Form 990-PF

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.

OMB No 1545-0052

D r	epartn Itemal	nent of the Treasury Revenue Service					-		n this form as uctions and t	-	-		Oper	という to Public Inspection
_		llendar year 2017	or ta			JUV/FORM	133UPF 1	or instr		, and en		uon.	Oper	, 20
		of foundation	UI La	. year begii		 -			, 2017	, and en		A Employer ide	ntificat	
	THE	JAMES FAMIL	Y FO	UNDATION	TNC.							20-5525		
-		er and street (or P O				to street a	iddress)			Room/su	ite	B Telephone no		see instructions)
		•					,					.,	\	,
	219	CHEROKEE RC	AD									(704)	907	-5374
_	City or	town, state or province	e, coun	try, and ZIP or fo	oreign pos	tal code				L	+	(, , , ,		
												C If exemption ap	plication	n is
	СНА	RLOTTE, NC 2	8207									pending, check	here.	
Ġ	Che	eck all that apply		Initial retur	'n		Initial	return	of a former	public ch	arity	D 1 Foreign orga	nization	r shask boro
				Final return	n		1	ded ret	•			2. Foreign orga		
				Address ch	nange		Name	change	e			85% test, che computation	eck here	and attach
F	Che	eck type of organi	zation:	X Section	on 501(c)(3) ex				~ · /				
		Section 4947(a)(1) r		_		$\overline{}$			ıvate founda	tion VY	/			atus was terminated (A), check here
Ĩ		market value o				unting n				crual /				a 60-month termination
	end	of year (from Pa	rt II, co			ther (sp		_						(B), check here
			098,					be on ca	sh basis)					.,,
	art	Analysis of Rev			es (The	·	evenue				Τ			(d) Disbursements
_		total of amounts i	n colun	nns (b), (c), ar	nd (d)		enses p		(b) Net inven		(c) Adjusted net income		for charitable purposes
		column (a) (see in			s in		books		incon	iie		mcome		(cash basis only)
_	1	Contributions, gifts, gran												
	2	Check ▶ if the	e founda ch Sch	ation is not requ B	ured to							7,		
	3	Interest on savings a						803.		803	1			
	4	Dividends and inte	rest fro	m securities	[342	,572.	34	2,572.				
2	5a	Gross rents			٤ [
2	b	Net rental income or	(loss)	1	`									
η <u>σ</u>	6a	Net gain or (loss) fro		f assets not on I	line 10									
∌ 5	b	Gross sales price for a assets on line 6a	all											
<u>-</u> ≥	7	Capital gain net in	come (f	from Part IV, Is	ine 2) .					0	·			
MA! Rev	8	Net short-term cap	ıtal gaır	n										
\supseteq	9	Income modification									<u> </u>			
SCANNED	iva	and allowances												
急		Less Cost of goods so							·					··-
	C	Gross profit or (los												
S	11	Other income (atta					313	375.	2 /	3,375.				
_	12	Total. Add lines 1					J4J,	0.		3,313.				
S	13	Compensation of office						٠.					+	·
JSe	14	Other employee sa		-	ī						-		+	
ber	15	Pension plans, em									-			
Х	16a	Legal fees (attach :					5.	045.					+	5,04
é		Accounting fees (a					<u> </u>	180.						18
Administrative Expenses	17	Other professional Interest			·						REC	EIVED		
str	18	Taxes (attach sche			1		4,	074.		<u> </u>			781	
Ξ	19	Depreciation (attac	, ,		,					8	MAR	21 2018		
E	20	Occupancy								 21 	 			
Ă	21	Travel, conference			T I						GD	ACM INS	-1E3	
and	22	Printing and public		•		-			<u>.</u>	F (_#	
		Other expenses (at						60.			 		+	6
peratina	24	Total operating ar		•	Г						†		\dashv	
era		Add lines 13 throu		-			9,	359.						5,28
	25	Contributions, gifts						000.			t		\dashv	826,00
Operal	26	Total expenses and disb			Г			359.		0			0.	831,28
) —	27	Subtract line 26 fro								 				·
N	a	Excess of revenue over			nts		-491,	984.						
u	l	Net investment in			}				34	3,375.	 			
	l	Adjusted net incor		-	´ F						1	<u> </u>		
SA F		perwork Reduction			ructions.						•		7	F 977 890-PF (201
7E1410	1 000	04455N 2098	2/28	8/2018	2:38:	15 PM	V	17-3.	2F				5	

Par	t II	Ralance Sheets	Attached schedules and amounts in the description column should be for end-of-year	Beginning of year	End of	year
\\ \frac{\chi_1}{\chi_2}		——————————————————————————————————————	amounts only (See instructions)	(a) Book Value	(b) Book Value	(c) Fair Market Value
1	1	Cash - non-interest-beari	ng	,		
2	2	Savings and temporary	cash investments	1,786,593.	1,294,609.	1,294,609.
3	3	Accounts receivable .				
		Less allowance for dou	btful accounts ▶			
4	4	Pledges receivable ▶				
		Less allowance for dou	btful accounts ▶			
!						
6			officers, directors, trustees, and other			
		disqualified persons (at	ach schedule) (see instructions)			
7			eceivable (attach schedule)			
			btful accounts >			
ध			e			<u> </u>
ssets			eferred charges		····	
¥ 10			e government obligations (attach schedule).			· · · · · · · · · · · · · · · · · · ·
			stock (attach schedule) ATCH 5	1,109,749.	1,109,749.	1,821,820
			bonds (attach schedule)			
11	l	Investments - land, buildings	6.	-		
		and equipment basis Less accumulated deprecia	ation -			
١.,		(attach schedule)		·		
12			loansATCH 6	9,949,362.	9,949,362.	15,982,564
14	1	Land, buildings, and	Lat scredule)	3,343,302.	J, J4J, 302.	13, 302, 304
		equipment basis Less accumulated deprecia	tion			
		(attach schedule)		··	-	
15		Other assets (describe				
''	,	instructions Also soon	completed by all filers - see the age 1, item i)	12 045 704	12,353,720.	10 000 002
+				12,845,704.	12,353,720.	19,098,993
17			ccrued expenses			
18						
Liabilities 51						
≣ 20			rs, trustees, and other disqualified persons			
[편] 21			tes payable (attach schedule)			
22	2	Other liabilities (describe	· >)			
23	,	Takal liabilisiaa (add laa	- 47 th (00)		0	
- 23			s 17 through 22)	0.	0.	
S			y SFAS 117, check here ▶ ☐			
2			through 26, and lines 30 and 31.			
E 24			• • • • • • • • • • • • • • • • • • • •		-	
E 25						
교 26						
or Fund Balances			ot follow SFAS 117, check here ► X			
5		and complete lines 27 t				
g 27		•	apal, or current funds			
Net Assets 30 31 31			land, bldg , and equipment fund	10 045 704	10 252 700	
S 29			lated income, endowment, or other funds	12,845,704.	12,353,720.	
30			balances (see instructions)	12,845,704.	12,353,720.	
Ž 31			net assets/fund balances (see	10 045 704	10 050 700	
				12,845,704.	12,353,720.	
			nges in Net Assets or Fund Balan			
			alances at beginning of year - Part II			10 045 704
e	nd-	or-year tigure reporte	d on prior year's return)		<u>1</u>	12,845,704
2 E	nte	r amount from Part I,	line 27a		2	-491,984
3 C	the	r increases not includ	led in line 2 (itemize) ▶		3	
					4	12,353,720
		eases not included in	· · · · ·		5	
<u>6</u> T	ota	I net assets or fund b	alances at end of year (line 4 minus l	ine 5) - Part II, column (b)	, line 30 6	12,353,720

_	2
Dana	. 1

Port IV Capital Gains	and Laccas for Tay on Inv				
	s and Losses for Tax on Inv		(b) How	1	
	escribe the kind(s) of property sold (for prick warehouse, or common stock, 200		acquired P - Purchase	(c) Date acquired (mo, day, yr)	(d) Date sold (mo , day, yr)
_ 	orick warehouse, or common stock, 200	- WILC CO)	D - Donation	(1110 ; day, y. /	(1110 ; day, y.)
l a					
b			<u> </u>		
С					
d					
е			l		
(e) Gross sales price	(f) Depreciation allowed	(g) Cost or other basis		(h) Gain or (lo	ss)
(e) cross sales price	(or allowable)	plus expense of sale		((e) plus (f) mini	us (g))
a					
b					
C					
d			İ		
е					
	showing gain in column (h) and owner	d by the foundation on 12/31/69		Caras (Cal. (b) as	
	(j) Adjusted basis	(k) Excess of col (i)		Gains (Col (h) ga (k), but not less to	
(i) FMV as of 12/31/69	as of 12/31/69	over col (j), if any		Losses (from co	
		1.5. 55. (j), dily	1	,	
<u>a</u>					
<u>b</u>			 		
<u>C</u>		<u> </u>	-		
d					
Ө			ļ		
Capital gain net income	or (not capital loss)	gain, also enter in Part I, line 7	1		
Suprice gam not mooning	If (loss), enter -0- in Part I, line 7	2		
Net short-term capital of	gain or (loss) as defined in sections	· · · · · · · · · · · · · · · · · · ·			
			1 1		
n uam, also emer in t	-an Lline 8 column (c) See in	istructions If (loss) enter -0- in L	1 1		
		istructions If (loss), enter -0- in $\}$			
Part I, line 8	<u></u>	<u></u>	3		
Part I, line 8	Under Section 4940(e) for Re			me)	-
Part I, line 8	Under Section 4940(e) for Report to the private foundations subject to the part blank.	educed Tax on Net Investment In the section 4940(a) tax on net invest butable amount of any year in the b	ment inco	· 	Yes X N
Part I, line 8	Under Section 4940(e) for Recommendations subject to the leave this part blank. The section 4942 tax on the distribution of the qualify under section 4940(e)	butable amount of any year in the b	ment inco	d?	Yes X N
Part I, line 8	Under Section 4940(e) for Recommendations subject to the leave this part blank. The section 4942 tax on the distribution of the qualify under section 4940(e)	educed Tax on Net Investment In the section 4940(a) tax on net invest butable amount of any year in the b	ment inco	d?	Yes X N
Part I, line 8	Under Section 4940(e) for Recommendations subject to the part blank. The section 4942 tax on the distribution of the section 4940(e) mount in each column for each years.	butable amount of any year in the boo not complete this part.	ment inco	d?	
Part I, line 8 Part V Qualification Or optional use by domestic section 4940(d)(2) applies, as the foundation liable for "Yes," the foundation does Enter the appropriate a (a) Base penod years	Under Section 4940(e) for Recommendations subject to the section 4942 tax on the distribution of the section 4942 tax on the distribution of the section 4940(e) mount in each column for each years. (b) Adjusted qualifying distributions	butable amount of any year in the boo not complete this part. ear, see the instructions before mak (c) Net value of nonchantable-use assets	ment inco	d? (d) Distribution ra (col (b) divided by	atio col (c))
Part I, line 8	Under Section 4940(e) for Rescription and the section 4942 tax on the distribution of the section 4942 tax on the distribution of the section 4940(e) amount in each column for each years. (b) Adjusted qualifying distributions 696, 937.	butable amount of any year in the book of complete this part. Pear, see the instructions before mak (c) Net value of nonchantable-use assets 14,939,524.	ment inco	d? (d) Distribution re (col (b) divided by	atio (col (c)) 0.046651
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Part I, line 8	Under Section 4940(e) for Rescription and the section 4942 tax on the distribution of the section 4942 tax on the distribution of the section 4940(e) amount in each column for each year. (b) Adjusted qualifying distributions 696, 937. 704, 413. 504, 950. 404, 950. 350, 176. (d) (d) (d) (e) It is for the 5-year base period - diving foundation has been in existence anoncharitable-use assets for 2017	butable amount of any year in the bound to complete this part. Pear, see the instructions before make (c) Net value of nonchantable-use assets 14,939,524. 13,719,666. 12,031,376. 9,707,518. 8,063,978. de the total on line 2 by 5.0, or by and less than 5 years.	pase perio	d? (d) Distribution re (col (b) divided by	atio col (c)) 0.046651 0.051343 0.041969 0.041715 0.043425 0.225103 0.045021
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Form 9	990-PF(2017) THE JAMES FAMILY FOUNDATION INC. / 20-5525	5003	P	age 4
Par	t VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see in	nstru	ction	5)
1at '	Exempt operating foundations described in section 4940(d)(2), check here			
	Date of ruling or determination letter (attach copy of letter if necessary - see instructions)			
	Domestic foundations that meet the section 4940(e) requirements in Part V, check		3,4	34.
	here X and enter 1% of Part I, line 27b		-	_
	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-)			
	Add lines 1 and 2		3,4	34.
	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only, others, enter -0-)			0.
	Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0		3,4	34.
	Credits/Payments			
	2017 estimated tax payments and 2016 overpayment credited to 2017 6a 4,000.			
	Exempt foreign organizations - tax withheld at source 6b			
	Tax paid with application for extension of time to file (Form 8868) 6c			
	Backup withholding erroneously withheld			
	Total credits and payments Add lines 6a through 6d		4.0	00.
	Enter any penalty for underpayment of estimated tax. Check here if Form 2220 is attached			
	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed			
			-	66.
	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid ▶ 10 Enter the amount of line 10 to be Credited to 2018 estimated tax ▶ 566 Refunded ▶ 11			
	t VII-A Statements Regarding Activities			
			Vac	No
	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it	10	Yes	No X
	participate or intervene in any political campaign?	1a		
	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the			Х
	instructions for the definition	1b		
	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			.,
	Did the foundation file Form 1120-POL for this year?	1c		X_
	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year			
	(1) On the foundation ►\$ (2) On foundation managers ►\$			
е	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed			
	on foundation managers \$	i		
2	Has the foundation engaged in any activities that have not previously been reported to the IRS?	2		X
	If "Yes," attach a detailed description of the activities			
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of			
	incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes	3		X
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a		Х
b	If "Yes," has it filed a tax return on Form 990-T for this year?	4b		N/A
	Was there a liquidation, termination, dissolution, or substantial contraction during the year?	5		Х
	If "Yes," attach the statement required by General Instruction T			
	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	X	
	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	Х	
	Enter the states to which the foundation reports or with which it is registered. See instructions.			
	NC,			[
	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 ² If "No," attach explanation	8b	Х	
	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or	_ <u></u>		
		į l		
	4942(j)(5) for calendar year 2017 or the tax year beginning in 2017? See the instructions for Part XIV If "Yes,"			X
	complete Part XIV	9		 -
	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their	4.0		×
	names and addresses	10		

Pai	rt VII-A Statements Regarding Activities (continued)			
	•		Yes	No
11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the			
	meaning of section 512(b)(13)? If "Yes," attach schedule See instructions	_11_		Х
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified			
	person had advisory privileges? If "Yes," attach statement See instructions	12		Х
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Х	
	Website address ► NONE			
14	The books are in care of ▶ R MICHAEL JAMES Telephone no ▶ 704-907-	-537	4	
	Located at ▶219 CHEROKEE ROAD, CHARLOTTE, NC ZIP+4 ▶ 28207			
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			
16	At any time during calendar year 2017, did the foundation have an interest in or a signature or other authority		Yes	No
	over a bank, securities, or other financial account in a foreign country?	16		X
	See the instructions for exceptions and filing requirements for FinCEN Form 114 If "Yes," enter the name of			
	the foreign country ▶			
Pai	rt 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)		43	33
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? Yes X No		183	22.9
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a			,
	disqualified person?		25	
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? Yes X No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?			Ž
	(5) Transfer any income or assets to a disqualified person (or make any of either available for		X .	· ``.
	the benefit or use of a disqualified person)? Yes X No		1	;
	(6) Agree to pay money or property to a government official? (Exception. Check "No" if the			, 34
	foundation agreed to make a grant to or to employ the official for a period after	Jan 1	š	
	termination of government service, if terminating within 90 days)		ľ	
b	olf any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations			N/A
	section 53 4941(d)-3 or in a current notice regarding disaster assistance? See instructions	1b	 	N/A
_	Organizations relying on a current notice regarding disaster assistance, check here	۸.		
C	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that			X
2	were not corrected before the first day of the tax year beginning in 2017?	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))			(X) (A)
а	At the end of tax year 2017, did the foundation have any undistributed income (lines 6d and	1	1 7	XXX X1
_	6e, Part XIII) for tax year(s) beginning before 2017?]	and the second
	If "Yes," list the years	v	, š	
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			1
	all years listed, answer "No" and attach statement - see instructions)	2b		N/A
С	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here			
	>			1
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise			* 3
	at any time during the year?			
b	If "Yes," did it have excess business holdings in 2017 as a result of (1) any purchase by the foundation or		Ľ	,
	disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the		Ľ	'
	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			, m
	foundation had excess business holdings in 2017)	3b		N/A
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

Pa	t VII-B Statements Regarding Activities	for Which Form	4720 May Be Req	uired (continued)			
5a .	During the year, did the foundation pay or incur any amo	ount to		<u> </u>		Yes	No
	(1) Carry on propaganda, or otherwise attempt to influe	ence legislation (section	n 4945(e))?	. Yes X No	[
	(2) Influence the outcome of any specific public ele	ection (see section 4	1955), or to carry or	ı,			
	directly or indirectly, any voter registration drive?			. Yes X No			
	(3) Provide a grant to an individual for travel, study, or o	other similar purposes?		. Yes X No			
	(4) Provide a grant to an organization other than a	charitable, etc., org	anization described i	n			
	section 4945(d)(4)(A)? See instructions			. Yes X No			
	(5) Provide for any purpose other than religious, ch						
	purposes, or for the prevention of cruelty to children	or animals?		. Yes X No			
b	If any answer is "Yes" to 5a(1)-(5), did any of the	transactions fail to	qualify under the e	xceptions described in			1
	Regulations section 53 4945 or in a current notice regar	ding disaster assistan	ce? See instructions.		5b		N/A
	Organizations relying on a current notice regarding disast	ster assistance, check	here	>			
С	If the answer is "Yes" to question 5a(4), does the	foundation claim e	xemption from the t	ax			
	because it maintained expenditure responsibility for the	grant?		. Yes No			
	If "Yes," attach the statement required by Regulations s	ection 53 4945-5(d)			ŀ		
6a	Did the foundation, during the year, receive any fur	nds, directly or indire	ectly, to pay premiur	ms	ŀ		
	on a personal benefit contract?			. Yes X No			
b	Did the foundation, during the year, pay premiums, dire				6b		X
	If "Yes" to 6b, file Form 8870						
7a	At any time during the tax year, was the foundation a p	arty to a prohibited tax	x shelter transaction?	. Yes X No			
b	If "Yes," did the foundation receive any proceeds or ha				7b		N/A
Pa	t VIII Information About Officers, Directo	rs, Trustees, Fou	ındation Manager	s, Highly Paid Emp	loyees,		
1	and Contractors List all officers, directors, trustees, foundation r	managers and their	r compensation. Sec	instructions.			
		(b) Title, and average	(c) Compensation	(d) Contributions to	(e) Expen	se acco	ount.
	(a) Name and address	hours per week devoted to position	(If not paid, enter -0-)	employee benefit plans and deferred compensation	other al		
ATC	H 7		0.	0.			0.
		1					
	- <u>-</u>						
2	Compensation of five highest-paid employees "NONE."	(other than thos	se included on lin	e 1 - see instruction	ons). If n	one,	ente
	NONE.	(b) Title, and average		(d) Contributions to			
(a)	Name and address of each employee paid more than \$50,000	hours per week	(c) Compensation	employee benefit plans and deferred	(e) Expen other al		
		devoted to position		compensation			
	NOVE						
	NONE		 -				
			<u> </u>				
							
Total	number of other employees paid over \$50,000						

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Part VIII Information About Officers, Directors, Trustees, Foundation and Contractors (continued)	Managers, Highly Paid Emplo	yees,
3 Five highest-paid independent contractors for professional services. Sec	e instructions. If none, enter "NONE	<u> </u>
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
	_	0
	-	
	_	
	-	
	-	
Total number of others receiving over \$50,000 for professional services		
Total Humber of others receiving over \$50,000 for professional services	<u> </u>	
Part IX-A Summary of Direct Charitable Activities		
List the foundation's four largest direct charitable activities during the tax year. Include relevant state organizations and other beneficianes served, conferences convened, research papers produced, etc.	tistical information such as the number of	Expenses
1 NONE		
	_	
2		-
	-	
	_	
3		
4		
Part IX-B Summary of Program-Related Investments (see instruction	s)	
Describe the two largest program-related investments made by the foundation during the tax year on lir	nes 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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Page 8

Par	Minimum Investment Return (All domestic foundations must complete this part. For see instructions.)	oreign found	ations,
1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc	.,	
	purposes:		
а	Average monthly fair market value of securities		16,533,570.
b	Average of monthly cash balances		1,501,340.
C	Fair market value of all other assets (see instructions)	. 1c	
d	l Total (add lines 1a, b, and c)	. 1d	18,034,910.
е	Reduction claimed for blockage or other factors reported on lines 1a and		
	1c (attach detailed explanation)		
2	Acquisition indebtedness applicable to line 1 assets	. 2	
3	Subtract line 2 from line 1d		18,034,910.
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, se	e	
	instructions)		270,524.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line		17,764,386.
6	Minimum investment return. Enter 5% of line 5		888,219.
Pai	Tt XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating f and certain foreign organizations, check here ▶ and do not complete this part)	oundations	
1	Minimum investment return from Part X, line 6	. 1	888,219.
2 a	Tax on investment income for 2017 from Part VI, line 5 2a 3,43		
b	Income tax for 2017. (This does not include the tax from Part VI.). 2b		
	Add lines 2a and 2b	. 2c	3,434.
3	Distributable amount before adjustments. Subtract line 2c from line 1	•	884,785.
4	Recoveries of amounts treated as qualifying distributions		
5	Add lines 3 and 4		884,785.
6	Deduction from distributable amount (see instructions)		
7	Distributable amount as adjusted Subtract line 6 from line 5. Enter here and on Part XII		
•	line 1		884,785.
	rt XII Qualifying Distributions (see instructions)		
1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes		021 005
	Expenses, contributions, gifts, etc total from Part I, column (d), line 26		831,285.
	Program-related investments - total from Part IX-B		
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc	! !	
	purposes	. 2	
3	Amounts set aside for specific charitable projects that satisfy the:		
а	and the characters are abbrevious damas at the contract of the		
b	- service and the following to the following of the first fi		
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line		831,285.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment incom		
	Enter 1% of Part I, line 27b. See instructions		3,434.
6	Adjusted qualifying distributions. Subtract line 5 from line 4		827,851.
	Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when qualifies for the section 4940(e) reduction of tax in those years	calculating	whether the foundation

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Form 990-PF (2017) Page 9 Undistributed Income (see instructions) Part XIII (a) (b) (c) (d) 2016 Corpus Years prior to 2016 2017 1 Distributable amount for 2017 from Part XI, 884,785. 2 Undistributed income, if any, as of the end of 2017 a Enter amount for 2016 only. . . . 91,735. **b** Total for pnor years 20 15 ,20 14 ,20 13 3 Excess distributions carryover, if any, to 2017 a From 2012 **b** From 2013 c From 2014 d From 2015 e From 2016 f Total of lines 3a through e 4 Qualifying distributions for 2017 from Part XII, 831,285. line 4 ▶ \$ 91,735. 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 739,550. d Applied to 2017 distributable amount..... e Remaining amount distributed out of corpus. . . 5 Excess distributions carryover applied to 2017 (If an amount appears in column (d), the same amount must be shown in column (a)) Enter the net total of each column as indicated below: a Corpus Add lines 3f, 4c, and 4e Subtract line 5 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 e Undistributed income for 2016 Subtract line 4a from line 2a Taxable amount - see f Undistributed income for 2017 Subtract lines 4d and 5 from line 1. This amount must be 145,235. 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) Excess distributions carryover from 2012 not applied on line 5 or line 7 (see instructions) . . . Excess distributions carryover to 2018. 0. Subtract lines 7 and 8 from line 6a 10 Analysis of line 9 a Excess from 2013 . . . b Excess from 2014 . . . c Excess from 2015 . . . d Excess from 2016 . . .

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e Excess from 2017 . . .

Pa	rt XIV · Private Op	erating Foundations	s (see instructions a	and Part VII-A, quest	ion 9)	NOT APPLICABLE
1a	If the foundation has					
	foundation, and the ruling					/
b	Check box to indicate v	whether the foundation	is a private operating	foundation described in	n section 4942	(j)(3) or / 4942(j)(5)
2 a	Enter the lesser of the ad-	Tax year		Prior 3 years		(e) Total
	justed net income from Part	(a) 2017	(b) 2016	(c) 2015	(d) 2014	(0, 1002)
	or the minimum investment return from Part X for each					
	year listed					
b	85% of line 2a					
С	Qualifying distributions from Part					
	XII, line 4 for each year listed .			 		
u	Amounts included in line 2c not used directly for active conduct of exempt activities					
е	Qualifying distributions made					
	directly for active conduct of					
	exempt activities Subtract line 2d from line 2c					
3	Complete 3a, b, or c for the					
а	"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 invest- ment return shown in Part X,					
	line 6 for each year listed					
С	"Support" alternative test - enter					
	(1) Total support other than					
	gross investment income (interest, dividends, rents,					
	payments on securities			İ		
	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 sup- port from an exempt					
	organization					
	(4) Gross investment income.					
Pa				t only if the founda	ition had \$5,000 o	or more in assets at
_		uring the year - see				
	Information Regarding			ro than 20% of the tot	al contributions room	eved by the foundation
•	before the close of any	tax year (but only if th	ey have contributed	more than \$5,000) (S	see section 507(d)(2))
	R MICHAEL A	ND KATHERINE H	JAMES			
b						lly large portion of the
	ownership of a partner	ship or other entity) of	which the foundatio	n has a 10% or greater	r ınterest.	
	N/A					
2	Information Regarding	g Contribution, Grant	, Gift, Loan, Scholars	hip, etc., Programs:		
	Check here ► X If t	he foundation only i	makes contributions	to preselected char	itable organizations	and does not accept
	unsolicited requests to	or tunds. It the found:	ation makes gifts, gr	ants, etc., to individua	als or organizations i	under other conditions,
	complete items 2a, b, o					
а	The name, address, a	nd telephone number	or email address of t	the person to whom app	plications should be ac	ldressed.
b	The form in which appl	lications should be sub	omitted and informat	on and materials they	should include	
	Any submission deadli	nes.				
ď	Any restrictions or lii	mitations on awards.	, such as by geog	raphical areas, charita	able fields, kinds of	institutions, or other
	factors:	·	, 5 - 5	. ,	, -	,

Part XV Supplementary Information (c	continued)			Page 11
3 Grants and Contributions Paid Durin Recipient Name and address (home or business)	ng the Year or Appr	oved for F	uture Payment	
Recipient	If recipient is an individual,	Foundation	Purpose of grant or	
Name and address (home or business)	any foundation manager	status of recipient	Purpose of grant or contribution	Amount
a Paid during the year				
ATCH 8				
-				
Tatal	<u>.</u>			826,000.
b Approved for future payment	 		▶ 3a	820,000.
NONE				
		Ì		
	:			
Total		<u>l</u>	<u> </u>	0.
Total	<u></u>		<u></u> <u></u> 3b	<u> </u>

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ter gross	amounts unless otherwise indicated		ated business income	 	y section 512, 513, or 514	(e) Related or exempt
Program	n service revenue	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	function income (See instructions)
a				_		
ь						
d						
е						
f						
g Fees	and contracts from government agencies			ļ. <u> </u>		
Member	ship dues and assessments			 		
Interest c	on savings and temporary cash investments •			14	803.	
Dividend	ds and interest from securities			14	342,572.	
	al income or (loss) from real estate			_		
	-financed property					
b Not o	debt-financed property • • • • • • •					
Net renta	al income or (loss) from personal property					
Other in	vestment income					
Gain or (I	loss) from sales of assets other than inventory					
Net inco	ome or (loss) from special events					
	rofit or (loss) from sales of inventory					
Other re	venue a					
						
·						
Total. Ad e workst	Add columns (b), (d), and (e)	ulations)				343,3
Total. Ad	dd line 12, columns (b), (d), and (e)	ulations) s to the A	ccomplishment of E	xempt Pur	poses	
Total. Ade workst	dd line 12, columns (b), (d), and (e)	ulations) s to the A	ccomplishment of E	xempt Pur	poses e) of Part XVI-A contribu	uted importantly to
Total. Ace workst rt XVI- ne No.	dd line 12, columns (b), (d), and (e) neet in line 13 instructions to venfy calcu B Relationship of Activities Explain below how each activity	ulations) s to the A	ccomplishment of E	xempt Pur	poses e) of Part XVI-A contribu	uted importantly to
Total. Ace workst rt XVI- ne No.	dd line 12, columns (b), (d), and (e) neet in line 13 instructions to venfy calcu B Relationship of Activities Explain below how each activity	ulations) s to the A	ccomplishment of E	xempt Pur	poses e) of Part XVI-A contribu	uted importantly to
Total. Ace workstort XVI- ne No.	dd line 12, columns (b), (d), and (e) neet in line 13 instructions to venfy calcu B Relationship of Activities Explain below how each activity	ulations) s to the A	ccomplishment of E	xempt Pur	poses e) of Part XVI-A contribu	uted importantly to
Total. Ace workstrt XVI- ne No.	dd line 12, columns (b), (d), and (e) neet in line 13 instructions to venfy calcu B Relationship of Activities Explain below how each activity	ulations) s to the A	ccomplishment of E	xempt Pur	poses e) of Part XVI-A contribu	uted importantly to
rotal. Ace workstrt XVI- ne No.	dd line 12, columns (b), (d), and (e) neet in line 13 instructions to venfy calcu B Relationship of Activities Explain below how each activity	ulations) s to the A	ccomplishment of E	xempt Pur	poses e) of Part XVI-A contribu	uted importantly to
rotal. Ace workstrt XVI- ne No.	dd line 12, columns (b), (d), and (e) neet in line 13 instructions to venfy calcu B Relationship of Activities Explain below how each activity	ulations) s to the A	ccomplishment of E	xempt Pur	poses e) of Part XVI-A contribu	uted importantly to
rotal. Ace workstrt XVI- e No.	dd line 12, columns (b), (d), and (e) neet in line 13 instructions to venfy calcu B Relationship of Activities Explain below how each activity	ulations) s to the A	ccomplishment of E	xempt Pur	poses e) of Part XVI-A contribu	uted importantly to
otal. Ad workst rt XVI- e No.	dd line 12, columns (b), (d), and (e) neet in line 13 instructions to venfy calcu B Relationship of Activities Explain below how each activity	ulations) s to the A	ccomplishment of E	xempt Pur	poses e) of Part XVI-A contribu	uted importantly to
otal. Ac workst rt XVI- e No.	dd line 12, columns (b), (d), and (e) neet in line 13 instructions to venfy calcu B Relationship of Activities Explain below how each activity	ulations) s to the A	ccomplishment of E	xempt Pur	poses e) of Part XVI-A contribu	uted importantly to
otal. Ad workst rt XVI- e No.	dd line 12, columns (b), (d), and (e) neet in line 13 instructions to venfy calcu B Relationship of Activities Explain below how each activity	ulations) s to the A	ccomplishment of E	xempt Pur	poses e) of Part XVI-A contribu	uted importantly to
otal. Adworkshipt XVI- e No.	dd line 12, columns (b), (d), and (e) neet in line 13 instructions to verify calcu B Relationship of Activities Explain below how each activity	ulations) s to the A	ccomplishment of E	xempt Pur	poses e) of Part XVI-A contribu	uted importantly to
otal. Ad workst rt XVI- e No.	dd line 12, columns (b), (d), and (e) neet in line 13 instructions to verify calcu B Relationship of Activities Explain below how each activity	ulations) s to the A	ccomplishment of E	xempt Pur	poses e) of Part XVI-A contribu	uted importantly to
otal. Adworkshipt XVI- e No.	dd line 12, columns (b), (d), and (e) neet in line 13 instructions to verify calcu B Relationship of Activities Explain below how each activity	ulations) s to the A	ccomplishment of E	xempt Pur	poses e) of Part XVI-A contribu	uted importantly to
otal. Ad workst rt XVI- e No.	dd line 12, columns (b), (d), and (e) neet in line 13 instructions to verify calcu B Relationship of Activities Explain below how each activity	ulations) s to the A	ccomplishment of E	xempt Pur	poses e) of Part XVI-A contribu	uted importantly to
rotal. Ace workstrt XVI- e No.	dd line 12, columns (b), (d), and (e) neet in line 13 instructions to verify calcu B Relationship of Activities Explain below how each activity	ulations) s to the A	ccomplishment of E	xempt Pur	poses e) of Part XVI-A contribu	uted importantly to
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Form 990	0-PF (2	(017)	THE JAME	ES FAMIL	Y FOUNDATIO	N INC.		20-552	5003	Pa	ge 13
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(a) Line		n any transaction o (b) Amount involved			now in column (e	- T		s, other assets, or s	~~		
(4) 21110	-	N/A	(c) Hame of		exempt organization	N/		siers, transactions, and sna	inig and	ingeme	1115
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Sign		Katherine F	1.games		3 13 2018	. J	Diesident	May the IR with the pr	S discus eparer s		
Here	Sign	ature of officer or trustee	0	Da	te	Title		See instruction		Yes	No
	l	Print/Type preparer's na	ame	Arepare	er's siggfaturg**, 🔥 ,		Date	Check If	PTIN		
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		IN	IDIANAPOLIS	, IN			46204	Phone no 317-6			
								Fo	m 990	U-PF	(2017)

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TATATATATA

	CHARITABLE PURPOSES	5,045.	5,045.
	ADJUSTED NET INCOME		
	NET INVESTMENT INCOME		
II	REVENUE AND EXPENSES PER BOOKS	5,045.	5,045.
FORM 990PF, PART I - ACCOUNTING FEES	NO	TAX RETURN PREPARATION	TOTALS
FORM 990P	DESCRIPTION	TAX RETURN	

THE JAMES FAMILY FOUNDATION INC.

OTHER PROFESSIONAL FEES ı PART I FORM 990PF,

REVENUE AND EXPENSES PER BOOKS

180.

180.

TOTALS

PROFESSIONAL WEBSITE DESIGN

DESCRIPTION

CHARITABLE PURPOSES

180.

180.

ATTACHMENT 2

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ATTACHMENT 3

FORM 990PF, PART I - TAXES

REVENUE AND EXPENSES

DESCRIPTION

PER BOOKS

2017 ESTIMATED TAX 2016 TAX PAYMENT

4,000. 74.

TOTALS

4,074.

THE JAMES FAMILY FOUNDATION INC.

ATTACHMENT 4

CHARITABLE PURPOSES 60.

.09

DESCRIPTION FOUNDATION WEBSITE/EMAIL FEES

REVENUE AND EXPENSES PER BOOKS

- OTHER EXPENSES

PART I

FORM 990PF,

60.

TOTALS

ATTACHMENT 4

ATTACHMENT 5

ATTACHMENT 5

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STOCK	
CORPORATE	
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PART	
990PF,	
FORM	

ENDING	BOOK VALUE
	DESCRIPTION

FMV	36,220. 1,785,600.	1,821,820.
BOOK VALUE	159,655.	1,109,749.
DESCRIPTION	WELLS FARGO & CO NEW (WFC) BERKSHIRE HATHAWAY INC CL A	TOTALS

ENDING FMV

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ENDING ENDING BOOK VALUE FMV	999, 297. 1, 672, 475. 572, 981. 810, 560. 993, 031. 1, 667, 105. 2, 136, 296. 3, 676, 288. 5, 078, 034. 8, 032, 486. 169, 723. 123, 650.	9,949,362.
DESCRIPTION	RUSSELL 2000 VALUE INDEX FUND COHEN & STERNS REALTY MAJORS INDEX FND RUSSELL MIDCAP VALUE INDEX FND DJ SELECT DIVID INDEX FUND SPDR TRUST SERIES 1 SPDR GOLD TR SHS	TOTALS

EXPENSE ACCT AND OTHER ALLOWANCES

CONTRIBUTIONS TO EMPLOYEE

ATTACHMENT

		COM	
2017 FORM 990-PF	FORM 990PF, PART VIII - LIST OF OFFICERS, DIRECTORS, AND TRUSTEES	TITLE AND AVERAGE HOURS PER WEEK DEVOTED TO POSITION	PRESIDENT 8.00
FOUNDATION INC.	VIII - LIST OF OFFICERS	. T. MI	
THE JAMES FAMILY FOUNDATION INC.	FORM 990PF, PART	NAME AND ADDRESS	KATHERINE H JAMES 219 CHEROKEE ROAD

BENEFIT PLANS	Ö
COMPENSATION	.0
WEEK DEVOTED TO POSITION	PRESIDENT 8.00

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VP/SECRETARY/TREASURER

CHARLOTTE, NC 28207

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CHARLOTTE, NC 28207 R MICHAEL JAMES 219 CHEROKEE ROAD



GRAND TOTALS

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

ATTACHMENT 8

	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR		•
	AND		
RECIPIENT NAME AND ADDRESS	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
WOFFORD COLLEGE	UNRELATED	SUPPORT ANNUAL FUND, SCHOLARSHIP FUND AND TERRIER	112,000
429 N COLLEGE ST	PC	CLUB	
SPARTANBURG, SC 29303			
URBAN MINISTRY CENTER	UNRELATED	SUPPORT PROGRAMS FOR HOMELESS MEN AND WOMEN	15,000
945 N COLLEGE ST	PC		
CHARLOTTE, NC 28206			
MIGRAINE RESEARCH FOUNDATION	UNRELATED	TO FUND SCIENTIFIC RESEARCH ON MIGRAINES	15,000
300 EAST 75TH ST SUITE 3K	PC		
NEW YORK, NY 10021			
TEACH FOR AMERICA	UNRELATED	SUPPORT TEACHERS IN HIGH POVERTY CLASSROOMS	25,000
5855 EXECUTIVE CENTER DR SUITE 200	PC		
CHARLOTTE, NC 28212			
CRISIS ASSISTANCE MINISTRY	UNRELATED	PROVIDE EMERGENCY ASSISTANCE TO THE POOR TO	25,000
500-A SPRAIT ST	PC	PREVENT HOMELESSNESS	
CHARLOTTE, NC 28206			
LOAVES AND FISHES	UNRELATED	PROVIDE FOOD TO AND SUPPORT OF OPERATIONS OF 18	15,000
638 B GRIFFITH RD	PC	EMERGENCY FOOD PANTRIES	
CHARLOTTE, NC 28217			

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THE JAMES FAMILY FOUNDATION INC

V 17-3 2F

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

ATTACHMENT 8 (CONT.D)	AMOUNT	5,000	105,000	2,000	5,000	5,000	1,000
ATTACHME	PURPOSE OF GRANT OR CONTRIBUTION	SUPPORT ENDOWED SCHOLARSHIP FUND	SUPPORT ANNUAL FUND DRIVE AND CAPITAL CAMPAIGN	SUPPORT PROGRAM TO PROVIDE MEALS-ON-WHEELS FOR HOMEBOUND INDIVIDUALS	SUPPORT RESIDENT AID ENDOWMENT	SUPPORT PROGRAMMING IN THE COLLEGE OF FAMILY AND CONSUMER SCIENCE	SUPPORT PROGRAM SERVICES FOR IMMIGRANT AND REFUGEE WOMEN
	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND FOUNDATION STATUS OF RECIPIENT	UNRELATED PC	UNRELATED PC	UNRELATED PC	UNRELATED SO I	UNRELATED PC	UNRELATED PC
	RECIPIENT NAME AND ADDRESS	WAKE FOREST UNIVERSITY P O BOX 7227 WINSTON-SALEM, UC 27109	CHARLOTTE COUNTRY DAY SCHOOL 1440 CARWEL ROAD CHARLOTTE, NC 28226	FRIENDSHIP TRAYS 2401-A DISTRIBUTION ST CHARLOTTE, NC 28203	PRESBYTERIAN COMMUNITIES OF SC 2817 ASHLAND ROAD COLUMBIA, SC 29210	UNIVERSITY OF GEORGIA FOUNDATION 224 DAWSOM HALL, 305 SANFORD DR ATHENS, GA 30602	EMPOWERED WOMEN INTERNATIONAL 320 S HENRY STREET ALEXANDRIA, VA 22314

ATTACHMENT 8 (CONT'D)

		AMOUNT
		PURPOSE OF GRANT OR CONTRIBUTION
RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR	AND	FOUNDATION STATUS OF RECIPIENT
		RECIPIENT NAME AND ADDRESS

	AND		
RECIPIENT NAME AND ADDRESS	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
ST PETER'S EPISCOPAL CHURCH - AUGUSTINE 115 WEST 7TH STREET CHARLOTTE, NC 28202	UNRELATED PC	SUPPORT AUGUSTINE PROJECT FOR LITERACY - TUTORING OF LOW INCOME STRUGGLING READERS	12,000
TREES CHARLOITE 701 TUCKASEGGEE RD CHARLOITE, NC 28208	UNRELATED PC	SUPPORT PUBLIC/PRIVATE PROGRAM TO PLANT TREES AND RAISE AWARENESS ABOUT TREE CANOPY	10,000
TOSTAN PO BOX 51987 WASHINGTON, DC 20091	UNRELATED PC	SUPPORT COMMUNITY HUMAN RIGHTS BASED EDUCAITON PROGRAMS IN WEST AFRICA	45,000
CHARLOTTE BILINGUAL PRESCHOOL 6300 HIGHLAND AVE CHARLOTTE, NC 28215	UNRELATED PC	SUPPORT EARLY CHILDHOOD EDUCATION PROGRAM FOR LATINO CHILDREN	2,000
FIRST PRESBYTERIAN CHURCH 200 W TRADE STREET CHARLOTTE, NC 28202	UNRELATED PC	SUPPORT GENERAL OPERATIONS, PROGRAMMING AND OUTREACH OF THE CHURCH SUPPORT PARISH CARE NURSE PROGRAMMING PROVIDE FUNDING FOR THE PURCHASE OF BOOKS FOR WESTERLY HILLS ACADEMY. SUPPORT MUSIC PROGRAMMING AT THE CHURCH	93,000
WFAE 8801 JM KEYNES DRIVE, SUITE 91 CHARLOTTE, NC 28262	UNRELATED PC	SUPPORT PROGRAMMING ON PUBLIC RADIO	5,000

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

		PURPOSE OF GRANT OR CONTRIBUTION	
RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR	AND	FOUNDATION STATUS OF RECIPIENT	
		T NAME AND ADDRESS	

ATTACHMENT 8 (CONT'D)

	AND		
RECIPIENT NAME AND ADDRESS	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
WING HAVEN FOUNDATION 248 RIDGEWOOD AVE CHARLOTTE, NC 28209	UNRELATED PC	SUPPORT OPERATIONS AND PROGRAMMING OF GARDENS AND BIRD SANCTUARY	30,000
FIRST PRESBYTERIAN CHURCH SUMMER CAMP 200 W TRADE ST CHARLOTTE, NC 28202	UNRELATED	SUPPORT SUMMER CAMP PROGRAMS FOR AT-RISK CHILDREN AND FUND CHURCH HISTORY BOOK	12,500
CHARLOTTE MECKLENBURG LIBRARY FOUNDATION 310 N TRYON STREET CHARLOTTE, NC 28202	UNRELATED SO I	SUPPORT CHARLOTTE MECALENBURG LIBRARY PROGRAMS AND SERVICES	5,000
YMCA OF GREATER CHARLOTTE 400 E MOREHEAD ST , 5TH FLOOR CHARLOTTE, HC 28202	UNRELATED PC	SUPPORT OUTREACH PROGRAMS OF THE YMCA	10,000

10,000

SUPPORT COMPREHENSIVE MEMORY CARE TO ELDERLY

UNRELATED

CHARLOTTE NEUROSCIENCE FOUNDATION

300 BILLINGSLEY RD , SUITE 108

CHARLOTTE, NC 28211

 PC

UNRELATED

THE IVEY MEMORY WELLNESS DAY CENTER

CHARLOTTE, NC 28210 6030 PARK SOUTH DR

PC.

PATIENTS AND THEIR FAMILIES

THE JAMES FAMILY FOUNDATION INC

20-5525003

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

ATTACHMENT 8 (CONT'D)

	AMOUNT	40,000	2, 000	10,000	100,000	10,000	10,000
	PURPOSE OF GRANT OR CONTRIBUTION	PROVIDE FUNDING FOR CLASSROOM NEEDS IN PUBLIC SCHOOLS	SUPPORT NURSE-FAMILY PARTNERSHIP PROGRAM FOR AT-RISK MOTHERS AND NEWBORNS	SUPPORT MATH TUTORING PROGRAM FOR HIGH-POVERTY AT-RISK STUDENTS	SUPPORT PROGRAMS TO INCREASE LITERACY PROFICIENCY IN CHARLOTTE MECKLENBURG SCHOOLS	SUPPORT CONSERVATION PROJECTS AROUND THE WORLD	SUPPORT CONSERVATION PROJECTS AROUND THE WORLD
RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND	FOUNDATION STATUS OF RECIPIENT	UNRELATED PC	UNRELATED	UNRELATED PC	UNRELATED PC	UNRELATED PC	UNRELATED PC
	RECIPIENT NAME AND ADDRESS	DONORSCHOOSE 134 W 37TH ST , FLOOR 11 NEW YORK, NY 10018	CARE RING- HURSE-FAMILY PARTNERSHIP 601 E 5TH ST , SUITE 140 CHARLOTTE, NC 28202	HEART MATH TUTORING PO BOX 30623 CHARLOTTE, NC 28208	FFTC- READ CHARLOTTE 220 N TRYOH ST CHARLOTTE, NC 28202	CONSERVATION INTERNATIONAL PO BOX 418608 BOSTON, MA 02241-8608	WORLD WILDLIFE FUND 1250 24TH ST , N W WASHINGTON, DC 20037

THE JAMES FAMILY FOUNDATION INC

20-5525003

FORM 990PE, PART XV - GRAHITS AND CONTRIBUTIONS PAID DURING THE YEAR

RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR

ATTACHMENT 8 (CONT'D)

	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR		
	AND		
RECIPIENT NAME AND ADDRESS	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
THE GREEN BELT MOVEMENT	UNRELATED	SUPPORT TREE-PLANTING EFFORTS IN KENYA FOR	2,000
165 COURT ST #175	PC	ENVIRONMENTAL AND LIVELIHOOD IMPROVEMENT	
ВКООКLY!!, NY 11201			
THE RELATIVES	UNRELATED	SUPPORT PROGRAMMING TO PROVIDE CHILDREN AND YOUTH	2,000
119 EAST 8TH ST	PC	WITH SHELTER AND SUPPORT	
CHARLOTTE, NC 28202			
CLASSIC CITY COMMUNITY CHURCH	UNRELATED	SUPPORT GENERAL OPERATIONS, PROGRAMMING AND	1,000
P O BOX 329	PC	OUTREACH OF THE CHURCH	
ATHENS, GA 30603			
ARTS & SCIENCE COUNCIL	UNRELATED	SUPPORT OPERATIONS AND PROGRAMMING OF THE COUNCIL	5,000
227 W TRADE ST	PC		
CHARLOTTE, NC 28202			
COMMUNITIES IN SCHOOLS	UNRELATED	SUPPORT DROPOUT PREVENTION PROGRAMMING FOR AT	2,000
601 E STH STREET	PC	RISK CHILDREN IN PUBLIC SCHOOLS	
SUITE 300			
CHARLOTTE, NC 28202			
THANKITED HORINATION OF PROTITIONS LATER	מקדי אינים איני	BOOVIDE LEGAL CEDVICES AND SHEADER FOR IMMICEBANT	000
PEGGE SENTICES OF SCOTLENIN FIEDRICIAL			
1431 ELIZABETH AVENUE		FAMILIES	
CHAKLOIIE, IIC 28024			

2017 FORM 990-PF

ATTACHMENT 8 (CONT'D)

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

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

ATTACHMENT 8 (CONT'D)

	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR		
	AND		
RECIPIENT NAME AND ADDRESS	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
REMOTE AREA MEDICAL	UNRELATED	SUPPORT FREE MEDICAL AND DENTAL SERVICES IN POOR	2,000
2200 STOCK CREEK BLVD ROCKFORD, TN 37853	PC	RURAL AREAS	
THE FISTULA FOUNDATION	UNRELATED	SUPPORT TREATMENT TO WOMEN SUFFERING FROM	2,000
1922 THE ALAMEDA, STE 302 SAN JOSE, CA 95126	PC	OBSTETRIC FISTULAS	
MIRACLEFEET	UNRELATED	SUPPORT TREATMENT OF CHILDREN BORN WITH A	5,000
107 CONNER DR , STE 230 CHAPEL HILL, NC 27514	PC	CLUBFOOT	
EVIDENCE ACTION	UNRELATED	SUPPORT INTERNATIONAL EFFORTS TO PROVIDE	5,000
PO BOY 65480 WASHINGTON, DC 20035-5480	PC	DEWORMING MEDICATION TO CHILDREN	

826,000	
PAID	
CONTRIBUTIONS	
OTAL	

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