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EXTENDED TO NOVEMBER 15, 2018

Form **990-PF** Department of the Treasury Internal Revenue Service

Return of Private Foundation

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

▶ Do not enter social security numbers on this form as it may be made public.

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

OMB No 1545-0052 **2017** Open to Public Inspection

For calendar year 2017 or tax year beginning , and ending

Name of foundation THE SOLOMON JACKSON JR FOUNDATION	A Employer identification number 27-1218152
Number and street (or P O box number if mail is not delivered to street address) Room/suite POST OFFICE BOX 90326	B Telephone number 803-765-0083
City or town, state or province, country, and ZIP or foreign postal code COLUMBIA, SC 29290	C If exemption application is pending, check here ▶ [ ]
G Check all that apply: [ ] Initial return [ ] Initial return of a former public charity [ ] Final return [ ] Amended return [ ] Address change [ ] Name change	D 1. Foreign organizations, check here ▶ [ ] 2. Foreign organizations meeting the 85% test, check here and attach computation ▶ [ ]
H Check type of organization: [X] Section 501(c)(3) exempt private foundation [ ] Section 4947(a)(1) nonexempt charitable trust [ ] Other taxable private foundation	E If private foundation status was terminated under section 507(b)(1)(A), check here ▶ [ ]
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ▶$ 5,456,115. J Accounting method: [X] Cash [ ] Accrual [ ] Other (specify) (Part I, column (d) must be on cash basis.)	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ▶ [ ]

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a).)

		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received			N/A	
	2 Check ▶ [X] if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	1,240.	1,240.		STATEMENT 1
	4 Dividends and interest from securities	119,857.	119,857.		STATEMENT 2
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	247,965.			
	b Gross sales price for all assets on line 6a 1,932,011.				
	7 Capital gain net income (from Part IV, line 2)		247,965.		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
	b Less Cost of goods sold				
	c Gross profit or (loss)				
	11 Other income	1,440.	0.		STATEMENT 3
	12 **Total.** Add lines 1 through 11	370,502.	369,062.		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	30,625.	10,208.		20,417.
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees				
	b Accounting fees STMT 4	7,900.	5,925.		1,975.
	c Other professional fees				
	17 Interest				
	18 Taxes STMT 5	2,842.	2,842.		0.
	19 Depreciation and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses STMT 6	42,912.	12,644.		30,268.
	24 **Total operating and administrative expenses** Add lines 13 through 23	84,279.	31,619.		52,660.
	25 Contributions, gifts, grants paid	330,488.			330,488.
	26 **Total expenses and disbursements.** Add lines 24 and 25	414,767.	31,619.		383,148.
	27 Subtract line 26 from line 12:				
	a Excess of revenue over expenses and disbursements	<44,265.>			
	b **Net investment income** (if negative, enter -0-)		337,443.		
	c **Adjusted net income** (if negative, enter -0-)			N/A	

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Part II Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only

		Beginning of year (a) Book Value	End of year (b) Book Value	End of year (c) Fair Market Value
Assets	1 Cash - non-interest-bearing	77,751.	80,034.	80,034.
	2 Savings and temporary cash investments			
	3 Accounts receivable ▶			
	Less: allowance for doubtful accounts ▶			
	4 Pledges receivable ▶			
	Less: allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons			
	7 Other notes and loans receivable ▶			
	Less: allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments - U.S. and state government obligations			
	b Investments - corporate stock STMT 7	4,640,542.	4,590,334.	5,370,786.
	c Investments - corporate bonds			
	11 Investments - land, buildings, and equipment basis ▶			
	Less accumulated depreciation ▶			
	12 Investments - mortgage loans			
	13 Investments - other			
	14 Land, buildings, and equipment: basis ▶			
	Less accumulated depreciation ▶			
	15 Other assets (describe ▶ PYR INCOME RECEIVAB)	1,635.	5,295.	5,295.
	16 **Total assets** (to be completed by all filers - see the instructions. Also, see page 1, item I)	4,719,928.	4,675,663.	5,456,115.
Liabilities	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe ▶)			
	23 **Total liabilities** (add lines 17 through 22)	0.	0.	
Net Assets or Fund Balances	**Foundations that follow SFAS 117, check here** ▶ [X] **and complete lines 24 through 26, and lines 30 and 31.**			
	24 Unrestricted	4,719,928.	4,675,663.	
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ [ ] **and complete lines 27 through 31.**			
	27 Capital stock, trust principal, or current funds			
	28 Paid-in or capital surplus, or land, bldg., and equipment fund			
	29 Retained earnings, accumulated income, endowment, or other funds			
	30 **Total net assets or fund balances**	4,719,928.	4,675,663.	
	31 **Total liabilities and net assets/fund balances**	4,719,928.	4,675,663.	

Part III Analysis of Changes in Net Assets or Fund Balances

1	Total net assets or fund balances at beginning of year - Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	4,719,928.
2	Enter amount from Part I, line 27a	2	<44,265.>
3	Other increases not included in line 2 (itemize) ▶	3	0.
4	Add lines 1, 2, and 3	4	4,675,663.
5	Decreases not included in line 2 (itemize) ▶	5	0.
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	4,675,663.

Part IV Capital Gains and Losses for Tax on Investment Income

	(a) List and describe the kind(s) of property sold (for example, real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a	SOUTH STATE BANK (.4549) ST CVRD / SCH D-1	P	01/01/17	12/31/17
b	SOUTH STATE BANK (.4549) LT CVRD / SCH D-1	P	01/01/17	12/31/17
c	CAPITAL GAINS DIVIDENDS			
d				
e				

	(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) ((e) plus (f) minus (g))
a	189,717.		170,409.	19,308.
b	1,734,974.		1,513,637.	221,337.
c	7,320.			7,320.
d				
e				

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69.

	(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a				19,308.
b				221,337.
c				7,320.
d				
e				

2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 / If (loss), enter -0- in Part I, line 7 } **2** 247,965.

3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8 **3** N/A

Part V Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income.)

If section 4940(d)(2) applies, leave this part blank.

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☒ No

If "Yes," the foundation doesn't qualify under section 4940(e). Do not complete this part.

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2016	345,417.	4,856,183.	.071129
2015	480,307.	5,240,463.	.091654
2014	336,193.	5,679,464.	.059194
2013	238,504.	5,415,190.	.044044
2012	217,655.	5,163,357.	.042154

2	**Total** of line 1, column (d)	2	.308175
3	Average distribution ratio for the 5-year base period - divide the total on line 2 by 5.0, or by the number of years the foundation has been in existence if less than 5 years	3	.061635
4	Enter the net value of noncharitable-use assets for 2017 from Part X, line 5	4	5,179,452.
5	Multiply line 4 by line 3	5	319,236.
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	3,374.
7	Add lines 5 and 6	7	322,610.
8	Enter qualifying distributions from Part XII, line 4	8	383,148.

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions.

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

1a	Exempt operating foundations described in section 4940(d)(2), check here ▶ [ ] and enter "N/A" on line 1. Date of ruling or determination letter: ______ (attach copy of letter if necessary-see instructions)			
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ▶ [X] and enter 1% of Part I, line 27b		1	3,374.
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations, enter 4% of Part I, line 12, col. (b).			
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-)		2	0.
3	Add lines 1 and 2		3	3,374.
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-)		4	0.
5	**Tax based on investment income** Subtract line 4 from line 3. If zero or less, enter -0-		5	3,374.
6	Credits/Payments:			
a	2017 estimated tax payments and 2016 overpayment credited to 2017	6a 1,367.		
b	Exempt foreign organizations - tax withheld at source	6b 0.		
c	Tax paid with application for extension of time to file (Form 8868)	6c 0.		
d	Backup withholding erroneously withheld	6d 0.		
7	Total credits and payments. Add lines 6a through 6d		7	1,367.
8	Enter any **penalty** for underpayment of estimated tax. Check here [X] if Form 2220 is attached		8	0.
9	**Tax due.** If the total of lines 5 and 8 is more than line 7, enter **amount owed** SEE STATEMENT 9 ▶		9	2,007.
10	**Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶		10	
11	Enter the amount of line 10 to be: **Credited to 2018 estimated tax** ▶	**Refunded** ▶	11	

Part VII-A Statements Regarding Activities

			Yes	No
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a		X
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 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: **(1)** On the foundation. ▶ $ 0. **(2)** On foundation managers. ▶ $ 0.			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ $ 0.			
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	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		X
b	If "Yes," has it filed a tax return on **Form 990-T** for this year? N/A	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by *General Instruction T.*	5		X
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	X	
7	Did the foundation have at least $5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV	7	X	
8a	Enter the states to which the foundation reports or with which it is registered. See instructions. ▶ SC			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by *General Instruction G*? If "No," attach explanation	8b	X	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2017 or the tax year beginning in 2017? See the instructions for Part XIV. If "Yes," complete Part XIV	9		X
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10		X

Part VII-A Statements Regarding Activities *(continued)*

			Yes	No
11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule. See instructions	11		X
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement. See instructions	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	

Website address ▶ N/A

14 The books are in care of ▶ SOLOMON JACKSON JR Telephone no. ▶ 803.765.0083
Located at ▶ 602 MEETING STREET, WEST COLUMBIA, SC ZIP+4 ▶ 29169

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of **Form 1041** - check here ▶ ☐
and enter the amount of tax-exempt interest received or accrued during the year ▶ 15 N/A

			Yes	No
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?	16		X
	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.

				Yes	No
1a	During the year, did the foundation (either directly or indirectly):				
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	☐ Yes ☒ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	☐ Yes ☒ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	☐ Yes ☒ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	☐ Yes ☒ No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	☐ Yes ☒ No			
	(6) Agree to pay money or property to a government official? (**Exception.** Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)	☐ Yes ☒ No			
b	If any answer is "Yes" to 1a(1)-(6), did **any** of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions	N/A	1b		
	Organizations relying on a current notice regarding disaster assistance, check here	▶ ☐			
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2017?		1c		X
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):				
a	At the end of tax year 2017, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2017?	☐ Yes ☒ No			
	If "Yes," list the years ▶ ______, ______, ______, ______				
b	Are there any years listed in 2a for which the foundation is **not** applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to **all** years listed, answer "No" and attach statement - see instructions.)	N/A	2b		
c	If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here. ▶ ______, ______, ______, ______				
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	☐ Yes ☒ No			
b	If "Yes," did it have excess business holdings in 2017 as a result of (**1**) any purchase by the foundation or disqualified persons after May 26, 1969; (**2**) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (**3**) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2017.)	N/A	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		4a		X
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2017?		4b		X

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

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

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors

1 List all officers, directors, trustees, and foundation managers and their compensation.

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
SEE STATEMENT 12		30,625.	0.	0.

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

(a) Name and address of each employee paid more than $50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				

Total number of other employees paid over $50,000 ▶ 0

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

3 Five highest-paid independent contractors for professional services. 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 ▶		0

Part IX-A Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1 SEE STATEMENT 13	329,188.
2 THE FOUNDATION PURCHASED AND THEN GIFTED 65 BOOKS TO ESTILL HIGH SCHOOL GRADUATES.	1,300.
3	
4	

Part IX-B Summary of Program-Related Investments

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.	Amount
1 N/A	
2	
All other program-related investments. See instructions.	
3	
Total. Add lines 1 through 3 ▶	0.

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	5,184,742.
b	Average of monthly cash balances	1b	73,585.
c	Fair market value of all other assets	1c	0.
d	Total (add lines 1a, b, and c)	1d	5,258,327.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation) — 1e: 0.		
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	5,258,327.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	78,875.
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3. Enter here and on Part V, line 4	5	5,179,452.
6	**Minimum investment return** Enter 5% of line 5	6	258,973.

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

1	Minimum investment return from Part X, line 6	1	258,973.
2a	Tax on investment income for 2017 from Part VI, line 5 — 2a: 3,374.		
b	Income tax for 2017. (This does not include the tax from Part VI.) — 2b:		
c	Add lines 2a and 2b	2c	3,374.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	255,599.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	255,599.
6	Deduction from distributable amount (see instructions)	6	0.
7	**Distributable amount** as adjusted Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	255,599.

Part XII Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
a	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	1a	383,148.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	**Qualifying distributions** Add lines 1a through 3b. Enter here and on Part V, line 8; and Part XIII, line 4	4	383,148.
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	5	3,374.
6	**Adjusted qualifying distributions** Subtract line 5 from line 4	6	379,774.

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

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2016	(c) 2016	(d) 2017
1 Distributable amount for 2017 from Part XI, line 7				255,599.
2 Undistributed income, if any, as of the end of 2017				
a Enter amount for 2016 only			0.	
b Total for prior years: ____ , ____ , ____		0.		
3 Excess distributions carryover, if any, to 2017:				
a From 2012				
b From 2013				
c From 2014				
d From 2015 23,123.				
e From 2016 104,488.				
f Total of lines 3a through e	127,611.			
4 Qualifying distributions for 2017 from Part XII, line 4: ▶ $ 383,148.				
a Applied to 2016, but not more than line 2a			0.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2017 distributable amount				255,599.
e Remaining amount distributed out of corpus	127,549.			
5 Excess distributions carryover applied to 2017 (If an amount appears in column (d), the same amount must be shown in column (a).)	0.			0.
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	255,160.			
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 2016. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2017. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2018				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions)	0.			
8 Excess distributions carryover from 2012 not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2018. Subtract lines 7 and 8 from line 6a	255,160.			
10 Analysis of line 9.				
a Excess from 2013				
b Excess from 2014				
c Excess from 2015 23,123.				
d Excess from 2016 104,488.				
e Excess from 2017 127,549.				

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

1 a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2017, enter the date of the ruling ▶

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

	Tax year	Prior 3 years			
	(a) 2017	(b) 2016	(c) 2015	(d) 2014	(e) Total
2 a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon:					
a "Assets" alternative test - enter: (1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test - enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed					
c "Support" alternative test - enter: (1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

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

1 **Information Regarding Foundation Managers:**

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

SOLOMON JACKSON JR

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

NONE

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

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

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

SEE STATEMENT 14

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

c Any submission deadlines:

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

Part XV Supplementary Information *(continued)*

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution **	Amount
a Paid during the year				
THE SOLOMON JACKSON JR SCHOLARSHIP FD (116 STUDENTS PROVIDED SCHOLARSHIPS) VARIOUS VARIOUS, SC 29290	NONE	501(C)(3)	SEE STATEMENT	329,188.
GIFT OF 65 (PURCHASED BOOKS) TO ESTILL HIGH SCHOOL GRADUATES VARIOUS VARIOUS, SC		501(C)(3)	SEE STATEMENT	1,300.
Total ▶ 3a				330,488.
b Approved for future payment				
NONE				
Total ▶ 3b				0.

** SEE PURPOSE OF GRANT CONTINUATIONS

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.	Unrelated business income (a) Business code	Unrelated business income (b) Amount	Excluded by section 512, 513, or 514 (c) Exclusion code	Excluded by section 512, 513, or 514 (d) Amount	(e) Related or exempt function income
1 Program service revenue:					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments			14	1,240.	
4 Dividends and interest from securities			14	119,857.	
5 Net rental income or (loss) from real estate:					
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal property					
7 Other investment income			14	1,440.	
8 Gain or (loss) from sales of assets other than inventory			18	247,965.	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue:					
a					
b					
c					
d					
e					
12 Subtotal. Add columns (b), (d), and (e)		0.		370,502.	0.

13 **Total.** Add line 12, columns (b), (d), and (e) 13 370,502.

(See worksheet in line 13 instructions to verify calculations.)

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

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes).

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

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

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

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

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

b If "Yes," complete the following schedule.

(a) Name of organization	(b) Type of organization	(c) Description of relationship
N/A		

Sign Here

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

Solomon Jackson Jr | 10.31.2018 | PRESIDENT

Signature of officer or trustee | Date | Title

May the IRS discuss this return with the preparer shown below? See instr ☒ Yes ☐ No

Paid Preparer Use Only

Print/Type preparer's name	Preparer's signature	Date	Check ☐ if self-employed	PTIN
WILLIAM E SELLARS JR	W	10/29/18		P00147687
Firm's name ▶ SELLARS & COLE, LLC			Firm's EIN ▶ 58-2292735	
Firm's address ▶ 602 MEETING STREET WEST COLUMBIA, SC 29169-7590			Phone no. 803-765-0083	

CMR 7018 0040 0000 1246 5015

Part XV Supplementary Information

3a Grants and Contributions Paid During the Year Continuation of Purpose of Grant or Contribution

NAME OF RECIPIENT - THE SOLOMON JACKSON JR SCHOLARSHIP FD (116 STUDENTS PROVIDED SCHOLARSHIPS)

THESE EDUCATION GRANTS WILL BE USED TO DEFRAY THE COST OF TUITION AND FEES FOR QUALIFIED PERSONS (STUDENTS) OF COLOR AND/OR LOW INCOME STUDENTS TO TWO AND FOUR YEAR EDUCATIONAL INSTITUTIONS.

NAME OF RECIPIENT - GIFT OF 65 (PURCHASED BOOKS) TO ESTILL HIGH SCHOOL GRADUATES

EDUCATE GRADUATES

2017 Tax Information Statement

Payer's Name and Address:
SOUTH STATE BANK
ATTN. TRUST ASSET MANAGEMENT
520 GERVAIS ST.
COLUMBIA, SC 29201

Account Number	SC004549
Recipient's Tax ID Number	XX-XXX8152
Payer's Federal ID Number:	57-0984960
Payer's State ID Number.	
State	SC
Questions?	(803)540-3941

☐ Corrected ☐ FATCA ☐ 2nd TIN notice

Recipient's Name and Address:
SOLOMON JACKSON JR FOUNDATION
C/O WILLIAM ROACH
P O BOX 1030
COLUMBIA, SC 29202

2017 Form 1099-B: Proceeds from Broker and Barter Exchange Transactions

OMB No. 1545-0715

Reported to the IRS is proceeds less commissions and option premiums
Covered (Box 5 is not checked)

Description of property (Box 1a)

Cusip Number	Date Sold or Disposed (Box 1c)	Date Acquired (Box 1b)	Proceeds (Box 1d)	Cost or Other Basis (Box 1e)	Market Discount (Box 1f)	Wash Loss Disallowed (Box 1g)	Net Gain or Loss	Ordinary (Box 2)	Federal Income Tax Withheld (Box 4)	State Tax Withheld (Box 16)
Short Term Sales Reported on 1099-B										
89 0	COSTCO WHSL CORP NEW									
22160K105	04/06/2017	04/06/2016	15,127 65	13,910 64			1,217 01		0 00	0 00
73 0	DUKE ENERGY CORP									
26441C204	07/25/2017	05/23/2017	6,105.58	6,159 74			-54.16		0 00	0 00
2135.0	KEY CORP									
493267108	05/23/2017	Various	38,279 71	26,053 29			12,226 42		0 00	0 00
146.0	L BRANDS INC									
501797104	03/01/2017	06/09/2016	7,705 11	10,036 13			-2,331 02		0 00	0 00
207.0	PHILLIPS 66									
718546104	03/01/2017	11/21/2016	16,460.63	17,559 91			-1,099.28		0 00	0.00
601.0	US BANCORP									
902973304	03/01/2017	Various	33,858 40	25,748 08			8,110 32		0.00	0 00
3964.418	VANGUARD MARKET NEUTRAL FUND									
92205G203	04/05/2017	Various	47,691.96	46,940 66			751 30		0 00	0 00
2028.799	VANGUARD MARKET NEUTRAL FUND									
92205G203	04/06/2017	Various	24,487.60	24,000.69			486 91		0 00	0 00

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Sch D-1

1/10

2017 Tax Information Statement

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ATTN TRUST ASSET MANAGEMENT
520 GERVAIS ST.
COLUMBIA, SC 29201

Account Number: SC004549
Recipient's Tax ID Number XX-XXX8152
Payer's Federal ID Number 57-0984960
Payer's State ID Number:
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OMB No 1545-0715

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Description of property (Box 1a)

Cusip Number	Date Sold or Disposed *(Box 1c)*	Date Acquired *(Box 1b)*	Proceeds *(Box 1d)*	Cost or Other Basis *(Box 1e)*	Market Discount *(Box 1f)*	Wash Loss Disallowed *(Box 1g)*	Net Gain or Loss	Ordinary *(Box 2)*	Federal Income Tax Withheld *(Box 4)*	State Tax Withheld *(Box 16)*
Total Short Term Sales Reported on 1099-B			189,716 64	170,409 14	0.00	0.00	19,307 50		0 00	0.00
Report on Form 8949, Part I, with Box A checked										
Long Term Sales Reported on 1099-B										
421 0	AMERICAN INTERNATIONAL GROUP									
026874784	03/01/2017	Various	27,168 48	20,831 03			6,337 45		0.00	0 00
246 0	AMERICAN INTERNATIONAL GROUP									
026874784	03/14/2017	10/10/2014	15,399 01	12,385 93			3,013 08		0 00	0 00
523 0	AMERICAN INTERNATIONAL GROUP									
026874784	04/06/2017	Various	32,346 83	27,078 05			5,268 78		0 00	0 00
401 0	AMERICAN INTERNATIONAL GROUP									
026874784	05/23/2017	Various	24,660 89	24,047 24			613 65		0 00	0 00
187 0	AMGEN INC									
031162100	04/06/2017	10/14/2014	30,392 44	24,903 61			5,488 83		0 00	0 00
24 0	AMGEN INC									
031162100	05/23/2017	10/14/2014	3,700 78	3,196 19			504 59		0 00	0 00

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Sch D-1

2/10

2017 Tax Information Statement

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OMB No. 1545-0715

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Description of property (Box 1a)

Cusip Number	Date Sold or Disposed (Box 1c)	Date Acquired (Box 1b)	Proceeds (Box 1d)	Cost or Other Basis (Box 1e)	Market Discount (Box 1f)	Wash Loss Disallowed (Box 1g)	Net Gain or Loss	Ordinary (Box 2)	Federal Income Tax Withheld (Box 4)	State Tax Withheld (Box 16)
131.0	APPLE INC									
037833100	05/23/2017	12/28/2012	20,103.19	9,567 37			10,535.82		0 00	0 00
120 0	APPLE INC									
037833100	07/25/2017	12/28/2012	18,334.38	8,764.00			9,570.38		0.00	0 00
625 0	BANK AMER CORP									
060505104	05/23/2017	09/18/2015	14,481 55	9,740.00			4,741 55		0 00	0 00
897 0	BANK AMER CORP									
060505104	11/01/2017	09/18/2015	24,648 99	13,978.85			10,670.14		0.00	0.00
55 0	BOEING COMPANY									
097023105	06/23/2017	09/02/2015	10,096 33	7,080 42			3,015.91		0.00	0.00
36.0	BOEING COMPANY									
097023105	07/25/2017	09/02/2015	7,636 86	4,634 46			3,002 40		0 00	0 00
42.0	BOEING COMPANY									
097023105	08/08/2017	09/02/2015	10,059 19	5,406 87			4,652 32		0 00	0 00
70 0	BOEING COMPANY									
097023105	11/01/2017	09/02/2015	18,026.80	9,011 44			9,015 36		0.00	0 00

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TFP33575 20 857 15 d 40

2017 Tax Information Statement

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COLUMBIA, SC 29201

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Recipient's Tax ID Number: XX-XXX8152
Payer's Federal ID Number: 57-0984960
Payer's State ID Number
State: SC
Questions? (803)540-3941

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2017 Form 1099-B: Proceeds from Broker and Barter Exchange Transactions

OMB No. 1545-0715

Reported to the IRS is proceeds less commissions and option premiums
Covered (Box 5 is not checked)

Description of property (Box 1a)

Cusip Number	Date Sold or Disposed (Box 1c)	Date Acquired (Box 1b)	Proceeds (Box 1d)	Cost or Other Basis (Box 1e)	Market Discount (Box 1f)	Wash Loss Disallowed (Box 1g)	Net Gain or Loss	Ordinary (Box 2)	Federal Income Tax Withheld (Box 4)	State Tax Withheld (Box 16)
6092.917	CALAMOS MARKET NEU INC FD I									
128119880	06/29/2017	08/25/2015	80,000 00	76,709 83			3,290 17		0 00	0 00
7110 604	CALAMOS MARKET NEU INC FD-I									
128119880	08/29/2017	Various	93,788 87	89,476 48			4,312.39		0 00	0 00
666 0	CISCO SYSTEMS INC									
17275R102	05/23/2017	Various	20,986 19	15,856 35			5,129.84		0.00	0.00
149.0	CITRIX SYS INC									
177376100	05/23/2017	02/09/2015	12,261 19	7,431.47			4,829.72		0.00	0.00
364 0	CITRIX SYS INC									
177376100	08/17/2017	Various	26,640 61	19,916 56			6,724 05		0 00	0 00
222 0	CONOCOPHILLIPS									
20825C104	05/23/2017	09/18/2015	10,406.00	10,964 25			-558.25		0.00	0.00
404 0	CONOCOPHILLIPS									
20825C104	11/01/2017	09/18/2015	20,854.12	19,952 95			901 17		0 00	0 00
218.0	CONOCOPHILLIPS									
20825C104	12/14/2017	09/18/2015	11,413 83	10,766 69			647 14		0.00	0 00

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Sch D-1 4/10

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2017 Tax Information Statement

Payer's Name and Address:
SOUTH STATE BANK
ATTN: TRUST ASSET MANAGEMENT
520 GERVAIS ST
COLUMBIA, SC 29201

Account Number:	SC004549
Recipient's Tax ID Number.	XX-XXX8152
Payer's Federal ID Number	57-0984960
Payer's State ID Number:	
State:	SC
Questions?	(803)540-3941

☐ Corrected ☐ FATCA ☐ 2nd TIN notice

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2017 Form 1099-B: Proceeds from Broker and Barter Exchange Transactions

OMB No. 1545-0715

Reported to the IRS is proceeds less commissions and option premiums
Covered (Box 5 is not checked)

Description of property (Box 1a)

Cusip Number	Date Sold or Disposed (Box 1c)	Date Acquired (Box 1b)	Proceeds (Box 1d)	Cost or Other Basis (Box 1e)	Market Discount (Box 1f)	Wash Loss Disallowed (Box 1g)	Net Gain or Loss	Ordinary (Box 2)	Federal Income Tax Withheld (Box 4)	State Tax Withheld (Box 16)
265.0	DEVON ENERGY CORPORATION NEW									
25179M103	07/25/2017	Various	8,750.10	16,366.59			-7,616 49		0 00	0 00
216.0	DEVON ENERGY CORPORATION NEW									
25179M103	10/09/2017	Various	7,752.54	13,238 16			-5,485 62		0 00	0 00
424 0	DEVON ENERGY CORPORATION NEW									
25179M103	11/01/2017	Various	16,332 48	22,655 40			-6,622 92		0.00	0 00
620 0	DEVON ENERGY CORPORATION NEW									
25179M103	12/14/2017	12/09/2015	23,581 15	22,186 95			1,394.20		0 00	0 00
1093 888	DIAMOND HILL SMALL/MID CAP-I									
25264S783	05/22/2017	03/08/2016	23,868 64	19,799 37			4,069.27		0 00	0 00
706.699	DIAMOND HILL SMALL/MID CAP-I									
25264S783	07/25/2017	03/08/2016	16,070 34	12,791 25			3,279 09		0 00	0 00
669 045	DIAMOND HILL SMALL/MID CAP-I									
25264S783	08/02/2017	03/08/2016	14,986.61	12,109 71			2,876.90		0 00	0.00
2182 344	DIAMOND HILL SMALL/MID CAP-I									
25264S783	11/01/2017	03/08/2016	49,822 91	39,500 43			10,322.48		0 00	0 00

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Sch D-1

5/10

2017 Tax Information Statement

Payer's Name and Address.
SOUTH STATE BANK
ATTN. TRUST ASSET MANAGEMENT
520 GERVAIS ST
COLUMBIA, SC 29201

Account Number:	SC004549
Recipient's Tax ID Number.	XX-XXX8152
Payer's Federal ID Number.	57-0984960
Payer's State ID Number:	
State	SC
Questions?	(803)540-3941

☐ Corrected ☐ FATCA ☐ 2nd TIN notice

Recipient's Name and Address:
SOLOMON JACKSON JR FOUNDATION
C/O WILLIAM ROACH
P O BOX 1030
COLUMBIA, SC 29202

2017 Form 1099-B: Proceeds from Broker and Barter Exchange Transactions

OMB No. 1545-0715

Reported to the IRS is proceeds less commissions and option premiums.
Covered (Box 5 is not checked)

Description of property *(Box 1a)*

Cusip Number	Date Sold or Disposed *(Box 1c)*	Date Acquired *(Box 1b)*	Proceeds *(Box 1d)*	Cost or Other Basis *(Box 1e)*	Market Discount *(Box 1f)*	Wash Loss Disallowed *(Box 1g)*	Net Gain or Loss	Ordinary *(Box 2)*	Federal Income Tax Withheld *(Box 4)*	State Tax Withheld *(Box 16)*
171.0	DUKE ENERGY CORP									
26441C204	04/06/2017	Various	14,126 71	13,141 61			985 10		0 00	0 00
300 0	ELI LILLY & CO									
532457108	05/23/2017	Various	23,404 36	21,114 58			2,289 77		0 00	0 00
154 0	GOLDMAN SACHS GROUP INC COM									
38141G104	03/01/2017	02/09/2015	38,806 26	28,139.03			10,667 23		0 00	0 00
113 0	GOLDMAN SACHS GROUP INC COM									
38141G104	09/13/2017	Various	25,532.28	20,782 59			4,749 69		0 00	0 00
137 0	HOME DEPOT INC									
437076102	05/23/2017	02/09/2015	21,213 40	14,911.45			6,301 95		0 00	0.00
51 0	HOME DEPOT INC									
437076102	07/25/2017	Various	7,484 08	5,621 64			1,862 44		0 00	0 00
221 0	JOHNSON & JOHNSON									
478160104	05/23/2017	04/06/2016	28,181 38	24,071.96			4,109.42		0.00	0 00
146.0	JP MORGAN CHASE & CO									
46625H100	05/23/2017	04/06/2016	12,474 46	8,526 38			3,948.08		0 00	0 00

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Sch D-1

6/10

2017 Tax Information Statement

Payer's Name and Address:
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ATTN. TRUST ASSET MANAGEMENT
520 GERVAIS ST
COLUMBIA, SC 29201

Account Number	SC004549
Recipient's Tax ID Number.	XX-XXX8152
Payer's Federal ID Number.	57-0984960
Payer's State ID Number	
State:	SC
Questions?	(803)540-3941

☐ Corrected ☐ FATCA ☐ 2nd TIN notice

Recipient's Name and Address
SOLOMON JACKSON JR FOUNDATION
C/O WILLIAM ROACH
P O BOX 1030
COLUMBIA, SC 29202

2017 Form 1099-B: Proceeds from Broker and Barter Exchange Transactions

OMB No 1545-0715

Reported to the IRS is proceeds less commissions and option premiums
Covered (Box 5 is not checked)

Description of property (Box 1a)

Cusip Number	Date Sold or Disposed (Box 1c)	Date Acquired (Box 1b)	Proceeds (Box 1d)	Cost or Other Basis (Box 1e)	Market Discount (Box 1f)	Wash Loss Disallowed (Box 1g)	Net Gain or Loss	Ordinary (Box 2)	Federal Income Tax Withheld (Box 4)	State Tax Withheld (Box 16)
675.0	KOHLS									
500255104	03/01/2017	Various	28,314 68	35,692 31			-7,377 63		0 00	0 00
637.0	KROGER									
501044101	03/01/2017	Various	20,631.34	23,363 70			-2,732 36		0.00	0.00
0.4377	LOGMEIN INC									
54142L109	02/10/2017	02/09/2015	44 87	32 07			12 80		0 00	0 00
86.0	LOGMEIN INC									
54142L109	05/23/2017	Various	9,475 17	6,871 42			2,603 75		0 00	0 00
181 0	MASTERCARD INC-A									
57636Q104	07/25/2017	02/09/2015	23,502 31	15,286 43			8,215 88		0 00	0 00
34.0	MASTERCARD INC-A									
57636Q104	09/29/2017	02/09/2015	4,800 46	2,871 48			1,928 98		0 00	0 00
114 0	MASTERCARD INC-A									
57636Q104	11/01/2017	02/09/2015	17,103 33	9,627 92			7,475 41		0.00	0.00
331.522	MATTHEWS ASIA DIVIDEND-INST									
577130750	11/01/2017	10/10/2014	6,607.23	5,098 22			1,509 01		0 00	0.00

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2017 Tax Information Statement

Payer's Name and Address
SOUTH STATE BANK
ATTN: TRUST ASSET MANAGEMENT
520 GERVAIS ST.
COLUMBIA, SC 29201

Account Number. SC004549
Recipient's Tax ID Number. XX-XXX8152
Payer's Federal ID Number. 57-0984960
Payer's State ID Number.
State: SC
Questions? (803)540-3941

☐ Corrected ☐ FATCA ☐ 2nd TIN notice

Recipient's Name and Address
SOLOMON JACKSON JR FOUNDATION
C/O WILLIAM ROACH
P O BOX 1030
COLUMBIA, SC 29202

2017 Form 1099-B: Proceeds from Broker and Barter Exchange Transactions

OMB No. 1545-0715

Reported to the IRS is proceeds less commissions and option premiums
Covered (Box 5 is not checked)

Description of property (Box 1a)

Cusip Number	Date Sold or Disposed (Box 1c)	Date Acquired (Box 1b)	Proceeds (Box 1d)	Cost or Other Basis (Box 1e)	Market Discount (Box 1f)	Wash Loss Disallowed (Box 1g)	Net Gain or Loss	Ordinary (Box 2)	Federal Income Tax Withheld (Box 4)	State Tax Withheld (Box 16)
124 0	MICROSOFT CORP									
594918104	07/25/2017	10/10/2014	9,184 47	5,539.07			3,645 40		0.00	0 00
434.0	MICROSOFT CORP									
594918104	11/01/2017	Various	36,180.14	18,914.68			17,265 46		0 00	0 00
3368 543	MILLER OPPORTUNITY TR-IN									
89832P333	04/05/2017	03/03/2016	72,491.05	61,917 51			10,543 54		0 00	0 00
272 0	MONDELEZ INTERNATIONAL INC									
609207105	05/23/2017	09/16/2015	12,532 96	11,622 29			910 67		0 00	0 00
67 0	NXP SEMICONDUCTORS									
N6596X109	07/25/2017	09/18/2015	7,353 08	6,082 02			1,271 06		0 00	0 00
41 0	NXP SEMICONDUCTORS									
N6596X109	10/09/2017	09/18/2015	4,696 44	3,721 83			974 61		0 00	0 00
200 0	PEPSICO INC									
713448108	05/23/2017	04/14/2015	23,058 18	19,358 46			3,699 72		0 00	0 00
745 0	PFIZER INC									
717081103	05/23/2017	Various	23,892.29	23,707 12			185 17		0 00	0.00

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2017 Tax Information Statement

Payer's Name and Address:
SOUTH STATE BANK
ATTN TRUST ASSET MANAGEMENT
520 GERVAIS ST.
COLUMBIA, SC 29201

Account Number:	SC004549
Recipient's Tax ID Number.	XX-XXX8152
Payer's Federal ID Number.	57-0984960
Payer's State ID Number	
State:	SC
Questions?	(803)540-3941

☐ Corrected ☐ FATCA ☐ 2nd TIN notice

Recipient's Name and Address.
SOLOMON JACKSON JR FOUNDATION
C/O WILLIAM ROACH
P O BOX 1030
COLUMBIA, SC 29202

2017 Form 1099-B: Proceeds from Broker and Barter Exchange Transactions

OMB No. 1545-0715

Reported to the IRS is proceeds less commissions and option premiums

Covered (Box 5 is not checked)

Description of property. *(Box 1a)*

Cusip Number	Date Sold or Disposed *(Box 1c)*	Date Acquired *(Box 1b)*	Proceeds *(Box 1d)*	Cost or Other Basis *(Box 1e)*	Market Discount *(Box 1f)*	Wash Loss Disallowed *(Box 1g)*	Net Gain or Loss	Ordinary *(Box 2)*	Federal Income Tax Withheld *(Box 4)*	State Tax Withheld *(Box 16)*
2212.0	POWERSHARES VARIABLE RATE PR									
73937B597	06/16/2017	08/20/2015	57,317.86	54,206 93			3,110.93		0 00	0 00
948 0	POWERSHARES VARIABLE RATE PR									
73937B597	06/29/2017	Various	24,701.85	22,888 52			1,813 33		0 00	0 00
1204 0	SUNCOR ENERGY INC									
867224107	07/17/2017	Various	35,600.98	39,397.86			-3,796.88		0 00	0 00
565 0	SUNCOR ENERGY INC									
867224107	07/17/2017	Various	16,712.31	18,611 71			-1,899 40		0 00	0 00
209.0	TARGET CORP									
87612E106	03/01/2017	02/09/2015	12,067.53	15,756.97			-3,689.44		0 00	0 00
402 0	TARGET CORP									
87612E106	04/06/2017	Various	21,562 37	30,435.87			-8,873 50		0 00	0 00
5831.729	TEMPLETON GLOBAL BOND FUND-AD									
880208400	07/14/2017	Various	72,021 85	70,754 99			1,266.86		0 00	0 00
347.0	TESORO CORP									
881609101	05/23/2017	04/06/2016	28,812.83	28,193.40			619 43		0 00	0 00

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TEP335725_20_873 21 of 40

2017 Tax Information Statement

Payer's Name and Address:
SOUTH STATE BANK
ATTN: TRUST ASSET MANAGEMENT
520 GERVAIS ST
COLUMBIA, SC 29201

Account Number. SC004549
Recipient's Tax ID Number. XX-XXX8152
Payer's Federal ID Number: 57-0984960
Payer's State ID Number:
State. SC
Questions? (803)540-3941

☐ Corrected ☐ FATCA ☐ 2nd TIN notice

Recipient's Name and Address:
SOLOMON JACKSON JR FOUNDATION
C/O WILLIAM ROACH
P O BOX 1030
COLUMBIA, SC 29202

2017 Form 1099-B: Proceeds from Broker and Barter Exchange Transactions

OMB No 1545-0715

Reported to the IRS is proceeds less commissions and option premiums.

Covered (Box 5 is not checked)

Description of property (Box 1a)

Cusip Number	Date Sold or Disposed (Box 1c)	Date Acquired (Box 1b)	Proceeds (Box 1d)	Cost or Other Basis (Box 1e)	Market Discount (Box 1f)	Wash Loss Disallowed (Box 1g)	Net Gain or Loss	Ordinary (Box 2)	Federal Income Tax Withheld (Box 4)	State Tax Withheld (Box 16)
582 0	UNITED CONTINENTAL HOLDINGS INC COM									
910047109	05/23/2017	09/02/2015	45,967.46	33,304 54			12,662.92		0 00	0.00
281 0	UNITED PARCEL SVC INC CL B									
911312106	11/01/2017	09/18/2015	32,956 83	27,988 36			4,968.47		0 00	0 00
3113.0	VANGUARD FTSE EUROPE ETF									
922042874	04/06/2017	03/03/2016	159,475 51	146,964 73			12,510.78		0 00	0 00
461 0	VERIZON COMMUNICATIONS									
92343V104	05/23/2017	Various	20,974 76	22,495 63			-1,520 87		0 00	0 00
173.0	YUM CHINA HOLDINGS INC									
98850P109	05/23/2017	09/18/2015	6,479 50	3,984 72			2,494 78		0.00	0 00
228 0	YUM CHINA HOLDINGS INC									
98850P109	07/25/2017	09/18/2015	8,360 57	5,251 54			3,109 03		0 00	0.00
457.0	YUM CHINA HOLDINGS INC									
98850P109	10/24/2017	09/18/2015	18,643.39	10,526 11			8,117 28		0 00	0.00
108 0	YUMI BRANDS INC									
988498101	05/23/2017	09/18/2015	7,656 21	6,281 42			1,374 79		0 00	0.00
Total Long Term Sales Reported on 1099-B			1,734,974 03	1,513,636 97	0 00	0.00	221,337 06		0 00	0.00

Report on Form 8949, Part II, with Box D checked

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FORM 990-PF INTEREST ON SAVINGS AND TEMPORARY CASH INVESTMENTS STATEMENT 1

SOURCE	(A) REVENUE PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME
SOUTH STATE BANK (.4549)	1,240.	1,240.	
TOTAL TO PART I, LINE 3	1,240.	1,240.	

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME
SOUTH STATE BANK (.4549)	119,857.	0.	119,857.	119,857.	
SOUTH STATE BANK (.4549)	7,320.	7,320.	0.	0.	
TO PART I, LINE 4	127,177.	7,320.	119,857.	119,857.	

FORM 990-PF OTHER INCOME STATEMENT 3

DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME
NON DIVIDEND DISTRIBUTIONS	1,440.	0.	
TOTAL TO FORM 990-PF, PART I, LINE 11	1,440.	0.	

FORM 990-PF ACCOUNTING FEES STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING FEES	7,900.	5,925.		1,975.
TO FORM 990-PF, PG 1, LN 16B	7,900.	5,925.		1,975.

FORM 990-PF	TAXES	STATEMENT 5

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FOREIGN TAX PAID	2,842.	2,842.		0.
TO FORM 990-PF, PG 1, LN 18	2,842.	2,842.		0.

FORM 990-PF	OTHER EXPENSES	STATEMENT 6

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
INVESTMENT FEES	42,146.	12,644.		29,502.
SUPPLIES	766.	0.		766.
TO FORM 990-PF, PG 1, LN 23	42,912.	12,644.		30,268.

FORM 990-PF	CORPORATE STOCK	STATEMENT 7

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
SOUTH STATE BANK (.4549) MGT ACCT SECURITIES	4,590,334.	5,370,786.
TOTAL TO FORM 990-PF, PART II, LINE 10B	4,590,334.	5,370,786.

FORM 990-PF	OTHER ASSETS	STATEMENT 8

DESCRIPTION	BEGINNING OF YR BOOK VALUE	END OF YEAR BOOK VALUE	FAIR MARKET VALUE
PYR INCOME RECEIVABLE	1,635.	5,295.	5,295.
TO FORM 990-PF, PART II, LINE 15	1,635.	5,295.	5,295.

FORM 990-PF	INTEREST AND PENALTIES	STATEMENT 9

TAX DUE FROM FORM 990-PF, PART VI	2,007.
LATE PAYMENT INTEREST	51.
LATE PAYMENT PENALTY	60.
TOTAL AMOUNT DUE	2,118.

FORM 990-PF	LATE PAYMENT PENALTY	STATEMENT 10

DESCRIPTION	DATE	AMOUNT	BALANCE	MONTHS	PENALTY
TAX DUE	05/15/18	2,007.	2,007.	6	60.
DATE FILED	11/15/18		2,007.		
TOTAL LATE PAYMENT PENALTY					60.

FORM 990-PF	LATE PAYMENT INTEREST	STATEMENT 11

DESCRIPTION	DATE	AMOUNT	BALANCE	RATE	DAYS	INTEREST
TAX DUE	05/15/18	2,007.	2,007.	.0500	184	51.
DATE FILED	11/15/18		2,058.			
TOTAL LATE PAYMENT INTEREST						51.

FORM 990-PF PART VIII - LIST OF OFFICERS, DIRECTORS TRUSTEES AND FOUNDATION MANAGERS STATEMENT 12

NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN-SATION	EMPLOYEE BEN PLAN CONTRIB	EXPENSE ACCOUNT
SOLOMON JACKSON JR POST OFFICE BOX 90326 COLUMBIA, SC 29290	PRESIDENT/DIRECTOR 1.00	0.	0.	0.
ROBERT SQUIREWELL POST OFFICE BOX 90326 COLUMBIA, SC 29290	TREASURER/DIRECTOR 2.00	7,500.	0.	0.
EDNA DELBRIDGE POST OFFICE BOX 90326 COLUMBIA, SC 29290	DIRECTOR 2.00	6,875.	0.	0.
LELAR RYANS POST OFFICE BOX 90326 COLUMBIA, SC 29290	DIRECTOR 2.00	7,500.	0.	0.
LELAR RYANS POST OFFICE BOX 90326 COLUMBIA, SC 29290	DIRECTOR 2.00	8,750.	0.	0.
TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII		30,625.	0.	0.

FORM 990-PF SUMMARY OF DIRECT CHARITABLE ACTIVITIES STATEMENT 13

ACTIVITY ONE

THE FOUNDATION AWARDED 116 QUALIFIED PERSONS (STUDENTS) OF COLOR AND/OR LOW INCOME STUDENTS ENROLLING IN TWO OR FOUR YEAR ACADEMIC INSTITUTIONS WITH $1,000-$5,000 COLLEGE SCHOLARSHIPS.

	EXPENSES
TO FORM 990-PF, PART IX-A, LINE 1	329,188.

FORM 990-PF GRANT APPLICATION SUBMISSION INFORMATION STATEMENT 14
PART XV, LINES 2A THROUGH 2D

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

ANN GLUSE (SOUTH STATE BANK)
520 GERVAIS STREET
COLUMBIA, SC 29201

TELEPHONE NUMBER

803.540.3941

FORM AND CONTENT OF APPLICATIONS

FOUNDATION HAS AN APPLICATION FORM WHICH WILL BE PROVIDED UPON REQUEST

ANY SUBMISSION DEADLINES

APRIL 1

RESTRICTIONS AND LIMITATIONS ON AWARDS

PERSONS OF COLOR AND/OR LOWER INCOME MALE OR FEMALE HIGH SCHOOL STUDENTS WHO ARE STUDENTS IN FOLLOWING SCHOOL DISTRICTS IN SC: ALLENDALE, DILLON 2, FAIRFIELD, FLORENCE 4, HAMPTON 2, JASPER, LEE, KERSHAW, MARION 7, ORANGEBURG, RICHLAND 1, & RICHLAND 2. SCHOLARSHIPS ARE TO DEFRAY COST OF TUITION, FEES, BOOKS, AND ROOM AND BOARD TO TWO OR FOUR YEAR COLLEGES IN THE US.