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

OMB No 1545-0052

2017

Form 990-PF (2017)

Depa	rtment	of the Treasury					2017
		enue Service Go to www.irs.gov/Formular year 2017 or tax year beginning	and ending	ions and the	latest into	ormation.	Open to Public Inspection
		P AND FRANCES A KIRBY ARITABLE TRUST	7			oyer identification number - 6201577	
	mber and	distreet (or PO box number if mail is not delivered to street address) BOX 310	B Telep	hone number (see instruction 4 - 845 - 1266	s)		
Cit	y or town	, state or province, country, and ZIP or foreign postal code		-		mption application is pending.	check here
			rn of a former public	chamby	1 n 1 E	oreign organizations, check he	are D
	JIICUK (Final return Amended	•	Chanty	1	-	<u></u>
		Address change Name cha				oreign organizations meeting t 5% test, check here and attact	
		type of organization: Section 501(c)(3) exempt private at 4947(a)(1) nonexempt charitable trust Other taxable		00	/ I	ate foundation status was terr on 507(b)(1)(A), check here	ninated under
		ket value of all assets at J Accounting method		ccrual	F If the	foundation is in a 60-month te	rmination
	nd of y ne 16)	ear (from Part II, col (c), Other (specify)			1	section 507(b)(1)(B), check f	
	art 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 in	ovestment ome	(c) Adjusted net income	(d) Disbursements for chantable purposes (cash basis only)
	1	Contributions, gifts, grants, etc , received (attach schedule)				III	
\mathcal{I}	2	Check ► X if the foundation is not required to attach Sch B			·····		
	3	Interest on savings and temporary cash investments	24 02		24 020		
	4	Dividends and interest from securities	34,83	'	34,830		
	5a	Gross rents					
9	b 6a	Net rental income or (loss) Net gain or (loss) from sale of assets not on line 10	42,72	4			
/en	b	Gross sales price for all assets on line 6a 118, 961		-	I -		.1
Revenue	7	Capital gain net income (from Part IV, line 2)			42,724		/
_	8	Net short-term capital gain			***************************************	0	***************************************
	9	Income modifications			_,_,		
	10a	Gross sales less returns and allowances					
	ь	Less Cost of goods sold				· · · · · · · · · · · · · · · · · · ·	
	С	Gross profit or (loss) (attach schedule)					
	11	Other income (attach schedule)					
	12	Total. Add lines 1 through 11	77,55		77,554	0	[
es	13	Compensation of officers, directors, trustees, etc.	2,00	-			
ĵ.	15	Other employee salaries and wages Pension plans, employee benefits					
	16a	Legal fees (attach schedule)	ļ	JECEN	(CD	 	
2018 ve Exi	b	Accounting fees (attach schedule) Stmt 1	2,05		<u>/LU_</u>		
Z 2	c	Other professional fees (attach schedule) Stmt 2	9, 68		9,685		
ag ig	17	Interest	্ষ		2018	P -	
Istra	18	Taxes (attach schedule) (see instructions) Stmt 3	ட 66			21	
JÜL. dminis	19	Depreciation (attach schedule) and depletion		GDEN	IIT		
<u></u>	20	Occupancy		MADLIA	, U i		
	21	Travel, conferences, and meetings					
3 8	22	Printing and publications		<u> </u>			
₹ 5	23	Other expenses (att sch)					
SCANNED _iiJl. 2 3 2018 Operating and Administrative Expens	24	Total operating and administrative expenses.	14 30		0 505	_	_
)er	2-	Add lines 13 through 23	14,39 66,84		9,685	0	66,844
Ŏ	25	Contributions, gifts, grants paid Total expenses and dishursements. Add lines 24 and 25	81,24		9,685	0	
	26 27	Total expenses and disbursements. Add lines 24 and 25 Subtract line 26 from line 12.	01,24	-	2,000	0	00,044
	a a	Excess of revenue over expenses and disbursements	-3,68	8		<u> </u>	
	b	Net investment income (if negative, enter -0-)	-,		67,869		
	C	Adjusted net income (if negative, enter -0-)				0	

G-16

For Paperwork Reduction Act Notice, see instructions.

	Part I	Balance Sheets Attached schedules and amounts in the description column	Beginning of year	End of	year
_	-	should be for end-of-year amounts only (See instructions)	(a) Book Value	(b) Book Value	(c) Fair Market Value
	1,	Cash – non-interest-bearing			<u></u> .
	2	Savings and temporary cash investments	69,917	77,530	77,533
	3	Accounts receivable ▶		į	
		Less allowance for doubtful accounts ▶			
	4	Pledges receivable ▶			
		Less¹ 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 (att_schedule)			
		Less ⁻ allowance for doubtful accounts ▶ 0			
2	8	Inventories for sale or use			
Assets	9	Prepaid expenses and deferred charges			
A	10a	Investments – U S and state government obligations (attach schedule) Stmt 4	50,680	25,262	25,640
	b	Investments – corporate stock (attach schedule) See Stmt 5	630,891	618,671	1,103,432
	С	Investments – corporate bonds (attach schedule) See Stmt 6	185,261	211,598	212,450
	11	Investments – land, buildings, and equipment basis			· · · · · · · · · · · · · · · · · · ·
		Less accumulated depreciation (attach sch.)			
	12	Investments – mortgage loans			
	13	Investments – other (attach schedule)			
ı	14	Land, buildings, and equipment basis			
		Less accumulated depreciation (attach sch.)			
	15	Other assets (describe ▶			
	16	Total assets (to be completed by all filers – see the			<u> </u>
\bot		ınstructions Also, see page 1, item I)	936,749	933,061	1,419,055
T	17	Accounts payable and accrued expenses			· · · · · · · · · · · · · · · · · · ·
	18	Grants payable			
<u>Liabilities</u>	19	Deferred revenue			
≝∣	20	Loans from officers, directors, trustees, and other disqualified persons		-	
흽	21	Mortgages and other notes payable (attach schedule)			
-1	22	Other liabilities (describe ▶)			
	23	Total liabilities (add lines 17 through 22)	0	0	
		Foundations that follow SFAS 117, check here			
ces		and complete lines 24 through 26 and lines 30 and 31.			
	24	Unrestricted			
Net Assets or Fund Balar	25	Temporarily restricted			
	26	Permanently restricted		,	
틹		Foundations that do not follow SFAS 117, check here			
딘		and complete lines 27 through 31.			
ွ	27	Capital stock, trust principal, or current funds		_	
ĕ	28	Paid-in or capital surplus, or land, bldg, and equipment fund			
S	29	Retained earnings, accumulated income, endowment, or other funds	936,749	933,061	
뒿	30	Total net assets or fund balances (see instructions)	936,749	933,061	
Ž	31	Total liabilities and net assets/fund balances (see			
┙		instructions)	936,749	933,061	
_1	Part II	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 (mu	st agree with		
	end-o	f-year figure reported on prior year's return)		1	936,749
2	Enter	amount from Part I, line 27a		2	-3,688
3	Other	ıncreases not included in line 2 (itemize) ▶		3	
4	Add I	nes 1, 2, and 3		4	933,061
5	Decre	eases 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 (l	b), line 30	6	933,061
					50m 990-PF (2017)

2-story brick warehouse, or	of property sold (for example, real estate, or common stock, 200 shs MLC Co)		(b) How acquired P Purchase	(c) Date acc	quired (d) Date sold	
			D – Donation	(mo , day,		
1a See Worksheet		-				
С						
						
e	(f) Depreciation allowed	(5) Cost of	other have		(h) Com or (local)	
(e) Gross sales price	(or allowable)		other basis nse of sale	((h) Gain or (loss) (e) plus (f) minus (g))	
_a						
<u>b</u>						
_ c						
e		· <u> </u>				
Complete only for assets showing gain in	column (h) and owned by the fou	indation on 12/31/6	69	(I) G	Sains (Col. (h) nain minus	
(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69		s of col (i) (j), if any	(I) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))		
a						
b						
<u>c</u>						
e						
Capital gain net income or (net capital los Net short-term capital gain or (loss) as de If gain, also enter in Part I, line 8, column	efined in sections 1222(5) and (6)	Part I, line 7		2	42,72	
Part I, line 8	action 4040/a) for Daduce	ad Tass are Nati		3		
Part V Qualification Under Set (For optional use by domestic private foundat	ection 4940(e) for Reduce			me	<u> </u>	
, ,		a) tax on net invest	ment income.)			
If section 4940(d)(2) applies, leave this part bl Was the foundation liable for the section 4942 If "Yes," the foundation does not qualify under	2 tax on the distributable amount		pase period?		Yes X	
1 Enter the appropriate amount in each colu	umn for each year, see the instruc	ctions before makii	ng any entries.			
(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	Net value	(c) e of nonchantable-use asset		(d) Distribution ratio (col (b) divided by col (c))	
2016	65.	232	1,276,4	162	0.05110	
2015		484	1,300,4		0.05419	
2014	67,	867	1,326,3		0.05116	
2013		056	1,274,	69	0.04868	
2012	<u>59,</u>	858	1,191,4	193	<u> </u>	
2 Total of line 1, column (d)	and accorded to the total on low	2 hu 5 0 hu 4h	_	2	0.25539	
3 Average distribution ratio for the 5-year banumber of years the foundation has been	•	ie 2 by 5 U, or by tr	ie	3	0.05107	
4 Enter the net value of noncharitable-use a	assets for 2017 from Part X, line 5	5		4	1,320,62	
5 Multiply line 4 by line 3				5	67,45	
6 Enter 1% of net investment income (1% of	of Part I, line 27b)			6	67	
7 Add lines 5 and 6				7	68,13	
8 Enter qualifying distributions from Part XII If line 8 is equal to or greater than line 7, or Part VI instructions		and complete that	part using a 1% tax r	ate See the	66,84	

	990-PF (2017) JUMN P AND FRANCES A KIRBI 20-62015//		-	P	age 4	Ŀ
	Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 – see instructions)					
ıa	Exempt operating foundations described in section 4940(d)(2), check here and enter "N/A" on line 1					
L	Date of ruling or determination letter (attach copy of letter if necessary—see instructions)			-	2 5 7	
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check	 		т,	<u>357</u>	-
	here and enter 1% of Part I, line 27b					
С	All other domestic foundations enter 2% of line 27b Exempt foreign organizations, enter 4% of					
_	Part I, line 12, col (b)				^	
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only, others, enter -0-)	+				-
3	Add lines 1 and 2 Subtitle A (necessary to 4047(-)/4) to take and to take 1 and 2 and 3	 		Ι,	<u>357</u>	-
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only, others, enter -0-) 4 Tay because the section 4947(a)(1) trusts and taxable foundations only, others, enter -0-)	 		-		-
5	Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0-			Ι,	357	-
6	Credits/Payments					
a	2017 estimated tax payments and 2016 overpayment credited to 2017 6a 510					
b	Exempt foreign organizations – tax withheld at source The product of the state of					
C	Tax paid with application for extension of time to file (Form 8868) 6c					
d -	Backup withholding erroneously withheld Take to be a second of the seco	1			-10	
7	Total credits and payments Add lines 6a through 6d	ļ			<u>510</u>	-
8	Enter any penalty for underpayment of estimated tax. Check here if Form 2220 is attached 8	4			- 4 =	-
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	ļ			<u>847</u>	
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	├ ──				
11	Enter the amount of line 10 to be Credited to 2018 estimated tax Refunded 11	<u> </u>				
	rt VII-A Statements Regarding Activities	-				
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it			Yes	No	
	participate or intervene in any political campaign?		1a		<u> </u>	
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the					
	Instructions for the definition		1b		X	
	If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials				ĺ	
	published or distributed by the foundation in connection with the activities					
C	Did the foundation file Form 1120-POL for this year?		1c		X	
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year				ĺ	
_	(1) On the foundation \$ (2) On foundation managers \$ (3) \$ (4) \$ (5) \$ (6) \$ (7) \$				ĺ	
е	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed				ĺ	
2	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		X	
3				1	ĺ	
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of			1	x	
40	incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		3			
4a b	Did the foundation have unrelated business gross income of \$1,000 or more during the year? If "Yes," has it filed a tax return on Form 990-T for this year?	N/A	4a		X	
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year?	N/A	4b		X	
3	If "Yes," attach the statement required by General Instruction T		5			
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either				i	
•	By language in the governing instrument, or				į	
	By state legislation that effectively amends the governing instrument so that no mandatory directions that			1	i	
	conflict with the state law remain in the governing instrument?			х	İ	
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		6 7	x		
, 8a	Enter the states to which the foundation reports or with which it is registered. See instructions.			^-		
Ua	VA			:	į	
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General			. :	į	
	(or designate) of each state as required by General Instruction G? If "No," attach explanation		_{oL}	v	!	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or		8b	X		_
•	4942(j)(5) for calendar year 2017 or the taxable year beginning in 2017? See instructions for Part XIV. If "Yes,"			1)
	complete Part XIV				х	V
0	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their		9			
•	names and addresses		,,		x	
			10	Λ.DE		

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 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 13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ▶ N/A 14 The books are in care of ▶ THE PETTYJOHN COMPANY POBOX 310 Located at ▶ LYNCHBURG 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 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 ▶ Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required	_Pa	art VII-A Statements Regarding Activities (continued)					
meaning of section 51 (20)(13)? If "Yes", attach schedule. See instructions 11 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 Did the foundation comely with the public inspection requirements for its annual returns and exemption application? 13 Website address ₽ N/A 14 The books are in care of ▶ THE PETTYJOHN COMPANY Telephone no ▶ 434 – 845 – 1266 15 Section 43*(76)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 – check here 16 All any time duming catendary are 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? 16 Sea the instructions for exceptions and filing requirements for Finch Form 1141 if "Yes," enter the name of the foreign country. 17 Sea the instructions for exceptions and filing requirements for Finch Form 1141 if "Yes," enter the name of the foreign country. 18 Statements Regarding Activities for Which Form 4720 May Be Regulred 19 File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. 19 Duning the year, did the foundation (either directly or indirectly): (1) Engage in the sale or exchange, or leasing of property with a disqualified person? (2) Borrow morney from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? (3) Furnish goods, services, or feotolities to (or accept): (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? (5) Transfer any income or assets to a disqualified person (or make any of either available for the behand or special person? (6) Agree to pay money or property to a government official? (Exception, Check. "No" if the foundation engage of make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days to a section 4942(a)(2) to all years						Yes	No
12 Dut the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person half advisory privileges it "I**es," attach statement. See instructions 32 Dut the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address № N/A 14 The books are in care of ▶ TRIE PETTYJOHN COMPANY PO BOX 310 Located at ▶ INTERIBERGE PO BOX 310 Located at ▶ INTERIBERGE Amy time during clare instable trusts filing Form 990-PF in lieu of Form 1041 – check here and enter the amount of fax exempt interest received or accured during the year 16 At any time during clarefact year 2017, dd 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 FinoEN Form 141 if 1*Yes,* enter the name of the foreign country ▶ Part YUI-B. Statements Regarding Activities for Whitch Form 4720 May Be Required Filis Form 4720 if any item is checked in the "ves" column, unless an exception applies. 19 During the year, did the foundation (either directly or indirectly): (1) Engage in the saller or exchange, or leasing of property with a disqualified person? (2) Borrow money from, lend money (to, or otherwise extend credit to (or accept it from) a disqualified person? (3) Furnish goods, services, or facilities to for accept the from) a disqualified person? (3) Furnish goods, services, or facilities to for accept them from) a disqualified person? (3) Furnish goods, services or facilities to for accept them from) a disqualified person? (4) Pay compensation to, or pay or remitieuse the expenses of a disqualified person? (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)? (6) Agree to pay money or property to a government official? (Exception, Check 'No' if the Coundation agreed to make a grant to or to emi	11						
person had advisory privileges? If Yes, "attach statement See instructions Ded the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ▶ N/A Telephone no ▶ 434-845-1266 P O BOX 310 Located at ▶ L'IXINCERDRO Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 – check here and enter the amount of lax-exempt interest received or accrued during the year 15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 – check here and enter the amount of lax-exempt interest received or accrued during the year 16 At any time during calinative 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 ▶ Part VI-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. 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? (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? (3) Furnish goods, services, or facilaties to (or accept them from) a disqualified person? (4) Pay componisation to, or pay or reimburse the expenses of, a disqualified person? (5) Transfer any income or assets to a disqualified person for the benefit or use of a disqualified person for make any of either available for the benefit or use of a disqualified person? (5) Agree to pay money or property to a government official? (Exception, Check 'No'f 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) If any answer "Yes" to 16		-			11		<u> </u>
13 DU the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► N/A 14 The books are in care of ► THE PETTYJOHN COMPANY Telephone no ► 434-845-1266 Located at ► IXXICHIBUTE 15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 – check here and other the amount of lax-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 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? 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. 19 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. 10 During the year, did the foundation (either directly or indirectly); (1) Engage in the sale or exchange, or lessing of property with a disqualified person? (2) Borrow money from, lend money to, or otherwese extend credit to (or accept in from) a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? (5) Transfer any income or assets to a disqualified person or property or property to a government service, if termination of property in property to a government service, if terminating within 90 days) (6) Agree to bay money or property to a government of the property of the acts of secretal and the exception des	12	·					
Website address ► N/A 14 The books are in care of ► THE PETTYJOHN COMPANY Telephone no ► 434-845-1266 P O BOX 310 Located at ► LYXINGENDR Section 4847(a)(1) nonexempt chantable trusts filing Form 990-PF in lieu of Form 1041 – check here and enter the amount of lax-exempt interest received or accrued during the year 15 Section 4847(a)(1) nonexempt chantable trusts filing Form 990-PF in lieu of Form 1041 – check here and enter the amount of lax-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 over a bank, secunities, or other financial account in a foreign country? See the instructions for executions and filing requirements for FinCEN Form 114 if "Yes," enter the name of the foreign country. See the instructions for executions and filing requirements for FinCEN Form 142 if "Yes," enter the name of the foreign country. 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. 19 Dump the year, did the foundation (either directly) or indirectly); (1) Engage in the sale or exchange, or lessing of property with a disqualified person? (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? (5) Agree to pay money or property to a government official? (Exception, Check 'No' if the foundation agreet to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days) 16 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							_ <u>X</u> _
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_Pi	art VII-B Statements Regarding Activities for Which Form	4720 May Be F	Required (con	tinued)	······································	
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 X 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 X No		
	(3) Provide a grant to an individual for travel, study, or other similar purposes?			Yes X No		
	(4) Provide a grant to an organization other than a charitable, etc., organization	described in				
	section 4945(d)(4)(A)? See instructions			Yes X No		
	(5) Provide for any purpose other than religious, charitable, scientific, literary, c	r educational				
	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 und	ler the exceptions of	described in			
	Regulations section 53 4945 or in a current notice regarding disaster assistance	e? See instructions		N/A	5b	
	Organizations relying on a current notice regarding disaster assistance, check h	nere		▶ [_]		1
С	If the answer is "Yes" to question 5a(4), does the foundation claim exemption from	om the tax	. —			
	because it maintained expenditure responsibility for the grant?		N/A 🗌 🔻	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 p	ay premiums	_			
	on a personal benefit contract?			Yes X No		
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a pe	rsonal benefit cont	ract?		6b	X
	If "Yes" to 6b, file Form 8870					
7a	At any time during the tax year, was the foundation a party to a prohibited tax st			Yes X No		
	If "Yes," did the foundation receive any proceeds or have any net income attribu			N/A	7b	
Pŧ	Information About Officers, Directors, Trustees, Fo	oundation Man	agers, Highly	Paid Employe	ees,	
4 '	and Contractors		-4			
- 1	ist all officers, directors, trustees, and foundation managers and their com	pensation. See in:	structions.	T o		
	(a) Name and address	(b) Title, and average	(c) Compensation	(d) Contributions to employee benefit	(e) Expe	ense account,
	(a) Name and address	hours per week devoted to position	(If not paid, enter -0-)	plans and deferred		allowances
N/	λ	·		compensation	-	.
IN/	n.					
			-			-
		İ				
						
	Compensation of five highest-paid employees (other than those included of		<u> </u>			
_	"NONE."	on line 1 – see ins	tructions). If non	e, enter		
		<u> </u>		(d) Contributions to	Γ	
	(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week	(c) Compensation	employee benefit	(e) Expe	ense account,
	(a) have the trained at other employees paid there than \$600,000	devoted to position	(c) compensation	plans and deferred compensation	other	allowances
NO.	NE	 		compensation		
110	··-					
		 		-	<u> </u>	
			-		 -	
			1			
		-		·		
		-	-		 -	
Otal	number of other employees paid over \$50,000				ļ	
. J.a	Hamber of caret carryloyees paid over 400,000					0

Form 990-PF (2017) JOHN P AND FRANCES A KIRBY	20-6201577	Page 7
Part VIII Information About Officers, Directors, Trustees, Four and Contractors (continued)	ndation Managers, Highly Paid Er	nployees,
3 Five highest-paid independent contractors for professional services. See ins	tructions. 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	on such as the number of	
organizations and other beneficiaries served, conferences convened, research papers produced, etc		Expenses
1 THE TRUST DISTRIBUTES ITS NET INCOME TO		
CHARITIES AS DIRECTED IN THE TRUST INSTR	UMENT.	
		66,844
2		
3		
4		
Part IX-B Summary of Program-Related Investments (see insti		
	ructions)	
Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2 1 N/A		Amount
I N/A		
2		
All other program-related investments. See instructions		
3		
Total. Add lines 1 through 3	•	

	1 990-PF (2017) CONN P AND FRANCES A RIRBI 20-0201377	an fou	Page 8
£*;	Minimum Investment Return (All domestic foundations must complete this part. Foreign instructions.)	gn iou	nuations,
_	sêe instructions.) Fair market value of assets not used (or held for use) directly in carrying out charitable, etc.,	Т Т	
1			
_	purposes Average monthly fair market value of securities	4.	1,284,625
a b	Average of monthly cash balances	1a 1b	56,115
	Fair market value of all other assets (see instructions)	1c	30,113
c d	Total (add lines 1a, b, and c)	1d	1,340,740
e	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	0
3	Subtract line 2 from line 1d	3	1,340,740
4	Cash deemed held for charitable activities Enter 1½% of line 3 (for greater amount, see		
•	instructions)	4	20,111
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	1,320,629
6	Minimum investment return. Enter 5% of line 5	6	66,031
P	art XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating	found	
	and certain foreign organizations check here ▶ ☐ and do not complete this part.)		
1	Minimum investment return from Part X, line 6	1	66,031
2a	Tax on investment income for 2017 from Part VI, line 5		<u> </u>
b	Income tax for 2017 (This does not include the tax from Part VI)		
С	Add lines 2a and 2b	2c	1,357
3	Distributable amount before adjustments Subtract line 2c from line 1	3	64,674
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	64,674
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	64,674
P	art XII Qualifying Distributions (see instructions)		
1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes.		
а	Expenses, contributions, gifts, etc - total from Part I, column (d), line 26	1a	66,844
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		
а	Suitability test (prior IRS approval required)	3a	<u> </u>
b	Cash distribution test (attach the required schedule)	<u>3</u> b	
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	66,844
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	0
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	66,844
	Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the found	lation	
	qualifies for the section 4940(e) reduction of tax in those years		

Pε	art XIII Undistributed Income	(see instructions)				
	•		(a)	(b)	(c)	(d)
1	Distributable amount for 2017 from Part	XI,	Corpus	Years prior to 2016	2016	2017
	line 7					64,674
2	Undistributed income, if any, as of the el	nd of 2017				
а	Enter amount for 2016 only			İ		
b	Total for prior years. 20 , 20	, 20				
3	Excess distributions carryover, if any, to	2017.				••••••••••••••••
а	From 2012	1,051	-		-	
b	From 2013	-			l l	
С	From 2014	2,469		ĺ		
d	From 2015	6,158	-			
е	From 2016	1,912			Į.	
f	Total of lines 3a through e		11,590			
4	Qualifying distributions for 2017 from Pa	rt XII,				
	line 4 ▶ \$ 66,844					
а	Applied to 2016, but not more than line 2	?a				
b	Applied to undistributed income of prior	years				
	(Election required – see instructions)					
C	Treated as distributions out of corpus (E	lection				
	required – see instructions)					
d	Applied to 2017 distributable amount	ļ				64,674
е	Remaining amount distributed out of cor	pus	2,170			
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:		-			
	Corpus Add lines 3f, 4c, and 4e Subtra-		13,760			
b	Prior years' undistributed income Subtra	ict	:			
	line 4b from line 2b	ļ				***************************************
C	Enter the amount of prior years' undistrib					
	income for which a notice of deficiency h	1				
	been issued, or on which the section 494	l2(a)				
	tax has been previously assessed	<u></u>				
d	Subtract line 6c from line 6b Taxable	-				
	amount – see instructions					
е	Undistributed income for 2016. Subtract	line				
	4a from line 2a Taxable amount – see		į.			
	instructions					
T	Undistributed income for 2017 Subtract		1			
	4d and 5 from line 1. This amount must be	pe			1	
7	distributed in 2018		<u></u>			0
7	Amounts treated as distributions out of c	•			1	
	to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may			}	1	
	required—see instructions)	De			1	
8	Excess distributions carryover from 2012	not		······································		
U	applied on line 5 or line 7 (see instruction		1,051		1	
9	Excess distributions carryover to 2018	· —				.t
•	Subtract lines 7 and 8 from line 6a	<i>"</i>	12,709		1	
10	Analysis of line 9		12,709		<u>-</u>	
a	Excess from 2013					
b	Excess from 2014	2,469			1	
C	Excess from 2015	6,158	1		1	
d	Excess from 2016	1,912		1	1	
-	Excess from 2017	2,170	1		1	
					L	

Pŧ	Part XIV Private Operating Foundations (see instructions and Part VII-A, question 9)								
1a	If the foundation has received a ruling or	determination letter th	nat it is a private opera	ting					
	foundation, and the ruling is effective for 2017, enter the date of the ruling								
ь	Check box to indicate whether the foundation		-	bed in section 4	942(J)(3) or 494	2(j)(5)			
2a	Enter the lesser of the adjusted net	Tax year		Prior 3 years					
	income from Part I or the minimum	(a) 2017	(b) 2016	(c) 2015	(d) 2014	(e) Total			
	investment return from Part X for			· · · · · · · · · · · · · · · · · · ·		/			
	each year listed				/				
b	85% of line 2a				/				
	Qualifying distributions from Part XII,				/				
С	line 4 for each year listed			_					
	Amounts included in line 2c not used directly		-		-/				
d	•				/				
_	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			,					
	alternative test relied upon.								
а	"Assets" alternative test – enter								
	(1) Value of all assets		<u> </u>	/					
	(2) Value of assets qualifying under			Y					
_	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		/			<u>,</u>			
С	"Support" alternative test – enter				1				
	(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		L	<u> </u>	<u> </u>				
Pa	irt XV Supplementary Inforn		•	the foundation h	ad \$5,000 or more	e in assets at			
	any time during the ye		tions.)						
1	Information Regarding Foundation Ma	-							
а	List any managers of the foundation who				•				
	before the close of any tax year (but only	if they have contribute	ed more than \$5,000).	(See section 507(d)(2))				
	N/A								
b	List any managers of the foundation who		•		e portion of the				
	ownership of a partnership or other entity) of which the foundat	ion has a 10% or grea	ter interest					
	N/A								
2	Information Regarding Contribution, C								
	Check here ► X if the foundation only			=	· ·				
	unsolicited requests for funds If the foun		ants, etc , to individual	s or organizations und	er other conditions,				
	complete items 2a, b, c, and d See instr								
а	The name, address, and telephone numb	per or email address o	f the person to whom a	applications should be	addressed				
	N/A								
									
b	The form in which applications should be	submitted and inform	ation and materials the	ey should include					
	N/A			<u>-</u> -					
С	Any submission deadlines. N/A								
		such as by assert-	onlarone shart-blad	oldo kundo of materials	no or other				
d	Any restrictions or limitations on awards,	such as by geographi	cai areas, chantable fi	eius, kirias oi institutio	ns, or other				
	factors								
	N/A								

Supplementary Information (continued) Grants and Contributions Paid During the Year or Approved for Future Payment If recipient is an individual, Foundation Recipient show any relationship to Purpose of grant or status of Amount any foundation manager contribution recipient Name and address (home or business) or substantial contributor a Paid during the year RANDOLPH COLLEGE 501(C)(3) 2500 RIVERMONT AVENUE LYNCHBURG VA 24503 UNRESTRICTED 20,053 ST JOHN'S EPISCOPAL CHURC 200 BOSTON AVENUE 501(c)(3) LYNCHBURG VA 24503 UNRESTRICTED 10,027 LYNCHBURG HUMANE SOCIETY 3038 WATERLICK ROAD 501(C)(3) LYNCHBURG VA 24502 UNRESTRICTED 16,711 THE SALVATION ARMY 2215 PARK AVENUE 501(C)(3) LYNCHBURG VA 24501 UNRESTRICTED 10,027 THE AMERICAN RED CROSS 2700 LANGHORNE ROAD 501(c)(3) LYNCHBURG VA 24501 UNRESTRICTED 6,684 DAILY BREAD INC 721 CLAY STREET 501(c)(3) LYNCHBURG VA 24504 UNRESTRICTED 3,342 66,844 Total 3a **b** Approved for future payment N/ATotal **▶** 3b

10111 990-F1 (2017) 001111 1 1H1D 11HH10HD 11 1C			2023		rage 12
Part XVI-A Analysis of Income-Producing Acti	I		T =		
Enter gross amounts unless otherwise indicated	Unrelate	ed business income	Excluded	by section 512, 513, or 514	(e)
•	(a)	(b)	(c)	(d)	Related or exempt
	Business code	Amount	Exclusion code	Amount	function income
1 Program service revenue			Code		(See instructions)
a					
b		"			<u> </u>
c			 		
			 		
e			1-		· · · · · · · · · · · · · · · · · · ·
f	ļ				 -
g Fees and contracts from government agencies	ļ				
2 Membership dues and assessments		<u> </u>	1		
3 Interest on savings and temporary cash investments			14		
4 Dividends and interest from securities			14	34,830	
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			1 1		
7 Other investment income			† †		_
			26	1,531	41,193
8 Gain or (loss) from sales of assets other than inventory	-		20	1,331	41,193
9 Net income or (loss) from special events			1		
10 Gross profit or (loss) from sales of inventory		<u> </u>			
11 Other revenue a					
b LITIGATION SETTLEMENT RECEIVE			1		
c					
d					
e				Ī	
12 Subtotal Add columns (b), (d), and (e)		0		36,361	41,193
13 Total. Add line 12, columns (b), (d), and (e)				13	77,554
(See worksheet in line 13 instructions to verify calculations)					
Part XVI-B Relationship of Activities to the Ac	complishm	ent of Exempt P	urposes		<u></u>
Line No. Explain below how each activity for which income is					
accomplishment of the foundation's exempt purpor					
N/A	Ses (other than	by providing failes to	1 Such pui	poses/ (occ manacin	5113 /
					· - · ·
					•
					
				 	
	_				
					
		<u></u> .			
				 	
					_
					•
				_	
					

orm 9	90-PF (20 ⁻	<u>17) JOHN PAN</u>	ID FRAI	NCES A KI	RBY	20-620.	1577		Pag	ge 13
Part	XVII	Information Regardate Exempt Organiza	_	ansfers To an	d Transactio	ons and Relationsh	hips With Noncharita	ble		
1 B	id the orga			ge in any of the fol	lowing with any	other organization descr	ribed		Yes	No
		01(c) (other than secti								
	rganization			,g,		g F				ĺ
	•	om the reporting found	ation to a no	oncharitable evemi	nt organization c	.f				
	l) Cash	on the reporting loans	ation to a ne	Shoriamable exem	pt organization c	•		1a(1)		x
•	•	aaata								X
•	2) Other a							1a(2)		
	ther trans									•
		f assets to a noncharita						1b(1)		X
•	•	ses of assets from a no			on			1b(2)		X
	•	of facilities, equipment,		sets				1b(3)		X
-	•	irsement arrangements	;					1b(4)		X
		or loan guarantees						1b(5)		X
(6	b) Perform	nance of services or me	embership o	r fundraising solici	tations			1b(6)		Х
	_	acilities, equipment, m	_					1c		X
d If	the answe	er to any of the above is	s "Yes," com	nplete the following	schedule Colu	mn (b) should always sl	how the fair market			
V	alue of the	goods, other assets, o	r services g	iven by the reporti	ng foundation If	the foundation received	l less than fair market			
V	alue in any	transaction or sharing	arrangeme	nt, show in column	(d) the value of	the goods, other assets	s, or services received			
(a)	Line no	(b) Amount involved	(c) Nam	e of noncharitable exem	pt organization	(d) Description of	f transfers, transactions, and sharing	arrangeme	nts	
I/A										
_										
								-		
,										
			_							
		-					 .			
	-									
										
							 .			
										
				.=			 .			
2a Is	the found	ation directly or indirec	tly affiliated	with, or related to,	one or more tax	e-exempt organizations				
d	escribed ir	section 501(c) (other	than section	i 501(c)(3)) or in se	ection 527?				s X	No
b If	"Yes," cor	mplete the following sci	nedule							
	. (:	a) Name of organization		(b) Type of o	rganization	_	(c) Description of relationship			
N/	'A									
	Under per	naities of perjury, I declare that	at I have exami	ned this return including	g accompanying sch	edules and statements and to	the best of my knowledge and belie	ef, it is true		
	correct, a	nd complete Declaration of p	reparer (other f	than taxpayer) is based	on all information of	which preparer has any knowle	edge			
:							May the IRS do with the prepar			
ign		(See instruction			No
ere	_	many 11)C -	- Tour	·	.				
	🕨 🚅	1111309 -90	van	- TRUSTEC		// 	CO-TRUSTEE			
	Signa	ature of officer or trustee	<i>U</i> _		Date	1	itle			
	Print/Ty	pe preparer's name			Prepare s signalu	re/ - 1 1 . \ .	Date	ł	Check	ıf
aıd					<i>\\\\\\</i>	<i>+</i> 11 4			self-em	ployed
aiu repar	Robe:	rt L. Harding,					05/1	11/18		
-	Firm's c			orinkard 8	Pennin	gton, PC	PTIN PC	1074	688	}
se On	Firm's a	address ► 104 A	rchway	Court			Firm's EIN ▶ 54	-124	798	7
		Lynch	burg,	VA 2450	2	\	\	4-84		
								Form 99		

5/11/2018 8:53 AM 1-4 25,640 25,640 Charitable Charitable Charitable Purpose Purpose Fair Market Purpose Value Ω. S Statement 4 - Form 990-PF, Part II, Line 10a - US and State Government Investments Valuation Basis of Adjusted Net Adjusted Adjusted Statement 2 - Form 990-PF, Part I, Line 16c - Other Professional Fees Set Net Cost Statement 1 - Form 990-PF, Part I, Line 16b - Accounting Fees Statement 3 - Form 990-PF, Part I, Line 18 - Taxes v) 25,262 25,262 End of Year 9,685 9,685 Investment Investment Investment **Federal Statements** Net Net Net 50,680 50,680 Beginning of Year 153 510 663 2,050 2,050 9,685 9,685 Total Total Total Ω 140PF JOHN P AND FRANCES A KIRBY INVESTMENT SERVICE FEES Description 2016 ESTIMATED TAX ES Description Description Description TAX PREPARATION FEES U S GOVERNMENT BONDS MUNICIPAL BONDS 2016 EXCISE TAX FYE: 12/31/2017 FOREIGN TAX Total Total Total 20-6201577

140PF JOHN P AND FRANCES A KIRBY

Federal Statements

5/11/2018 8:53 AM

20-6201577 FYE: 12/31/2017

•	Fair Market Value	\$ 1,103,432	\$ 1,103,432
Investments	Basis of Valuation	Cost	
990-PF, Part II, Line 10b - Corporate Stock Investmen	End of Year	618,671	618,671
0b - C	I	ۍ ا	∾∥
. Part II, Line 1	Beginning of Year	630,891	630,891
990-PI		₩.	ω
Statement 5 - Form 99(Description	CORPORATE STOCKS	Total

	Fair Market Value	\$ 212,450	\$ 212,450
<u>Investments</u>	Basis of Valuation	Cost	
990-PF, Part II, Line 10c - Corporate Bond Investmen	End of Year	211,598	211,598
Line 10c -	_	<u>61</u> \$	\$ \$
PF, Part II,	Beginning of Year	185,2	185,2
_!		ω _l	₩
Statement 6 - Form	Description	CORPORATE BONDS	Total

Form 990-PF		pital Gains and Losse	es for Tax on In	vestment in	come	2017	
Name ·				, and onding	Employer Ider	ntification Number	
JOHN P AND FRANCES A KIRBY CHARITABLE TRUST					20-6201	20-6201577	
(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 P-Purchase D-Donation					(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)	
(1) BRIGHTHOUSE FINANCIAL P					03/09/12	08/07/17	
(2) GE P					03/10/11	03/28/17	
(3) ABBVIE INC P					04/26/14	05/17/17	
(4) GE CAPTIAL NOTES P					11/01/10 08/03/04	11/15/17 01/11/17	
						03/28/17	
(7) VIRGINIA CI				P	02/17/10 06/21/11	02/01/17	
	SEC,	NOMINEE CGD					
(9)					ļ		
(10) (11)					 		
(12)					 	 	
(13)							
(14)							
(15)					L	<u> </u>	
(e) Gross sales price	······	(f) Depreciation allowed (or allowable)	(g) Cost or oth plus expense	er basis	(h) Gain (e) plus (f)	or (loss)	
(1) <u>1</u>	1	(or unovasio)	pius expense	8	(e) plus (f) minus (g)		
(2) 8,87			6,133			2,742	
(3) 32,58	2			11,429	21,153		
(4) 15,00		· · · · · · · · · · · · · · · · · · ·		15,000			
(5) 8,81			4,173		4,642		
(6) 27,14 (7) 25,00		 	14,075 25,419		13,072 -419		
(7) 25,00 (8) 1,53				23,419		1,531	
(9)					 		
(10)							
(11)					<u> </u>		
(12)					_		
(13)		 			 		
(15)							
Complete only for asset	s showing a	ain in column (h) and owned by th	e foundation on 12/31/6	9	Ţ <u></u>		
(i) FMV as of 12/31/69	9	(j) Adjusted basis as of 12/31/69		(k) Excess of col (i) over col (j), if any		(I) Gains (Col (h) gain minus col (k), but not less than -0-) Or Losses (from col (h))	
(1)	+					3	
(2)						2,742	
(3)						21,153	
(4)			+		 	4 642	
(<u>5)</u> (<u>6</u>)			+		4,642		
(7)			 			-419	
(8)						1,531	
(9)							
(10)					<u> </u>		
(11)					 		
(12) (13)	+-				 		
(14)	- 				 		
(15)					 		