

For calendar year 2017, or tax year beginning 01-01-2017, and ending 12-31-2017

Name of foundation JOHN B & BROWNIE YOUNG MEMORIAL FUND		A Employer identification number 61-6025137	
Number and street (or P.O. box number if mail is not delivered to street address) PO BOX 2907 - TRUST TAX DEPT		Room/suite	
City or town, state or province, country, and ZIP or foreign postal code WILSON, NC 278942907		B Telephone number (see instructions) (270) 689-2551	
G Check all that apply <div><input type="checkbox"/> Initial return</div> <div><input type="checkbox"/> Initial return of a former public charity</div> <div><input type="checkbox"/> Final return</div> <div><input type="checkbox"/> Amended return</div> <div><input type="checkbox"/> Address change</div> <div><input type="checkbox"/> Name change</div>		D 1. Foreign organizations, check here 2. Foreign organizations meeting the 85% test, check here and attach computation	
H Check type of organization <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> 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) \$ 16,449,449	J Accounting method <input type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ (Part I, column (d) must be on cash basis)	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here	

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received (attach schedule)	148,934			
	2 Check <input type="checkbox"/> if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments	21,260	21,260		
	4 Dividends and interest from securities	345,086	345,086		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	83,571			
	b Gross sales price for all assets on line 6a _____ 3,030,472				
	7 Capital gain net income (from Part IV, line 2)		83,571		
	8 Net short-term capital gain			0	
	9 Income modifications				
	10a Gross sales less returns and allowances _____				
Operating and Administrative Expenses	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)	3,902			
	12 Total. Add lines 1 through 11	602,753	449,917		
	13 Compensation of officers, directors, trustees, etc	79,897	35,949		43,949
	14 Other employee salaries and wages		0	0	0
	15 Pension plans, employee benefits		0	0	
	16a Legal fees (attach schedule)				0
	b Accounting fees (attach schedule)	1,200			1,200
	c Other professional fees (attach schedule)	50,220			50,220
	17 Interest				0
	18 Taxes (attach schedule) (see instructions)	8,009	8,009		0
	19 Depreciation (attach schedule) and depletion	0	0		
	20 Occupancy				
	21 Travel, conferences, and meetings		0	0	
	22 Printing and publications	193	0	0	193
	23 Other expenses (attach schedule)	167	167		
	24 Total operating and administrative expenses. Add lines 13 through 23	139,686	44,125	0	95,562
	25 Contributions, gifts, grants paid	918,195			918,195
	26 Total expenses and disbursements. Add lines 24 and 25	1,057,881	44,125	0	1,013,757
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	-455,128			
	b Net investment income (if negative, enter -0-)		405,792		
c Adjusted net income (if negative, enter -0-)				0	

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions.)			Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value			
Assets	1	Cash—non-interest-bearing					
	2	Savings and temporary cash investments	440,221	444,331		444,331	
	3	Accounts receivable ▶ _____ Less allowance for doubtful accounts ▶ _____		0		0	
	4	Pledges receivable ▶ _____ Less allowance for doubtful accounts ▶ _____					
	5	Grants receivable					
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)					
	7	Other notes and loans receivable (attach schedule) ▶ _____ Less allowance for doubtful accounts ▶ _____ 0					
	8	Inventories for sale or use					
	9	Prepaid expenses and deferred charges					
	10a	Investments—U S and state government obligations (attach schedule)					
	b	Investments—corporate stock (attach schedule)	8,087,408	7,957,174		9,908,199	
	c	Investments—corporate bonds (attach schedule)	5,904,566	5,749,602		5,748,736	
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____					
	12	Investments—mortgage loans					
	13	Investments—other (attach schedule)	492,003	326,132		348,183	
	14	Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____					
15	Other assets (describe ▶ _____)						
16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	14,924,198	14,477,239		16,449,449		
Liabilities	17	Accounts payable and accrued expenses					
	18	Grants payable					
	19	Deferred revenue					
	20	Loans from officers, directors, trustees, and other disqualified persons					
	21	Mortgages and other notes payable (attach schedule).					
	22	Other liabilities (describe ▶ _____)					
	23	Total liabilities (add lines 17 through 22)		0			
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.						
	24	Unrestricted					
	25	Temporarily restricted					
	26	Permanently restricted					
	Foundations that do not follow SFAS 117, check here ▶ <input checked="" type="checkbox"/> and complete lines 27 through 31.						
	27	Capital stock, trust principal, or current funds	14,924,198	14,477,239			
	28	Paid-in or capital surplus, or land, bldg , and equipment fund					
	29	Retained earnings, accumulated income, endowment, or other funds					
30	Total net assets or fund balances (see instructions)	14,924,198	14,477,239				
31	Total liabilities and net assets/fund balances (see instructions) .	14,924,198	14,477,239				

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	14,924,198
2	Enter amount from Part I, line 27a	2	-455,128
3	Other increases not included in line 2 (itemize) ▶ _____	3	8,169
4	Add lines 1, 2, and 3	4	14,477,239
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	14,477,239

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
1a See Additional Data Table			
b			
c			
d			
e			

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a See Additional Data Table			
b			
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
a See Additional Data Table			
b			
c			
d			
e			

2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	83,571
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8	3	

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?



Yes



No

If "Yes," the foundation does not qualify under section 4940(e) Do not complete this part

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2016	1,059,135	15,392,733	0 068807
2015	967,568	16,427,267	0 0589
2014	1,156,939	17,219,834	0 067186
2013	1,013,268	17,210,939	0 058873
2012	1,082,772	16,073,200	0 067365
2 Total of line 1, column (d)			2 0 321131
3 Average distribution ratio for the 5-year base period—divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years			3 0 064226
4 Enter the net value of noncharitable-use assets for 2017 from Part X, line 5			4 15,935,827
5 Multiply line 4 by line 3			5 1,023,494
6 Enter 1% of net investment income (1% of Part I, line 27b)			6 4,058
7 Add lines 5 and 6			7 1,027,552
8 Enter qualifying distributions from Part XII, line 4			8 1,013,757

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 <input type="checkbox"/> 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 <input type="checkbox"/> and enter 1% of Part I, line 27b	1	8,116
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	8,116
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	8,116
6	Credits/Payments		
a	2017 estimated tax payments and 2016 overpayment credited to 2017	6a	3,012
b	Exempt foreign organizations—tax withheld at source	6b	
c	Tax paid with application for extension of time to file (Form 8868)	6c	
d	Backup withholding erroneously withheld	6d	
7	Total credits and payments. Add lines 6a through 6d.	7	3,012
8	Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> 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	9	5,104
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 <input type="checkbox"/> 0 Refunded <input type="checkbox"/>	11	0

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a	No
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for definition)? <i>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</i>	1b	No
c Did the foundation file Form 1120-POL for this year?	1c	No
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation <input type="checkbox"/> \$ _____ (2) On foundation managers <input type="checkbox"/> \$ _____		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input type="checkbox"/> \$ _____		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If "Yes," attach a detailed description of the activities</i>	2	No
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? <i>If "Yes," attach a conformed copy of the changes</i>	3	No
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a	No
b If "Yes," has it filed a tax return on Form 990-T for this year?	4b	
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If "Yes," attach the statement required by General Instruction T</i>	5	No
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	Yes
7 Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col (c), and Part XV</i>	7	Yes
8a Enter the states to which the foundation reports or with which it is registered (see instructions) <input type="checkbox"/> KY		
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? <i>If "No," attach explanation</i> .	8b	Yes
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2017 or the taxable year beginning in 2017 (see instructions for Part XIV)? <i>If "Yes," complete Part XIV</i>	9	No
10 Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses</i>	10	No

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions).	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ►	13	Yes	
14	The books are in care of ► <u>BRANCH BANKING AND TRUST COMPANY</u> Telephone no ► <u>(270) 689-2551</u>			

Located at ► 100 W 3RD ST OWENSBORO KY ZIP+4 ► 42303

15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here	<input type="checkbox"/>		
	and enter the amount of tax-exempt interest received or accrued during the year	► 15		
16	At any time during calendar year 2017, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?	16	Yes	No
	See instructions for exceptions and filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR) If "Yes," enter the name of the foreign country ►			

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.

1a	During the year did the foundation (either directly or indirectly)		Yes	No
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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)?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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).	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)?		1b	
	Organizations relying on a current notice regarding disaster assistance check here.	► <input type="checkbox"/>		
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	No
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?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
	If "Yes," list the years ► 20____, 20____, 20____, 20____			
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions).		2b	No
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ► 20____, 20____, 20____, 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b	If "Yes," did it have excess business holdings in 2017 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2017).		3b	
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		4a	No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2017?		4b	No

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

5a During the year did the foundation pay or incur any amount to (1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (3) Provide a grant to an individual for travel, study, or other similar purposes? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? (see instructions). <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No Organizations relying on a current notice regarding disaster assistance check here. <input type="checkbox"/>	5b		
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? <input type="checkbox"/> Yes <input type="checkbox"/> No <i>If "Yes," attach the statement required by Regulations section 53.4945–5(d)</i>			
6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No <i>If "Yes" to 6b, file Form 8870</i>	6b		No
7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No b If yes, did the foundation receive any proceeds or have any net income attributable to the transaction? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	7b		

Part VIII

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

1

List all officers, directors, trustees, foundation managers and their compensation (see instructions).

(a) Name and address	Title, and average hours per week (b) devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances
See Additional Data Table				

2

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

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

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

0

3

Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE".

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		

Total number of others receiving over \$50,000 for professional services.

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	
2	
3	
4	

Part IX-B

Summary of Program-Related Investments (see instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1	
2	
All other program-related investments. See instructions.	
3	

Total. Add lines 1 through 3

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
a	Average monthly fair market value of securities.	1a	15,654,688
b	Average of monthly cash balances.	1b	523,817
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	16,178,505
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	16,178,505
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	242,678
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4.	5	15,935,827
6	Minimum investment return. Enter 5% of line 5.	6	796,791

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	796,791
2a	Tax on investment income for 2017 from Part VI, line 5.	2a	8,116
b	Income tax for 2017 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	8,116
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	788,675
4	Recoveries of amounts treated as qualifying distributions.	4	117,505
5	Add lines 3 and 4.	5	906,180
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	906,180

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	1,013,757
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	0
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required).	3a	0
b	Cash distribution test (attach the required schedule).	3b	0
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4.	4	1,013,757
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	1,013,757

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				906,180
2 Undistributed income, if any, as of the end of 2017				
a Enter amount for 2016 only.			0	
b Total for prior years 20____, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2017				
a From 2012. 224,391				
b From 2013. 41,036				
c From 2014. 265,200				
d From 2015. 52,606				
e From 2016. 229,256				
f Total of lines 3a through e.	812,489			
4 Qualifying distributions for 2017 from Part XII, line 4 ▶ \$ <u>1,013,757</u>				
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.				906,180
e Remaining amount distributed out of corpus	107,577			
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	920,066			
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 instructions			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 (see instructions).	224,391			
9 Excess distributions carryover to 2018. Subtract lines 7 and 8 from line 6a	695,675			
10 Analysis of line 9				
a Excess from 2013. 41,036				
b Excess from 2014. 265,200				
c Excess from 2015. 52,606				
d Excess from 2016. 229,256				
e Excess from 2017. 107,577				

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

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2017, enter the date of the ruling. ▶					
b Check box to indicate whether the organization is a private operating foundation described in section <input type="checkbox"/> 4942(j)(3) or <input type="checkbox"/> 4942(j)(5)					
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed	Tax year	Prior 3 years			(e) Total
	(a) 2017	(b) 2016	(c) 2015	(d) 2014	
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon					
a "Assets" alternative test—enter					
(1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed. . .					
c "Support" alternative test—enter					
(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii). . . .					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

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

1 Information Regarding Foundation Managers:	
a List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000) (See section 507(d)(2)) NONE	
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	
<div style="text-align: right;">▶</div>	
2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:	
Check here <input type="checkbox"/> if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. (see instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d	
a The name, address, and telephone number or e-mail address of the person to whom applications should be addressed BBT WEALTH MGMT DIVISION 230 FREDERICA ST - MC757-01-04-30 OWENSBORO, KY 423013003 (270) 689-2551	
b The form in which applications should be submitted and information and materials they should include COMPLETED APPLICATION ALONG WITH TRANSCRIPT OF GRADES AND ACT/SAT SCORES	
c Any submission deadlines ACADEMIC SCHOOL YEAR	
d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors UNMARRIED, FULL-TIME STUDENTS LOCATED IN OWENSBORO, KY, DAVIES CO, KY OR MCLEAN CO, KY SCHOOL DISTRICTS	

Part XV **Supplementary Information** (continued)**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient	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
Name and address (home or business)				
a <i>Paid during the year</i> See Additional Data Table				
Total			3a	918,195
b <i>Approved for future payment</i>				
Total			3b	

Enter gross amounts unless otherwise indicated

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

Form **990-PF** (2017)

Part XVII

		Yes	No
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1a(1)	No
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1a(2)	No
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1b(1)	No
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1b(2)		No
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1b(3)		No
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1b(4)		No
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1b(5)	No
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1b(6)		No
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1c		No
----	--	----

value
ue[illegible]

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations

described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? ☐ Yes ☒ No

b If "Yes," complete the following schedule

(a) Name of organization	(b) Type of organization	(c) Description of relationship

(see instr)? ☐ Yes ☐ No

**Paid
Preparer
Use Only**

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d			
List and describe the kind(s) of property sold (e g , real estate, (a) 2-story brick warehouse, or common stock, 200 shs MLC Co)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
50000 VERIZON COMMUNICATIONS DTD 09/18/2013 5		2015-03-09	2017-02-03
75000 EXPRESS SCRIPTS HOLDING CO DTD 06/05/201		2015-11-02	2017-02-10
1250 AFLAC INC		2016-02-25	2017-03-21
1169 298 AVENUE CREDIT STRATEGIES FUND			2017-03-21
14649 304 AVENUE CREDIT STRATEGIES FUND			2017-03-21
603 ISHARES MSCI EMERGING MKTS INDEX FUND		2013-10-11	2017-03-21
130 I SHARES EAFE INDEX FUND		2015-06-18	2017-03-21
31 ISHARES RUSSELL 1000 GROWTH INDEX		2013-10-11	2017-03-21
335 ISHARES TR MSCI SMALL CAP ETF		2014-03-10	2017-03-21
8 ISHARES MSCI EAFE VALUE INDEX FUND		2013-10-11	2017-03-21

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

(e) Gross sales price	Depreciation allowed (f) (or allowable)	Cost or other basis (g) plus expense of sale	Gain or (loss) (h) (e) plus (f) minus (g)
55,941		55,407	534
73,020		74,552	-1,532
89,515		75,094	14,421
10,079		9,828	251
126,277		160,935	-34,658
23,863		25,811	-1,948
8,054		8,623	-569
3,509		2,440	1,069
18,083		17,644	439
401		443	-42

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	Adjusted basis (j) as of 12/31/69	Excess of col (i) (k) over col (j), if any	
			534
			-1,532
			14,421
			251
			-34,658
			-1,948
			-569
			1,069
			439
			-42

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d			
List and describe the kind(s) of property sold (e g , real estate, (a) 2-story brick warehouse, or common stock, 200 shs MLC Co)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
176 ISHARES MSCI EAFE GROWTH INDEX FUND		2015-04-24	2017-03-21
549 ISHARES CORE MSCI EMERGING MARKETS ETF		2015-07-24	2017-03-21
310 SPDR PORTFOLIO WORLD EX-US ETF		2013-10-11	2017-03-21
4849 029 AQR MANAGED FUTURES STRATEGY FUND INST C			2017-04-19
11879 096 AQR MANAGED FUTURES STRATEGY FUND INST C		2014-03-10	2017-04-19
75000 US TREASURY BOND DTD 08/15/2016 1 5% 08/		2016-10-14	2017-05-03
25000 EXXON MOBIL CORP EXXON MOBIL CORP DTD 03/03/2016 2 726% 03/01/2		2016-02-29	2017-05-22
55000 US TREASURY DTD 5/15/2015 2 125% 05/15/2		2016-10-27	2017-05-30
75000 CAPITAL ONE FINANCIAL CO DTD 09/04/2007			2017-06-15
333 NATIONAL GRID GROUP-SPON ADR		2016-05-19	2017-06-16

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

(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)
12,110		12,932	-822
26,343		24,777	1,566
8,523		8,803	-280
44,078		46,701	-2,623
107,981		120,454	-12,473
70,119		73,325	-3,206
25,376		25,000	376
54,942		56,369	-1,427
75,889		75,516	373
22		26	-4

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(I) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			-822
			1,566
			-280
			-2,623
			-12,473
			-3,206
			376
			-1,427
			373
			-4

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

List and describe the kind(s) of property sold (e g , real estate, (a) 2-story brick warehouse, or common stock, 200 shs MLC Co)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
2480 CHICAGO BRIDGE & IRON CO N V N Y			2017-06-19
1250 DE LUXE CHECK PRINTERS INCORPORATED			2017-06-19
276 I SHARES EAFE INDEX FUND		2015-06-18	2017-06-19
22 ISHARES RUSSELL MIDCAP INDEX FUND		2015-10-16	2017-06-19
9 ISHARES RUSSELL 1000 GROWTH INDEX		2016-05-19	2017-06-19
12 CEF ISHARES TR S&P		2015-07-24	2017-06-19
416 ISHARES TR MSCI SMALL CAP ETF			2017-06-19
140 ISHARES MSCI EAFE VALUE INDEX FUND		2013-10-11	2017-06-19
345 ISHARES MSCI EAFE GROWTH INDEX FUND			2017-06-19
1705 PROLOGIS INC COMMON		2016-05-19	2017-06-19

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

(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)
38,586		97,236	-58,650
88,533		79,726	8,807
18,417		18,308	109
4,261		3,595	666
1,084		877	207
844		696	148
24,471		20,992	3,479
7,405		7,760	-355
26,120		25,220	900
99,271		79,430	19,841

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			-58,650
			8,807
			109
			666
			207
			148
			3,479
			-355
			900
			19,841

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d			
List and describe the kind(s) of property sold (e g , real estate, (a) 2-story brick warehouse, or common stock, 200 shs MLC Co)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
374 SPDR PORTFOLIO WORLD EX-US ETF		2013-10-11	2017-06-19
100000 SIMON PROPERTY GROUP LP DTD 01/25/2010 5		2016-08-12	2017-06-26
50000 COCA COLA CO 3 150% 11/15/20		2015-06-02	2017-07-11
75000 MCDONALD'S CORP DTD 06/09/2014 3 25% 06/		2015-11-03	2017-07-11
75000 HUMANA INC DTD 12/10/2012 3 15% 12/01/20			2017-07-20
18000 HCP INC DTD 01/24/2011 CALLABLE 5 375% 0			2017-07-27
11000 UNITED TECH CORP 3 100% 06/01/22		2015-03-17	2017-08-10
74000 UNITED TECH CORP 3 100% 06/01/22		2015-03-17	2017-08-10
30000 ORACLE CORP DTD 07/07/2016 1 9% 09/15/20			2017-08-16
1245 ENVISION HEALTHCARE CORP COMMON		2016-11-29	2017-11-01

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

(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)
10,939		10,620	319
110,036		109,948	88
51,964		51,688	276
76,640		74,078	2,562
76,749		73,655	3,094
19,783		19,478	305
11,350		11,222	128
76,204		75,491	713
29,855		30,106	-251
36,115		83,192	-47,077

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			319
			88
			276
			2,562
			3,094
			305
			128
			713
			-251
			-47,077

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

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co.)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo, day, yr)	(d) Date sold (mo, day, yr)
75000 EXXON MOBIL CORP EXXON MOBIL CORP DTD 03/03/2016 2 726% 03/01/2		2016-02-29	2017-11-14
50000 HOME DEPOT INC DTD 03/31/2011 4 4% 04/01		2015-12-08	2017-11-14
100000 JPMORGAN CHASE & CO DTD 12/20/2007 6% 01		2014-03-21	2017-11-15
85000 FIFTH THIRD BANCORP DTD 07/27/2015 2 875		2015-07-22	2017-11-21
50000 US TREASURY NOTE DTD 11/17/2008 3 75% 11		2014-01-30	2017-11-21
145 AGCO CORPORATION COMMON			2017-11-22
400 ABBVIE INC			2017-11-22
350 ALIBABA GROUP HOLDING -SP ADR		2016-12-21	2017-11-22
10 AMAZON INC COMMON		2016-12-21	2017-11-22
170 APPLE COMPUTER CORPORATION COMMON			2017-11-22

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

(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)
75,756		75,000	756
53,333		53,451	-118
100,670		100,000	670
86,186		84,890	1,296
51,018		51,112	-94
10,284		6,971	3,313
37,912		24,553	13,359
66,595		31,434	35,161
11,475		7,692	3,783
29,674		11,827	17,847

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(I) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
			756
			-118
			670
			1,296
			-94
			3,313
			13,359
			35,161
			3,783
			17,847

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d			
List and describe the kind(s) of property sold (e g , real estate, (a) 2-story brick warehouse, or common stock, 200 shs MLC Co)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
280 BROADRIDGE FINANCIAL SOLUTIONS INC		2012-03-13	2017-11-22
500 CENTENE CORP			2017-11-22
70 FACEBOOK INC CL A		2016-12-21	2017-11-22
2105 GLAXO PLC		2016-05-19	2017-11-22
150 GLAXO PLC		2016-12-21	2017-11-22
220 IDEX CORP			2017-11-22
3380 INTERPUBLIC GROUP		2016-11-29	2017-11-22
647 ISHARES MSCI EMERGING MKTS INDEX FUND		2013-10-11	2017-11-22
201 I SHARES EAFE INDEX FUND			2017-11-22
6 ISHARES RUSSELL MIDCAP INDEX FUND		2015-10-16	2017-11-22

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

(e) Gross sales price	Depreciation allowed (f) (or allowable)	Cost or other basis (g) plus expense of sale	Gain or (loss) (h) (e) plus (f) minus (g)
24,942		6,794	18,148
48,672		28,844	19,828
12,668		8,338	4,330
73,893		87,910	-14,017
5,266		5,737	-471
28,637		15,486	13,151
63,281		82,345	-19,064
30,851		27,695	3,156
14,024		13,286	738
1,221		980	241

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(I) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	Adjusted basis (j) as of 12/31/69	Excess of col (i) (k) over col (j), if any	
			18,148
			19,828
			4,330
			-14,017
			-471
			13,151
			-19,064
			3,156
			738
			241

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d			
List and describe the kind(s) of property sold (e g , real estate, (a) 2-story brick warehouse, or common stock, 200 shs MLC Co)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
29 ISHARES TR RUSSELL 1000 VALUE INDEX FUND		2016-05-19	2017-11-22
203 ISHARES RUSSELL 1000 GROWTH INDEX		2016-05-19	2017-11-22
144 CEF ISHARES TR S&P		2015-07-24	2017-11-22
434 ISHARES TR MSCI SMALL CAP ETF			2017-11-22
99 ISHARES MSCI EAFE VALUE INDEX FUND		2013-10-11	2017-11-22
220 ISHARES MSCI EAFE GROWTH INDEX FUND		2015-06-18	2017-11-22
606 ISHARES CORE MSCI EMERGING MARKETS ETF		2015-07-24	2017-11-22
370 LAM RESH CORP		2015-10-16	2017-11-22
140 MCDONALDS CORPORATION			2017-11-22
1154 667 NATIONAL GRID GROUP-SPON ADR		2016-05-19	2017-11-22

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

(e) Gross sales price	Depreciation allowed (f) (or allowable)	Cost or other basis (g) plus expense of sale	Gain or (loss) (h) (e) plus (f) minus (g)
3,479		2,882	597
26,874		19,789	7,085
10,978		8,352	2,626
27,498		21,500	5,998
5,416		5,488	-72
17,599		15,942	1,657
34,829		27,349	7,480
80,079		25,178	54,901
23,687		17,029	6,658
67,600		90,884	-23,284

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	Adjusted basis (j) as of 12/31/69	Excess of col (i) (k) over col (j), if any	
			597
			7,085
			2,626
			5,998
			-72
			1,657
			7,480
			54,901
			6,658
			-23,284

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

List and describe the kind(s) of property sold (e g , real estate, (a) 2-story brick warehouse, or common stock, 200 shs MLC Co)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
183 333 NATIONAL GRID GROUP-SPON ADR		2016-12-21	2017-11-22
985 QUEST DIAGNOSTICS INC		2016-05-19	2017-11-22
68 S & P 500 DEPOSITARY RECEIPT COMMON		2016-05-19	2017-11-22
936 SPDR PORTFOLIO WORLD EX-US ETF		2013-10-11	2017-11-22
1050 SCHLUMBERGER LTD		2016-11-29	2017-11-22
500 STERLING CAPITAL L/S EQUITY-INS		2016-12-21	2017-11-22
175 THOR INDUSTRIES INC		2014-12-01	2017-11-22
140 VALERO ENERGY CORP		2016-11-29	2017-11-22
80 VISA INC		2016-12-21	2017-11-22
CAPITAL GAIN DIVIDENDS	P		

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


(e) Gross sales price	Depreciation allowed (f) (or allowable)	Cost or other basis (g) plus expense of sale	Gain or (loss) (h) (e) plus (f) minus (g)
10,733		11,614	-881
91,394		74,734	16,660
17,675		13,845	3,830
29,347		26,578	2,769
64,968		83,506	-18,538
4,655		4,500	155
23,653		10,175	13,478
11,556		8,959	2,597
8,895		6,254	2,641
			447

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(I) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	Adjusted basis (j) as of 12/31/69	Excess of col (i) (k) over col (j), if any	
			-881
			16,660
			3,830
			2,769
			-18,538
			155
			13,478
			2,597
			2,641

Form 990PF Part VIII Line 1 - List all officers, directors, trustees, foundation managers and their compensation

(a) Name and address	Title, and average hours per week (b) devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances
BRANCH BANKING AND TRUST CO	TRUSTEE 5	71,897		
100 W 3RD ST OWENSBORO, KY 42303				
DAVIESS CO BOARD OF ED	COMMITTEE MEMBER 0	2,000		
PO BOX 21510 OWENSBORO, KY 42304				
MCLEAN CO BOARD OF ED	COMMITTEE MEMBER 0	2,000		
PO BOX 245 CALHOUN, KY 42327				
OWENSBORO BOARD OF ED	COMMITTEE MEMBER 0	2,000		
450 GRIFFITH AVE OWENSBORO, KY 42301				
OWENSBORO CATHOLIC SCHOOL	COMMITTEE MEMBER 0	2,000		
600 LOCUST STREET OWENSBORO, KY 42301				

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	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
Name and address (home or business)				
a <i>Paid during the year</i>				
RADFORD UNIVERSITY 801 EAST MAIN ST RADFORD, VA 24142	NONE	EXEMPT	SCHOLARSHIPS	4,974
KENTUCKY STATE UNIVERSITY FBO JALISA R CASON 400 EAST MAIN STREET FRANKFORT, KY 40601	NONE	EXEMPT	SCHOLARSHIPS	250
WASHINGTON UNIVERSITY FBO THOMAS E EGGERS ST LOUIS, MO 631304899	NONE	EXEMPT	SCHOLARSHIP	250
UNIVERSITY OF KANSAS FBO LAUREN M HAGAN LAWRENCE, KS 66045	NONE	EXEMPT	SCHOLARSHIPS	10,782
UNIVERSITY OF CINCINNATI FBO CLARON G HAYDEN CINCINNATI, OH 452210140	NONE	EXEMPT	SCHOLARSHIPS	4,170
Total 				918,195
3a				

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	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
Name and address (home or business)				
a Paid during the year				
FRANCISCAN UNIVERSITY FBO OLIVIA M OSBORNE STEUBENVILLE, OH 43952	NONE	EXEMPT	SCHOLARSHIPS	250
BELLARMINE UNIVERSITY 2001 NEWBURG RD LOUISVILLE, KY 40205	NONE	EXEMPT	SCHOLARSHIPS	12,262
BEREA COLLEGE101 CHESTNUT ST BEREA, KY 40404	NONE	EXEMPT	SCHOLARSHIPS	964
ASBURY COLLEGE1 MACKLEM DR WILMORE, KY 40390	NONE	EXEMPT	SCHOLARSHIPS	16,712
BELMONT UNIVERSITY 1900 BELMONT BLVD NASHVILLE, TN 37212	NONE	EXEMPT	SCHOLARSHIPS	25,120
Total ▶ 3a				918,195

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	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
Name and address (home or business)				
a <i>Paid during the year</i>				
BLUEGRASS COMM & TECH COLLEGE 470 COOPER DR LEXINGTON, KY 40506	NONE	EXEMPT	SCHOLARSHIPS	250
BRESCIA UNIVERSITY 717 FREDERICA ST OWENSBORO, KY 42301	NONE	EXEMPT	SCHOLARSHIP	16,529
CAMPBELLVILLE UNIVERSIT 1 UNIVERSITY DR CAMPBELLVILLE, KY 42718	NONE	EXEMPT	SCHOLARSHIPS	2,706
CENTRE COLLEGE600 WEST WALNUT ST DANVILLE, KY 40422	NONE	EXEMPT	SCHOLARSHIPS	500
EASTERN KENTUCKY UNIVERSITY 1 PENNINGTON LANE CORBIN, KY 40701	NONE	EXEMPT	SCHOLARSHIPS	13,877
Total ▶ 3a				918,195

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	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
Name and address (home or business)				
a <i>Paid during the year</i>				
FRANKLIN COLLEGE101 BRANIGIN BLVD FRANKLIN, IN 46131	NONE	EXEMPT	SCHOLARSHIPS	250
GEORGETOWN COLLEGE 400 EAST COLLEGE ST GEORGETOWN, KY 40324	NONE	EXEMPT	SCHOLARSHIPS	3,200
KENTUCKY WESLEYAN COLLEGE 3000 FREDERICA ST OWENSBORO, KY 42301	NONE	EXEMPT	SCHOLARSHIP	82,833
LINDSEY WILSON COLLEGE 210 LINDSEY WILSON ST COLUMBIA, KY 42728	NONE	EXEMPT	SCHOLARSHIPS	13,964
MIDDLE TENNESSEE ST UNIV 1301 EAST MAIN ST MURFREESBORO, TN 37132	NONE	EXEMPT	SCHOLARSHIPS	6,256
Total ▶ 3a				918,195

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	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
Name and address (home or business)				
a <i>Paid during the year</i>				
MOREHEAD STATE UNIVERSITY 150 UNIVERSITY BLVD MOREHEAD, KY 40351	NONE	EXEMPT	SCHOLARSHIPS	5,648
MURRAY STATE UNIVERSITY 102 CURRIS CENTER MURRAY, KY 42071	NONE	EXEMPT	SCHOLARSHIPS	57,816
NORTHERN KENTUCKY UNIVERSITY NUNN DRIVE HIGHLAND HEIGHTS, KY 41099	NONE	EXEMPT	SCHOLARSHIPS	5,860
OWENSBORO COMM & TECH COLLEGE 4800 NEW HARTFORD RD OWENSBORO, KY 42303	NONE	EXEMPT	SCHOLARSHIP	16,300
ST LOUIS UNIVERSITY1 GRAND BLVD ST LOUIS, MO 63103	NONE	EXEMPT	SCHOLARSHIPS	125
Total ► 3a				918,195

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	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
Name and address (home or business)				
a <i>Paid during the year</i>				
TRANSLYVANIA UNIVERSITY 300 N BROADWAY RD LEXINGTON, KY 40508	NONE	EXEMPT	SCHOLARSHIP	10,982
UNIVERSITY OF EVANSVILLE 1800 LINCOLN AVE EVANSVILLE, IN 47714	NONE	EXEMPT	SCHOLARSHIPS	15,026
UNIVERSITY OF LOUISVILLE 2301 S 3RD ST LOUISVILLE, KY 40208	NONE	EXEMPT	SCHOLARSHIPS	99,273
UNIVERSITY OF KENTUCKY 410 ADMINISTRATION DR LEXINGTON, KY 40526	NONE	EXEMPT	SCHOLARSHIPS	174,730
UNIVERSITY OF SOUTHERN INDIANA 8600 UNIVERSITY BLVD EVANSVILLE, IN 47712	NONE	EXEMPT	SCHOLARSHIPS	35,501
Total ▶ 3a				918,195

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	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
Name and address (home or business)				
a <i>Paid during the year</i>				
VANDERBILT UNIVERSITY 2305 WEST END AVE NASHVILLE, TN 37203	NONE	EXEMPT	SCHOLARSHIPS	250
WESTERN KENTUCKY UNIVERSITY 1906 COLLEGE HEIGHTS BLVD BOWLING GREEN, KY 421011018	NONE	EXEMPT	SCHOLARSHIP	139,643
XAVIER UNIVERSITY 3800 VICTORY PARKWAY CINCINNATI, OH 45207	NONE	EXEMPT	SCHOLARSHIPS	13,688
OWENSBORO CATHOLIC SCHOOL 1524 W PARRISH AVE OWENSBORO, KY 42301	NONE	EXEMPT	SCHOLARSHIPS	1,000
DAVIEES COUNTY BOARD OF EDUCATION 1622 SOUTHEASTERN PARKWAY OWENSBORO, KY 42303	NONE	EXEMPT	SCHOLARSHIPS	1,500
Total ► 3a				918,195

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	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
Name and address (home or business)				
a Paid during the year				
MCLEAN COUNTY BOARD OF EDUCATION 283 MAIN ST CALHOUN, KY 42327	NONE	EXEMPT	SCHOLARSHIPS	1,000
UNIVERSITY OF ALABAMABOX 870132 TUSCALOOSA, AL 35487	NONE	EXEMPT	SCHOLARSHIPS	10,986
EMBRY-RIDDLE AERONAUTICAL UNIVERSIT 600 S CLYDE MORRIS BLVD DAYTONA BEACH, FL 321143900	NONE	EXEMPT	SCHOLARSHIPS	11,838
UNIVERSITY OF CUMBERLANDS 6174 COLLEGE STATION DR WILLIAMSBURG, KY 407691372	NONE	EXEMPT	SCHOLARSHIPS	14,502
MIDWAY COLLEGE 512 EAST STEPHENS STREET MIDWAY, KY 40347	NONE	PUBLIC	SCHOLARSHIP	76
Total ► 3a				918,195

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	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
Name and address (home or business)				
a <i>Paid during the year</i>				
OWENSBORO BOARD OF EDUCATION 1335 WEST ELEVENTH STREET OWENSBORO, KY 42301	NONE	EXEMPT	SCHOLARSHIP	500
OHIO STATE UNIVERSITY 281 W LANE AVENUE COLUMBUS, OH 43210	NONE	EXEMPT	SCHOLARSHIPS	27,244
MACALESTER COLLEGE 1600 GRAND AVENUE SAINT PAUL, MN 55105	NONE	EXEMPT	SCHOLARSHIPS	1,346
OAKLAND CITY UNIVERSITY 138 N LUCRETIA STREET OAKLAND CITY, IN 47660	NONE	EXEMPT	SCHOLARSHIPS	2,300
UNIVERSITY OF NOTRE DAME 220 MAIN BUILDING NOTRE DAME, IN 46556	NONE	EXEMPT	SCHOLARSHIPS	2,456
Total ► 3a				918,195

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	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
Name and address (home or business)				
a <i>Paid during the year</i>				
UNIVERSITY OF ALABAMA IN HUNTSVILLE 301 SPARKMAN DR NW HUNTSVILLE, AL 35899	NONE	EXEMPT	SCHOLARSHIPS	250
UNIVERSITY OF MISSISSIPPI PO BOX 1848 UNIVERSITY, MS 38677	NONE	EXEMPT	SCHOLARSHIPS	250
FLORIDA A&M UNIVERSITY 1601 S MARTIN LUTHER KING JR BLVD TALLAHASSEE, FL 32301	NONE	EXEMPT	SCHOLARSHIPS	433
ARCHITECTURAL ASSOCIATION SCHOOL 36 BEDFORD SQUARE LONDON 1B 3ES UK	NONE	EXEMPT	SCHOLARSHIP	7,983
ARIZONA STATE UNIVERSITY PO BOX 870412 TEMPE, AZ 852870412	NONE	EXEMPT	SCHOLARSHIP	250
Total ► 3a				918,195

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	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
Name and address (home or business)				
a <i>Paid during the year</i>				
LEE UNIVERSITY 1120 NORTH OCCOEE STREET CLEVELAND, TN 37320	NONE	EXEMPT	SCHOLARSHIP	6,396
SHAWNEE STATE UNIVERSITY 940 SECOND ST PORTSMOUTH, OH 45662	NONE	EXEMPT	SCHOLARSHIP	250
SOUTH CENTRAL KY COMMUNITY COLLEGE 1845 LOOP AVENUE BOWLING GREEN, KY 42101	NONE	EXEMPT	SCHOLARSHIP	4,062
SPAULDING UNIVERSITY 845 S THIRD STREET LOUISVILLE, KY 40203	NONE	EXEMPT	SCHOLARSHIP	3,610
TENNESSEE STATE UNIVERSITY 3500 JOHN A MERRITT BLVD NASHVILLE, TN 37209	NONE	EXEMPT	SCHOLARSHIP	13,596
Total ▶ 3a				918,195

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	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
Name and address (home or business)				
a <i>Paid during the year</i>				
UNIVERSITY OF TAMPA 401 W KENNEDY BLVD TAMPA, FL 33606	NONE	EXEMPT	SCHOLARSHIP	250
WESTERN KY COMMUNITY COLLEGE 4810 ALBEN BARKLEY DRIVE PADUCAH, KY 42001	NONE	EXEMPT	SCHOLARSHIP	125
YOUNGSTOWN STATE UNIVERSITY ONE UNVIERSITY PLAZA YOUNGSTOWN, OH 44555	NONE	EXEMPT	SCHOLARSHIP	250
FLORIDA SOUTHERN COLLEGE 111 LAKE HOLLINGSWORTH DR LAKELAND, FL 33801	NONE	EXEMPT	SCHOLARSHIP	8,126
STANFORD UNIVERSITY 450 SERRA MALL STANFORD, CA 94305	NONE	EXEMPT	SCHOLARSHIP	125
Total ▶ 3a				918,195

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	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
Name and address (home or business)				
a <i>Paid during the year</i>				
VIRGINIA TECH925 PRICES FORK ROAD BLACKSBURG, VA 24061	NONE	EXEMPT	SCHOLARSHIP	6,550
Total <div>▶</div> 3a				918,195

TY 2017 Other Increases Schedule

Name: JOHN B & BROWNIE YOUNG MEMORIAL FUND

EIN: 61-6025137

Description	Amount
ADJ FOR MUTUAL FUND REC/REPORTED	1,672
ACCRUED INTEREST	1,675
COST BASIS ADJUSTMENTS	4,822

efile GRAPHIC print - DO NOT PROCESS		As Filed Data -		DLN: 93491100009508	
<div>Schedule B (Form 990, 990-EZ, or 990-PF) Department of the Treasury Internal Revenue Service</div>		<div>Schedule of Contributors</div> <div>▶ Attach to Form 990, 990-EZ, or 990-PF</div> <div>▶ Information about Schedule B (Form 990, 990-EZ, or 990-PF) and its instructions is at www.irs.gov/form990</div>			<div>OMB No 1545-0047</div> <div>2017</div>
Name of the organization JOHN B & BROWNIE YOUNG MEMORIAL FUND				Employer identification number 61-6025137	
Organization type (check one)					
<div>Filers of:</div> <div>Form 990 or 990-EZ</div> <div>Form 990-PF</div>					
<div>Section:</div> <div><input type="checkbox"/> 501(c)() (enter number) organization</div> <div><input type="checkbox"/> 4947(a)(1) nonexempt charitable trust not treated as a private foundation</div> <div><input type="checkbox"/> 527 political organization</div> <div><input checked="" type="checkbox"/> 501(c)(3) exempt private foundation</div> <div><input type="checkbox"/> 4947(a)(1) nonexempt charitable trust treated as a private foundation</div> <div><input type="checkbox"/> 501(c)(3) taxable private foundation</div>					
Check if your organization is covered by the General Rule or a Special Rule .					
Note. Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.					
<div>General Rule</div> <div><input checked="" type="checkbox"/> For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or other property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions.</div>					
<div>Special Rules</div> <div><input type="checkbox"/> For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33¹/₃% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.</div> <div><input type="checkbox"/> For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 <i>exclusively</i> for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I, II, and III.</div> <div><input type="checkbox"/> For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions <i>exclusively</i> for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an <i>exclusively</i> religious, charitable, etc., purpose. Don't complete any of the parts unless the General Rule applies to this organization because it received <i>nonexclusively</i> religious, charitable, etc., contributions totaling \$5,000 or more during the year. . . . ▶ \$</div>					
Caution. An organization that isn't covered by the General Rule and/or the Special Rules doesn't file Schedule B (Form 990, 990-EZ, or 990-PF), but it must answer "No" on Part IV, line 2, of its Form 990, or check the box on line H of its Form 990-EZ or on its Form 990PF, Part I, line 2, to certify that it doesn't meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).					
For Paperwork Reduction Act Notice, see the Instructions for Form 990, 990-EZ, or 990-PF		Cat No 30613X		Schedule B (Form 990, 990-EZ, or 990-PF) (2017)	

Name of organization JOHN B & BROWNIE YOUNG MEMORIAL FUND	Employer identification number 61-6025137
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Part I Contributors (See instructions) Use duplicate copies of Part I if additional space is needed			
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	GATES YOUNG TRUST PO BOX 94715 CLEVELAND, OH 44101	\$ 31,429	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
-		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
-		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
-		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
-		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
-		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
-		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)

Employer identification number

61-6025137

Part II

[illegible]

Name of organization JOHN B & BROWNIE YOUNG MEMORIAL FUND	Employer identification number 61-6025137
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Part III	Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of exclusively religious, charitable, etc., contributions of \$1,000 or less for the year. (Enter this information once. See instructions.) ▶ \$ _____ Use duplicate copies of Part III if additional space is needed
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(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	<div></div> <div></div>	<div></div> <div></div>	<div></div> <div></div>
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4		Relationship of transferor to transferee
	<div></div> <div></div>	<div></div> <div></div>	
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	<div></div> <div></div>	<div></div> <div></div>	<div></div> <div></div>
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4		Relationship of transferor to transferee
	<div></div> <div></div>	<div></div> <div></div>	
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	<div></div> <div></div>	<div></div> <div></div>	<div></div> <div></div>
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4		Relationship of transferor to transferee
	<div></div> <div></div>	<div></div> <div></div>	
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	<div></div> <div></div>	<div></div> <div></div>	<div></div> <div></div>
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4		Relationship of transferor to transferee
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