operating Expenses
45 233 33	1 1 2017	Pope Center for Higher Ed	353 E Six Forks Road, Suite 200	Raleigh	NC	27609	General Operating Expenses
45 233 33	2 1 2017	James G Martin Center for Academic Renewal (formerly Pope Center)	353 E Six Forks Road, Suite 200	Raleigh	NC	27609	General Operating Expenses
45 233 33	3 1 2017	James G Martin Center for Academic Renewal (formerly Pope Center)	353 E Six Forks Road, Suite 200	Raleigh	NC	27609	General Operating Expenses
45 233 33	4 1 2017	James G Martin Center for Academic Renewal (formerly Pope Center)	353 E Six Forks Road, Suite 200	Raleigh	NC	27609	General Operating Expenses
45 233 33	5 1 2017	James G Martin Center for Academic Renewal (formerly Pope Center)	353 E Six Forks Road, Suite 200	Raleigh	NC	27609	General Operating Expenses
45 233 33	6 1 2017	James G Martin Center for Academic Renewal (formerly Pope Center)	353 E Six Forks Road, Suite 200	Raleigh	NC	27609	General Operating Expenses
10 000 00	11 30 2016	Junior Achievement	4904 Waters Edge Drive Suite 155	Raleigh	NC	27606	Restricted - Entrepreneurship Programs in Wake County
10 000 00	11 14 2016	Kidznotes	PO Box 200	Durham	NC	27702	General Operating Expenses
5 000 00	5 30 2017	Liberty and Law Institute	914 Greenwood Circle	Cary	NC	27511	General Operating Expenses
10 000 00	11 30 2016	Life Line Outreach, Inc	P O Box 1632	Henderson	NC	27536	General Operating Expenses
10 000 00	5 30 2017	Lincoln Network	3105 S Harrington Street	Raleigh	NC	27603	General Operating Expenses
60 000 00	5 30 2017	Lucy Burns Institute	8383 Greenway Blvd Suite 600	Middleton	WI	53562	Restricted - Fact Check
5 000 00	11 30 2016	Lucy Daniels Center	9003 Weston Parkway	Cary	NC	27513	Restricted - Treatment of Child Mental & Emotional Illnesses in Wake Co
50 000 00	5 30 2017	Manhattan Institute for Policy Research, Inc	52 Vanderbilt Avenue Third Floor	New York	NY	10017	Restricted - Adam Smith Society
125 000 00	5 30 2017	Mercatus Center	3434 Washington Blvd, 4th Floor	Arlington	VA	22201	Restricted - Project for the Study of Capitalism
10 000 00	5 30 2017	Moving Picture Institute	375 Greenwich Street	New York	NY	10013	General Operating Expenses
75 000 00	5 30 2017	National Review Institute	215 Lexington Avenue	New York	NY	10016	Restricted - Core Programming
50 000 00	5 30 2017	National Taxpayers Union Foundation	25 Massachusetts Ave Suite 140	Washington	DC	20001	Restricted-CBO Alternative
18 000 00	9 13 2016	NC Family Policy Council	PO Box 20607	Raleigh	NC	27619	General Operating Expenses
50 000 00	9 13 2016	NC Family Policy Council	PO Box 20607	Raleigh	NC	27619	General Operating Expenses
42 000 00	5 30 2017	NC Family Policy Council	PO Box 20607	Raleigh	NC	27619	General Operating Expenses
25 000 00	5 30 2017	NC Free Enterprise Foundation	PO Box 12406	Raleigh	NC	27605	General Operating Expenses
5 000 00	11 30 2016	NC Girl Scouts-Coastal Pines	6901 Pinecrest Road	Raleigh	NC	27613	Restricted - Vance County Activities
250 000 00	11 14 2016	NC Museum of Art Foundation	4630 Mail Service Center	Raleigh	NC	27699-4630	Restricted - Pope Gallery
10 000 00	12 21 2016	NC Opera Company	612 Wade Avenue Suite 100	Raleigh	NC	27605	General Operating Expenses
25 000 00	12 21 2016	NC Opera Company	612 Wade Avenue Suite 100	Raleigh	NC	27605	General Operating Expenses
50 000 00	5 30 2017	NCSU (North Carolina State University Foundation)	NCSU Campus Box 8101	Raleigh	NC	27695-8101	Restricted - Study & Research of the NC Opportunity Scholarship Program
85 200 00	5 30 2017	NCSU (North Carolina State University Foundation)	NCSU Campus Box 8101	Raleigh	NC	27695-8101	Restricted - Public Choice Law & Economics
25 000 00	11 14 2016	NC Symphony	3700 Glenwood Ave Suite 130	Raleigh	NC	27612	General Operating Expenses
50 000 00	11 30 2016	NC Theatre	One East South Street	Raleigh	NC	27601	General Operating Expenses
5 000 00	11 30 2016	NC Youth Legislative Assembly Administration (YLA)	1319 Mail Service Center	Raleigh	NC	27699	General Operating Expenses
5 000 00	5 30 2017	Network of Enlightened Women (NeW)	1513 16th Street NW	Washington	DC	20036	Restricted - Retreat and Camp
2 500 00	11 30 2016	Neuse Christian Academy	7600 Falls of Neuse Road	Raleigh	NC	27615	General Operating Expenses
10 000 00	5 30 2017	Pacific Legal Foundation	930 G Street	Sacramento	CA	95814	General Operating Expenses
15 000 00	5 30 2017	Pacific Research Institute for Public Policy	101 Montgomery Street Suite 1300	San Francisco	CA	94104	General Operating Expenses
5 000 00	11 14 2016	Performance Edge	1408 Dixie Trail	Raleigh	NC	27607	General Operating Expenses
50 000 00	5 30 2017	Philanthropy Roundtable	1120 20th Street NW Suite 550 South	Washington	DC	20036	Restricted - July 2016 Summit-Economic Opportunity Program
50 000 00	5 30 2017	Philanthropy Roundtable	1120 20th Street NW Suite 550 South	Washington	DC	20036	General Operating Expenses
25 000 00	12 21 2016	Prevent Child Abuse NC	3716 National Drive	Raleigh	NC	27612	General Operating Expenses
25 000 00	5 30 2017	Prevent Child Abuse NC	3716 National Drive	Raleigh	NC	27612	General Operating Expenses
10 000 00	5 30 2017	Property and Environment Research Center (PERC)	2048 Analysis Dr Suite A	Bozeman	MT	59718	General Operating Expenses
75 000 00	5 30 2017	Public Interest Legal Foundation	209 West Main Street	Plainfield	IN	46168	General Operating Expenses
2 500 00	12 21 2016	Raleigh Camerata	11020 Trappers Creek Drive	Raleigh	NC	27614	General Operating Expenses

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25 000 00	11 30 2016	Raleigh Charter High School	1307 Glenwood Avenue	Raleigh	NC	27605	General Operating Expenses
25 000 00	11 14 2016	Raleigh Fine Arts Society	PO Box 10614	Raleigh	NC	27605	General Operating Expenses
5 000 00	11 30 2016	Raleigh Little Theatre	301 Pogue Street	Raleigh	NC	27607	General Operating Expenses
15 000 00	12 21 2016	Raleigh Rescue Mission Inc	P O Box 27391	Raleigh	NC	27611	General Operating Expenses
125 000 00	12 21 2016	Ravenscroft School	7409 Falls of Neuse Road	Raleigh	NC	27615	General Operating Expenses
25 000 00	12 21 2016	Ravenscroft School	7409 Falls of Neuse Road	Raleigh	NC	27615	General Operating Expenses
75 000 00	5 30 2017	Reason Foundation Inc	1747 Connecticut Avenue NW	Washington	DC	20009	Restricted - NC Specific Projects
50 000 00	5 30 2017	Reason Foundation Inc	1747 Connecticut Avenue NW	Washington	DC	20009	General Operating Expenses
5 000 00	5 30 2017	SAFE Haven for Cats	8431-137 Garvey Drive	Raleigh	NC	27616	General Operating Expenses
10 000 00	11 30 2016	Salvation Army - Raleigh	PO Box 27584	Raleigh	NC	27611	General Operating Expenses
25 000 00	10 14 2016	Salvation Army - Raleigh	PO Box 27584	Raleigh	NC	27611	Restricted - Hurricane Matthew
25 000 00	10 14 2016	Second Harvest Food Bank of Southeast NC	PO Box 2009	Fayetteville	NC	28302	Restricted - Hurricane Matthew
32 500 00	11 14 2016	SECU Family House at UNC Hospitals	123 Old Mason Farm Rd	Chapel Hill	NC	27517	Restricted - One Room for One Year
10 000 00	11 14 2016	Shepherd's Table Soup Kitchen	121 Hillsborough Street	Raleigh	NC	27603	General Operating Expenses
5 000 00	11 30 2016	Show 'n Tell Ministries	125 Bonita Creek Drive	Garner	NC	27529	Restricted - Hurricane Matthew Benefit
20 000 00	5 30 2017	State Policy Network	1655 North Fort Myer Drive Ste 360	Arlington	VA	22209-3108	Restricted - Web Expansion
40 000 00	6 14 2017	State Policy Network	1655 North Fort Myer Drive Ste 360	Arlington	VA	22209-3108	General Operating Expenses
100 000 00	3 13 2017	Stecoah Valley Cultural Arts Center	121 Schoolhouse Road	Robbinsville	NC	28771	Restricted - Courtyard of the Cherokee Project
25 000 00	11 30 2016	StepUp Ministry	1701 Oberlin Rd	Raleigh	NC	27608	Restricted - Statewide Expansion
20 000 00	5 30 2017	Student Free Press Association	4771 Mechanic Road	Hillsdale	MI	49242	General Operating Expenses
10 000 00	12 21 2016	Talent Market	2868 Tradewind Drive	Mt Pleasant	SC	29466	General Operating Expenses
25 000 00	5 30 2017	The Fund for American Studies	1706 New Hampshire Ave NW	Washington	DC	20009	General Operating Expenses
25 000 00	5 30 2017	The Fund for American Studies	1706 New Hampshire Ave NW	Washington	DC	20009	General Operating Expenses
10 000 00	11 30 2016	The Green Chair Project	1853 Capital Boulevard	Raleigh	NC	27604	General Operating Expenses
15 300 00	12 21 2016	The Green Chair Project	1853 Capital Boulevard	Raleigh	NC	27604	General Operating Expenses
10 000 00	11 30 2016	Thoroughbred Charities of America	3101 Beaumont Centre Circle Suite 110	Lexington	KY	40513	General Operating Expenses
10 000 00	11 14 2016	Transitions LifeCare	250 Hospice Circle	Raleigh	NC	27607	General Operating Expenses
5 000 00	11 30 2016	Triangle Special Hockey Association	434 Fincastle Drive	Raleigh	NC	27607	General Operating Expenses
10 000 00	11 30 2017	TROSA - Triangle Residential Options for Substance Abusers	1820 James Street	Durham	NC	27707	Restricted - Wake County
15 000 00	12 21 2016	TROSA - Triangle Residential Options for Substance Abusers	1820 James Street	Durham	NC	27707	General Operating Expenses
15 000 00	11 30 2016	United Way of Vance County	212 Dabney Drive	Henderson	NC	27536	General Operating Expenses
50 000 00	8 9 2016	University of North Carolina at Chapel Hill	101 Caldwell Hall	Chapel Hill	NC	27599	Restricted - Philosophy Politics & Economy
100 000 00	11 14 2016	University of North Carolina at Chapel Hill	101 Caldwell Hall	Chapel Hill	NC	27599	JWP Distinguished Professorship in Cancer Research
56 500 00	3 14 2017	University of North Carolina at Chapel Hill-Arts and Sciences Fnd	101 Caldwell Hall	Chapel Hill	NC	27599	Restricted - Arts and Sciences
10 000 00	12 21 2016	Urban Ministries of Wake County	P O Box 26476	Raleigh	NC	27611	General Operating Expenses
1 000 00	11 14 2016	Vance County Animal Shelter	165 Vance Academy Road	Henderson	NC	27537	General Operating Expenses
10 000 00	8 25 2016	Vance County Historical Society	P O Box 1850	Henderson	NC	27536	General Operating Expenses
25 000 00	11 30 2016	Virginia Episcopal School	400 VES Rd	Lynchburg	VA	24503	General Operating Expenses
100 000 00	11 30 2016	Virginia Episcopal School	400 VES Rd	Lynchburg	VA	24503	Restricted - Vision 2016 Campaign
120 000 00	5 30 2017	Wake Forest University Foundation	School of Business PO Box 7897	Winston Salem	NC	27109	Restricted - BB&T Center for the Study of Capitalism
10 000 00	5 30 2017	Washington Legal Foundation	2009 Massachusetts Ave NW	Washington	DC	20036	General Operating Expenses
100 000 00	2 22 2017	Wesley Shelter	106 Vance St E	Wilson	NC	27893	Restricted - Shelter Renovation
50 000 00	11 14 2016	White Memorial Presbyterian Church	1704 Oberlin Rd	Raleigh	NC	27608	General Operating Expenses
50 000 00	11 14 2016	White Memorial Presbyterian Church	1704 Oberlin Rd	Raleigh	NC	27608	Restricted - Maintenance Endowment Fund
200 000 00	11 14 2016	White Memorial Presbyterian Church	1704 Oberlin Rd	Raleigh	NC	27608	Restricted - Memorial Fund
5 000 00	11 30 2016	YMCA of the Triangle	1601 Hillsborough Street	Raleigh	NC	27605	General Operating Expenses
20 000 00	5 30 2017	Young America's Foundation	F M Kirby Freedom Center 110 Elden Street	Herndon	VA	20170	Restricted - National Journalism Center
15 000 00	5 30 2017	Young America's Foundation	F M Kirby Freedom Center 110 Elden Street	Herndon	VA	20170	Restricted - National Journalism Center

11,193,999.96 ***TOTAL***