

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

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

▶ Do not enter social security numbers on this form as it may be made public.
▶ Go to www.irs.gov/Form990PF for instructions and the latest information.

OMB No 1545-0052

2018

Open to Public Inspection

For calendar year 2018 or tax year beginning

, and ending

Name of foundation ANONYMOUS TRUST U/A DATED 2-4-2008		A Employer identification number 26-6220561
Number and street (or P.O. box number if mail is not delivered to street address) PO BOX 31143		B Telephone number (919) 571-3332
City or town, state or province, country, and ZIP or foreign postal code RALEIGH, NC 27622		C If exemption application is pending, check here ☐
G Check all that apply: ☐ Initial return ☐ Initial return of a former public charity ☐ Final return ☐ Amended return ☐ Address change ☐ Name change		D 1. Foreign organizations, check here ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ☐
H Check type of organization: ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here ☐
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 193,501,664.		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐
J Accounting method ☒ Cash ☐ Accrual ☐ Other (specify) _____		

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1	Contributions, gifts, grants, etc., received			N/A	
2	Check ☒ if the foundation is not required to attach Sch. B				
3	Interest on savings and temporary cash investments				
4	Dividends and interest from securities	4,883,989.	4,759,557.		STATEMENT 1
5a	Gross rents				
b	Net rental income or (loss)				
6a	Net gain or (loss) from sale of assets not on line 10	7,021,893.			
b	Gross sales price for all assets on line 6a	20,054,330.			
7	Capital gain net income (from Part IV, line 2)		7,021,893.		
8	Net short-term capital gain				
9	Income modifications				
10a	Gross sales less returns and allowances				
b	Less: Cost of goods sold				
c	Gross profit or (loss)				
11	Other income	689.	689.		STATEMENT 2
12	Total. Add lines 1 through 11	11,906,571.	11,782,139.		
13	Compensation of officers, directors, trustees, etc	365,000.	0.		365,000.
14	Other employee salaries and wages				
15	Pension plans, employee benefits	70,994.	0.		70,994.
16a	Legal fees STMT 3	18,540.	0.		18,540.
b	Accounting fees STMT 4	23,150.	0.		23,150.
c	Other professional fees STMT 5	173,464.	171,606.		0.
17	Interest				
18	Taxes STMT 6	257,061.	0.		0.
19	Depreciation and depletion				
20	Occupancy	19,500.	0.		500.
21	Travel, conferences, and meetings	3,434.	0.		434.
22	Printing and publications	101.	0.		101.
23	Other expenses STMT 7	43,810.	0.		810.
24	Total operating and administrative expenses. Add lines 13 through 23	975,054.	171,606.		544,529.
25	Contributions, gifts, grants paid	5,814,971.			5,814,971.
26	Total expenses and disbursements. Add lines 24 and 25	6,790,025.	171,606.		6,359,500.
27	Subtract line 26 from line 12:				
a	Excess of revenue over expenses and disbursements	5,116,546.			
b	Net investment income (if negative, enter -0-)		11,610,533.		
c	Adjusted net income (if negative, enter -0-)			N/A	

 SCANNED MAY 09 2018 Revenue
Operating and Administrative Expenses

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Part II Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only				Beginning of year	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		6,424,587.	4,850,127.	4,850,127.
	3	Accounts receivable ▶				
		Less: allowance for doubtful accounts ▶				
	4	Pledges receivable ▶				
		Less: allowance for doubtful accounts ▶				
	5	Grants receivable				
	6	Receivables due from officers, directors, trustees, and other disqualified persons				
	7	Other notes and loans receivable ▶				
		Less: allowance for doubtful accounts ▶				
	8	Inventories for sale or use				
	9	Prepaid expenses and deferred charges				
	10a	Investments - U.S. and state government obligations STMT 10		24,866,694.	24,422,418.	24,823,178.
	b	Investments - corporate stock STMT 11		63,396,011.	67,158,992.	135,814,900.
	c	Investments - corporate bonds STMT 12		23,232,416.	27,093,270.	26,129,559.
	Liabilities	11	Investments - land, buildings, and equipment basis ▶			
		Less: accumulated depreciation ▶				
12		Investments - mortgage loans				
13		Investments - other STMT 13		2,654,597.	2,152,191.	1,883,900.
14		Land, buildings, and equipment: basis ▶				
		Less: accumulated depreciation ▶				
15		Other assets (describe ▶)				
16		Total assets (to be completed by all filers - see the instructions. Also, see page 1, item I)		120,574,305.	125,676,998.	193,501,664.
17		Accounts payable and accrued expenses				
18		Grants payable				
Net Assets or Fund Balances	19	Deferred revenue				
	20	Loans from officers, directors, trustees, and other disqualified persons				
	21	Mortgages and other notes payable				
	22	Other liabilities (describe ▶ STATEMENT 14)		43,231.	55,540.	
	23	Total liabilities (add lines 17 through 22)		43,231.	55,540.	
Net Assets or Fund Balances		Foundations that follow SFAS 117, check here ☐ 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 ☒ and complete lines 27 through 31.				
	27	Capital stock, trust principal, or current funds		120,531,074.	125,621,458.	
	28	Paid-in or capital surplus, or land, bldg., and equipment fund		0.	0.	
	29	Retained earnings, accumulated income, endowment, or other funds		0.	0.	
	30	Total net assets or fund balances		120,531,074.	125,621,458.	
	31	Total liabilities and net assets/fund balances		120,574,305.	125,676,998.	

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	120,531,074.
2	Enter amount from Part I, line 27a	2	5,116,546.
3	Other increases not included in line 2 (itemize) ▶ SEE STATEMENT 8	3	200,547.
4	Add lines 1, 2, and 3	4	125,848,167.
5	Decreases not included in line 2 (itemize) ▶ SEE STATEMENT 9	5	226,709.
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	125,621,458.

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Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (for example, real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a PUBLICLY TRADED SECURITIES NORTHERN TRUST	P		
b PUBLICLY TRADED SECURITIES RAYMOND JAMES	P		
c QWEST	P		
d CAPITAL GAINS DIVIDENDS			
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 11,171,662.		7,940,995.	3,230,667.
b 8,381,008.		4,550,865.	3,830,143.
c 500,000.		540,577.	-40,577.
d 1,660.			1,660.
e			

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

(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a			3,230,667.
b			3,830,143.
c			-40,577.
d			1,660.
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	7,021,893.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6)	{ If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8 }	3	N/A

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

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

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

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

☐ Yes ☒ No

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2017	13,964,168.	200,939,223.	.069494
2016	9,277,637.	180,666,764.	.051352
2015	9,018,637.	186,932,251.	.048245
2014	6,458,740.	183,614,108.	.035176
2013	8,140,598.	171,357,134.	.047507

2 Total of line 1, column (d)	2	.251774
3 Average distribution ratio for the 5-year base period - divide the total on line 2 by 5.0, or by the number of years the foundation has been in existence if less than 5 years	3	.050355
4 Enter the net value of noncharitable-use assets for 2018 from Part X, line 5	4	207,434,231.
5 Multiply line 4 by line 3	5	10,445,351.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	116,105.
7 Add lines 5 and 6	7	10,561,456.
8 Enter qualifying distributions from Part XII, line 4	8	6,359,500.

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.

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

1a Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)			
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☐ and enter 1% of Part I, line 27b		1	232,211.
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	232,211.
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	232,211.
6 Credits/Payments:			
a 2018 estimated tax payments and 2017 overpayment credited to 2018	6a	240,000.	
b Exempt foreign organizations - tax withheld at source	6b	0.	
c Tax paid with application for extension of time to file (Form 8868)	6c	0.	
d Backup withholding erroneously withheld	6d	0.	
7 Total credits and payments. Add lines 6a through 6d		7	240,000.
8 Enter any penalty for underpayment of estimated tax. Check here ☐ 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	
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid		10	7,789.
11 Enter the amount of line 10 to be: Credited to 2019 estimated tax ☐ 7,789. Refunded ☐		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	X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition. 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.	1b	X
c Did the foundation file Form 1120-POL for this year?	1c	X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation ☐ \$ 0. (2) On foundation managers ☐ \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ☐ \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.	2	X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes	3	X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a	X
b If "Yes," has it filed a tax return on Form 990-T for this year?	4b	
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T	5	X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	X
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV	7	X
8a Enter the states to which the foundation reports or with which it is registered. See instructions. <u>NC</u>		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	8b	X
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2018 or the tax year beginning in 2018? See the instructions for Part XIV. If "Yes," complete Part XIV	9	X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10	X

N/A

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Part VII-A Statements Regarding Activities (continued)

	Yes	No
11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule. See instructions		X
12 Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement. See instructions		X
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	X	
Website address N/A		
14 The books are in care of THE NORTHERN TRUST COMPANY Telephone no. (312) 630-6000 Located at 50 SOUTH LASALLE STREET, CHICAGO, IL ZIP+4 60603		
15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - check here and enter the amount of tax-exempt interest received or accrued during the year	15	N/A
16 At any time during calendar year 2018, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country		X

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

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.

	Yes	No
1a During the year, did the foundation (either directly or indirectly)		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	☐ Yes ☒ No	
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	☐ Yes ☒ No	
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	☐ Yes ☒ No	
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	☐ Yes ☒ No	
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	☐ Yes ☒ No	
(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)	☐ Yes ☒ No	
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions. Organizations relying on a current notice regarding disaster assistance, check here	N/A	
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 2018?		X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)).		
a At the end of tax year 2018, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2018? If "Yes," list the years	☐ Yes ☒ No	
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.)	N/A	
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	☐ Yes ☒ No	
b If "Yes," did it have excess business holdings in 2018 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 2018.)	N/A	
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2018?		X

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Part VII-B	Statements Regarding Activities for Which Form 4720 May Be Required <i>(continued)</i>
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5a During the year, did the foundation pay or incur any amount to:

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☒ No

(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☒ No

(3) Provide a grant to an individual for travel, study, or other similar purposes? ☒ Yes ☐ No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions ☐ Yes ☒ No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☒ No

b If any answer is "Yes" to 5a(1)-(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance? See instructions

Organizations relying on a current notice regarding disaster assistance, check here  ☐

c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? **N/A** ☐ Yes ☐ No

If "Yes," attach the statement required by Regulations section 53.4945-5(d)

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? ☐ Yes ☒ No

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? ☐ Yes ☒ No

If "Yes" to 6b, file Form 8870.

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☒ No

b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction? **N/A**

8 Is the foundation subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment(s) during the year? ☐ Yes ☒ No

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

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

[illegible]

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

[illegible]**Total number of other employees paid over \$50,000** $\overline{0}$

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

3 Five highest-paid independent contractors for professional services. If none, enter "NONE."

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
THE NORTHERN TRUST COMPANY		
50 SOUTH LASALLE STREET, CHICAGO, IL 60603	INVESTMENT ADVISORY	100,776.
RAYMOND JAMES & ASSOCIATES, INC. - 3515		
GLENWOOD AVENUE, STE 200, RALEIGH, NC 27612	INVESTMENT ADVISORY	72,688.

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 N/A	
2	
3	
4	

Part IX-B Summary of Program-Related Investments

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

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	210,593,128.
b	Average of monthly cash balances	1b	
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	210,593,128.
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	210,593,128.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	3,158,897.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	207,434,231.
6	Minimum investment return. Enter 5% of line 5	6	10,371,712.

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	10,371,712.
2a	Tax on investment income for 2018 from Part VI, line 5	2a	232,211.
b	Income tax for 2018. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	232,211.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	10,139,501.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	10,139,501.
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	10,139,501.

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	6,359,500.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8; and Part XIII, line 4	4	6,359,500.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	0.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	6,359,500.

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.

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Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2017	(c) 2017	(d) 2018
1 Distributable amount for 2018 from Part XI, line 7				10,139,501.
2 Undistributed income, if any, as of the end of 2018				
a Enter amount for 2017 only			4,257,868.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2018:				
a From 2013				
b From 2014				
c From 2015				
d From 2016				
e From 2017				
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2018 from Part XII, line 4. ▶ \$ 6,359,500.				
a Applied to 2017, but not more than line 2a			4,257,868.	
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 2018 distributable amount				2,101,632.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2018 (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	0.			
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 2017. Subtract line 4a from line 2a Taxable amount - see instr.			0.	
f Undistributed income for 2018. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2019				8,037,869.
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 2013 not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2019. Subtract lines 7 and 8 from line 6a	0.			
10 Analysis of line 9:				
a Excess from 2014				
b Excess from 2015				
c Excess from 2016				
d Excess from 2017				
e Excess from 2018				

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

- 1** a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2018, enter the date of the ruling ▶
- b** Check box to indicate whether the foundation is a private operating foundation described in section ☐ 4942(j)(3) or ☐ 4942(j)(5)

	Prior 3 years				(e) Total
	Tax year (a) 2018	(b) 2017	(c) 2016	(d) 2015	
2 a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon:					
a "Assets" alternative test - enter:					
(1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test - enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed					
c "Support" alternative test - enter:					
(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

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

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

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

- 2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:**
- Check here ☐ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc., to individuals or organizations under other conditions, complete items 2a, b, c, and d.

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

SEE STATEMENT 16

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

- c** Any submission deadlines:

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

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year SEE ATTACHED STATEMENT 17				5,814,971.
Total				5,814,971.
b Approved for future payment SEE ATTACHED STATEMENT 18				4,808,500.
Total				4,808,500.

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Enter gross amounts unless otherwise indicated		Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income	
		(a) Business code	(b) Amount	(c) Exclu- sion code	(d) Amount		
1	Program service revenue:						
a							
b							
c							
d							
e							
f							
g	Fees and contracts from government agencies						
2	Membership dues and assessments						
3	Interest on savings and temporary cash investments						
4	Dividends and interest from securities			14	4,883,989.		
5	Net rental income or (loss) from real estate						
a	Debt-financed property						
b	Not debt-financed property						
6	Net rental income or (loss) from personal property						
7	Other investment income			14	689.		
8	Gain or (loss) from sales of assets other than inventory			18	7,021,893.		
9	Net income or (loss) from special events						
10	Gross profit or (loss) from sales of inventory						
11	Other revenue:						
a							
b							
c							
d							
e							
12	Subtotal. Add columns (b), (d), and (e)		0.		11,906,571.		0.
13	Total. Add line 12, columns (b), (d), and (e)					13	11,906,571.

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

[illegible]

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

1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c)(3) (other than section 501(c)(3) organizations) or in section 527, relating to political organizations? a Transfers from the reporting foundation to a noncharitable exempt organization of: (1) Cash (2) Other assets b Other transactions: (1) Sales of assets to a noncharitable exempt organization (2) Purchases of assets from a noncharitable exempt organization (3) Rental of facilities, equipment, or other assets (4) Reimbursement arrangements (5) Loans or loan guarantees (6) Performance of services or membership or fundraising solicitations c Sharing of facilities, equipment, mailing lists, other assets, or paid employees d If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received.	Yes	No	
	1a(1)		X
	1a(2)		X
	1b(1)		X
	1b(2)		X
	1b(3)		X
	1b(4)		X
	1b(5)		X
	1b(6)		X
	1c		X

[illegible]

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) (other than section 501(c)(3)) or in section 527?

☐ Yes ☒ No

b If "Yes," complete the following schedule.

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

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

Sign Here
Marie M. [Signature]
4/1/2019
Trustee

Signature of officer or trustee
 Date
 Title

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

Paid Preparer Use Only	Print/Type preparer's name	Preparer's signature	Date	Check ☒ if self-employed	PTIN
	SEREITA M. POWERS	<i>Sereita M. Powers</i>	3/15/19		P01200944
	Firm's name ▶ SEREITA M. POWERS			Firm's EIN ▶	
	Firm's address ▶ 8065 LASATER ROAD CLEMMONS, NC 27012			Phone no. 336-999-7461	

FORM 990-PF	DIVIDENDS AND INTEREST FROM SECURITIES	STATEMENT	1
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SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
RAYMOND JAMES	1,371,742.	119.	1,371,623.	1,371,623.	
THE NORTHERN TRUST CO MKT DISC & PREM NOT IN 1099	341.	0.	341.	341.	
THE NORTHERN TRUST COMPANY	3,513,566.	1,541.	3,512,025.	3,387,593.	
TO PART I, LINE 4	4,885,649.	1,660.	4,883,989.	4,759,557.	

FORM 990-PF	OTHER INCOME	STATEMENT	2
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DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
THE NORTHERN TRUST COMPANY 1099-MISC	689.	689.	
TOTAL TO FORM 990-PF, PART I, LINE 11	689.	689.	

FORM 990-PF	LEGAL FEES	STATEMENT	3
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
LEGAL FEES	18,540.	0.		18,540.
TO FM 990-PF, PG 1, LN 16A	18,540.	0.		18,540.

FORM 990-PF	ACCOUNTING FEES	STATEMENT	4
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING FEES	8,650.	0.		8,650.
BOOKKEEPING FEES	14,500.	0.		14,500.
TO FORM 990-PF, PG 1, LN 16B	23,150.	0.		23,150.

FORM 990-PF	OTHER PROFESSIONAL FEES	STATEMENT	5
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FIDUCIARY FEES THE NORTHERN TRUST COMPANY	100,776.	98,918.		0.
FIDUCIARY FEES RAYMOND JAMES & ASSOCIATES, INC.	72,688.	72,688.		0.
TO FORM 990-PF, PG 1, LN 16C	173,464.	171,606.		0.

FORM 990-PF	TAXES	STATEMENT	6
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FOREIGN TAXES PAID ON DIVIDENDS	15,942.	0.		0.
EXCISE TAX	241,119.	0.		0.
TO FORM 990-PF, PG 1, LN 18	257,061.	0.		0.

FORM 990-PF	OTHER EXPENSES	STATEMENT	7
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
POSTAGE, MAILING SERVICE	759.	0.		759.
OFFICE EXPENSE	4,893.	0.		4,893.
TELEPHONE	2,347.	0.		2,347.
INSURANCE (OTHER THAN HEALTH)	1,904.	0.		1,904.
MEMBERSHIP, DUES & SUBSCRIPTIONS	5,086.	0.		5,086.
BUSINESS GIFTS	682.	0.		682.
COMPUTER & WEB EXPENSE	12,905.	0.		12,905.
MEALS	1,498.	0.		1,498.
MILEAGE REIMBURSEMENT	13,556.	0.		13,556.
CONTRACT LABOR	180.	0.		180.
TO FORM 990-PF, PG 1, LN 23	43,810.	0.		43,810.

FORM 990-PF	OTHER INCREASES IN NET ASSETS OR FUND BALANCES	STATEMENT	8
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DESCRIPTION	AMOUNT
INTEREST AND DIVIDENDS RECEIVED IN 2018 FOR 2017	198,093.
2017 ACCRUED INTEREST PAID REDUCING 2018 INCOME	2,454.
TOTAL TO FORM 990-PF, PART III, LINE 3	200,547.

FORM 990-PF	OTHER DECREASES IN NET ASSETS OR FUND BALANCES	STATEMENT	9
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DESCRIPTION	AMOUNT
INTEREST AND DIVIDENDS RECEIVED IN 2019 FOR 2018	224,118.
2018 ACCRUED INTEREST PAID REDUCING 2019 INCOME	1,093.
NONDEDUCTIBLE MEALS	1,498.
TOTAL TO FORM 990-PF, PART III, LINE 5	226,709.

FORM 990-PF	U.S. AND STATE/CITY GOVERNMENT OBLIGATIONS	STATEMENT	10
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DESCRIPTION	U.S. GOV'T	OTHER GOV'T	BOOK VALUE	FAIR MARKET VALUE
SEE ATTACHED SCHEDULE		X	24,422,418.	24,823,178.
TOTAL U.S. GOVERNMENT OBLIGATIONS				
TOTAL STATE AND MUNICIPAL GOVERNMENT OBLIGATIONS			24,422,418.	24,823,178.
TOTAL TO FORM 990-PF, PART II, LINE 10A			24,422,418.	24,823,178.

FORM 990-PF	CORPORATE STOCK	STATEMENT	11
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
SEE ATTACHED SCHEDULE	67,158,992.	135,814,900.
TOTAL TO FORM 990-PF, PART II, LINE 10B	67,158,992.	135,814,900.

FORM 990-PF	CORPORATE BONDS	STATEMENT	12
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
SEE ATTACHED SCHEDULE	27,093,270.	26,129,559.
TOTAL TO FORM 990-PF, PART II, LINE 10C	27,093,270.	26,129,559.

FORM 990-PF	OTHER INVESTMENTS	STATEMENT	13
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DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
SEE ATTACHED SCHEDULE	COST	2,152,191.	1,883,900.
TOTAL TO FORM 990-PF, PART II, LINE 13		2,152,191.	1,883,900.

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	BEGINNING OF YEAR		END OF YEAR	
	(a) BOOK VALUE	(b) BOOK VALUE	(c) FAIR MARKET VALUE	
10a				
INVESTMENTS- U.S. AND				
STATE GOVERNMENT OBLIGATIONS				
ADELANTO CALIF PUB UTIL AUTH REV 4.25%	-	606,737		627,042
ADMINISTRATORS OF THE TULANE EDL FD LA REV 5.0%	450,000	450,000		525,760
ARIZONA BRD REGENTS CTFS PARTN 3.09%	246,800	246,800		247,485
BALDWIN CNTY ALA 4.25%	494,675	494,675		514,245
BRISTOL VA 4.888%	506,404	506,272		518,680
CANAVERAL FLA PORT AUTH REV 4.494%	512,161	511,719		506,525
CHARLESTON CNTY SC SPL SOURCE 3.535%	-	573,275		567,617
CHICAGO ILL BRD ED 4.882%	200,000	-		-
CHICAGO ILL BRD ED 5.082%	600,000	600,000		599,562
CLEARLAKE CALIF REDEV AGY SUCCESSOR AGY 4.0%	500,000	500,000		490,265
COLUMBUS-FRANKLIN CNTY OHIO FIN AUTH 3.3%	496,250	496,250		496,420
COMMONWEALTH FING AUTH PA REV 4.144%	504,839	504,684		505,265
CORPUS CHRISTI TEX REGL TRANSN AUTH SYS REV 6.1%	770,726	770,205		824,235
DUNDEE TWP ILL PK DIST 6.0%	132,707	132,707		158,493
EFFINGHAM CNTY GA INDL DEV AUTH 3.625%	726,247	726,247		744,351
FLORIDA HURRICANE CATASTROPHE FD 2.995%	306,437	304,337		300,393
FORT LAUDERDALE FL SPL OBLIG 5.143%	745,005	745,005		783,585
FULTON CNTY GA DEV AUTH REV 5.21%	507,043	506,687		543,455
GRAND PRAIRIE TEX SALES TAX REV 4.0%	475,018	471,480		463,095
GUILFORD CNTY NC PUB FACS CORP 4.564%	329,833	329,833		356,388
HAGERSTOWN MD 5.2%	253,041	252,720		253,558
HEALTH CARE AUTH FOR BAPTIST HEALTH ALA 5.5%	237,033	237,033		270,708
HIGH POINT NC LTD OBLIG 3.69%	-	500,531		489,440
ILLINOIS ST 5.727%	507,917	506,024		512,710
JACKSON OHIO CITY SCH DIST 2.35%	433,795	433,795		429,954
MADISON CNTY ILL CMNTY UNIT SCH DIST 2.9%	494,525	494,525		492,885
MISSISSIPPI ST 3.429%	250,000	250,000		249,563
MISSISSIPPI ST 3.529%	250,000	250,000		250,748
NC CAPS FACS FIN AGY EDL FACSREV	24,932	-		-
NC CAPS FACS FIN AGY EDL FACSREV	174,526	-		-
NC EASTN MUN PWR AGY PWR SYS REV SER	445,321	-		-
NC EASTN MUN PWR AGY PWR SYS REV SER	511,831	-		-
NC EASTN MUN PWR AGY PWR SYS REV SER	284,053	282,660		282,216

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LINE	BEGINNING OF YEAR	END OF YEAR	(c) FAIR MARKET	
	(a) BOOK VALUE	(b) BOOK VALUE	VALUE	VALUE
NC MED CARE COMMN HEALTH CARE FIRST	212,169	-	-	-
NC MED CARE COMMN HEALTH CARE FIRST	963,902	-	-	-
NC STATE UNIV NC RALEIGH REV 2.573%	869,759	869,759	863,756	863,756
NEW HAMPSHIRE ST HSG FIN AUTH 3 689%	446,916	376,470	377,584	377,584
NEW JERSEY ECONOMIC DEV AUTH REV 2 321%	248,828	-	-	-
NORTH AUGUSTA SC PUB FACS CORP REV 4 687%	510,847	510,503	504,535	504,535
NORTH CHARLESTON SC LTD OBLIG 4 049%	508,769	508,182	507,985	507,985
OAKLAND CALIF PENSION OBLIG 3 6%	509,967	506,737	507,535	507,535
OKLAHOMA DEV FNI AUTH LEASE REV 4.25%	446,903	446,736	444,250	444,250
PEORIA CNTY ILL SCH DIST NO 150 5 35%	250,000	250,000	255,993	255,993
PEORIA CNTY ILL SCH DIST NO 150 5 45%	160,000	160,000	163,941	163,941
PERRY CNTY KY SCH DIST FIN CORP 5 0%	311,053	310,415	316,410	316,410
PHENIX CITY ALA 5 25%	160,000	160,000	170,934	170,934
PHENIX CITY ALA 5 25%	337,667	337,667	362,851	362,851
RALEIGH DURHAM NC ARPT AUTH ARPT REV	510,658	510,897	526,778	526,778
ROYAL OAK MICH 4 524%	491,752	491,207	495,368	495,368
SAN FRANCISCO CALIF CITY & CNTY REDEV 4 375%	501,242	501,217	504,225	504,225
SOUTH CAROLINA JOBS ECONOMIC DEV AUTH 3 925%	1,335,915	1,333,823	1,271,018	1,271,018
SOUTHWEST HIGHER ED AUTH INC TEX REV 4 156%	444,375	444,375	512,385	512,385
ST LUCIE CNTY FLA REV 3 919%	-	494,320	498,945	498,945
SUMTER LANDING COMNTY DEV DIST FLA 2.155%	250,872	-	-	-
TAFT TEX INDPT SCH DIST 4 207%	532,310	531,243	519,695	519,695
UNION CITY CALIF CMNTY REDEV AGY SUCCESSOR 3.5%	260,000	260,000	265,717	265,717
UNIVERSITY HAWAII REV 3 28%	-	503,090	500,245	500,245
UNIVERSITY NC CHAPEL HILL REV3.326%	252,831	252,736	233,275	233,275
UNIVERSITY NC CHAPEL HILL REV 5 75%	508,840	508,840	513,645	513,645
UNIVERSITY NC CHARLOTTE REV TAXABLE	500,000	500,000	513,285	513,285
VICTOR VALLEY CALIF CMNTY COLLEGE DIST 3 498%	970,000	970,000	988,180	988,180
TOTAL LINE 10a (OTHER GOVERNMENT)	24,866,694	24,422,418	24,823,178	24,823,178

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			END OF YEAR SHARES HELD	BEGINNING OF YEAR			END OF YEAR	
				(a) BOOK VALUE	(b) BOOK VALUE	(c) FAIR MARKET VALUE		
10b	INVESTMENTS-CORPORATE STOCK							
	ABBOTT LABORATORIES		27,600	1,167,294	919,370	1,996,308		
	ANADARKO PETE CORPORATION		16,900	1,315,149	1,315,149	740,896		
	APPLE INCORPORATED		8,300	1,239,917	530,723	1,309,242		
	CARDINAL HEALTH, INC		14,700	636,334	-	-		
	CATERPILLAR INC DEL		11,950	1,396,527	1,115,516	1,518,487		
	CHEVRON CORPORATION		13,000	1,454,913	1,454,913	1,414,270		
	CIGNA CORP NEW COM		47	982	982	8,968		
	COCA-COLA COMPANY		32,800	1,232,344	1,232,344	1,553,080		
	COSTCO WHOLESALE CORPORATION		8,000	815,061	815,061	1,629,680		
	CVS HEALTH CORPORATION		10,200	-	749,983	668,304		
	DEERE & COMPANY		10,700	1,310,903	961,998	1,596,119		
	DISCOVER FINL SVCS COM		7,380	11,311	11,311	435,272		
	DOLLAR GENERAL CORP		16,650	935,874	747,975	1,799,532		
	DOWDUPONT INC		21,000	960,863	960,863	1,123,080		
	EXXON MOBIL CORPORATION		16,000	1,423,046	1,423,046	1,091,040		
	FEDEX CORPORATION		7,200	1,289,060	928,123	1,161,576		
	FIRST CITIZENS BANCSHARES INC NC CL A		73,080	260,292	251,896	27,554,814		
	GENERAL ELECTRIC CO		19,262	163,679	163,679	145,813		
	INTL BUSINESS MACHINES CORP		12,000	1,338,678	2,093,360	1,364,040		
	JPMORGAN CHASE & COMPANY		15,000	821,148	821,148	1,464,300		
	JOHNSON & JOHNSON		13,400	966,686	966,686	1,729,270		
	KANSAS CITY SOUTHERN COM NEW		6,500	-	745,335	620,425		
	KRAFT HEINZ COMPANY		16,800	774,962	774,962	723,072		
	LINCOLN NATIONAL CORP		216,500	9,392	9,392	11,108,615		
	MACQUARIE INFRASTRUCTURE CORPORATION		16,150	-	747,957	590,444		
	MCDONALDS CORP		12,000	1,099,845	1,099,845	2,130,840		
	MERCK & CO INC NEW		2,312	64,324	64,324	176,660		
	MFC SPDR S&P 500 ETF TRUST UNITS SER I		106,944	15,453,876	15,453,876	26,727,444		
	MFC ISHARES TR SELECT DIVID ETF FD		58,990	3,436,035	-	-		
	MFC ISHARES TR MSCI EAFE ETF FD		63,453	3,428,958	3,428,958	3,729,767		
	MFC ISHARES TR MSCI EMERGING MKTS INDEX FD ETF		41,233	1,721,698	1,721,698	1,610,561		
	MFC ISHARES TR RUSSELL 2000 ETF FD		41,258	3,425,046	3,425,046	5,524,446		
	MFC SPDR S&P MIDCAP 400 ETF TR UNIT SER		37,972	6,830,238	6,830,238	11,492,985		
	MORGAN STANLEY COM		14,760	57,276	57,276	585,234		

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	BEGINNING OF YEAR		END OF YEAR	
	(a) BOOK VALUE	(b) BOOK VALUE	(c) FAIR MARKET VALUE	
MOTOROLA SOLUTIONS, INC	14,400	1,031,638	829,632	1,656,576
NORFOLK SOUTHERN CORP	12,850	1,248,855	913,238	1,921,589
NUCOR CORP	5,000	163,786	163,786	259,050
PFIZER INC	44,200	1,172,031	1,172,031	1,929,330
PRINCIPAL FINL GROUP INC	100	-	-	4,417
PROCTER & GAMBLE CO	15,000	1,085,349	1,085,349	1,378,800
PUTNAM SHORT DURATION INCOME FUND CLASS A	620,659	-	6,237,613	6,219,006
PUTNAM SHORT DURATION INCOME FUND CLASS A	149,254	-	1,500,006	1,495,522
SOUTHERN COMPANY	10,000	444,516	444,516	439,200
UNITED PARCEL SVC INC CL B	14,800	1,161,299	1,161,299	1,443,444
UNITED PARCEL SVC INC CL B	5,000	310,300	310,300	487,650
VERIZON COMMUNICATIONS INC	20,700	907,630	907,630	1,163,754
VISA, INC COM CLASS A	15,200	828,390	610,053	2,005,488
YADKIN VY CO COM NEW	9	506	506	86,490
TOTAL LINE 10b		63,396,011	67,158,992	135,814,900

ANONYMOUS TRUST U/A DATED 2-4-2008
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LINE		BEGINNING OF YEAR		END OF YEAR	
		(a) BOOK VALUE	(b) BOOK VALUE	(c) FAIR MARKET VALUE	
10c	INVESTMENTS-CORPORATE BONDS				
	AMERITECH CAP FDG CORP 6 875%	361,160	356,155	320,772	
	ANALOG DEVICES INC 4 5%	306,173	305,958	283,247	
	ANALOG DEVICES INC 2 5%	-	493,120	488,075	
	APPLE INC 2 4%	246,125	246,125	241,733	
	APPLE INC 2 85%	-	251,961	250,305	
	ARCONIC INC 5.72%	490,230	-	-	
	AT&T INC 3 0%	249,200	249,200	243,813	
	AT&T INC 4 125%	257,285	256,541	244,301	
	AUTOZONE INC 2 5%	-	198,602	195,574	
	BARCLAYS BK PLC MEDIUM TERM NTS 5%	250,000	250,000	248,787	
	BELLSOUTH TELECOMMUNICATIONS INC 7 0%	479,051	470,505	457,748	
	BERKSHIRE HATHAWAY INC 3 0%	300,065	300,054	297,263	
	BOSTON UNIV 5 2%	253,669	253,669	278,775	
	CAPITAL ONE FINL CORP 3 75%	-	477,000	464,397	
	CBRE SVCS INC 4 875%	531,487	528,307	512,649	
	CBS CORP NEW 3 5%	504,765	504,196	476,574	
	CH ROBINSON WORLDWIDE INC 4 2%	-	497,400	501,403	
	COMCAST CABLE COMMUNICATIONS INC 8 5%	-	331,040	322,410	
	CONOCOPHILLIPS CO 3 35%	161,338	161,338	180,636	
	CVS HEALTH CORP 2 875%	48,628	48,628	45,541	
	DEERE & CO 2.6%	250,424	250,334	244,678	
	DEERE & CO 7.125%	286,981	282,180	269,644	
	DIRECTTV HLDGS LLC 5 15%	314,640	314,317	280,233	
	DIRECTTV HLDGS LLC 6 0%	308,857	308,664	303,087	
	DOLLAR GEN CORP NEW 3.25%	253,035	252,519	244,268	
	EDUCATION RLTY OPER PARTNERSHIP 4 6%	395,829	-	-	
	ENBRIDGE INC BNDS 3.5%	382,639	381,704	366,103	
	ENERGY TRANSFER PARTNERS L P 4 05%	162,384	162,384	169,878	
	ENERGY TRANSFER PARTNERS L P 4.75%	-	307,495	291,498	
	EQUIFAX INC NTS 2 3%	-	291,852	290,958	
	EXELON GENERATION CO LLC 4 0%	-	408,486	401,635	
	FEDEX CORP 3 9%	326,326	326,326	300,580	
	FEDEX CORP 3 3%	-	247,758	237,714	
	FORD MOTOR CO DEL 6.625%	692,901	684,183	593,589	
	FORD MOTOR CO LLC MED TRM NTS 4 6%	-	500,000	425,770	

ANONYMOUS TRUST U/A DATED 2-4-2008
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LINE

LINE		BEGINNING OF YEAR		END OF YEAR	
		(a) BOOK VALUE	(b) BOOK VALUE	(c) FAIR MARKET VALUE	
	GENERAL ELEC CAP CORP INTERNOTES 2 06586%	244,360	244,360	205,000	
	GEORGIA PWR CO 4 25%	501,897	501,523	503,870	
	HCA INC SR SEC'D NT 6 5%	-	524,140	512,500	
	HEWLETT PACKARD CO 6 0%	404,895	404,798	396,499	
	HORACE MANN EDUCATORS CORP NEW 4.5%	515,014	513,390	490,570	
	HORACE MANN SCH NEW YORK 2 476%	-	243,975	244,453	
	HYATT HOTELS CORP 4.85%	406,830	406,157	409,592	
	JEFFERIES GROUP LLC 5.0%	498,142	498,142	458,295	
	JOHNSON & JOHNSON 2 45%	304,641	304,140	281,765	
	JP MORGAN CHASE & CO 3 375%	249,965	249,965	244,533	
	KEMPER CORP DEL 4 35%	253,964	253,502	246,792	
	LAM RESH CORP 2 8%	252,426	251,754	247,215	
	L3 TECHNOLOGIES INC 3.85%	264,510	264,077	251,695	
	LEGG MASON INC 4 75%	413,535	412,183	408,728	
	MACY'S RETAIL HLDGS INC 4.5%	127,819	127,819	112,818	
	MARRIOTT INTERNATIONAL INC 4.5%	310,278	309,854	286,152	
	MISSION HEALTH SYS INC 4 424%	260,700	260,700	306,714	
	MORGAN STANLEY 3 95%	492,025	492,025	471,397	
	MORGAN STANLEY MEDIUM TERM 4 0%	254,584	253,998	245,032	
	MVC CAPITAL INC 6 25%	500,000	500,000	494,800	
	MPLX LP 4 875%	534,790	530,353	508,966	
	NORDSTROM INC 6 95%	300,494	296,638	276,500	
	NEW JERSEY BELL TEL CO 8.0%	288,108	280,245	280,434	
	OCEANEERING INTL INC 4.65%	510,999	509,620	394,931	
	PACCAR FINANCIAL CORP MTN 1.65%	-	433,554	433,832	
	PFIZER INC 2.75%	99,215	99,215	94,997	
	PROTECTIVE LIFE CORP 7 375%	507,708	506,045	513,977	
	QUEST DIAGNOSTICS INC 4.25%	505,476	504,723	510,295	
	QWEST CORP 7 0%	540,577	-	-	
	SHELL INTL FIN B V 4.3%	502,927	502,352	504,624	
	SOUTHERN POWER CO 4 15%	301,436	299,724	283,412	
	SPECTRA ENERGY PARTNERS LP 4.75%	539,861	534,275	513,839	
	TECH DATA CORP 4.95%	-	260,937	234,666	
	TEVA PHARMACEUTICAL FIN NETH 3 15%	47,268	47,268	38,161	
	THOMSON REUTERS CORPORATION 3 85%	379,808	376,796	349,918	
	THOMSON REUTERS CORPORATION 3.95%	258,185	256,230	251,080	

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LINE		BEGINNING OF YEAR		END OF YEAR	
		(a) BOOK VALUE	(b) BOOK VALUE	(c) FAIR MARKET VALUE	
	TIME WARNER COS INC 6 625%	307,195	303,213	295,823	
	TOYOTA MTR CR CORP MEDIUM TERM NTS	250,000	250,000	248,952	
	TRIANGLE CAPITAL CORP SR NTS 6 375%	509,841	-	-	
	TRIANGLE CAPITAL CORP UNSECURED NTS 6 375%	516,587	-	-	
	TUPPERWARE BRANDS CORP 4 75%	-	309,233	307,348	
	UNITED TECHNOLOGIES CORP 4 5%	263,758	263,050	263,512	
	VIACOM INC NEW 7 875%	164,491	161,847	149,527	
	VIACOM INC NEW 3 45%	243,590	243,590	233,618	
	W P CAREY INC 4 6%	313,276	310,869	300,407	
	WELLS FARGO & CO MEDIUM TERM NTS VAR RT	250,000	250,000	249,827	
	WELLS FARGO & CO MEDIUM TERM NTS VAR RT	500,000	500,000	477,920	
	WHIRLPOOL CORP MEDIUM TERM NTS 4 7%	528,049	522,169	511,655	
	WHIRLPOOL CORP MEDIUM TERM NTS 4.85%	-	419,746	409,685	
	ZIMMER BIOMET HLDGS INC 3 55%	-	207,075	199,595	
	TOTAL LINE 10c	23,232,416	27,093,270	26,129,559	

ANONYMOUS TRUST U/A DATED 2-4-2008
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TAX YEAR 2018

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LINE

	END OF YEAR SHARES HELD	BEGINNING OF YEAR		END OF YEAR	
		(a) BOOK VALUE	(b) BOOK VALUE	(c) FAIR MARKET VALUE	
13 INVESTMENTS-OTHER					
ENERGY LA LLC IST MTG BD 6%	20,000	540,714	540,714	475,100	
EQUITY COMWLTH SR NT	20,000	502,406	-	-	
RIVERNORTH MARKETPLACE LENDING CORP SER A	20,000	500,000	500,000	494,000	
TELEPHONE & DATA SYS INC PFD	20,000	554,382	554,382	465,800	
UNITED STATES CELLULAR CORP SR NT	20,000	557,095	557,095	449,000	
TOTAL LINE 13		2,654,597	2,152,191	1,883,900	

FORM 990-PF	OTHER LIABILITIES	STATEMENT	14
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DESCRIPTION	BOY AMOUNT	EOY AMOUNT
OUTSTANDING CHECKS(NET)	21,597.	7,403.
PAYROLL LIABILITIES WITHHELD	11,136.	11,637.
ACCRUED SEP	10,498.	36,500.
TOTAL TO FORM 990-PF, PART II, LINE 22	43,231.	55,540.

FORM 990-PF	PART VIII - LIST OF OFFICERS, DIRECTORS TRUSTEES AND FOUNDATION MANAGERS	STATEMENT	15
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NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN CONTRIB	EXPENSE ACCOUNT
ANNE B. FAIRCLOTH 207 N. CHESTNUT STREET CLINTON, NC 28328	TRUSTEE 0.00	0.	0.	0.
MARIA M. LYNCH PO BOX 30515 RALEIGH, NC 27622	TRUSTEE 0.00	0.	0.	0.
MARGARET TURLINGTON P.O. BOX 2087 CLINTON, NC 28329	SCHOLARSHIP COORDINATOR 30.00	50,000.	5,000.	0.
KIMBERLY K BREEDEN 16 NATURES WAY DUNN, NC 28334	SIMPLY EAST FUND DIRECTOR 40.00	140,000.	20,822.	0.
DEBORAH M AIKEN 1504 CONSETT COURT RALEIGH, NC 27613	EXECUTIVE DIRECTOR 40.00	175,000.	17,500.	0.
TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII		365,000.	43,322.	0.

FORM 990-PF

GRANT APPLICATION SUBMISSION INFORMATION
PART XV, LINES 2A THROUGH 2D

STATEMENT 16

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

MARGARET TURLINGTON, COORDINATOR
PO BOX 2087
CLINTON, NC 28329

TELEPHONE NUMBER

NAME OF GRANT PROGRAM

910-385-6716

THE SIMPLE GIFTS FUND SAMPSON COUNTY LOVE OF
LEARNING GRANT PROGRAM

RESTRICTIONS AND LIMITATIONS ON AWARDS

GRANTS FOR SCHOOLS UP TO \$3,000 AND INDIVIDUAL STIPENDS UP TO \$1,000 WILL BE AWARDED THREE TIMES ANNUALLY FOR THE ADVANCEMENT OF EDUCATORS AND THEIR STUDENTS, IN ORDER TO ENABLE TEACHERS TO PROVIDE ILLUMINATING PROGRAMS AND OPPORTUNITIES FOR STUDENTS IN THE CLASSROOM, AFTER SCHOOL, IN THE SUMMER OR ON WEEKENDS. THE GOAL IS TO INSPIRE THE IMPROVEMENT OF PUBLIC EDUCATION BY ENGAGING STUDENTS IN CRITICAL THINKING AND PROBLEM SOLVING THAT DEEPENS KNOWLEDGE OF SUBJECT MATTER. APPLICANTS MUST BE A TEN-MONTH TEACHER, GUIDANCE COUNSELOR OR MEDIA COORDINATOR IN A SAMPSON COUNTY OR CLINTON CITY PUBLIC K-12 SCHOOL; HAVE A MINIMUM OF TWO YEARS CLASSROOM TEACHING EXPERIENCE; BE A FULL TIME EDUCATOR SPENDING AT LEAST 50% OF THE TIME IN THE CLASSROOM OR A CLASSROOM-LIKE SETTING; HAVE THE INTENTION OF RETURNING TO TEACHING IN SAMPSON COUNTY IN THE CONSECUTIVE SCHOOL YEAR AND HAVE THE PROPOSAL REVIEWED AND APPROVED BY THE SCHOOL PRINCIPAL. GRANT FUNDS MAY BE USED FOR RESOURCE MATERIALS, SUPPLIES, EQUIPMENT, TRANSPORTATION, TECHNOLOGY OR STIPENDS. ALTHOUGH FUNDS MAY BE USED TO SUPPORT THE PROFESSIONAL DEVELOPMENT NECESSARY TO IMPLEMENT THE PROJECT, THE MAJORITY OF GRANT FUNDS MUST BE SPENT ON MATERIALS OR EDUCATIONAL EXPERIENCES FOR STUDENTS. EDUCATORS ARE ELIGIBLE TO APPLY OR REAPPLY FOR GRANTS IN SUBSEQUENT APPLICATION PERIODS. FUNDS MAY NOT BE USED FOR LOBBYING OR RELIGIOUS PURPOSES. \$300,096 TOTAL GRANTS WERE AWARDED IN 2018.

FORM 990-PF

GRANT APPLICATION SUBMISSION INFORMATION
PART XV, LINES 2A THROUGH 2D

STATEMENT 16

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

MARGARET TURLINGTON, COORDINATOR
PO BOX 2087
CLINTON, NC 28329

TELEPHONE NUMBER

NAME OF GRANT PROGRAM

910-385-6716

THE SIMPLE GIFTS SCHOLARSHIP PROGRAM

FORM AND CONTENT OF APPLICATIONS

SIMPLE GIFTS SCHOLARSHIP APPLICATION (AVAILABLE AT THE WEBSITE [HTTP://WWW.SIMPLEGIFTSFUND.ORG](http://www.simplegiftsfund.org)), A CURRENT RESUME, THREE RECOMMENDATIONS (TEACHER, PEER, ADDITIONAL), TRANSCRIPTS OF ACADEMIC RECORDS, A COPY OF THE US DEPARTMENT OF EDUCATION/STUDENT AID REPORT, A COPY OF THE FINANCIAL AWARD LETTER FROM THE COLLEGE/UNIVERSITY TO BE ATTENDED, A COPY OF THE LETTER(S) NOTIFYING THE APPLICANT OF SCHOLARSHIPS OR FELLOWSHIPS GRANTED.

ANY SUBMISSION DEADLINES

DECEMBER 1 FOR THE FOLLOWING ACADEMIC YEAR.

RESTRICTIONS AND LIMITATIONS ON AWARDS

THE SIMPLE GIFTS SCHOLARSHIP IS WORTH UP TO \$50,000 PER YEAR TO EARN A FOUR YEAR DEGREE AT AN OUT OF STATE LIBERAL ARTS COLLEGE OR UNIVERSITY. ELIGIBLE STUDENTS MUST BE A UNITED STATES CITIZEN AND A RESIDENT OF NORTH CAROLINA; HAVE ATTENDED A HIGH SCHOOL LOCATED IN SAMPSON COUNTY, NORTH CAROLINA FOR A MINIMUM OF TWO SCHOOL YEARS OR BE SCHEDULED TO COMPLETE A MINIMUM OF TWO YEARS AT THE TIME OF GRADUATION; BE SCHEDULED TO BECOME A HIGH SCHOOL GRADUATE IN THE YEAR OF THE APPLICATION OR BE A GRADUATE OF SAMPSON COMMUNITY COLLEGE; HAVE BEEN ACCEPTED INTO AND BE PLANNING TO ATTEND AN ACCREDITED LIBERAL ARTS COLLEGE OR UNIVERSITY; RANK IN THE TOP TWENTY-FIVE PERCENT OF HIS OR HER HIGH SCHOOL GRADUATING CLASS; AND HAVE AN UNMET FINANCIAL NEED. \$319,945 IN SCHOLARSHIPS WERE PAID IN 2018.

FORM 990-PF

GRANT APPLICATION SUBMISSION INFORMATION
PART XV, LINES 2A THROUGH 2D

STATEMENT 16

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

MARGARET TURLINGTON, COORDINATOR
PO BOX 2087
CLINTON, NC 28329

TELEPHONE NUMBER

NAME OF GRANT PROGRAM

910-385-6716

THE SIMPLE GIFTS FUND SAMPSON COUNTY TEACHERS
FELLOWSHIP GRANT PROGRAM

FORM AND CONTENT OF APPLICATIONS

APPLICANTS COMMITTING TO A SIX WEEK FULL TIME SUMMER PROJECT MUST SUBMIT A PERSONAL INFORMATION FORM WITH A DESCRIPTION OF THE PROJECT, A BUDGET AND A COPY OF A VALID NORTH CAROLINA TEACHING LICENSE ACCOMPANIED BY A RECOMMENDATION LETTER.

ANY SUBMISSION DEADLINES

PUBLICIZED ON THE SIMPLE GIFTS WEBSITE AND FLYERS TO SAMPSON COUNTY AND CLINTON CITY SCHOOLS.

RESTRICTIONS AND LIMITATIONS ON AWARDS

THE ONE TIME GRANTS ARE FOR \$8,000 EACH AND WILL NOT BE RENEWED. THE GRANTS ARE BASED SOLELY ON MERIT AND THE PROPOSALS WILL BE JUDGED ON SUBSTANCE, CLARITY, FEASIBILITY AND RESEARCH. THE SELECTION COMMITTEE WILL REVIEW THE EXPECTED DIRECT AND INDIRECT BENEFITS OF THE GRANT PROPOSAL TO THE TEACHER, HIS OR HER STUDENTS AND THE SCHOOL SYSTEM. THE GRANTS ARE AVAILABLE TO TEACHERS, GUIDANCE COUNSELORS AND LIBRARY MEDIA SPECIALISTS THAT HAVE BEEN EMPLOYED BY SAMPSON COUNTY OR CLINTON CITY SCHOOLS FOR AT LEAST ONE YEAR. THE APPLICANT MUST BE NORTH CAROLINA CERTIFIED IN GRADES K-12 AND BE EMPLOYED FULLTIME. THE GRANTS WILL BE TAXABLE TO THE RECIPIENT AND WILL STATE THAT THE RECIPIENT WILL REPAY THE TRUST IF THE PROJECT CANNOT BE COMPLETED. GRANTS TOTALING \$40,000 WERE PAID IN 2018.

FORM 990-PF

GRANT APPLICATION SUBMISSION INFORMATION
PART XV, LINES 2A THROUGH 2D

STATEMENT 16

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

KIMBERLY BREEDEN, DIRECTOR
128 E. BROAD STREET
DUNN, NC 28334

TELEPHONE NUMBER

NAME OF GRANT PROGRAM

910-292-2580

SIMPLY EAST FUND

RESTRICTIONS AND LIMITATIONS ON AWARDS

SIMPLY EAST FUND SEEKS TO IMPROVE THE QUALITY OF LIFE FOR THE ECONOMICALLY CHALLENGED BY SUPPORTING SOCIAL SERVICE ORGANIZATIONS THAT HAVE IMPACT AND ARE DOING THE MOST GOOD IN EASTERN NORTH CAROLINA. THE ORGANIZATION MUST HAVE EXPENSES OF \$5 MILLION AND UNDER; BE A 501(C)(3) IN NORTH CAROLINA AND THE PROJECTS MUST BE FOR THE BENEFIT OF ORGANIZATIONS BASED IN EASTERN NORTH CAROLINA. THE ELIGIBLE REQUESTS MAY BE FOR GENERAL OPERATING SUPPORT; SUPPORT FOR ONGOING OR NEW PROGRAMS OR PROJECTS; CAPITAL REQUESTS FOR CONSTRUCTION, RENOVATION, PURCHASE OF A BUILDING OR ENDOWMENTS; HEALTH/HUMAN SERVICES PROGRAMS; YOUTH EDUCATION PROGRAMS/SCHOOLS. THE GRANT RANGE IS \$10,000 AND HIGHER. A LETTER OF INQUIRY CONSISTING OF A COVER PAGE, LOI DETAIL AND PROJECT BUDGET, ORGANIZATION BUDGET, BOARD OF DIRECTORS ROSTER, 501(C)(3) LETTER AND MOST RECENT AUDIT MAY BE SUBMITTED VIA EMAIL TO KBREEDEN@ANONYMOUSTRUST.ORG. ACCEPTANCE OF A LETTER OF INQUIRY DOES NOT IMPLY FUNDING. ACCEPTANCE OF LETTER OF INQUIRY IS ACCEPTED BY REQUEST AFTER ADVANCE CONVERSATIONS. THE GRANT DECISION IS MADE WITHIN 60 DAYS FROM RECEIPT OF THE LETTER OF INQUIRY. THE SIMPLY EAST FUND MADE \$760,000 IN GRANTS DURING 2018.

ANONYMOUS TRUST U/A DATED 2-4-2008
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26-6220561
STATEMENT 17

GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

IF RECIPIENT IS AN
INDIVIDUAL, SHOW
ANY RELATIONSHIP
TO ANY FOUNDATION
MANAGER OR
SUBSTANTIAL
CONTRIBUTOR

RECIPIENT NAME AND ADDRESS (HOME OR BUSINESS)	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
ALLIANCE FRANCAIS DE RALEIGH, DURHAM CHAPEL HILL 5510 MUNFORD ROAD RALEIGH, NC 27612	N/A PUBLIC CHARITY	GRANT FOR GENERAL OPERATING SUPPORT AND SALARY OF DIRECTOR	40,000
ALLIANCE FRANCAIS DE RALEIGH, DURHAM CHAPEL HILL 5510 MUNFORD ROAD RALEIGH, NC 27612	N/A PUBLIC CHARITY	ADMINISTRATIVE SUPPORT	650
BIG BROTHERS BIG SISTERS OF THE TRIANGLE 808 AVIATION PARKWAY, SUITE 900 MORRISVILLE, NC 27560	N/A PUBLIC CHARITY	GIFT TOWARDS THE BRENDA BOYD SCHOLARSHIP FUND AT TRIANGLE COMMUNITY FOUNDATION	150,000
BIG BROTHERS BIG SISTERS OF THE TRIANGLE 808 AVIATION PARKWAY, SUITE 900 MORRISVILLE, NC 27560	N/A PUBLIC CHARITY	MENTORING CHILDREN OF PRISONERS PROGRAM THAT STRIVES TO HELP THEM STAY IN SCHOOL, AVOID RISKY BEHAVIORS AND JOINING GANGS, IMPROVE ACADEMIC PERFORMANCE	118,000
BOYS AND GIRLS CLUBS OF CUMBERLAND COUNTY PO BOX 48155 FAYETTEVILLE, NC 28331	N/A PUBLIC CHARITY	GRANT FOR GENERAL OPERATING SUPPORT TO ENABLE ALL YOUNG PEOPLE, ESPECIALLY THOSE WHO NEED US MOST, TO REACH THEIR FULL POTENTIAL AS PRODUCTIVE, CARING, RESPONSIBLE CITIZENS	55,000

ANONYMOUS TRUST U/A DATED 2-4-2008
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26-6220561
STATEMENT 17

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ANY RELATIONSHIP
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MANAGER OR
SUBSTANTIAL
CONTRIBUTOR

RECIPIENT NAME AND ADDRESS (HOME OR BUSINESS)	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
BOYS AND GIRLS CLUBS OF WAYNE AND JOHNSTON COUNTIES PO BOX 774 GOLDSBORO, NC 27533	N/A	GRANT FOR GENERAL OPERATING SUPPORT TO ENABLE ALL YOUNG PEOPLE, ESPECIALLY THOSE WHO NEED US MOST, TO REACH THEIR FULL POTENTIAL AS PRODUCTIVE, CARING, RESPONSIBLE CITIZENS	65,000
BOYS AND GIRLS HOMES OF NC PO BOX 127 LAKE WACCAMAW, NC 28450	N/A	GRANT FOR GENERAL OPERATING SUPPORT TO PROVIDE A COMPREHENSIVE ARRAY OF RESIDENTIAL AND COMMUNITY BASED SERVICES TO MEET THE NEEDS OF VULNERABLE CHILDREN BY ADDRESSING THEIR PHYSICAL, EMOTIONAL, SOCIAL, EDUCATIONAL AND SPIRITUAL DEVELOPMENT	50,000
BOYS AND GIRLS HOMES OF NC PO BOX 127 LAKE WACCAMAW, NC 28450	N/A	HURRICANE FLORENCE DISASTER RELIEF	30,000
COMMUNITIES SUPPORTING SCHOOLS OF WAYNE COUNTY PO BOX 11557 GOLDSBORO, NC 27532	N/A	GRANT FOR GENERAL OPERATING SUPPORT TO PROVIDE OPPORTUNITIES FOR STUDENTS TO STAY IN SCHOOL, GRADUATE, AND BE SUCCESSFUL IN LIFE	30,000
DRESS FOR SUCCESS TRIANGLE 1815 TILLERY PLACE, SUITE 105 RALEIGH, NC 27604	N/A	GENERAL OPERATING SUPPORT TO HELP EMPOWER WOMEN TO ACHIEVE ECONOMIC INDEPENDENCE BY PROVIDING A NETWORK OF SUPPORT, PROFESSIONAL ATTIRE AND DEVELOPMENT TOOLS TO HELP WOMEN THRIVE IN WORK AND LIFE	50,000

ANONYMOUS TRUST U/A DATED 2-4-2008
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26-6220561
STATEMENT 17

GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

IF RECIPIENT IS AN
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ANY RELATIONSHIP
TO ANY FOUNDATION
MANAGER OR
SUBSTANTIAL
CONTRIBUTOR

RECIPIENT		FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
NAME AND ADDRESS (HOME OR BUSINESS)	N/A			
DUKE UNIVERSITY OFFICE OF UNIVERSITY DEVELOPMENT PO BOX 90600 DURHAM, NC 27708	N/A	EDUCATIONAL INSTITUTION	ANNE-MARIE BRYAN PROFESSORSHIP FUND	1,250,000
ENVIRONMENTAL DEFENSE FUND 4000 WESTCHASE BLVD, SUITE 510 RALEIGH, NC 27607	N/A	PUBLIC CHARITY	GENERAL OPERATING SUPPORT TO HELP BRING LASTING SOLUTIONS TO THE MOST SERIOUS ENVIRONMENTAL PROBLEMS AFFECTING THE AGRICULTURAL SOUTHEASTERN LANDSCAPE	200,000
FOOD BANK OF CENTRAL AND EASTERN NC 1924 CAPITAL BOULEVARD RALEIGH, NC 27604	N/A	PUBLIC CHARITY	HURRICANE FLORENCE DISASTER RELIEF	75,000
HABITAT FOR HUMANITY FAYETTEVILLE AREA 310 GREEN STREET FAYETTEVILLE, NC 28301	N/A	PUBLIC CHARITY	GRANT FOR GENERAL OPERATING SUPPORT TO BRING PEOPLE TOGETHER TO BUILD HOMES, COMMUNITIES AND HOPE	100,000
HABITAT FOR HUMANITY FAYETTEVILLE AREA 310 GREEN STREET FAYETTEVILLE, NC 28301	N/A	PUBLIC CHARITY	HARVARD BOARD OF GOVERNANCE PROGRAM	5,000
HABITAT FOR HUMANITY FAYETTEVILLE AREA 310 GREEN STREET FAYETTEVILLE, NC 28301	N/A	PUBLIC CHARITY	HURRICANE FLORENCE RELIEF TO HELP REPAIR AND REBUILD HOMES	75,000
HEARTS & HANDS FOR HAITI 6612 CREEDMOOR ROAD RALEIGH, NC 27613	N/A	PUBLIC CHARITY	GENERAL HAITI DONATIONS, EDUCATION FUND	20,000

GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

IF RECIPIENT IS AN
INDIVIDUAL, SHOW
ANY RELATIONSHIP
TO ANY FOUNDATION
MANAGER OR
SUBSTANTIAL
CONTRIBUTOR

RECIPIENT NAME AND ADDRESS (HOME OR BUSINESS)	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
HEARTS & HANDS FOR HAITI 6612 CREEDMOOR ROAD RALEIGH, NC 27613	N/A	GENERAL HAITI DONATIONS, STAN & PATTY WIEBE, EDUCATION FUND, HAITI LEADERSHIP SUPPORT, HEARTS AND HANDS FOR HAITI	50,000
HISTORIC PRESERVATION FOUNDATION OF NC PO BOX 27644 RALEIGH, NC 27611	N/A	CHALLENGE GRANT FOR THE GRAVES HOUSE- PLUMMER T HALL HOUSE PROJECT	350,000
HISTORIC PRESERVATION FOUNDATION OF NC PO BOX 27644 RALEIGH, NC 27611	N/A	GIFT FOR THE GRAVES HOUSE-PLUMMER T. HALL HOUSE PROJECT	150,000
INTERFAITH PRISON MINISTRY FOR WOMEN 112 SOUTH SALISBURY STREET RALEIGH, NC 27601	N/A	GRANT FOR GENERAL OPERATING SUPPORT TO HELP PROVIDE CRITICAL CHAPLAINCY SERVICES AND TRANSITIONAL EDUCATION/SUPPORT FOR WOMEN IN PRISON	35,000
INTERFAITH PRISON MINISTRY FOR WOMEN 112 SOUTH SALISBURY STREET RALEIGH, NC 27601	N/A	GENERAL OPERATING SUPPORT TO HELP PROVIDE CRITICAL CHAPLAINCY SERVICES AND TRANSITIONAL EDUCATION/SUPPORT FOR WOMEN IN PRISON	60,000
L'ECOLE FRENCH SCHOOL OF RALEIGH 5510 MUNFORD ROAD RALEIGH, NC 27612	N/A	ADMINISTRATIVE SUPPORT INCLUDING RENT ASSISTANCE OF \$60,000 AND EXECUTIVE DIRECTOR'S SALARY OF \$30,000	90,000
LOAVES AND FISHES CUMBERLAND COUNTY 200 JOHNSON STREET FAYETTEVILLE, NC 28303	N/A	HURRICANE FLORENCE DISASTER RELIEF HOT MEALS TO VICTIMS AND VOLUNTEERS	15,000

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NAME AND ADDRESS (HOME OR BUSINESS)	RECIPIENT	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
THE MADEIRA SCHOOL 8328 GEORGETOWN PIKE MCLEAN, VA 22102	N/A	EDUCATIONAL INSTITUTION	ALL THE DIFFERENCE DORM MODERNIZATION FUND	1,000,000
NATIONAL AMERICAN RED CROSS PO BOX 37838 BOONE, IA 50037	N/A	PUBLIC CHARITY	HURRICANE FLORENCE DISASTER RELIEF	50,000
THE NORTH CAROLINA COMMUNITY FOUNDATION 3737 GLENWOOD AVENUE, SUITE 460 RALEIGH, NC 27612	N/A	PUBLIC CHARITY	HURRICANE FLORENCE DISASTER RELIEF	50,000
NORTH CAROLINA DISASTER RELIEF FUND 20312 MAIL SERVICE CENTER RALEIGH, NC 27699	N/A	PUBLIC CHARITY	HURRICANE FLORENCE DISASTER RELIEF	75,000
NC OPERA 612 WADE AVENUE RALEIGH, NC 27605	N/A	PUBLIC CHARITY	GENERAL OPERATING SUPPORT TO HELP PRESENT OPERATIC PERFORMANCES AT THE HIGHEST LEVEL THROUGHOUT THE TRIANGLE REGION	5,000
NC SYMPHONY 3700 GLENWOOD AVENUE, SUITE 130 RALEIGH, NC 27612	N/A	PUBLIC CHARITY	SUPPORT FOR THE SAMPSON COUNTY MUSIC RESIDENCY PROGRAM FOR 2016-17, 2017-18 AND 2018-19 (TOTAL PLEDGE \$225,000)	75,000
PARTNERS IN MINISTRY PO BOX 1621 LAURINBURG, NC 28352	N/A	PUBLIC CHARITY	HURRICANE FLORENCE RELIEF TO HELP REBUILD HOUSES	50,000

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FOUNDATION
STATUS OF
RECIPIENT

RECIPIENT
NAME AND ADDRESS (HOME OR BUSINESS)

PURPOSE OF GRANT OR
CONTRIBUTION

AMOUNT

PENLAND SCHOOL OF CRAFTS PO BOX 37 PENLAND, NC 28765	N/A	PUBLIC CHARITY	GENERAL OPERATING SUPPORT TO BRING WORKSHOPS TO AN INTERNATIONAL CENTER FOR CRAFT EDUCATION IN THE BLUE RIDGE MOUNTAINS OF NORTH CAROLINA	10,000
PUBLIC SCHOOL FORUM OF NC 3725 NATIONAL DR, STE 101 RALEIGH, NC 27612	N/A	PUBLIC CHARITY	GRANT FOR THE RURAL OPPORTUNITY INSTITUTE AND THE WORK OF SETH SAEUGLING AND VICKI JAGANNATHAN FOR THEIR ADVERSE CHILDHOOD EXPERIENCE PROJECT IN RURAL NORTH CAROLINA	75,000
PUBLIC SCHOOL FORUM OF NC 3725 NATIONAL DR, STE 101 RALEIGH, NC 27612	N/A	PUBLIC CHARITY	GRANT FOR THE RURAL OPPORTUNITY INSTITUTE AND THE WORK OF SETH SAEUGLING AND VICKI JAGANNATHAN FOR THEIR ADVERSE CHILDHOOD EXPERIENCE PROJECT IN RURAL NORTH CAROLINA	75,000
RELIGIOUS COMMUNITY SERVICES 919 GEORGE STREET NEW BERN, NC 28560	N/A	PUBLIC CHARITY	HURRICANE FLORENCE DISASTER RELIEF	35,000
REX HEALTHCARE FOUNDATION 4420 LAKE BOONE TRAIL RALEIGH, NC 27607	N/A	SUPPORTING ORGANIZATION	GRANT FOR THE BEHAVIORAL HEALTH ZONE LAUNCHED AS AN EXTENSION OF THE EMERGENCY DEPARTMENT PROVIDING PATIENTS WITH A CARING AND HEALING ENVIRONMENT UNTIL THEY CAN BE TRANSFERRED TO A FACILITY WITH PSYCHIATRIC SERVICES	266,280

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RECIPIENT	MANAGER OR SUBSTANTIAL CONTRIBUTOR	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
NAME AND ADDRESS (HOME OR BUSINESS)				
ROBESON COUNTY DISASTER RECOVERY 802 N. CEDAR STREET LUMBERTON, NC 28358	N/A	PUBLIC CHARITY	HURRICANE FLORENCE DISASTER RELIEF FINDING HOMES FOR DISPLACED FAMILIES	50,000
THE SALVATION ARMY PO BOX 1959 ATLANTA, GA 30301	N/A	PUBLIC CHARITY	HURRICANE FLORENCE DISASTER RELIEF	50,000
SAMPSON COUNTY ARTS COUNCIL 709 COLLEGE STREET CLINTON, NC 28328	N/A	PUBLIC CHARITY	GRANT FOR ADMINISTRATIVE SUPPORT TO ENRICH THE CULTURAL LIVES OF THE CITIZENS OF SAMPSON COUNTY BY NURTURING AND SUPPORTING EXCELLENCE IN THE ARTS; PROMOTING, PRESENTING AND ENCOURAGING EDUCATIONAL ACTIVITIES, AND OTHERWISE ENHANCING THE GROWTH AND APPRECIATION OF THE VISUAL, LITERARY AND PERFORMING ARTS	25,000
SECOND HARVEST FOOD BANK OF SE NC 406 DEEP CREEK ROAD FAYETTEVILLE, NC 28302	N/A	PUBLIC CHARITY	HURRICANE FLORENCE DISASTER RELIEF	50,000
SIMPLY GIRLS INC 406 W. BROAD STREET DUNN, NC 28334	N/A	PUBLIC CHARITY	GRANT FOR GENERAL OPERATING SUPPORT TO SERVE GIRLS AGES 5-18 IN AFTER SCHOOL AND SUMMER PROGRAMS; INSPIRING ALL GIRLS TO BE SMART, HEALTHY, STRONG, BOLD AND PROUD	100,000

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RECIPIENT NAME AND ADDRESS (HOME OR BUSINESS)	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
SIMPLY GIRLS INC 406 W. BROAD STREET DUNN, NC 28334	PUBLIC CHARITY	GRANT FOR GENERAL OPERATING SUPPORT TO SERVE GIRLS AGES 5-18 IN AFTER SCHOOL AND SUMMER PROGRAMS, INSPIRING ALL GIRLS TO BE SMART, HEALTHY, STRONG, BOLD AND PROUD	50,000

TOTAL AWARDS, GRANTS AND GIFTS
LOVE OF LEARNING GRANTS.

5,154,930

BUTLER AVENUE SCHOOL 301 WEST BUTLER AVENUE CLINTON, NC 28328	N/A	EDUCATIONAL INSTITUTION	SIMPLE SAFARI & JAPANESE JOURNEY	2,300
BUTLER AVENUE SCHOOL 301 WEST BUTLER AVENUE CLINTON, NC 28328	N/A	EDUCATIONAL INSTITUTION	THINK OUTSIDE THE HAT	881
BUTLER AVENUE SCHOOL 301 WEST BUTLER AVENUE CLINTON, NC 28328	N/A	EDUCATIONAL INSTITUTION	AUTHOR VISIT: REFLECTION OF CULTURAL HISTORY	1,639
CLEMENT ELEMENTARY SCHOOL 3220 MAXWELL ROAD AUTRYVILLE, NC 28318	N/A	EDUCATIONAL INSTITUTION	MATTER OF SCIENCE	600
CLINTON HIGH SCHOOL 340 INDIAN TOWN ROAD CLINTON, NC 28328	N/A	EDUCATIONAL INSTITUTION	DISNEY DREAMS IN DECEMBER	3,000

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RECIPIENT NAME AND ADDRESS (HOME OR BUSINESS)	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
CLINTON HIGH SCHOOL 340 INDIAN TOWN ROAD CLINTON, NC 28328	EDUCATIONAL INSTITUTION	BETA CLUB	3,000
CLINTON HIGH SCHOOL 340 INDIAN TOWN ROAD CLINTON, NC 28328	EDUCATIONAL INSTITUTION	VENETIA MANN CHS DECA	3,000
EF TOURS TWO EDUCATION CIRCLE CAMBRIDGE, MA 02141	INDIVIDUAL	ASHLEY KNOWLES DISCOVER COSTA RICA UNION MIDDLE SCHOOL STUDENTS	7,770
GO GLOBAL 68 T W ALEXANDER DRIVE RESEARCH TRIANGLE PARK, NC 27709	PUBLIC CHARITY	JUANDALYNN RAY REGIONAL TEACHER OF THE YEAR 2019 GLOBAL TEACHERS MEXICO PROGRAM	6,500
GO GLOBAL 68 T W ALEXANDER DRIVE RESEARCH TRIANGLE PARK, NC 27709	PUBLIC CHARITY	FOR AMY PARKER, ROBERT SMITH AND LYNN RAY 2018 GLOBAL TEACHERS CHINA PROGRAM	18,500
HOBBTON ELEMENTARY SCHOOL 12361 HOBBDON HWY NEWTON GROVE, NC 28366	EDUCATIONAL INSTITUTION	A NORTH CAROLINA MOUNTAIN VIEW	2,418
HOBBTON HIGH SCHOOL 12201 HOBBDON HIGHWAY NEWTON GROVE, NC 28366	EDUCATIONAL INSTITUTION	BETA CLUB	2,300

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RECIPIENT		FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
NAME AND ADDRESS (HOME OR BUSINESS)				
HOBBDON HIGH SCHOOL 12201 HOBBDON HIGHWAY NEWTON GROVE, NC 28366	N/A	EDUCATIONAL INSTITUTION	JENNIFER JACKSON BASS ART BEHIND THE SCENES	3,000
HOBBDON HIGH SCHOOL 12201 HOBBDON HIGHWAY NEWTON GROVE, NC 28366	N/A	EDUCATIONAL INSTITUTION	CARLA SUTTON LIGHTS CAMERA ACTION!	3,000
HOBBDON HIGH SCHOOL 12201 HOBBDON HIGHWAY NEWTON GROVE, NC 28366	N/A	EDUCATIONAL INSTITUTION	HITTING THE ROAD WITH AM HX-THE PRESIDENTIAL TRIP CHARLOTTESVILLE VA	3,000
HOBBDON HIGH SCHOOL 12201 HOBBDON HIGHWAY NEWTON GROVE, NC 28366	N/A	EDUCATIONAL INSTITUTION	JOHNNY JESSUP NATIONAL FFA CONVENTION	3,000
HOBBDON HIGH SCHOOL 12201 HOBBDON HIGHWAY NEWTON GROVE, NC 28366	N/A	EDUCATIONAL INSTITUTION	NC MUSIC CONFERENCE	1,570
HOBBDON HIGH SCHOOL 12201 HOBBDON HIGHWAY NEWTON GROVE, NC 28366	N/A	EDUCATIONAL INSTITUTION	HITTING THE ROAD WITH AM HX-THE DC TOUR	3,000
HOBBDON HIGH SCHOOL 12201 HOBBDON HIGHWAY NEWTON GROVE, NC 28366	N/A	EDUCATIONAL INSTITUTION	ADVENTURES IN MUSICAL THEATER	3,000

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RECIPIENT NAME AND ADDRESS (HOME OR BUSINESS)	IF RECIPIENT IS AN INDIVIDUAL, SHOW ANY RELATIONSHIP TO ANY FOUNDATION MANAGER OR SUBSTANTIAL CONTRIBUTOR	FOUNDATION STATUS OF RECIPIENT	AUTHOR VISIT: REFLECTION OF CULTURAL HISTORY	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
LANGDON C KERR ELEMENTARY 112 KIMBROUGH ROAD CLINTON, NC 28328	N/A	EDUCATIONAL INSTITUTION			1,939
MIDWAY HIGH SCHOOL 15274 SPIVEY'S CORNER ROAD NEWTON GROVE, NC 28366	N/A	EDUCATIONAL INSTITUTION	LORI KNOWLES SUPERCALIFRAGILISTICEXPIALIDOCIOUS		3,000
MIDWAY HIGH SCHOOL 15274 SPIVEY'S CORNER ROAD NEWTON GROVE, NC 28366	N/A	EDUCATIONAL INSTITUTION	JANELLE COCHRAN LET'S LOSE OUR MARBLES		2,250
MIDWAY HIGH SCHOOL 15274 SPIVEY'S CORNER ROAD NEWTON GROVE, NC 28366	N/A	EDUCATIONAL INSTITUTION	JOSH TEW DISCOVERING MUSIC BEYOND NC		3,000
MIDWAY HIGH SCHOOL 15274 SPIVEY'S CORNER ROAD NEWTON GROVE, NC 28366	N/A	EDUCATIONAL INSTITUTION	JOSH TEW BRINGING IN THE PROS-SERAPH BRASS QUINTET		3,000
MIDWAY ELEMENTARY SCHOOL 15375 SPIVEY'S CORNER ROAD NEWTON GROVE, NC 28366	N/A	EDUCATIONAL INSTITUTION	LITERACY FOOTPRINTS LEVELED BOOKS TO EMPOWER ESL STUDENTS		1,350
MIDWAY MIDDLE SCHOOL 1115 ROBERT'S GROVE ROAD DUNN, NC 28334	N/A	EDUCATIONAL INSTITUTION	GARDENS, GOURDS & GIRLS		750

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			RAIDER RENAISSANCE		
MIDWAY MIDDLE SCHOOL 1115 ROBERT'S GROVE ROAD DUNN, NC 28334	N/A	EDUCATIONAL INSTITUTION			1,250
MIDWAY MIDDLE SCHOOL 1115 ROBERT'S GROVE ROAD DUNN, NC 28334	N/A	EDUCATIONAL INSTITUTION	RYAN BARD MAKING HISTORY II		2,249
MIDWAY ELEMENTARY SCHOOL 15375 SPIVEY'S CORNER ROAD NEWTON GROVE, NC 28366	N/A	EDUCATIONAL INSTITUTION	ROCKIN READERS & LITTLE MINDS WANT TO KNOW		5,130
UNC-WORLVIEW 230 E. CAMERON AVENUE, CB# 8011 UNC-CHAPEL HILL CHAPEL HILL, NC 27599	N/A	EDUCATIONAL INSTITUTION	WORLD VIEW UNC CHINA		32,400
UNC-WORLVIEW 230 E. CAMERON AVENUE, CB# 8011 UNC-CHAPEL HILL CHAPEL HILL, NC 27599	N/A	EDUCATIONAL INSTITUTION	WORLD VIEW UNC DOMINICAN REPUBLIC		17,200
UNC-WORLVIEW 230 E. CAMERON AVENUE, CB# 8011 UNC-CHAPEL HILL CHAPEL HILL, NC 27599	N/A	EDUCATIONAL INSTITUTION	WORLD VIEW UNC CHINA		10,700

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NAME AND ADDRESS (HOME OR BUSINESS) RECIPIENT	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
NC DEPARTMENT OF PUBLIC INSTRUCTION ATTENTION DR. ERIC HALL MSC 6312 RALEIGH, NC 27699	N/A	HARVARD TURNAROUND SCHOOL LEADERSHIP PROGRAM	12,525
NC MUSEUM OF NATURAL SCIENCE 11 WEST JONES STREET RALEIGH, NC 27601	N/A	PUBLIC CHARITY FOR MELANIE SMITH AND BROOKE PRITCHETT EDUCATORS OF EXCELLENCE INSTITUTE	2,600
NC OUTWARD BOUND SCHOOL 2582 RICEVILLE ROAD ASHEVILLE, NC 28805	N/A	EDUCATIONAL INSTITUTION SAMPSON MIDDLE SCHOOL TUITION	23,940
NC OUTWARD BOUND SCHOOL 2582 RICEVILLE ROAD ASHEVILLE, NC 28805	N/A	EDUCATIONAL INSTITUTION SAMPSON MIDDLE SCHOOL TUITION	34,762
PLAIN VIEW ELEMENTARY 4140 PLAIN VIEW HIGHWAY DUNN, NC 28334	N/A	EDUCATIONAL INSTITUTION RITA WILSON UKE IT UP!	1,993
ROSEBORO-SALEMBURG MIDDLE SCHOOL 305 WEST PLEASANT STREET ROSEBORO, NC 28382	N/A	EDUCATIONAL INSTITUTION BRINGING THE PAGES TO LIFE; MAKING CONNECTIONS WITH READING & HISTORY	3,000
SALEMBURG ELEMENTARY 404 EAST COLLEGE STREET SALEMBURG, NC 28385	N/A	EDUCATIONAL INSTITUTION ENGAGING LEARNERS THROUGH ART	2,716

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RECIPIENT NAME AND ADDRESS (HOME OR BUSINESS)	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
SAMPSON EARLY COLLEGE HIGH SCHOOL 1801 SUNSET AVENUE CLINTON, NC 28328	N/A	DURHAM BULLS EDUCATION DAY 2019	1,300
SAMPSON EARLY COLLEGE HIGH SCHOOL 1801 SUNSET AVENUE CLINTON, NC 28328	N/A	EXPLORING OUR NATION'S CAPITAL	3,000
SAMPSON MIDDLE SCHOOL 1201 W. ELIZABETH STREET CLINTON, NC 28328	N/A	MEMORIES AT MEYMANDI	10,000
SAMPSON MIDDLE SCHOOL 1201 W. ELIZABETH STREET CLINTON, NC 28328	N/A	MEMORIES AT MEYMANDI	10,000
SAMPSON MIDDLE SCHOOL 1201 W. ELIZABETH STREET CLINTON, NC 28328	N/A	MOREHEAD PLANETARIUM	1,800
SAMPSON MIDDLE SCHOOL 1201 W. ELIZABETH STREET CLINTON, NC 28328	N/A	SAMPSON MIDDLE SCHOOL SEAPERCH 2018	3,000
SAMPSON MIDDLE SCHOOL 1201 W. ELIZABETH STREET CLINTON, NC 28328	N/A	NATIONAL JUNIOR BETA CONVENTION	3,000

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SAMPSON MIDDLE SCHOOL 1201 W ELIZABETH STREET CLINTON, NC 28328	N/A	ENCORE!! EDUCATIONAL INSTITUTION	3,000
SAMPSON MIDDLE SCHOOL 1201 W. ELIZABETH STREET CLINTON, NC 28328	N/A	MEMORIES AT MEYMANDI EDUCATIONAL INSTITUTION	4,835
SUNSET AVENUE SCHOOL 505 SUNSET AVENUE CLINTON, NC 28328	N/A	AUTHOR VISIT REFLECTION OF CULTURAL HISTORY EDUCATIONAL INSTITUTION	1,639
UNION ELEMENTARY SCHOOL 10400 TAYLORS BRIDGE HWY CLINTON, NC 28328	N/A	CONTINUING CHOICE BASED ART CLASSROOM EDUCATIONAL INSTITUTION	3,000
UNION HIGH SCHOOL 1189 KADER MERRITT ROAD ROSE HILL, NC 28458	N/A	INSPIRING & MOTIVATING FROM POVERTY TO PROSPERITY EDUCATIONAL INSTITUTION	2,099
UNION INTERMEDIATE SCHOOL 1190 EDMOND MATHIS ROAD CLINTON, NC 28328	N/A	TEACHER MAKERS TAKE ON THE BIG APPLE EDUCATIONAL INSTITUTION	2,405
UNION INTERMEDIATE SCHOOL 1190 EDMOND MATHIS ROAD CLINTON, NC 28328	N/A	RITA WILSON UKE IT UP! EDUCATIONAL INSTITUTION	1,993

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NAME AND ADDRESS (HOME OR BUSINESS)	RECIPIENT	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
AMANDA BYRD 1166 OLD WARSAW ROAD CLINTON, NC 28328		INDIVIDUAL	NATIONAL JUNIOR BETA CONVENTION	500
PAULA DARDEN 512 CONCORD SCHOOL CLINTON, NC 28328		INDIVIDUAL	RAIDER RENAISSANCE	500
MEGHAN H FUSSELL 1560 UNION SCHOOL ROAD CLINTON, NC 28328		INDIVIDUAL	NATIONAL BOARD CERTIFICATION	2,865
CATINA M IVERSON 825 REEDA BRANCH ROAD ROSEBORO, NC 28382		INDIVIDUAL	BRINGING THE PAGES TO LIFE; MAKING CONNECTIONS WITH READING & HISTORY	1,000
JAMIE L HARPER 409-C W ELIZABETH STREET CLINTON, NC 28328		INDIVIDUAL	LOVE OF LEARNING GRANT	1,000
JAMIE L HARPER 409-C W ELIZABETH STREET CLINTON, NC 28328		INDIVIDUAL	LOVE OF LEARNING GRANT	500
TRAVIS JORDAN 200 CHARLIE LANE CLINTON, NC 28328		INDIVIDUAL	DISNEY DREAMS IN DECEMBER	800

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NAME AND ADDRESS (HOME OR BUSINESS)	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
				CONTINUING CHOICE BASED ART CLASSROOM		
MARY MALPASS 189 WARREN MILL ROAD NEWTON GROVE, NC 28366		NONE	INDIVIDUAL			1,000
ANGELA LYNN MARTIN 1007 CARROLL STORE ROAD AUTRYVILLE, NC 28318		NONE	INDIVIDUAL	TEACHER STIPEND		1,000
LESLIE MATTHIS 3057 UNION SCHOOL ROAD CLINTON, NC 28328		NONE	INDIVIDUAL	SAMPSON MIDDLE SCHOOL SEAPERCH 2018		1,000
RAGAN PEARSON 106 REYNARD PATH CLINTON, NC 28328		NONE	INDIVIDUAL	TEACHER STIPEND		500
MELANIE SMITH 75 DUFFERS WALK LANE CLINTON, NC 28328		NONE	INDIVIDUAL	EDUCATORS OF EXCELLENCE STIPEND		428
CARLA SUTTON 226 WEST GROVE STREET NEWTON GROVE, NC 28366		NONE	INDIVIDUAL	TEACHER STIPEND		500
JOSH TEW 15274 SPIVEY'S CORNER HIGHWAY NEWTON GROVE, NC 28366		NONE	INDIVIDUAL	TEACHER STIPEND		200
TOTAL LOVE OF LEARNING GRANTS						300,096

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RECIPIENT		MANAGER OR SUBSTANTIAL CONTRIBUTOR	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
NAME AND ADDRESS (HOME OR BUSINESS)					
SIMPLE GIFTS SCHOLARSHIPS					
ABILENE CHRISTIAN UNIVERSITY 1600 CAMPUS COURT ABILENE, TX 79699		NONE	INDIVIDUAL	SCHOLARSHIP FOR GERALD ZUNIGA	9,750
BRANDEIS UNIVERSITY 415 SOUTH STREET WALTHAM, MA 02453		NONE	INDIVIDUAL	SCHOLARSHIP FOR THALIA PLATA	8,593
BRIDGEWATER COLLEGE 402 EAST COLLEGE STREET BRIDGEWATER, VA 22812		NONE	INDIVIDUAL	SCHOLARSHIP FOR ISAI CRUZ	9,400
BRIDGEWATER COLLEGE 402 EAST COLLEGE STREET BRIDGEWATER, VA 22812		NONE	INDIVIDUAL	SCHOLARSHIP FOR MARC LOPEZ	7,000
CEDAR CREST COLLEGE 100 COLLEGE DRIVE ALLENTOWN, PA 18104		NONE	INDIVIDUAL	SCHOLARSHIP FOR PERLA GUILLERMO	19,370
THE GEORGE WASHINGTON UNIVERSITY 2121 I STREET NW WASHINGTON, DC 20052		NONE	INDIVIDUAL	SCHOLARSHIP FOR CAROLINE CZARKOWSKA	12,950
HAMPDEN-SYDNEY COLLEGE 80 COLLEGE ROAD HAMPDEN SYDNEY, VA 23943		NONE	INDIVIDUAL	SCHOLARSHIP FOR GRAY SUTTER	11,000

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HAMPDEN-SYDNEY COLLEGE 80 COLLEGE ROAD HAMPDEN SYDNEY, VA 23943	NONE	INDIVIDUAL	SCHOLARSHIP FOR LAWRENCE SPELL CARR	7,500
HARVARD UNIVERSITY MASSACHUSETTS HALL CAMBRIDGE, MA 02138	NONE	INDIVIDUAL	SCHOLARSHIP FOR AARON VISER	10,000
HOLLINS UNIVERSITY PO BOX 9658 ROANOKE, VA 24020	NONE	INDIVIDUAL	SCHOLARSHIP FOR KAYLA MORRIS	9,250
HOLLINS UNIVERSITY PO BOX 9658 ROANOKE, VA 24020	NONE	INDIVIDUAL	SCHOLARSHIP FOR DANIELLE SAWYER	11,000
HOWARD UNIVERSITY 2400 SIXTH STREET, NW WASHINGTON, DC 20059	NONE	INDIVIDUAL	SCHOLARSHIP FOR KALEB L MCLAURIN	18,050
HOWARD UNIVERSITY 2400 SIXTH STREET, NW WASHINGTON, DC 20059	NONE	INDIVIDUAL	SCHOLARSHIP FOR JANET THOMPSON	10,750
ITHACA COLLEGE 953 DANBY ROAD ITHACA, NY 14850	NONE	INDIVIDUAL	SCHOLARSHIP FOR LUCAS JACKSON	9,246

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GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

RECIPIENT NAME AND ADDRESS (HOME OR BUSINESS)	IF RECIPIENT IS AN INDIVIDUAL, SHOW ANY RELATIONSHIP TO ANY FOUNDATION MANAGER OR SUBSTANTIAL CONTRIBUTOR	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
MARYVILLE COLLEGE 502 E LAMAR ALEXANDER PKWY MARYVILLE, TN 37804	NONE	INDIVIDUAL	SCHOLARSHIP FOR BRIANNA GIBSON	7,000
MIDDLEBURY COLLEGE 14 OLD CHAPEL ROAD MIDDLEBURY, VT 05753	NONE	INDIVIDUAL	SCHOLARSHIP FOR NYREKE PETERS	750
NC OUTWARD BOUND SCHOOL 2582 RICEVILLE ROAD ASHEVILLE, NC 28805	NONE	INDIVIDUALS	SEVEN FIRST YEAR SCHOLARS	16,873
OHIO WESLEYAN 61 S. SANDUSKY STREET DELAWARE, OH 43015	NONE	INDIVIDUAL	SCHOLARSHIP FOR JOSE ARMENDARIZ	18,000
PRATT INSTITUTE 200 WILLOUGHBY AVENUE BROOKLYN, NY 11205	NONE	INDIVIDUAL	SCHOLARSHIP FOR CALEB WETTIG	17,600
RANDOLPH MACON COLLEGE 114 COLLEGE AVENUE ASHLAND, VA 23005	NONE	INDIVIDUAL	SCHOLARSHIP FOR NATHALI DIAZ AGUILAR	19,370
RANDOLPH MACON COLLEGE 114 COLLEGE AVENUE ASHLAND, VA 23005	NONE	INDIVIDUAL	SCHOLARSHIP FOR KYLIE CASHWELL	7,000

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NAME AND ADDRESS (HOME OR BUSINESS)	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
RANDOLPH MACON COLLEGE 114 COLLEGE AVENUE ASHLAND, VA 23005		NONE	INDIVIDUAL	SCHOLARSHIP FOR EDITH JANE CARR	6,000
ROANOKE COLLEGE 221 COLLEGE LANE SALEM, VA 24153		NONE	INDIVIDUAL	SCHOLARSHIP FOR CAROLINA DAUGHTRY	9,700
ROANOKE COLLEGE 221 COLLEGE LANE SALEM, VA 24153		NONE	INDIVIDUAL	SCHOLARSHIP FOR ROSA JARAMILLO	8,750
SAVANNAH COLLEGE OF ART & DESIGN 342 BULL STREET SAVANNAH, GA 31401		NONE	INDIVIDUAL	SCHOLARSHIP FOR LEAH MOORE	15,751
UNIVERSITY OF THE PACIFIC 3601 PACIFIC AVENUE STOCKTON, CA 95211		NONE	INDIVIDUAL	SCHOLARSHIP FOR MONICA ODEH	15,000
UNIVERSITY OF ROCHESTER OFFICE OF BURSAR 330 MELIORA HALL ROCHESTER, NY 14627		NONE	INDIVIDUAL	SCHOLARSHIP, EXPENSES FOR SERGIO AGUILAR DIAZ	2,473
KYLIE CASHWELL 200 TOMAHAWK TRAIL CLINTON, NC 28328		NONE	INDIVIDUAL	INTERNSHIP FUNDING	2,175

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GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

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RECIPIENT NAME AND ADDRESS (HOME OR BUSINESS)	IF RECIPIENT IS AN INDIVIDUAL, SHOW ANY RELATIONSHIP TO ANY FOUNDATION	MANAGER OR SUBSTANTIAL CONTRIBUTOR	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION		AMOUNT
				INTERNSHIP FUNDING	CONTRIBUTION	
CAROLINE CZARKOWSKA 54 WENDY LANE CLINTON, NC 28328		NONE	INDIVIDUAL	INTERNSHIP FUNDING		3,840
PERLA GUILLERMO 1377 PEARLIE WATKINS BURGAW, NC 28425		NONE	INDIVIDUAL	INTERNSHIP FUNDING		3,840
NYREKE PETERS 391 KINGS POND LANE CLINTON, NC 28328		NONE	INDIVIDUAL	INTERNSHIP FUNDING		2,000
THALIA PLATA 407 W. BUTLER AVENUE CLINTON, NC 28328		NONE	INDIVIDUAL	INTERNSHIP FUNDING		2,400
PATRICIA VALDES-GONZALEZ 422 SMITH ROAD CLINTON, NC 28328		NONE	INDIVIDUAL	INTERNSHIP FUNDING		2,250
AMERICAN EXPRESS		NONE	INDIVIDUAL	EXPENSES FOR COLLEGE INTERVIEWS, VISITS SUPPLIES AND HEALTH INSURANCE		5,314

TOTAL SIMPLE GIFTS SCHOLARSHIPS

319,945

GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

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)					
TEACHER GRANTS:					
AMANDA BYRD 1166 OLD WARSAW ROAD CLINTON, NC 28328	NONE	INDIVIDUAL	TEACHER GRANT		8,000
VALERIE T FRETWELL 7556 HOBBS HIGHWAY CLINTON, NC 28328	NONE	INDIVIDUAL	TEACHER GRANT		8,000
SANDRA W PEARSON 207 TOMAHAWK TRAIL CLINTON, NC 28328	NONE	INDIVIDUAL	TEACHER GRANT		8,000
PENNY F. THORNE 123 CURRIE STREET WALLACE, NC 28466	NONE	INDIVIDUAL	TEACHER GRANT		8,000
TEREZA TRIOLO 97 CYPRESS LANE GODWIN, NC 28344	NONE	INDIVIDUAL	TEACHER GRANT		8,000
TOTAL TEACHER GRANTS					40,000
TOTAL QUALIFYING GRANTS AND CONTRIBUTIONS					5,814,971

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GRANTS AND CONTRIBUTIONS APPROVED FOR FUTURE PAYMENT

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RECIPIENT		FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
NAME AND ADDRESS (HOME OR BUSINESS)				
ALLIANCE FRANCAIS DE RALEIGH, DURHAM CHAPEL HILL 5510 MUNFORD ROAD RALEIGH, NC 27612	N/A	PUBLIC CHARITY	GRANT FOR GENERAL OPERATING SUPPORT AND SALARY OF DIRECTOR	40,000
AREA LAHEC 1631 S WESLEYAN BLVD ROCKY MOUNT, NC 27803	N/A	PUBLIC CHARITY	GRANT FOR THE RURAL OPPORTUNITY INSTITUTE AND THE WORK OF SETH SAEUGLING AND VICH JAGANNATHAN FOR THEIR ADVERSE CHILDHOOD EXPERIENCE PROJECT IN RURAL NORTH CAROLINA	129,000
BIG BROTHERS BIG SISTERS OF THE TRIANGLE 808 AVIATION PARKWAY, SUITE 900 MORRISVILLE, NC 27560	N/A	PUBLIC CHARITY	CHALLENGE GRANT FOR OPERATING EXPENSES	50,000
BOYS AND GIRLS CLUBS OF THE COASTAL PLAIN 621 WEST FIRE TOWER ROAD WINTERVILLE, NC 28590	N/A	PUBLIC CHARITY	FUNDING FOR INAUGURAL CLUB ACADEMY IN MARTIN COUNTY FOR 3RD AND 4TH GRADERS	150,000
BOYS AND GIRLS CLUBS OF THE COASTAL PLAIN 621 WEST FIRE TOWER ROAD WINTERVILLE, NC 28590	N/A	PUBLIC CHARITY	GENERAL OPERATING SUPPORT FOR BOYS AND GIRLS CLUBS OF WASHINGTON, NC	50,000
BOYS AND GIRLS CLUBS OF THE TAR RIVER REGION PO BOX 1622 ROCKY MOUNT, NC 27802	N/A	PUBLIC CHARITY	GRANT FOR GENERAL OPERATING SUPPORT	50,000

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RECIPIENT NAME AND ADDRESS (HOME OR BUSINESS)	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
DUKE UNIVERSITY OFFICE OF UNIVERSITY DEVELOPMENT PO BOX 90600 DURHAM, NC 27708	N/A	ANNE-MARIE BRYAN PROFESSORSHIP FUND	1,250,000
GO GLOBAL NC 68 T W ALEXANDER DRIVE RESEARCH TRIANGLE PARK, NC 27709	PUBLIC CHARITY	FUNDING TO SUPPORT A COHORT OF 8 EDUCATORS FROM RURAL EASTERN TIER 1 COUNTIES NC TEACHERS TO PARTICIPATE IN THE GLOBAL TEACHERS 2019 MEXICO PROGRAM	45,500
L'ECOLE FRENCH SCHOOL OF RALEIGH 5510 MUNFORD ROAD RALEIGH, NC 27612	EDUCATIONAL INSTITUTION	ADMINISTRATIVE SUPPORT INCLUDING RENT ASSISTANCE OF \$60,000 AND EXECUTIVE DIRECTOR'S SALARY OF \$30,000	90,000
THE MADEIRA SCHOOL 8328 GEORGETOWN PIKE MCLEAN, VA 22102	EDUCATIONAL INSTITUTION	ALL THE DIFFERENCE: DORM MODERNIZATION FUND	2,000,000
NC RURAL CENTER 4021 CARYA DRIVE RALEIGH, NC 27610	PUBLIC CHARITY	CHALLENGE GRANT TO FUND 50% OF A REGIONAL LEADERSHIP AND ECONOMIC DEVELOPMENT PROGRAM IN EASTERN NC REPRESENTING 42 COUNTIES DIVIDED INTO 5 COHORTS	100,000
NC STATE UNIVERSITY CAMPUS BOX 7406 RALEIGH, NC 27695	EDUCATIONAL INSTITUTION	FUNDING FOR INSTITUTE FOR EMERGING ISSUES (\$10,000); 40 SCHOLARSHIPS FOR CONFERENCE ATTENDANCE (\$120,000), 4 STIPENDS FOR TWO YEARS FOR EASTERN NC COHORTS	130,000

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SIMPLY GIRLS INC 406 W BROAD STREET DUNN, NC 28334	N/A	PUBLIC CHARITY	GRANT FOR GENERAL OPERATING SUPPORT TO SERVE GIRLS AGES 5-18 IN AFTER SCHOOL AND SUMMER PROGRAMS, INSPIRING ALL GIRLS TO BE SMART, HEALTHY, STRONG, BOLD AND PROUD	150,000
TEACH FOR AMERICA PO BOX 12331 DURHAM, NC 27709	N/A	PUBLIC CHARITY	GRANT TO CONTINUE TO SUPPORT EASTERN NC RESIDENCY PROGRAMS AND STRENGTHEN LOCAL SUPPORT TO PROGRAMMING AND COALITION BUILDING; GROW AND ACTIVATE ALUMNI NETWORK	250,000
TEACH FOR AMERICA PO BOX 12331 DURHAM, NC 27709	N/A	PUBLIC CHARITY	CHALLENGE GRANT TO CONTINUE SUPPORT OF EASTERN NC RESIDENCY PROGRAMS, STRENGTHEN LOCAL SUPPORT TO PROGRAMMING AND COALITION BUILDING, GROW AND ACTIVATE ALUMNI NETWORK	250,000
ROBESON COUNTY DISASTER RECOVERY COMMITTEE 802 N CEDAR STREET LUMBERTON, NC 28358	N/A	PUBLIC CHARITY	TO SUPPORT EFFORTS WITH HELPING VICTIMS RECOVER FROM HURRICANE MATTHEW	50,000
UNC-WORLDVIEW 230 E. CAMERON AVENUE, CB# 8011 UNC-CHAPEL HILL CHAPEL HILL, NC 27599	N/A	PUBLIC CHARITY	TO ENROLL 8 TEACHERS FROM SAMPSON AND BLADEN COUNTIES IN THE WORLD VIEW STUDY VISIT PROGRAM TO COSTA RICA	24,000

TOTAL

4,808,500