....990-PF

Department of the Treasury



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

2017

▶ 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.

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		enue Service Go to www.irs.gov/Form		tions and the	atost iiiioi	manon.	Open to Public Inapaction
	calend me of four		and ending		A Emplo	yer identification number	
		DE L NELSON CHARITABLE			A Emplo	yer identification number	
		DATION			63-	-1082768	
		street (or P O box number if mail is not delivered to street address)	· · · · · · · · · · · · · · · · · · ·	Room/suite		Tone number (see instructions)
_ 7	00	12TH AVE S, UNIT 1212			93:	1-962-1060	
City	y or town,	state or province, country, and ZIP or foreign postal code			C If exen	nption application is pending.	check here
_ <u>N</u>	ASH	VILLE TN 37203-3	432		J II OXGII	inplicit application is penging,	
, G (Check a	ill that apply Initial return Initial retur	n of a former public	charity	D 1. For	reign organizations, check he	• ▶ <u></u>
9/5		Final return Amended			2. For	reign organizations meeting th	e
40~	`	Address change Name cha	nge		85	% test, check here and ettach	computation
HC	Check ty	ype of organization X Section 501(c)(3) exempt private	foundation	o V	E If priva	ite foundation status was tem	inated under
	Section	4947(a)(1) nonexempt charitable trust Other taxable	e private foundation		section	n 507(b)(1)(A), check here	▶ [_]
I Fa	aır marl	ket value of all assets at J Accounting method	X Cash A	Accrual	F If the f	oundation is in a 60-month tei	mination
er	nd of ye	ear (from Part II, col. (c), Other (specify)			under	section 507(b)(1)(B), check h	ere 🕨 📘
lin	ne 16) 🕽	\$ 245,716 (Part I, column (d) must b	e on cash basis)		<u> </u>		
P	art i	Analysis of Revenue and Expenses (The total of	(a) Revenue and	(b) Net in	estment	(c) Adjusted net	(d) Disbursements for chantable
		amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))	expenses per books	inco		income	purposes
	1	Contributions, gifts, grants, etc , received (attach schedule)	100,00	00			(cash basis only)
	2	Check ► If the foundation is not required to attach Sch B	100,00	~~			
	3	Interest on savings and temporary cash investments				·	
	4	Dividends and interest from securities	2,8	4.6	2,846		
	5a	Gross rents					
•	b	Net rental income or (loss)	***************************************				
ž	6a	Net gain or (loss) from sale of assets not on line 10	3,9	15		·····	
ě	Ь	Gross sales price for all assets on line 6a 11, 645					
Revenue	7	Capital gain net income (from Part IV, line 2)			3,915		
_	8	Net short-term capital gain	· · · · · · · · · · · · · · · · · · ·			0	
	9	Income modifications					
	10a	Gross sales less returns and allowances					
	b	Less Cost of goods sold					
	С	Gross profit or (loss) (attach schedule)					
	11	Other income (attach schedule)					
	12	Total. Add lines 1 through 11	\ 106,7	61	6,761	0	
w	13	Compensation of officers, directors, trustees, etc		0			
nses	14	Other employee salaries and wages					<u> </u>
ē ē	15	Pension plans, employee benefits		_			
Expe	16a	Legal fees (attach schedule)					
ο o	b	Accounting fees (attach schedule) STMT 1		00			100
يٍ ا	С	Other professional fees (attach schedule) STMT 2	8	94	894		
JUL. nistra	17	Interest	·				ļ
Sistematical Services	18	Taxes (attach schedule) (see instructions) STMT 3		72	62		10
ν <u>ξ</u>	19	Depreciation (attach schedule) and the pletton EIVED					
Ad	20	Occupancy					
ing and Adm	21	Occupancy Travel, conferences, and meetings Printing and publications MAY 1 7 2018 Other expenses (att sch)		-		<u> </u>	
ָם ק	22	Printing and publications WIAT 1 2010	····-				
5	23	Other expenses (att sch.)					
_ ati	24	Total operating and administrative expanses T Add lines 13 through 28	1,0	66	956	C	110
Operating and Administrative	25	Contributions, gifts, grants paid	10,1				10,100
ō	26	Total expenses and disbursements. Add lines 24 and 25	11,1		956	C	
	27	Subtract line 26 from line 12:		~~ 			10,210
	a	Excess of revenue over expenses and disbursements	95,5	95			Į.
	b	Net investment income (if negative, enter -0-)		 	5,805		
	c	Adjusted net income (if negative, enter -0-)				C	

For Paperwork Reduction Act Notice, see instructions.

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om 990-PF (2017)

	D 11	Palance Sheets: Attached schedules and amounts in the description column	Beginning of year		End of year		
	Part II	Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)	(a) Book Value	(b) Book Value	(c) Fair Market Value		
٦	1	Cash – non-interest-bearing					
	2	Savings and temporary cash investments	31,040	_101,178	101,178		
-	3	Accounts receivable ▶					
		Less allowance for doubtful accounts ▶			L		
	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			ľ		
		instructions)					
	7	Other notes and loans receivable (att. schedule)					
		Less allowance for doubtful accounts ▶ 0			1		
S	8	Inventories for sale or use			<u> </u>		
Assets	9	Prepaid expenses and deferred charges					
As	10a	Investments – U S and state government obligations (attach schedule)					
ı	b	Investments – corporate stock (attach schedule) SEE STMT 4	84,346	111,872	134,784		
	С	Investments – corporate bonds (attach schedule) SEE STMT 5	11,928	9,859			
1	11	investments – land, buildings, and equipment basis					
		Less accumulated depreciation (attach sch.)]				
1	12	Investments – mortgage loans					
	13	Investments – other (attach schedule)					
	14	Land, buildings, and equipment basis					
		Less accumulated depreciation (attach sch.)	}				
	15	Other assets (describe ▶)					
	16	Total assets (to be completed by all filers – see the					
		instructions Also, see page 1, item I)	127,314	222,909	245,716		
1	17	Accounts payable and accrued expenses					
	18	Grants payable					
es	19	Deferred revenue			1		
謡	20	Loans from officers, directors, trustees, and other disqualified persons			1		
Liabilities	21	Mortgages and other notes payable (attach schedule)			1		
	22	Other liabilities (describe ▶)			1		
	23	Total liabilities (add lines 17 through 22)	0	C			
		Foundations that follow SFAS 117, check here			1		
es		and complete lines 24 through 26 and lines 30 and 31.					
Š	24	Unrestricted					
lar	25	Temporarily restricted			1		
8	26	Permanently restricted					
nd		Foundations that do not follow SFAS 117, check here			1		
Net Assets or Fund Balance		and complete lines 27 through 31.					
ō	27	Capital stock, trust principal, or current funds	İ				
ets	28	Paid-in or capital surplus, or land, bldg , and equipment fund					
58	29	Retained earnings, accumulated income, endowment, or other funds	127,314	222,909	1		
4	30	Total net assets or fund balances (see instructions)	127,314	222,909	<u> </u>		
ž	31	Total liabilities and net assets/fund balances (see					
		instructions)	127,314	222,909)		
_	Part I						
		net assets or fund balances at beginning of year - Part II, column (a), line 30 (must a	agree with				
-		f-year figure reported on pnor year's return)	-	1	127,314		
2		amount from Part I, line 27a		2	95,595		
		increases not included in line 2 (itemize) ▶		3			
		nes 1, 2, and 3		4	222,909		
		eases not included in line 2 (itemize)		5			
_6	Total	net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b),	line 30	6	222,909		

1-11		nt Income					
	the kind(s) of property sold (for example, real estate, arehouse, or common stock, 200 shs MLC Co)		(b) How acquired P – Purchase D – Donation	(c) Date ac		(d) Date sold (mo , day, yr)	
1a 253.294 SHS DFA	INTL VECTOR		P	04/06	/16	08/09/17	
b 187.441 SHS DFA	US MICRO CAP PORT		P	04/06		07/17/17	
c 18 SHS ISHARES	TIPS BOND		P	04/06	/16	11/28/17	
d SCHWAB							
_e		 				<u> </u>	
(e) Gross sales pnce	(f) Depreciation allowed (or allowable)		Cost or other basis is expense of sale		(h) Gain or (loss) ((e) plus (f) minus (g))		
a 2,969		<u> </u>	2,389			580	
b 3,969			3,272			697	
c 2,050		ļ	2,069			-19	
d 2,657		ļ				2,657	
<u>e</u>		<u> </u>					
Complete only for assets showing	gain in column (h) and owned by the four	ndation on 12/3	1/69	(1)	Gains (Col	(h) gain minus	
(i) FMV as of 12/31/69	(i) FMV as of 12/31/69 (j) Adjusted basis (k) Excess of col (i) as of 12/31/69 over col (j), if any		•	col		less than -0-) or om col (h))	
a						580	
b						697	
c						-19	
d						2,657	
e		<u></u>					
2 Capital gain net income or (net ca	pital loss) If gain, also enter in If (loss), enter -0- in		}	2		3,915	
3 Net short-term capital gain or (loss	s) as defined in sections 1222(5) and (6)	_	_				
If gain, also enter in Part I, line 8, o	column (c) See instructions If (loss), enti-	er -0- in	٦	l			
Part I, line 8		-	<u></u>	3			
Part V Qualification Un	der Section 4940(e) for Reduc	ed Tax on N	let Investment Incor	ne		 	
(For optional use by domestic private f	foundations subject to the section 4940(a	tax on net inve	estment income)				
If section 4940(d)(2) applies, leave this	s part blank		·				
If section 4940(d)(2) applies, leave this	•						
Was the foundation liable for the section	on 4942 tax on the distributable amount o		base period?			Yes X No	
Was the foundation liable for the section if "Yes," the foundation does not qualif	on 4942 tax on the distributable amount of under section 4940(e) Do not complete	this part	·			Yes X No	
Was the foundation liable for the section if "Yes," the foundation does not qualiful Enter the appropriate amount in each	on 4942 tax on the distributable amount of y under section 4940(e). Do not complete ach column for each year, see the instruc	this part	·				
Was the foundation liable for the section if "Yes," the foundation does not qualified. 1 Enter the appropriate amount in each (a) Base penod years	on 4942 tax on the distributable amount of y under section 4940(e). Do not complete ach column for each year, see the instruction.	this part	king any entries			(d)	
Was the foundation liable for the section of "Yes," the foundation does not qualiful Enter the appropriate amount in each (a) Base penod years Calendar year (or tax year beginning in)	on 4942 tax on the distributable amount of younder section 4940(e). Do not complete ach column for each year, see the instruction (b). Adjusted qualifying distributions.	this part	king any entries (c) et value of nonchantable-use assets			(d) hbutton ratio divided by col (c))	
Was the foundation liable for the section of "Yes," the foundation does not qualify a line of the appropriate amount in each of the section o	on 4942 tax on the distributable amount of younder section 4940(e). Do not complete ach column for each year, see the instruction (b). Adjusted qualifying distributions.	this part	king any entries (c) et value of nonchantable-use asset	442		(d) nbutton ratio divided by col (c)) 0.062100	
Was the foundation liable for the section of "Yes," the foundation does not qualifulate amount in each (a) Base penod years Calendar year (or tax year beginning in) 2016 2015	on 4942 tax on the distributable amount of younder section 4940(e). Do not complete ach column for each year, see the instruction (b). Adjusted qualifying distributions.	this part tions before ma , 610 , 754	king any entries (c) et value of nonchantable-use assets 106, 98,	442 532		(d) nbutton ratio livided by col (c)) 0.062100 0.068546	
Was the foundation liable for the section of "Yes," the foundation does not qualifulate amount in each (a) Base period years Calendar year (or tax year beginning in) 2016 2015 2014	on 4942 tax on the distributable amount of younder section 4940(e). Do not complete ach column for each year, see the instruction (b). Adjusted qualifying distributions.	this part tions before ma , 610 , 754 , 692	king any entries (c) et value of nonchantable-use assets 106, 98,	442 532 034		(d) Inbutton ratio Invided by col (c)) 0.062100 0.068546 0.060531	
Was the foundation liable for the section of "Yes," the foundation does not qualifulate the appropriate amount in each of the section of the	on 4942 tax on the distributable amount of younder section 4940(e). Do not complete ach column for each year, see the instruction (b). Adjusted qualifying distributions.	this part tions before ma , 610 , 754 , 692 644	king any entries (c) et value of nonchantable-use assets 106, 98, 94, 79,	442 532 034 665		(d) nbutton ratio livided by col. (ci) 0.062100 0.068546 0.060531 0.008084	
Was the foundation liable for the section of "Yes," the foundation does not qualifulate amount in each (a) Base period years Calendar year (or tax year beginning in) 2016 2015 2014	on 4942 tax on the distributable amount of younder section 4940(e). Do not complete ach column for each year, see the instruction (b). Adjusted qualifying distributions.	this part tions before ma , 610 , 754 , 692	king any entries (c) et value of nonchantable-use assets 106, 98,	442 532 034 665		(d) Inbutton ratio Invided by col (c)) 0.062100 0.068546 0.060531	
Was the foundation liable for the sector if "Yes," the foundation does not qualifulate the appropriate amount in each (a) Base penod years Calendar year (or tax year beginning in) 2016 2015 2014 2013 2012	on 4942 tax on the distributable amount of younder section 4940(e). Do not complete ach column for each year, see the instruction (b). Adjusted qualifying distributions.	this part tions before ma , 610 , 754 , 692 644	king any entries (c) et value of nonchantable-use assets 106, 98, 94, 79,	442 532 034 665 588		(d) nbutton ratio livided by col (c)) 0.062100 0.068546 0.060531 0.008084 0.008716	
Was the foundation liable for the sector if "Yes," the foundation does not qualifulate the appropriate amount in each (a) Base penod years Calendar year (or tax year beginning in) 2016 2015 2014 2013 2012 2 Total of line 1, column (d)	on 4942 tax on the distributable amount of younder section 4940(e). Do not complete ach column for each year, see the instruction (b). Adjusted qualifying distributions 6.5.	this part tions before ma , 610 , 754 , 692 644 685	king any entries (c) et value of nonchantable-use assets 106, 98, 94, 79, 78,	442 532 034 665		(d) nbutton ratio livided by col. (ci) 0.062100 0.068546 0.060531 0.008084	
Was the foundation liable for the section of "Yes," the foundation does not qualify a section of the appropriate amount in each of the appropr	on 4942 tax on the distributable amount of younder section 4940(e). Do not complete ach column for each year, see the instruction. (b) Adjusted qualifying distributions. 6 5	this part tions before ma , 610 , 754 , 692 644 685	king any entries (c) et value of nonchantable-use assets 106, 98, 94, 79, 78,	442 532 034 665 588		(d) Inbution ratio Invided by col (c)) 0.062100 0.068546 0.060531 0.008084 0.008716	
Was the foundation liable for the section of "Yes," the foundation does not qualify a section of the appropriate amount in each of the appropr	on 4942 tax on the distributable amount of younder section 4940(e). Do not complete ach column for each year, see the instruction (b). Adjusted qualifying distributions 6.5.	this part tions before ma , 610 , 754 , 692 644 685	king any entries (c) et value of nonchantable-use assets 106, 98, 94, 79, 78,	442 532 034 665 588		(d) nbutton ratio livided by col (c)) 0.062100 0.068546 0.060531 0.008084 0.008716	
Was the foundation liable for the sector if "Yes," the foundation does not qualifulate the appropriate amount in each appropriate	on 4942 tax on the distributable amount of younder section 4940(e). Do not complete ach column for each year, see the instruction. (b) Adjusted qualifying distributions. 6 5	this part tions before ma , 610 , 754 , 692 644 685	king any entries (c) et value of nonchantable-use assets 106, 98, 94, 79, 78,	442 532 034 665 588		(d) Inbution ratio Invided by col (c)) 0.062100 0.068546 0.060531 0.008084 0.008716	
Was the foundation liable for the sector if "Yes," the foundation does not qualifulate the appropriate amount in each of the appropriate amoun	on 4942 tax on the distributable amount of younder section 4940(e). Do not complete ach column for each year, see the instruction (b). Adjusted qualifying distributions 6. 6. 5. -year base period – divide the total on line as been in existence if less than 5 years.	this part tions before ma , 610 , 754 , 692 644 685	king any entries (c) et value of nonchantable-use assets 106, 98, 94, 79, 78,	442 532 034 665 588 2		(d) nbutton ratio invided by col (c)) 0.062100 0.068546 0.060531 0.008084 0.008716 0.207977 0.041595	
Was the foundation liable for the sector if "Yes," the foundation does not qualifulate the appropriate amount in each appropriate	on 4942 tax on the distributable amount of younder section 4940(e). Do not complete ach column for each year, see the instruction (b). Adjusted qualifying distributions 6. 6. 5. -year base period – divide the total on line as been in existence if less than 5 years.	this part tions before ma , 610 , 754 , 692 644 685	king any entries (c) et value of nonchantable-use assets 106, 98, 94, 79, 78,	442 532 034 665 588		(d) Inbutton ratio Invided by col (ci) 0.062100 0.068546 0.060531 0.008084 0.008716 0.207977 0.041595	
Was the foundation liable for the sector if "Yes," the foundation does not qualifulate the appropriate amount in each of the appropriate amoun	on 4942 tax on the distributable amount of younder section 4940(e). Do not complete ach column for each year, see the instruction (b). Adjusted qualifying distributions 6. 6. 5.	this part tions before ma , 610 , 754 , 692 644 685	king any entries (c) et value of nonchantable-use assets 106, 98, 94, 79, 78,	442 532 034 665 588 2		(d) nbutton ratio invided by col (c)) 0.062100 0.068546 0.060531 0.008084 0.008716 0.207977 0.041595	
Was the foundation liable for the sector if "Yes," the foundation does not qualifulate the appropriate amount in each (a) Base penod years Calendar year (or tax year beginning in) 2016 2015 2014 2013 2012 2 Total of line 1, column (d) 3 Average distribution ratio for the 5 number of years the foundation has 4 Enter the net value of nonchantable 5 Multiply line 4 by line 3	on 4942 tax on the distributable amount of younder section 4940(e). Do not complete ach column for each year, see the instruction (b). Adjusted qualifying distributions 6. 6. 5.	this part tions before ma , 610 , 754 , 692 644 685	king any entries (c) et value of nonchantable-use assets 106, 98, 94, 79, 78,	442 532 034 665 588 2 3		(d) Inbutton ratio Invided by col (c)) 0.062100 0.068546 0.060531 0.008084 0.008716 0.207977 0.041595 144,707 6,019	
Was the foundation liable for the sector if "Yes," the foundation does not qualif 1 Enter the appropriate amount in each of the appropriate a	on 4942 tax on the distributable amount of younder section 4940(e). Do not complete ach column for each year, see the instruction (b). Adjusted qualifying distributions 6. 6. 5. -year base period – divide the total on line as been in existence if less than 5 years decuse assets for 2017 from Part X, line 5. e (1% of Part I, line 27b)	this part tions before ma , 610 , 754 , 692 644 685	king any entries (c) et value of nonchantable-use assets 106, 98, 94, 79, 78,	442 532 034 665 588 2 3		(d) Inbutton ratio Invided by col (ci) 0.062100 0.068546 0.060531 0.008084 0.008716 0.207977 0.041595 144,707 6,019	

Form	990-PF (2017) · CLAUDE L NELSON CHARITABLE 63-1082768 /				Р	age 4
Pa	rt 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	1				<u>58</u>
	here ► X and enter 1% of Part I, line 27b					
С	All other domestic foundations enter 2% of line 27b Exempt foreign organizations, enter 4% of					
	Part I, line 12, col (b)					
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only, others, enter -0-)	2				0
3	Add lines 1 and 2	3				58
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				58
6	Credits/Payments					
а	2017 estimated tax payments and 2016 overpayment credited to 2017 6a 6a					
b	Exempt foreign organizations – tax withheld at source 6b					
C	Tax paid with application for extension of time to file (Form 8868)					
đ	Backup withholding erroneously withheld 6d 6					
7	Total credits and payments Add lines 6a through 6d	7				
8	Enter any penalty for underpayment of estimated tax. Check here if Form 2220 is attached	8				
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9				58
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				
Pa	rt VII-A Statements Regarding Activities			, ,		
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it			LI	Yes	No
	participate or intervene in any political campaign?			1a		<u>X</u>
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the					
	Instructions for the definition			1b		X
	If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials					
	published or distributed by the foundation in connection with the activities		/	1 1		
C	Did the foundation file Form 1120-POL for this year?		N/A	1c		
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year			1 1		
	(1) On the foundation ▶ \$ (2) On foundation managers ▶ \$	_				
е	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed					
	on foundation managers > \$			_	į	V
2	Has the foundation engaged in any activities that have not previously been reported to the IRS?			2		X
•	If "Yes," attach a detailed description of the activities					
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of			_	v	
4-	incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes			3	<u>X</u>	X
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year? If "Yea" has it filed a tay return an Form 990 T for this year?		A\N	4a		
ь 5	If "Yes," has it filed a tax return on Form 990-T for this year? Was there a liquidation, termination, dissolution, or substantial contraction during the year?		N/A	4b		X
3	If "Yes," attach the statement required by General Instruction T.			-		
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	Χ	
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.			<u> </u>		
	AL					
ь	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	Х	
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 If "Yes,"			[]]	1/
	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
				9C	O_DF	(2017)

Form 990-PF (2017) CLAUDE L NELSON CHARITABLE 63-1082768 Page 5 Statements Regarding Activities (continued) Yes No 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 Χ_ 11 Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified 12 person had advisory privileges? If "Yes," attach statement. See instructions Did the foundation comply with the public inspection requirements for its annual returns and exemption application? 13 13 Website address ▶ N/A Telephone no ▶ 931-607-5213 The books are in care of ▶ LESA NELSON AGEE 14 700 12TH AVE S, UNIT 1212 ZIP+4 ▶ 37203-3432 Located at ▶ NASHVILLE TN 15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - check here and enter the amount of tax-exempt interest received or accrued during the year 16 At any time during calendar year 2017, did the foundation have an interest in or a signature or other authority Yes No over a bank, securities, or other financial account in a foreign country? 16 Χ 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. No Yes 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? X 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 X No the benefit or use of a disqualified person)? (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 X No termination of government service, if terminating within 90 days.) Yes 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 $A \setminus N$ 1b Organizations relying on a current notice regarding disaster assistance, check here 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? $A \setminus N$ 1c 2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)) At the end of tax year 2017, did the foundation have any undistributed income (lines 6d and X No 6e, Part XIII) for tax year(s) beginning before 2017? Yes If "Yes," list the years ▶ 20 , 20 , 20 , 20 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 N/A all years listed, answer "No" and attach statement - see instructions) 2b 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 Did the foundation hold more than a 2% direct or indirect interest in any business enterprise X No at any time during the year? 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 N/A foundation had excess business holdings in 2017)

Did the foundation invest during the year any amount in a manner that would jeopardize its chantable purposes?

Did the foundation make any investment in a pnor year (but after December 31, 1969) that could jeopardize its chantable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2017?

Form 990-PF (2017)

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orm	990-PF (2017) ·CLAUDE L NE	LSON CHARITABLE_	63-1	<u>.082768 </u>			Page 6
Pa	art VII-B Statements Regard	ing Activities for Which Forn	1 4720 May Be R	equired (contin	nued)		
 5а	During the year did the foundation pay or	incur any amount to					
	(1) Carry on propaganda, or otherwise a	ttempt to influence legislation (section	4945(e))?	☐ \	∕es X No	- 1	
	(2) Influence the outcome of any specific	c public election (see section 4955), or	to carry on,	_		- }	
	directly or indirectly, any voter registi		•		res X No	- 1	
	(3) Provide a grant to an individual for tr	avel, study, or other similar purposes?		Πı	res X No		
	(4) Provide a grant to an organization of		described in		حے		
	section 4945(d)(4)(A)? See instruction				res X No		
	(5) Provide for any purpose other than r		r educational			- 1	
	purposes, or for the prevention of cri	•			res X No	1	
b	If any answer is "Yes" to 5a(1)-(5), did a	•	er the exceptions desc	_		1	
	Regulations section 53 4945 or in a curre	-	•		N/A	5b	Ī
	Organizations relying on a current notice				▶ 🗀		
С	If the answer is "Yes" to question 5a(4),				· []	}	1
_	because it maintained expenditure response	·		N/A 🗌 Y	res No		
	If "Yes," attach the statement required by	·		٠., ٠٠٠		-	
6a	Did the foundation, during the year, rece	•	ay premiums				I
-	on a personal benefit contract?	,,, c, to pt	A Erannensa		res X No	- 1	I
b	Did the foundation, during the year, pay	premiums, directly or indirectly, on a pe	rsonal benefit contract			6b	İχ
_	If "Yes" to 6b, file Form 8870	,,,,					
7a	At any time during the tax year, was the	foundation a party to a prohibited tax sh	elter transaction?		res X No		
	If "Yes," did the foundation receive any p				N/A	7b	Ī
_		fficers, Directors, Trustees, F					
-	and Contractors				. ,	•	
1 L	ist all officers, directors, trustees, and	foundation managers and their con	npensation. See inst	ructions.			
			(b) Title, and average	(c) Compensation	(d) Contributions to	}	
	(a) Name and	address	hours per week	(If not paid,	employee benefit plans and deferred		ense account, allowances
			devoted to position	enter -0-)	compensation	Oalei	allowalices
LE	SA NELSON AGEE	NASHVILLE	PRESIDENT				
70	0 12TH AVE S, UNIT 1212	TN _37203-3432	1.00	o	o		0
WI	LLIAM HENRY AGEE	NASHVILLE	SECRETARY				
70	0 12TH AVE_S,_UNIT_1212	TN _37203-3432	1.00	0	0		0
NE	LSON AGEE	NASHVILLE	VICE PRES				
70	0 12TH AVE S, UNIT 1212	TN _37203-3432	1.00	0	o		0
	AY S AGEE	NASHVILLE	TREASURER				
70	0 12TH AVE S, UNIT 1212	TN 37203-3432	1.00	О	o		. 0
	Compensation of five highest-paid en		on line 1 - see instri	uctions). If none,	enter		
	"NONE."						
			(b) Title, and average		(d) Contributions to		
	(a) Name and address of each employee	paid more than \$50,000	hours per week	(c) Compensation	employee benefit plans and deferred		ense account, allowances
			devoted to position		compensation	00.00	
NC	NE		ļ		Į.		
_]	
		<u> </u>	1				
	· — — ·	-					<u> </u>
ota	I number of other employees paid over \$5	0,000			• • • • • • • • • • • • • • • • • • •	l	0

<u> Form 990-PF (2</u>	2017) CLAUDE L NELSON CHARITABLE	63-1082768	Page 7
Part VIII '	Information About Officers, Directors, Trustees, Foundand Contractors (continued)	ndation Managers, Highly Paid Er	nployees,
3 Five high	nest-paid independent contractors for professional services. See ins	tructions. If none, enter "NONE."	
	(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE			
			
	 		
otal number o	f others receiving over \$50,000 for professional services		
Part IX-A	Summary of Direct Charitable Activities		
	o's four largest direct chantable activities during the tax year. Include relevant statistical information other beneficianes served, conferences convened, research papers produced, etc.	such as the number of	Expenses
1 N/A			
			ļ
2			
			Į.
3			ļ-
•			
			
4			
Part IX-B	Summary of Program-Related Investments (see inst	ructions)	
	argest program-related investments made by the foundation during the tax year on lines 1 and 2		Amount
1 N/A			
			ļ
2			
			ţ
All other program-	related investments. See instructions		
3			

Total. Add lines 1 through 3

Pa	art X Minimum Investment Return (All domestic foundations must complete this part. Foreign see instructions.)	four	idations,
1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc.		
	purposes		
а	Average monthly fair market value of securities	1a	137,383
b	Average of monthly cash balances	1b	9,528
С	Fair market value of all other assets (see instructions)	1c	0
đ	Total (add lines 1a, b, and c)	_1d	146,911
е	Reduction claimed for blockage or other factors reported on lines 1a and		
	1c (attach detailed explanation)		
2	Acquisition indebtedness applicable to line 1 assets	2	0
3	Subtract line 2 from line 1d	3	146,911
4	Cash deemed held for charitable activities Enter 11/2% of line 3 (for greater amount, see		
	instructions)	4	2,204
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	144,707
6	Minimum investment return. Enter 5% of line 5	6	7,235
Pa	art XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating for	ounda	ations
	and certain foreign organizations check here ▶ and do not complete this part)		
1	Minimum investment return from Part X, line 6	1	7,235
2 a	Tax on investment income for 2017 from Part VI, line 5		
b	Income tax for 2017 (This does not include the tax from Part VI)		
С	Add lines 2a and 2b	_2c	58
3	Distributable amount before adjustments Subtract line 2c from line 1	3	7,177
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	7,177
6	Deduction from distributable amount (see instructions)	6	
7	Distributable amount as adjusted Subtract line 6 from line 5. Enter here and on Part XIII,		
	line 1	7	7,177
Pa	art XII Qualifying Distributions (see instructions)		
1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes		
а	Expenses, contributions, gifts, etc. – total from Part I, column (d), line 26	1a	10,210
b	Program-related investments – total from Part IX-B	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out chantable, etc.,		
	purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the		
а	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	10,210
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	58
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	10,152
	Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation	า	
	qualifies for the section 4940(e) reduction of tax in those years		

Form 990-PF (2017)

Pa	rt XIII ' Undistributed Income (see instructions)				
		(a)	(b)	(c)	(d)
1	Distributable amount for 2017 from Part XI,	Corpus	Years pnor to 2016	2016	2017
	line 7				7,177
2	Undistributed income, if any, as of the end of 2017				
а	Enter amount for 2016 only				
b	Total for prior years 20, 20, 20			······································	
3	Excess distributions carryover, if any, to 2017				
а	From 2012				
b					
С	From 2014 1,056				
d	From 2015 1,867				
е	From 2016 1, 308				
f	Total of lines 3a through e	4,231			
4	Qualifying distributions for 2017 from Part XII,				
	line 4 ▶ \$ 10,210			•	
а	Applied to 2016, but not more than line 2a				
þ	Applied to undistributed income of prior years				
	(Election required – see instructions)				
С	Treated as distributions out of corpus (Election				
	required – see instructions)				
d	Applied to 2017 distributable amount				7,177
е	Remaining amount distributed out of corpus	3,033		······································	
5	Excess distributions carryover applied to 2017				
	(If an amount appears in column (d), the same				
	amount must be shown in column (a))				
6	Enter the net total of each column as			ī.	
	indicated below:				
а	Corpus Add lines 3f, 4c, and 4e Subtract line 5	7,264			
b	Prior years' undistributed income Subtract	i			
	line 4b from line 2b				
С	Enter the amount of prior years' undistributed	1			
	income for which a notice of deficiency has				
	been issued, or on which the section 4942(a)				
	tax has been previously assessed				
d	Subtract line 6c from line 6b Taxable				
	amount – see instructions				
е	Undistributed income for 2016 Subtract line				
	4a from line 2a Taxable amount – see	Ì			
	instructions				
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)				
8	Excess distributions carryover from 2012 not				
_	applied on line 5 or line 7 (see instructions)	· · · · · · · · · · · · · · · · · · ·			
9	Excess distributions carryover to 2018.	7 064			
	Subtract lines 7 and 8 from line 6a	7,264			
10	Analysis of line 9				
a	Excess from 2013				
b	Excess from 2014 1,056 Excess from 2015 1,867	į.			
٦ C					
d	Excess from 2016 1, 308 Excess from 2017 3, 033	ł			
<u> </u>	Excess from 2017 3, 033				L

Pa	rt XIV Private Operating For	undations (see in:	structions and Part	t_Vil-A, guestion 9)	
1a	If the foundation has received a ruling or	determination letter tha	t it is a private operating]	
	foundation, and the ruling is effective for 2	2017, enter the date of	the ruling		1	
b	Check box to indicate whether the founda			d in section 4	942(j)(3) or 494	12(1)(5)
2a	Enter the lesser of the adjusted net	Tax year		Prior 3 years	<u> </u>	T
	income from Part I or the minimum	(a) 2017	(b) 2016	(c) 2015	(d) 2014	(e) Total
	investment return from Part X for	\\ \\\\	1	1	 	
		}	1	}		
_	each year listed		 	 	 	
p	85% of line 2a	}	 	 	 	 /
С	Qualifying distributions from Part XII,	Į	[ł	
	line 4 for each year listed	 	 	 	 	/
d	Amounts included in line 2c not used directly	ł	1	Į	/	
	for active conduct of exempt activities		 	 		
е	Qualifying distributions made directly	[1	l		1
	for active conduct of exempt activities	ļ		(
	Subtract line 2d from line 2c	<u> </u>	ļ	ļ	/	<u> </u>
3	Complete 3a, b, or c for the	{		/	ľ	}
	alternative test relied upon		•			}
а	"Assets" alternative test – enter		{	/	}	
	(1) Value of all assets	ļ				<u> </u>
	(2) Value of assets qualifying under	}	}	\ /	İ	
	section 4942(j)(3)(B)(i)				<u></u>	
b	"Endowment" alternative test enter 2/3				1	
	of minimum investment return shown in	[1	ĺ	}	1
	Part X, line 6 for each year listed		/		ì	}
С	"Support" alternative test – enter					1
	(1) Total support other than gross		/)		ì
	investment income (interest,			})	Ì
	dividends, rents, payments on				}	ļ
	securities loans (section		l /	[Į.
	512(a)(5)), or royalties)	ļ	-/			
	(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					ł
	(4) Gross investment income					
Pa	art XV Supplementary Inform	nation (Complete	this part only if t	he foundation ha	d \$5 000 or more	in assets at
	any time during the ye	• •	•	ile louridation ha	a 40,000 or more	in assets at
1	Information Regarding Foundation Ma					
а	List any managers of the foundation who i		than 2% of the total cor	atributions received by t	he foundation	
-	before the close of any tax year (but only i			•	ne roundation	
	N/A	r they have contributed	111010 111011 40,000) (01	sc sccion 507 (d)(2))		
b	List any managers of the foundation who	own 10% or more of the	stock of a corporation	(or an equally large no	ttion of the	
•	ownership of a partnership or other entity)		· · · · · · · · · · · · · · · · · · ·		ruon or the	
	N/A	or which the loaneage	irriad a 1070 or greater	interest		
2	Information Regarding Contribution, G	irant Gift Loan Scho	plarship etc. Program			
_	Check here ► X if the foundation only				e not accent	
	unsolicited requests for funds. If the found					
			its, etc., to individuals o	i organizations under o	mer conditions,	
	complete items 2a, b, c, and d See instru The name, address, and telephone number		ha naraan ta whom ann	Nections should be add		
а		er or email address or t	he person to whom app	nications should be add	ressea	
	N/A					
	The form on the boundaries of the state of t		ion and restaurt it.	alan and an alandara		
b	The form in which applications should be	supmitted and informat	ion and materials they s	enonia lucinas.		
	N/A					
С	Any submission deadlines					
	N/A		dana a boatot e e co	- Insula of the		
d	Any restrictions or limitations on awards, s	such as by geographica	ii areas, charitable field	s, kinas of institutions, (or other	
	factors					
	N/A					

Part XV ' Supplementary Information (continued) 3 Grants and Contributions Paid During the Year or Approved for Future Payment If recipient is an individual, Foundation Recipient Purpose of grant or show any relationship to status of Amount алу foundation manager contribution recipient Name and address (home or business) or substantial contributor a Paid during the year CYSTIC FIBROSIS FOUNDATION 6931 ARLINGTON ROAD BETHESDA MD 20814 MEDICAL RESEARCH 500 ROSE PARK MIDDLE SCHOOL 1025 9TH AVE S NASHVILLE TN 37203 EDUCATION AND YOUTH SPORTS 6,000 ARC OF CALHOUN & CLEBURNE COUNTIES 20 W 14TH ST ANNISTON AL 36201 SUPPORT FOR PEOPLE WITH DISABILITIES 3,000 ST THOMAS HEALTH FOUNDATION 4220 HARDING ROAD NASHVILLE TN 37205 HEALTH CARE 600 Total ▶ 3a 10,100 Approved for future payment N/A **Total ▶** 3b

Enter arcee amo		ctivities				
Linei gross anio	unts unless otherwise indicated	Unrelate (a) Business code	d business income (b) Amount	(c) Exclusion code	1 by section 512, 513, or 514 (d) Amount	(e) Related or exempt function income
1 Program ser	vice revenue					(See instructions)
a			<u></u>			
b		_				
	·					
d		_				
			<u> </u>			
f	·	_		_		
g Fees an	d contracts from government agencies			_]		
2 Membership	dues and assessments					
3 Interest on s	avings and temporary cash investments					
4 Dividends ar	nd interest from securities			14	2,846	
5 Net rental in	come or (loss) from real estate					
a Debt-fina	anced property					
b Not debt	-financed property	L				
6 Net rental in	come or (loss) from personal property					
7 Other invest	ment income			<u> </u>		
8 Gain or (loss) from sales of assets other than inventory			14	1,258	2,657
9 Net income	or (loss) from special events					
10 Gross profit	or (loss) from sales of inventory					
11 Other reveni	ue a					
						
е						
12 Subtotal Ad	d columns (b), (d), and (e)			0	4,104	2,657
13 Total. Add is	ne 12, columns (b), (d), and (e)	<u> </u>			13	
(See worksheet	n line 13 instructions to verify calculations)					
Part XVI-B	Relationship of Activities to the	Accomplishme	ent of Exempt P	urposes		
Line No. ▼	Explain below how each activity for which income accomplishment of the foundation's exempt purp)
N/A	,					
		· · · · · · · · · · · · · · · · · · ·				

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Page 13

		Exempt Organiza	ations								
1		inization directly or indi		in any of the follow	ving with any other	er organization d	escribed			Yes	No
	in section 50	01(c) (other than section	on 501(c)(3) o	organizations) or in	section 527, rela	ting to political			ſ		
	organization	s?							- 1		É
а	Transfers fro	om the reporting found:	ation to a non	ncharitable exempt	organization of.				- }		Ė
	(1) Cash							Į.	1a(1)		<u>X</u>
	(2) Other as	ssets							1a(2)		X
b	Other transa	actions									Ė
	(1) Sales of	fassets to a nonchanta	ble exempt o	organization				<u> </u>	1b(1)		<u>X</u>
	(2) Purchas	ses of assets from a no	ncharitable e	xempt organization					1b(2)		X
	(3) Rental o	of facilities, equipment,	or other asse	ets				1	1b(3)		X
	(4) Reimbu	rsement arrangements						<u> </u>	1b(4)		X
	(5) Loans o	r loan guarantees						į	1b(5)		X
(6) Performance of services or membership or fundraising solicitations]:	1b(6)		X
	•	acilities, equipment, ma	•	•				Į	1c		X
d		r to any of the above is									
		goods, other assets, or	=								
		transaction or sharing									
	(a) Line no	(b) Amount involved	(c) Nam	ne of nonchantable exemp	t organization	(d) De:	scription of transfers, tra	ansactions, and sharing arrai	ngement	ts	
1/7	<u>A</u>										
		 						 			
		 	 								
		 				ļ 					
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			ļ								
		 	 								
							, , , , , , , , , , , , , , , , , , , 				
			 								
_			 								
2a	Is the founda	ation directly or indirect	v affiliated w	ith or related to on	e or more tax-ex	emot organization	ons				
		section 501(c) (other t				omprorgamean	, .	٢	Ye	s X	No
ь		plete the following sch		(.) (.)		•		L			,
		a) Name of organization		(b) Type of or	rganization		(c) Descrip	tion of relationship			
]	N/A										
		nalties of perjury, I declare than domplete. Declaration of p						knowledge and belief, it is t	rue,		
	conect, an	id complete Declaration of p	reparer (outer ut	an taxpayer) is based or	tali iliointiadon of wi	iich preparer has any	Kilowiedge	May the IRS discus	s this ref	turn	\Box
Sigi	ע וי	1	0					with the preparer st			ا ۱۰۰
ler		Solve SH	lso	$n \mid \delta \alpha \alpha$	0 15	2/2018		See instructions	X	168	No
		una /				7-72-70	PRES	IDENT			
	Signa	ature of officer or trustee		U	Date		Title				
	Pnnt/Ty _i	pe preparer's name			Preparer's signature			Date		Check	
aid					11/21/1	10		1	1	self-em	" لـــ ployed
	arer WALLA	ACE E. LYONS			WILL	Z G_		05/02			
•	Only Firm's n			RGAN, P.C.				PTIN PO1	_		
-3C	Firm's a	ddress ► 105 N		REET		/)		Firm's EIN ▶ 63-1			
		CENT	RE, AL	35960		<u></u>		Phone no 256			
								Fo	.m 99	10-PF	(2017)

Schedule B (Form 990, 990-EZ,

or 990-PF)
Department of the Treasury
Internal Revenue Service

Name of the organization

Schedule of Contributors

► Attach to Form 990, Form 990-EZ, or Form 990-PF.

► Go to www.irs.gov/Form990 for the latest information.

OMB No 1545-0047

2017

Employer identification number

Schedule B (Form 990, 990-EZ, or 990-PF) (2017)

CLAUDE L NEL	SON CHARITABLE			
FOUNDATION 63-1082768				
Organization type (check	one)			
Filers of:	Section:			
F 000 000 F7	n 990 or 990 E7 S01(c) (enter cumber) organization			
Form 990 or 990-EZ	501(c)() (enter number) organization			
	4947(a)(1) nonexempt charitable trust not treated as a private foundation	ion		
	527 political organization			
Form 990-PF	X 501(c)(3) exempt private foundation			
	4947(a)(1) nonexempt charitable trust treated as a private foundation			
	501(c)(3) taxable private foundation			
, -	s covered by the General Rule or a Special Rule.)(7), (8), or (10) organization can check boxes for both the General Rule and a Sp	pecial Rule See		
General Rule				
X For an organization	n filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions t	totaling \$5,000		
	or property) from any one contributor Complete Parts I and II See instructions fo	-		
contributor's total c	contributions			
Special Rules				
For an organization	n described in section 501(c)(3) filing Form 990 or 990-EZ that met the 331/3% sup	pport test of the		
regulations under s	sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 99	00-EZ), Part II, line		
	d that received from any one contributor, during the year, total contributions of the of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Compl	~		
\$5,000, 01 (2) 2% 0	of the amount on (i) Form 990, Fart Vill, line 111, or (ii) Form 990-E2, line 1. Compi	iele Parts i and ii		
	n described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that receive	-		
· -	the year, total contributions of more than \$1,000 exclusively for religious, chantab anal purposes, or for the prevention of cruelty to children or animals. Complete Pai			
_				
	n described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that receive the year, contributions <i>exclusively</i> for religious, charitable, etc., purposes, but no :	•		
•	d more than \$1,000 If this box is checked, enter here the total contributions that			
	an exclusively religious, charitable, etc., purpose. Don't complete any of the parts			
• •	lies to this organization because it received nonexclusively religious, charitable, et			
totaling \$5,000 or n	nore dunng the year	▶ \$		
•	hat isn't covered by the General Rule and/or the Special Rules doesn't file Schedu	•		
· · · · · · · · · · · · · · · · · · ·	nust answer "No" on Part IV, line 2, of its Form 990; or check the box on line H of to certify that it doesn't meet the filing requirements of Schedule B (Form 990, 99			

For Paperwork Reduction Act Notice, see the instructions for Form 990, 990-EZ, or 990-PF.

PAGE 1 OF 1

Name of organization CLAUDE L NELSON CHARITABLE

Employer identification number 63-1082768

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	WILLIAM HENRY AND LESA AGEE 700 12TH AVE S, UNIT 1212 NASHVILLE TN 37203-3432	\$ 100,000	Person X Payroll Noncash (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
110.		\$	Person Payroll Noncash (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person Payroll Noncash (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person Payroll Noncash (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person Payroll Noncash (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person Payroll Noncash (Complete Part II for noncash contributions)

NELFOUND768 CLAUDE L NELSON CHARITABLE 63-1082768 FYE: 12/31/2017

5/2/2018 10:20 AM

Statement 4 - Form	990-PF,	Part II, Line 1	0b - Col	990-PF, Part II, Line 10b - Corporate Stock Investment	Investments		
Description	Be	Seginning of Year		End of Year	Basis of Valuation	ш	Fair Market Value
DFA COMMODITY STRATEGY	န	7,590	w	7,852	COST	٠	8,703
DFA EMERGING MKTS CORE		9,159		9,406	COST		13,089
DFA GLOBAL REAL ESTATE		7,858		8,150	COST		8,140
DEA INTL VECTOR EQTY		21,576		28,252	COST		36,368
DFA US MICRO CAP PORT		13,788		19,691	COST		22,721
DF US VECTOR EQIY PORT	}	24,375		38,521	COST		45,763
TOTAL	ς, V	84,346	w.	111,872		s,	134,784

	Fair Market Value	\$ 3,936 5,818	\$ 9,754
Bond Investments	Basis of Valuation	COST	
porate Bond	End of Year	3,998 5,861	9,859
10c - Corporate I	ļ	တ	\$
-PF, Part II, Line 10	Beginning of Year	3,998	11,928
990		တ	S
Statement 5 - Form	Description	ISHARE CORE US BOND ISHARE TIPS BOND	TOTAL