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Form **990-PF**

Return of Private Foundation

OMB No 1545-0052

2017

Department of the Treasury
Internal Revenue Service

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.
▶ Go to www.irs.gov/Form990PF for instructions and the latest information.

Open to Public Inspection

For calendar year 2017 or tax year beginning , 2017, and ending , 20

Name of foundation JACK & MARY MCCALL CHARITABLE FOUNDATION, INC		A Employer identification number 20-3955279
Number and street (or P O box number if mail is not delivered to street address) 312 MOUNT EDEN PLACE		B Telephone number (see instructions) () -
City or town, state or province, country, and ZIP or foreign postal code CARY, NC 27518		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) ▶ \$ 345,619.		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)	250.			
	2 Check ☐ if the foundation is not required to attach Sch. B.				
	3 Interest on savings and temporary cash investments.	8.	8.		ATCH 1
	4 Dividends and interest from securities	8,860.	8,860.		ATCH 2
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	6,340.			
	b Gross sales price for all assets on line 6a 110,393.				
	7 Capital gain net income (from Part IV, line 2)		6,340.		
	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) ATCH 3	70.			
	12 Total. Add lines 1 through 11	15,528.	15,208.		
	13 Compensation of officers, directors, trustees, etc.	0.			
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)	995.			
	c Other professional fees (attach schedule) [4]	3,817.	3,817.		
	17 Interest	1.			
	18 Taxes (attach schedule) (see instructions) [5]	126.	68.		
	19 Depreciation (attach schedule) and depletion.				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule) ATCH 6	96.			
	24 Total operating and administrative expenses. Add lines 13 through 23.	5,035.	3,885.		
	25 Contributions, gifts, grants paid	33,545.			33,545.
	26 Total expenses and disbursements. Add lines 24 and 25	38,580.	3,885.		33,545.
	27 Subtract line 26 from line 12:				
	a Excess of revenue over expenses and disbursements	-23,052.			
b Net investment income (if negative, enter -0-)			11,323.		
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	60,235.	75,860.	75,860.
	2	Savings and temporary cash investments	28,103.	28,112.	28,112.
	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) ATCH 7	266,067.	227,381.	241,647.
	c	Investments - corporate bonds (attach schedule)			
	Liabilities	11	Investments - land, buildings, and equipment basis ▶		
		Less: accumulated depreciation ▶ (attach schedule)			
12		Investments - mortgage loans			
13		Investments - other (attach schedule)			
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)	354,405.	331,353.	345,619.
17		Accounts payable and accrued expenses			
18		Grants payable			
Net Assets or Fund Balances	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	354,405.	331,353.	
	28	Paid-in or capital surplus, or land, bldg, and equipment fund			
29	Retained earnings, accumulated income, endowment, or other funds				
30	Total net assets or fund balances (see instructions)	354,405.	331,353.		
31	Total liabilities and net assets/fund balances (see instructions)	354,405.	331,353.		

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	354,405.
2	Enter amount from Part I, line 27a	2	-23,052.
3	Other increases not included in line 2 (itemize) ▶	3	
4	Add lines 1, 2, and 3	4	331,353.
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	331,353.

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Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (for example, 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.)
1 a SEE PART IV SCHEDULE					
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					
b					
c					
d					
e					
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))		
(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any			
a					
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	6,340.	
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	0.	

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 doesn't qualify under section 4940(e). Do not complete this part.

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

(a) Base period years 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))
2016	34,291.	274,106.	0.125101
2015	34,821.	292,748.	0.118945
2014	34,946.	148,245.	0.235731
2013	26,231.		
2012	17,713.		

2 Total of line 1, column (d)	2	0.479777
3 Average distribution ratio for the 5-year base period - divide the total on line 2 by 5.0, or by the number of years the foundation has been in existence if less than 5 years	3	0.095955
4 Enter the net value of noncharitable-use assets for 2017 from Part X, line 5	4	343,466.
5 Multiply line 4 by line 3.	5	32,957.
6 Enter 1% of net investment income (1% of Part I, line 27b).	6	113.
7 Add lines 5 and 6.	7	33,070.
8 Enter qualifying distributions from Part XII, line 4. 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	8	33,545.

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	113.
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	113.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only, others, enter -0-)		4	0.
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-		5	113.
6 Credits/Payments:			
a 2017 estimated tax payments and 2016 overpayment credited to 2017	6a		
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		0.
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		113.
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 2018 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?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (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.		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		X
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • 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?		X
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV	X	
8a Enter the states to which the foundation reports or with which it is registered See instructions. ☐ NC,		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2017 or the tax year beginning in 2017? See the instructions for Part XIV. If "Yes," complete Part XIV.		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

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Part VII-A Statements Regarding Activities (continued)

	Yes	No
11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule See instructions		X
12 Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement See instructions		X
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ▶ N/A		X
14 The books are in care of ▶ LINDSEY, LINDSEY & MUELLER Telephone no ▶ 919-787-8995 Located at ▶ 5811 GLENWOOD AVENUE, STE 200 RALEIGH, NC ZIP+4 ▶ 27612		
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 2017, 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 the instructions for exceptions and filing requirements for FinCEN Form 114 If "Yes," enter the name of the foreign country ▶		X

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

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

	Yes	No
1a During the year, did the foundation (either directly or indirectly):		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ 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	X
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 2017?	1c	X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)).		
a At the end of tax year 2017, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2017? ☐ Yes ☒ No If "Yes," list the years ▶		
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions)	2b	X
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ▶		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☒ No		
b If "Yes," did it have excess business holdings in 2017 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 2017.)	3b	
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2017?	4b	X

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

		Yes	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.		
	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?		
	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?		

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	(b) Title, and average hours per week devoted to position	(c) Compensation (if not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
ATCH 8		0.	0.	0.

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	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				

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

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 PROVIDE MEDICAL, DENTAL, EDUCATIONAL AND HOUSING ASSISTANCE FOR DISADVANTAGED CHILDREN THROUGH NO FAULT OF THEIR OWN. (SEE SCHEDULE OF GRANTS/CONTRIBUTIONS PAID)	33,545.
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 NONE	
2	
All other program-related investments. See instructions	
3 NONE	
Total. Add lines 1 through 3 ▶	

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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	252,541.
b	Average of monthly cash balances	1b	96,155.
c	Fair market value of all other assets (see instructions).	1c	
d	Total (add lines 1a, b, and c)	1d	348,696.
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	348,696.
4	Cash deemed held for charitable activities. Enter 1 1/2 % of line 3 (for greater amount, see instructions).	4	5,230.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	343,466.
6	Minimum investment return. Enter 5% of line 5	6	17,173.

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	17,173.
2a	Tax on investment income for 2017 from Part VI, line 5 2a 113.		
b	Income tax for 2017 (This does not include the tax from Part VI) 2b		
c	Add lines 2a and 2b	2c	113.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	17,060.
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4.	5	17,060.
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	17,060.

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	33,545.
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	33,545.
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	113.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	33,432.

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 2016	(c) 2016	(d) 2017
1 Distributable amount for 2017 from Part XI, line 7				17,060.
2 Undistributed income, if any, as of the end of 2017:				
a Enter amount for 2016 only.				
b Total for prior years 20 <u>15</u> , 20 <u>14</u> , 20 <u>13</u>				
3 Excess distributions carryover, if any, to 2017:				
a From 2012				17,713.
b From 2013				26,231.
c From 2014				27,690.
d From 2015				20,330.
e From 2016				20,702.
f Total of lines 3a through e	112,666.			
4 Qualifying distributions for 2017 from Part XII, line 4: ► \$ <u>33,545.</u>				
a Applied to 2016, 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 2017 distributable amount.				17,060.
e Remaining amount distributed out of corpus.	16,485.			
5 Excess distributions carryover applied to 2017 (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	129,151.			
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 2016 Subtract line 4a from line 2a. Taxable amount - see instructions				
f Undistributed income for 2017 Subtract lines 4d and 5 from line 1. This amount must be distributed in 2018.				
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 2012 not applied on line 5 or line 7 (see instructions)	17,713.			
9 Excess distributions carryover to 2018. Subtract lines 7 and 8 from line 6a	111,438.			
10 Analysis of line 9				
a Excess from 2013	26,231.			
b Excess from 2014	27,690.			
c Excess from 2015	20,330.			
d Excess from 2016	20,702.			
e Excess from 2017	16,485.			

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 ATCH 13				
Total			3a	33,545.
b Approved for future payment				
Total			3b	

Enter gross amounts unless otherwise indicated

Part XV-A Analysis of Income-Producing Activities		Unrelated business income		Excluded by section 512, 513, or 514		(e)
Enter gross amounts unless otherwise indicated		(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	Related or exempt function income (See instructions.)
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	8.	
4	Dividends and interest from securities			14	8,860.	
5	Net rental income or (loss) from real estate:					
a	Debt-financed property					
b	Not debt-financed property					
6	Net rental income or (loss) from personal property					
7	Other investment income					
8	Gain or (loss) from sales of assets other than inventory			18	6,340.	
9	Net income or (loss) from special events . . .					
10	Gross profit or (loss) from sales of inventory . .					
11	Other revenue. a _____					
b	ATCH 14 _____				70.	
c	_____					
d	_____					
e	_____					
12	Subtotal. Add columns (b), (d), and (e)				15,278.	
13	Total. Add line 12, columns (b), (d), and (e)				13	15,278.

[illegible]

FORM 990-PF - PART IV
CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME

Kind of Property		Description				P or D	Date acquired	Date sold
Gross sale price less expenses of sale	Depreciation allowed/ allowable	Cost or other basis	FMV as of 12/31/69	Adj. basis as of 12/31/69	Excess of FMV over adj basis		Gain or (loss)	
11,405.		EDWARD JONES #983-17602 10,327.					VAR 1,078.	12/31/2017
98,988.		EDWARD JONES #983-17602 93,726.					VAR 5,262.	12/31/2017
TOTAL GAIN (LOSS)							<u>6,340.</u>	

ATTACHMENT 1

FORM 990PF, PART I - INTEREST ON TEMPORARY CASH INVESTMENTS

<u>DESCRIPTION</u>	<u>REVENUE AND EXPENSES PER BOOKS</u>	<u>NET INVESTMENT INCOME</u>
INTEREST INCOME	8.	8.
TOTAL	<u>8.</u>	<u>8.</u>

ATTACHMENT 2

FORM 990PF, PART I - DIVIDENDS AND INTEREST FROM SECURITIES

<u>DESCRIPTION</u>	<u>REVENUE AND EXPENSES PER BOOKS</u>	<u>NET INVESTMENT INCOME</u>
DIVIDEND, INTEREST & CAPITAL GAINS	8,860.	8,860.
TOTAL	<u>8,860.</u>	<u>8,860.</u>

ATTACHMENT 3FORM 990PF, PART I - OTHER INCOME

<u>DESCRIPTION</u>	<u>REVENUE AND EXPENSES PER BOOKS</u>
MISCELLANEOUS INCOME (REFUND PRIOR GRANT)	70.
TOTALS	<u>70.</u>

ATTACHMENT 4

FORM 990PF, PART I - OTHER PROFESSIONAL FEES

<u>DESCRIPTION</u>	<u>REVENUE AND EXPENSES PER BOOKS</u>	<u>NET INVESTMENT INCOME</u>
INVESTMENT ADVISORY FEES	3,817.	3,817.
TOTALS	<u>3,817.</u>	<u>3,817.</u>

ATTACHMENT 5

FORM 990PF, PART I - TAXES

<u>DESCRIPTION</u>	<u>REVENUE AND EXPENSES PER BOOKS</u>	<u>NET INVESTMENT INCOME</u>
TAXES - FOREIGN	68.	68.
TAXES - FEDERAL	58.	
TOTALS	<u>126.</u>	<u>68.</u>

ATTACHMENT 6FORM 990PF, PART I - OTHER EXPENSES

<u>DESCRIPTION</u>	<u>REVENUE AND EXPENSES PER BOOKS</u>
BANK SERVICE CHARGES	47.
POSTAGE & DELIVERY	49.
TOTALS	<u>96.</u>

ATTACHMENT 7FORM 990PF, PART II - CORPORATE STOCK

<u>DESCRIPTION</u>	<u>ENDING BOOK VALUE</u>	<u>ENDING FMV</u>
EDWARD JONES INVESTMENTS	227,381.	241,647.
TOTALS	<u>227,381.</u>	<u>241,647.</u>

JACK & MARY MCCALL CHARITABLE FOUNDATION, INC 2017 FORM 990-PF
 FORM 990PF, PART VIII - LIST OF OFFICERS, DIRECTORS, AND TRUSTEES

20-3955279

ATTACHMENT 8

NAME AND ADDRESS	TITLE AND AVERAGE HOURS PER WEEK DEVOTED TO POSITION	COMPENSATION	CONTRIBUTIONS TO EMPLOYEE BENEFIT PLANS	EXPENSE ACCT AND OTHER ALLOWANCES
BILLIE BLOCK 312 MOUNT EDEN PLACE CARY, NC 27518	PRESIDENT/TREASURER 10.00	0.	0.	0.
ROBERT PHAY 123 MORGAN BEND COURT CHAPEL HILL, NC 27514	DIRECTOR 1.00	0.	0.	0.
DICK LEVIN 2131 NORTH LAKESHORE DRIVE CHAPEL HILL, NC 27514	DIRECTOR 1.00	0.	0.	0.
BEVERLY SMITH 3323 ALLEGHANY DRIVE RALEIGH, NC 27609	DIRECTOR 1.00	0.	0.	0.
KIM CHAPPELL 1425 ENCHANTED OAKS DRIVE RALEIGH, NC 27606	DIRECTOR 1.00	0.	0.	0.
DAVE FARRAR 3651 BASTION LANE RALEIGH, NC 27604	DIRECTOR 1.00	0.	0.	0.
GRAND TOTALS		0.	0.	0.

ATTACHMENT 9FORM 990PF, PART XV - NAME, ADDRESS AND PHONE FOR APPLICATIONS

JACK & MARY MCCALL CHARITABLE FOUND
107 EDINBURGH SOUTH DRIVE, STE 100
CARY, NC 27511
919-787-8995



ATTACHMENT 10

990PF, PART XV - FORM AND CONTENTS OF SUBMITTED APPLICATIONS

JACK & MARY MCCALL CHARITABLE FOUND
LETTER FORM

ATTACHMENT 11

990PF, PART XV - SUBMISSION DEADLINES

JACK & MARY MCCALL CHARITABLE FOUND
NONE - GRANTS MADE BASED ON NEED

ATTACHMENT 12

990PF, PART XV - RESTRICTIONS OR LIMITATIONS ON AWARDS

JACK & MARY MCCALL CHARITABLE FOUND
NONE - GRANTS MADE BASED ON NEED

FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
ALL GOD'S CHILDREN UMC P.O. BOX 69 AULANDER, NC 27505	NONE	PROVIDE FUNDING FOR VOLUNTEER'S FIELD TRIP FOR WORK DURING LITERACY CAMP 6 WEEK PROGRAM.	1,467.
WORLD VIEW UNC CAMPUS, P.O. BOX 8011 CHAPEL HILL, NC 27599	NONE	PROVIDE FOR EDUCATORS TO ATTEND WORLD VIEW SEMINAR AND SPONSORSHIP FOR CULTURAL ENRICHMENT SEMINAR.	6,000.
CENTRAL PARK SCHOOL FOR CHILDREN 724 FOSTER STREET DURHAM, NC 27701	NONE	PROVIDE FUNDING FOR 7 STUDENTS TO ATTEND FIELD TRIP TO TRINITY CENTER SOUND TO SEA.	1,575.
APEX ELEMENTARY SCHOOL STUDENTS 700 TINGEN ROAD APEX, NC 27502	NONE	PROVIDE FUNDING FOR 7 STUDENTS TO ATTEND FIELD TRIP TO TRINITY CENTER SOUND TO SEA.	890.
DEAN MENDEZ 1749 DOBBINS DRIVE, APT 423A CHAPEL HILL, NC 27516	NONE	PROVIDE 10 THERAPY COUNSELING SESSIONS. PAYMENT MADE DIRECTLY TO SERVICE PROVIDER, DAVID SHANKS, LCSW, MBA, PLLC.	1,050.
FRASURE FAMILY CHILDREN 929 GREEN ADLER COURT CARY, NC 27519	NONE	PROVIDE FOR 7 CHILDREN'S NEEDS AND GENERAL WELFARE. REFERRED BY AND PAYMENT MADE DIRECTLY TO SCHOOL SOCIAL WORKER.	500.

ATTACHMENT 13

FORM 990FF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEARATTACHMENT 13 (CONT'D)

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
SAISON SUMPTER 4909 DANA DRIVE #6S RALEIGH, NC 27606	NONE	PROVIDE FOR SHORT-TERM, FULL TIME CHILDCARE. PAYMENT MADE DIRECTLY TO THE HAPPY FACE PRESCHOOL.	500.
MORRIS GROVE ELEMENTARY SCHOOL STUDENTS 215 EUBANKS ROAD CHAPEL HILL, NC 27516	NONE	PROVIDE FUNDING FOR 7 STUDENTS TO ATTEND FIELD TRIP TO TRINITY CENTER SOUND TO SEA.	1,540.
ROYSTON AND RIAN GOODEN 3839 BRENTWOOD ROAD RALEIGH, NC 27604	NONE	PROVIDE FOR 2 CHILDREN TO ATTEND SUMMER CAMP. PAYMENT MADE DIRECTLY TO LEARNING TOGETHER SUMMER CAMP.	1,200.
MIGUEL ROSARIO GARCIA 2806 CONIFER DRIVE, APT B RALEIGH, NC 27606	NONE	PROVIDE FOR CHILD TO ATTEND SUMMER CAMP. PAYMENT MADE DIRECTLY TO LEARNING TOGETHER SUMMER CAMP.	500.
LANDON GIGGINS 106 TAYPORT COURT CARY, NC 27511	NONE	PROVIDE BEFORE SCHOOL CARE FOR STUDENT. PAYMENT MADE DIRECTLY TO KIDS "R" KIDS.	500.
ZACHARIAH BLYTHER 408 PEARCE AVENUE WAKE FOREST, NC 27587	NONE	PROVIDE FOR FURNITURE AND BASIC NECESSITIES FOR FAMILY WHICH LOST EVERYTHING. PAYMENT MADE DIRECTLY TO SCHOOL SOCIAL WORKER.	500.

FORM 990-PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEARATTACHMENT 13 (CONT'D)

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND FOUNDATION STATUS OF RECIPIENT		PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
JOSUE HUEZO PANIAGUA 3120-D WALNUT CREEK PARKWAY RALEIGH, NC 27606	NONE		PROVIDE NUTRITIONAL SUPPLEMENTS AND SUPPLIES FOR CHILD. PAYMENT MADE DIRECTLY TO SCHOOL SOCIAL WORKER.	500.
ANIYA PINNOCK 1820 BAKERS GROVE WAY, APT 101 RALEIGH, NC 27610	NONE		PROVIDE HOME CARE NECESSITIES, BEDDING AND CLOTHING. PAYMENT MADE DIRECTLY TO SCHOOL SOCIAL WORKER.	500.
JORDAN SASSER 629 HENRY BAKER ROAD ZEBULON, NC 27597	NONE		PURCHASE CAR SEAT WITH ATTACHMENTS FOR CHILD WITH CEREBRAL PALSY. PAYMENT MADE DIRECTLY TO FIRST IN FAMILIES.	584.
HIGH CHILDREN (S) 709 WEXFORD DRIVE RALEIGH, NC 27603	NONE		PROVIDE WINTER CLOTHING FOR CHILDREN. PAYMENT MADE DIRECTLY TO SCHOOL SOCIAL WORKER.	500.
SHEAUNA JOHNSON 6556 APPLEWHITE ROAD FAYETTEVILLE, NC 28304	NONE		PURCHASE ADPTIVE STROLLER FOR DISABLED CHILD. PAYMENT MADE DIRECTLY TO FIRST IN FAMILIES.	895.
STOUGH ELEMENTARY SCHOL STUDENTS 4210 EDWARDS MILL ROAD RALEIGH, NC 27612	NONE		PROVIDE FOR 5 STUDENTS TO ATTEND SCHOOL FIELD TRIP TO WASHINGTON, DC.	1,090.

FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEARATTACHMENT 13 (CONT'D)

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
JUSTIN LATTA 4 COLLINSWOOD COURT DURHAM, NC 27703	NONE	PROVIDE SPEECH AND FEEDING THERAPY FOR CHILD WITH LIMITED MOBILITY. PAYMENT MADE DIRECTLY TO SPEECH PATHOLOGIST LYNN CARSWELL (RIGHT FIT SPEECH).	500.
COLIN BRYANT NOT PROVIDED DURHAM, NC 27707	NONE	PROVIDE CHILD WITH ADAPTIVE STROLLER. PAYMENT MADE DIRECTLY TO FIRST IN FAMILIES	535.
JESSE CHINEA 5421 PORTREE PLACE, APT 4 RALEIGH, NC 27606	NONE	PROVIDE FOR DISPLACED FAMILY DUE TO HURRICANE IN PUERTO RICO NOW LIVING IN NC. PAYMENT MADE DIRECTLY TO SCHOOL SOCIAL WORKER.	500.
MISCELLANEOUS GRANTS (< \$500 PER GRANT) 312 MOUNT EDEN PLACE CARY, NC 27518	NONE	PROVIDE ASSISTANCE FOR CHILDREN IN NEED OF MEDICAL, DENTAL, VISION, EDUCATION, ETC. SERVICES AND ASSISTANCE. PAYMENTS ARE MADE DIRECTLY TO PROVIDER.	11,719.
TOTAL CONTRIBUTIONS PAID			<u>33,545.</u>

FORM 990-PF, PART XVI-A - ANALYSIS OF OTHER REVENUE

ATTACHMENT 14

<u>DESCRIPTION</u>	<u>BUSINESS CODE</u>	<u>AMOUNT</u>	<u>EXCLUSION CODE</u>	<u>AMOUNT</u>	<u>RELATED OR EXEMPT FUNCTION INCOME</u>
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MISCELLANEOUS INCOME (REFUND OF PRIOR YEAR GRANT)				70.	
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TOTALS				<u>70.</u>	
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