

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](http://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 01-01-2018 , and ending 12-31-2018**

|   |  |   |  |
|---|--|---|--|
| Name of foundation<br>HARRY & ZACKIA SHAIJA CHARITABLE FOUNDATION   |  | A Employer identification number<br>54-1991934  |  |
| Number and street (or P O box number if mail is not delivered to street address)<br>10313 FRASER CT   |  | Room/suite  |  |
|   |  | B Telephone number (see instructions)<br>(804) 426-5298   |  |
| City or town, state or province, country, and ZIP or foreign postal code<br>HENRICO, VA 23233538  |  | C If exemption application is pending, check here <input type="checkbox"/>  |  |
| G Check all that apply <input type="checkbox"/> Initial return <input type="checkbox"/> Initial return of a former public charity<br><input type="checkbox"/> Final return <input type="checkbox"/> Amended return<br><input checked="" type="checkbox"/> Address change <input type="checkbox"/> Name change |  | D 1. Foreign organizations, check here <input type="checkbox"/><br>2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>                  |  |
| H Check type of organization <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation<br><input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation  |  | E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>   |  |
| I Fair market value of all assets at end of year (from Part II, col (c), line 16) ▶ \$ <u>168,943</u>   |  | J Accounting method <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual<br><input type="checkbox"/> Other (specify) _____<br>(Part I, column (d) must be on cash basis) |  |
|   |  | F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>  |  |

| <b>Part I Analysis of Revenue and Expenses</b> <i>(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions) )</i> |  | (a) Revenue and expenses per books | (b) Net investment income | (c) Adjusted net income | (d) Disbursements for charitable purposes (cash basis only) |
|---|--|------------------------------------|---------------------------|-------------------------|---|
| <b>Revenue</b>  | <b>1</b> Contributions, gifts, grants, etc., received (attach schedule) . . . . .                          | 5,300                              |                           |                         |   |
|   | <b>2</b> Check <input type="checkbox"/> if the foundation is <b>not</b> required to attach Sch B . . . . . |                                    |                           |                         |   |
|   | <b>3</b> Interest on savings and temporary cash investments . . . . .                                      |                                    |                           |                         |   |
|   | <b>4</b> Dividends and interest from securities . . . . .  | 4,296                              | 4,296                     |                         |   |
|   | <b>5a</b> Gross rents . . . . .  |                                    |                           |                         |   |
|   | <b>b</b> Net rental income or (loss) _____   |                                    |                           |                         |   |
|   | <b>6a</b> Net gain or (loss) from sale of assets not on line 10 . . . . .                                  | 3,931                              |                           |                         |   |
|   | <b>b</b> Gross sales price for all assets on line 6a <u>57,748</u>   |                                    |                           |                         |   |
|   | <b>7</b> Capital gain net income (from Part IV, line 2) . . . . .  |                                    | 3,931                     |                         |   |
|   | <b>8</b> Net short-term capital gain . . . . .   |                                    |                           |                         |   |
|   | <b>9</b> Income modifications . . . . .  |                                    |                           |                         |   |
|   | <b>10a</b> Gross sales less returns and allowances _____   |                                    |                           |                         |   |
| <b>b</b> Less Cost of goods sold . . . . .  |  |                                    |                           |                         |   |
| <b>c</b> Gross profit or (loss) (attach schedule) . . . . .   |  |                                    |                           |                         |   |
| <b>11</b> Other income (attach schedule) . . . . .  | 79   | 79                                 |                           |                         |   |
| <b>12 Total.</b> Add lines 1 through 11 . . . . .   | 13,606   | 8,306                              |                           |                         |   |
| <b>Operating and Administrative Expenses</b>  | <b>13</b> Compensation of officers, directors, trustees, etc . . . . .                                     | 0                                  | 0                         |                         | 0   |
|   | <b>14</b> Other employee salaries and wages . . . . .  |                                    |                           |                         |   |
|   | <b>15</b> Pension plans, employee benefits . . . . .   |                                    |                           |                         |   |
|   | <b>16a</b> Legal fees (attach schedule) . . . . .  |                                    |                           |                         |   |
|   | <b>b</b> Accounting fees (attach schedule) . . . . .   | 3,700                              | 0                         |                         | 3,700   |
|   | <b>c</b> Other professional fees (attach schedule) . . . . .   |                                    |                           |                         |   |
|   | <b>17</b> Interest . . . . .   |                                    |                           |                         |   |
|   | <b>18</b> Taxes (attach schedule) (see instructions) . . . . .   | 325                                | 300                       |                         | 25  |
|   | <b>19</b> Depreciation (attach schedule) and depletion . . . . .   |                                    |                           |                         |   |
|   | <b>20</b> Occupancy . . . . .  |                                    |                           |                         |   |
|   | <b>21</b> Travel, conferences, and meetings . . . . .  |                                    |                           |                         |   |
|   | <b>22</b> Printing and publications . . . . .  |                                    |                           |                         |   |
|   | <b>23</b> Other expenses (attach schedule) . . . . .   | 2,659                              | 1,904                     |                         | 755   |
|   | <b>24 Total operating and administrative expenses.</b> Add lines 13 through 23 . . . . .                   | 6,684                              | 2,204                     |                         | 4,480   |
|   | <b>25</b> Contributions, gifts, grants paid . . . . .  | 17,000                             |                           |                         | 17,000  |
| <b>26 Total expenses and disbursements.</b> Add lines 24 and 25 . . . . .   | 23,684   | 2,204                              |                           | 21,480                  |   |
| <b>27</b> Subtract line 26 from line 12   |  |                                    |                           |                         |   |
| <b>a Excess of revenue over expenses and disbursements</b>  | -10,078  |                                    |                           |                         |   |
| <b>b Net investment income</b> (if negative, enter -0-)   |  | 6,102                              |                           |                         |   |
| <b>c Adjusted net income</b> (if negative, enter -0-)   |  |                                    |                           |                         |   |

| <b>Part II Balance Sheets</b> Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions) |  | Beginning of year | End of year    |                       |
|--|--|-------------------|----------------|-----------------------|
|  |  | (a) Book Value    | (b) Book Value | (c) Fair Market Value |
| <b>Assets</b>  | <b>1</b> Cash—non-interest-bearing . . . . .   |                   |                |                       |
|  | <b>2</b> Savings and temporary cash investments . . . . .  | 6,693             | 9,349          | 9,349                 |
|  | <b>3</b> Accounts receivable ▶ _____<br>Less allowance for doubtful accounts ▶ _____   |                   |                |                       |
|  | <b>4</b> Pledges receivable ▶ _____<br>Less allowance for doubtful accounts ▶ _____  |                   |                |                       |
|  | <b>5</b> Grants receivable . . . . .   |                   |                |                       |
|  | <b>6</b> Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions) . . . . . |                   |                |                       |
|  | <b>7</b> Other notes and loans receivable (attach schedule) ▶ _____<br>Less allowance for doubtful accounts ▶ _____                        |                   |                |                       |
|  | <b>8</b> Inventories for sale or use . . . . .   |                   |                |                       |
|  | <b>9</b> Prepaid expenses and deferred charges . . . . .   |                   |                |                       |
|  | <b>10a</b> Investments—U S and state government obligations (attach schedule)  | 39,857            | 48,710         | 48,370                |
|  | <b>b</b> Investments—corporate stock (attach schedule) . . . . .   | 91,134            | 79,573         | 111,224               |
|  | <b>c</b> Investments—corporate bonds (attach schedule) . . . . .   | 10,026            | 0              | 0                     |
|  | <b>11</b> Investments—land, buildings, and equipment basis ▶ _____<br>Less accumulated depreciation (attach schedule) ▶ _____              |                   |                |                       |
|  | <b>12</b> Investments—mortgage loans . . . . .   |                   |                |                       |
|  | <b>13</b> Investments—other (attach schedule) . . . . .  |                   |                |                       |
|  | <b>14</b> Land, buildings, and equipment basis ▶ _____<br>Less accumulated depreciation (attach schedule) ▶ _____                          |                   |                |                       |
| <b>15</b> Other assets (describe ▶ _____)  |  |                   |                |                       |
| <b>16 Total assets</b> (to be completed by all filers—see the instructions Also, see page 1, item I)   | 147,710  | 137,632           | 168,943        |                       |
| <b>Liabilities</b>   | <b>17</b> Accounts payable and accrued expenses . . . . .  |                   |                |                       |
|  | <b>18</b> Grants payable . . . . .   |                   |                |                       |
|  | <b>19</b> Deferred revenue . . . . .   |                   |                |                       |
|  | <b>20</b> Loans from officers, directors, trustees, and other disqualified persons   |                   |                |                       |
|  | <b>21</b> Mortgages and other notes payable (attach schedule) . . . . .  |                   |                |                       |
|  | <b>22</b> Other liabilities (describe ▶ _____)   |                   |                |                       |
|  | <b>23 Total liabilities</b> (add lines 17 through 22) . . . . .  | 0                 | 0              |                       |
| <b>Net Assets or Fund Balances</b>   | <b>Foundations that follow SFAS 117, check here</b> <input type="checkbox"/> <b>and complete lines 24 through 26 and lines 30 and 31.</b>  |                   |                |                       |
|  | <b>24</b> Unrestricted . . . . .   |                   |                |                       |
|  | <b>25</b> Temporarily restricted . . . . .   |                   |                |                       |
|  | <b>26</b> Permanently restricted . . . . .   |                   |                |                       |
|  | <b>Foundations that do not follow SFAS 117, check here</b> <input checked="" type="checkbox"/> <b>and complete lines 27 through 31.</b>    |                   |                |                       |
|  | <b>27</b> Capital stock, trust principal, or current funds . . . . .   | 0                 | 0              |                       |
|  | <b>28</b> Paid-in or capital surplus, or land, bldg, and equipment fund  | 0                 | 0              |                       |
| <b>29</b> Retained earnings, accumulated income, endowment, or other funds   | 147,710  | 137,632           |                |                       |
| <b>30 Total net assets or fund balances</b> (see instructions) . . . . .   | 147,710  | 137,632           |                |                       |
| <b>31 Total liabilities and net assets/fund balances</b> (see instructions) .  | 147,710  | 137,632           |                |                       |

**Part III Analysis of Changes in Net Assets or Fund Balances**

|   |          |         |
|---|----------|---------|
| <b>1</b> 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) | <b>1</b> | 147,710 |
| <b>2</b> Enter amount from Part I, line 27a . . . . .   | <b>2</b> | -10,078 |
| <b>3</b> Other increases not included in line 2 (itemize) ▶ _____   | <b>3</b> | 0       |
| <b>4</b> Add lines 1, 2, and 3 . . . . .  | <b>4</b> | 137,632 |
| <b>5</b> Decreases not included in line 2 (itemize) ▶ _____   | <b>5</b> | 0       |
| <b>6</b> Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30 .  | <b>6</b> | 137,632 |

**Part IV Capital Gains and Losses for Tax on Investment Income**

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

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

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

|   |   |       |
|---|---|-------|
| <b>2</b> Capital gain net income or (net capital loss)  | 2 | 3,931 |
| <b>3</b> Net short-term capital gain or (loss) as defined in sections 1222(5) and (6)<br>If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0-<br>in Part I, line 8 | 3 |       |

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?  Yes  No  
 If "Yes," the foundation does not qualify under section 4940(e). Do not complete this part.

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

| (a)<br>Base period years Calendar<br>year (or tax year beginning in) | (b)<br>Adjusted qualifying distributions | (c)<br>Net value of noncharitable-use assets | (d)<br>Distribution ratio<br>(col. (b) divided by col. (c)) |
|--|--|--|---|
| 2017   | 18,878                                   | 190,072                                      | 0.099320  |
| 2016   | 35,563                                   | 189,432                                      | 0.187735  |
| 2015   | 1,984                                    | 206,305                                      | 0.009617  |
| 2014   | 19,265                                   | 219,279                                      | 0.087856  |
| 2013   | 19,310                                   | 205,835                                      | 0.093813  |

|   |   |          |
|---|---|----------|
| <b>2</b> Total of line 1, column (d)  | 2 | 0.478341 |
| <b>3</b> 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 | 0.095668 |
| <b>4</b> Enter the net value of noncharitable-use assets for 2018 from Part X, line 5   | 4 | 189,222  |
| <b>5</b> Multiply line 4 by line 3  | 5 | 18,102   |
| <b>6</b> Enter 1% of net investment income (1% of Part I, line 27b)   | 6 | 61       |
| <b>7</b> Add lines 5 and 6  | 7 | 18,163   |
| <b>8</b> Enter qualifying distributions from Part XII, line 4   | 8 | 21,480   |

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

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

Table with 11 rows for excise tax calculations. Includes items like 'Exempt operating foundations', 'Domestic foundations that meet the section 4940(e) requirements', and 'Tax based on investment income'. Total amount owed is 58, with 58 refunded.

Part VII-A Statements Regarding Activities

Table with 10 rows for activity statements. Questions include '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?', 'Did it spend more than \$100 during the year for political purposes?', and 'Did the foundation have at least \$5,000 in assets at any time during the year?'.

Part VII-A Statements Regarding Activities (continued)

11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule See instructions.
12 Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement See instructions
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address N/A
14 The books are in care of ANNE-MARIE CONDLIN PRESIDENT Telephone no (804) 426-5298
Located at 10313 FRASER COURT RICHMOND VA ZIP+4 232333538
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
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

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

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.
1a During the year did the foundation (either directly or indirectly)
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?
(6) Agree to pay money or property to a government official? (Exception. Check "No" if the 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 ).
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.
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?
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 20, 20, 20, 20
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement-see instructions ).
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here 20, 20, 20, 20
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?
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 ).
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?
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?

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

|   |                              |  |            |           |
|---|------------------------------|--|------------|-----------|
| <b>5a</b> During the year did the foundation pay or incur any amount to   |                              |  | <b>Yes</b> | <b>No</b> |
| (1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?   | <input type="checkbox"/> Yes | <input checked="" type="checkbox"/> No |            |           |
| (2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?   | <input type="checkbox"/> Yes | <input checked="" type="checkbox"/> No |            |           |
| (3) Provide a grant to an individual for travel, study, or other similar purposes?  | <input type="checkbox"/> Yes | <input checked="" type="checkbox"/> No |            |           |
| (4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions.  | <input type="checkbox"/> Yes | <input checked="" type="checkbox"/> No |            |           |
| (5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?   | <input type="checkbox"/> Yes | <input checked="" type="checkbox"/> No |            |           |
| <b>b</b> If any answer is "Yes" to 5a(1)–(5), did <b>any</b> 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.                    |                              |  | <b>5b</b>  |           |
| Organizations relying on a current notice regarding disaster assistance check here.   | <input type="checkbox"/>     |  |            |           |
| <b>c</b> 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?<br><i>If "Yes," attach the statement required by Regulations section 53.4945–5(d)</i> | <input type="checkbox"/> Yes | <input type="checkbox"/> No            |            |           |
| <b>6a</b> Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?   | <input type="checkbox"/> Yes | <input checked="" type="checkbox"/> No | <b>6b</b>  | <b>No</b> |
| <b>b</b> Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?<br><i>If "Yes" to 6b, file Form 8870</i>  |                              |  |            |           |
| <b>7a</b> At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?  | <input type="checkbox"/> Yes | <input checked="" type="checkbox"/> No | <b>7b</b>  |           |
| <b>b</b> If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?  |                              |  |            |           |
| <b>8</b> Is the foundation subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment during the year?  | <input type="checkbox"/> Yes | <input checked="" type="checkbox"/> No |            |           |

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

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

| (a) Name and address   | (b) Title, and average hours per week devoted to position | (c) Compensation (If not paid, enter -0-) | (d) Contributions to employee benefit plans and deferred compensation | (e) Expense account, other allowances |
|--|---|---|---|---------------------------------------|
| ANNE-MARIE CONDLIN<br>10313 FRASER COURT<br>RICHMOND, VA 23233         | PRESIDENT, DIRECTOR<br>0 00                               | 0   | 0   | 0                                     |
| WILLIAM H SHAIA JR<br>2245 MECKLENBURG AVENUE<br>CHARLOTTE, NC 28205   | SECRETARY<br>0 00   | 0   | 0   | 0                                     |
| MICHAEL A SHAIA<br>10808 JOHN CUSSONS DRIVE<br>GLEN ALLEN, VA 23060    | TREASURER, DIRECTOR<br>0 00                               | 0   | 0   | 0                                     |
| ANTHONY J SHAIA<br>11413 BARRINGTON BRIDGE COURT<br>RICHMOND, VA 23233 | VICE-PRESIDENT, DIRECTOR<br>0 00                          | 0   | 0   | 0                                     |

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

| (a) Name and address of each employee paid more than \$50,000 | (b) Title, and average hours per week devoted to position | (c) Compensation | (d) Contributions to employee benefit plans and deferred compensation | (e) Expense account, other allowances |
|---|---|------------------|---|---------------------------------------|
| NONE  |   |                  |   |                                       |
|   |   |                  |   |                                       |
|   |   |                  |   |                                       |
|   |   |                  |   |                                       |
|   |   |                  |   |                                       |
|   |   |                  |   |                                       |
|   |   |                  |   |                                       |
|   |   |                  |   |                                       |
|   |   |                  |   |                                       |
|   |   |                  |   |                                       |
| <b>Total number of other employees paid over \$50,000.</b>    |   |                  | <b>▶</b>  | <b>0</b>                              |

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

| <b>3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE".</b> |                     |                  |
|---|---------------------|------------------|
| (a) Name and address of each person paid more than \$50,000   | (b) Type of service | (c) Compensation |
| NONE  |                     |                  |
|   |                     |                  |
|   |                     |                  |
|   |                     |                  |
|   |                     |                  |
|   |                     |                  |
|   |                     |                  |
| <b>Total number of others receiving over \$50,000 for professional services.</b>  |                     | <b>0</b>         |

**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 |
|--|----------|
| <b>1</b>   |          |
|  |          |
| <b>2</b>   |          |
|  |          |
| <b>3</b>   |          |
|  |          |
| <b>4</b>   |          |
|  |          |

**Part IX-B Summary of Program-Related Investments (see instructions)**

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

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

|          |  |           |         |
|----------|--|-----------|---------|
| <b>1</b> | Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes   |           |         |
| <b>a</b> | Average monthly fair market value of securities.   | <b>1a</b> | 184,619 |
| <b>b</b> | Average of monthly cash balances.  | <b>1b</b> | 7,485   |
| <b>c</b> | Fair market value of all other assets (see instructions).  | <b>1c</b> | 0       |
| <b>d</b> | <b>Total</b> (add lines 1a, b, and c).   | <b>1d</b> | 192,104 |
| <b>e</b> | Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).   | <b>1e</b> | 0       |
| <b>2</b> | Acquisition indebtedness applicable to line 1 assets.  | <b>2</b>  | 0       |
| <b>3</b> | Subtract line 2 from line 1d.  | <b>3</b>  | 192,104 |
| <b>4</b> | Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).   | <b>4</b>  | 2,882   |
| <b>5</b> | <b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. Enter here and on Part V, line 4. | <b>5</b>  | 189,222 |
| <b>6</b> | <b>Minimum investment return.</b> Enter 5% of line 5.  | <b>6</b>  | 9,461   |

**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.)

|           |  |           |       |
|-----------|--|-----------|-------|
| <b>1</b>  | Minimum investment return from Part X, line 6.   | <b>1</b>  | 9,461 |
| <b>2a</b> | Tax on investment income for 2018 from Part VI, line 5.  | <b>2a</b> | 61    |
| <b>b</b>  | Income tax for 2018 (This does not include the tax from Part VI).  | <b>2b</b> |       |
| <b>c</b>  | Add lines 2a and 2b.   | <b>2c</b> | 61    |
| <b>3</b>  | Distributable amount before adjustments. Subtract line 2c from line 1.                                     | <b>3</b>  | 9,400 |
| <b>4</b>  | Recoveries of amounts treated as qualifying distributions.   | <b>4</b>  | 0     |
| <b>5</b>  | Add lines 3 and 4.   | <b>5</b>  | 9,400 |
| <b>6</b>  | Deduction from distributable amount (see instructions).  | <b>6</b>  | 0     |
| <b>7</b>  | <b>Distributable amount</b> as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1. | <b>7</b>  | 9,400 |

**Part XII Qualifying Distributions** (see instructions)

|          |  |           |        |
|----------|--|-----------|--------|
| <b>1</b> | Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes  |           |        |
| <b>a</b> | Expenses, contributions, gifts, etc.—total from Part I, column (d), line 26.   | <b>1a</b> | 21,480 |
| <b>b</b> | Program-related investments—total from Part IX-B.  | <b>1b</b> | 0      |
| <b>2</b> | Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes.   | <b>2</b>  |        |
| <b>3</b> | Amounts set aside for specific charitable projects that satisfy the  |           |        |
| <b>a</b> | Suitability test (prior IRS approval required).  | <b>3a</b> |        |
| <b>b</b> | Cash distribution test (attach the required schedule).   | <b>3b</b> |        |
| <b>4</b> | <b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4.                                   | <b>4</b>  | 21,480 |
| <b>5</b> | 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. | <b>5</b>  | 61     |
| <b>6</b> | <b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4.   | <b>6</b>  | 21,419 |

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

**Part XIII Undistributed Income** (see instructions)

|  | (a)<br>Corpus | (b)<br>Years prior to 2017 | (c)<br>2017 | (d)<br>2018 |
|--|---------------|----------------------------|-------------|-------------|
| <b>1</b> Distributable amount for 2018 from Part XI, line 7  |               |                            |             | 9,400       |
| <b>2</b> Undistributed income, if any, as of the end of 2018   |               |                            |             |             |
| <b>a</b> Enter amount for 2017 only. . . . .   |               |                            | 0           |             |
| <b>b</b> Total for prior years 20___, 20___, 20___   |               | 0                          |             |             |
| <b>3</b> Excess distributions carryover, if any, to 2018   |               |                            |             |             |
| <b>a</b> From 2013. . . . .  | 9,180         |                            |             |             |
| <b>b</b> From 2014. . . . .  | 8,503         |                            |             |             |
| <b>c</b> From 2015. . . . .  |               |                            |             |             |
| <b>d</b> From 2016. . . . .  | 26,271        |                            |             |             |
| <b>e</b> From 2017. . . . .  | 9,556         |                            |             |             |
| <b>f</b> Total of lines 3a through e. . . . .  | 53,510        |                            |             |             |
| <b>4</b> Qualifying distributions for 2018 from Part XII, line 4 ▶ \$ <u>21,480</u>  |               |                            |             |             |
| <b>a</b> Applied to 2017, but not more than line 2a  |               |                            | 0           |             |
| <b>b</b> Applied to undistributed income of prior years (Election required—see instructions). . . . .  |               | 0                          |             |             |
| <b>c</b> Treated as distributions out of corpus (Election required—see instructions). . . . .  | 0             |                            |             |             |
| <b>d</b> Applied to 2018 distributable amount. . . . .   |               |                            |             | 9,400       |
| <b>e</b> Remaining amount distributed out of corpus  | 12,080        |                            |             |             |
| <b>5</b> Excess distributions carryover applied to 2018<br>(If an amount appears in column (d), the same amount must be shown in column (a) )  |               |                            |             | 0           |
| <b>6</b> Enter the net total of each column as indicated below:  |               |                            |             |             |
| <b>a</b> Corpus Add lines 3f, 4c, and 4e Subtract line 5   | 65,590        |                            |             |             |
| <b>b</b> Prior years' undistributed income Subtract line 4b from line 2b . . . . .   |               | 0                          |             |             |
| <b>c</b> 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                          |             |             |
| <b>d</b> Subtract line 6c from line 6b Taxable amount—see instructions . . . . .   |               | 0                          |             |             |
| <b>e</b> Undistributed income for 2017 Subtract line 4a from line 2a Taxable amount—see instructions . . . . .   |               |                            | 0           |             |
| <b>f</b> Undistributed income for 2018 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2019 . . . . .   |               |                            |             | 0           |
| <b>7</b> 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             |                            |             |             |
| <b>8</b> Excess distributions carryover from 2013 not applied on line 5 or line 7 (see instructions). . . . .  | 9,180         |                            |             |             |
| <b>9</b> Excess distributions carryover to 2019. Subtract lines 7 and 8 from line 6a . . . . .   | 56,410        |                            |             |             |
| <b>10</b> Analysis of line 9   |               |                            |             |             |
| <b>a</b> Excess from 2014. . . . .   | 8,503         |                            |             |             |
| <b>b</b> Excess from 2015. . . . .   |               |                            |             |             |
| <b>c</b> Excess from 2016. . . . .   | 26,271        |                            |             |             |
| <b>d</b> Excess from 2017. . . . .   | 9,556         |                            |             |             |
| <b>e</b> Excess from 2018. . . . .   | 12,080        |                            |             |             |

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

**1a** If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2018, enter the date of the ruling. . . . . ▶

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

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

**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

**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. See instructions.

**a** The name, address, and telephone number or e-mail address of the person to whom applications should be addressed  
 ANNE-MARIE CONDLIN  
 10313 FRASER COURT  
 RICHMOND, VA 23233  
 (804) 426-5298

**b** The form in which applications should be submitted and information and materials they should include  
 A LETTER OUTLINING THE REQUEST

**c** Any submission deadlines  
 NONE

**d** Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors  
 THERE WILL BE NO LIMITATIONS OR RESTRICTIONS ON THE CLASS OF INDIVIDUALS WHO WILL BE ELIGIBLE RECIPIENTS

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

| Recipient<br>Name and address (home or business)   | If recipient is an individual,<br>show any relationship to<br>any foundation manager<br>or substantial contributor | Foundation<br>status of<br>recipient | Purpose of grant or<br>contribution   | Amount |
|--|--|--------------------------------------|---------------------------------------|--------|
| <b>a</b> <i>Paid during the year</i><br>MCV FOUNDATION<br>1016 E CLAY ST 3RD FLOOR<br>RICHMOND, VA 23298 | NONE   | PUBLIC<br>CHARITY                    | TO CARRY OUT CHARITABLE<br>ACTIVITIES | 17,000 |
| <b>Total</b> . . . . .   |  |                                      | ▶ <b>3a</b>                           |        |
| <b>b</b> <i>Approved for future payment</i>  |  |                                      |                                       |        |
| <b>Total</b> . . . . .   |  |                                      | ▶ <b>3b</b>                           |        |





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

| List and describe the kind(s) of property sold (e.g., real estate,<br>(a) 2-story brick warehouse, or common stock, 200 shs MLC Co.) |                            | (b)<br>How acquired<br>P—Purchase<br>D—Donation | (c)<br>Date acquired<br>(mo., day, yr.) | (d)<br>Date sold<br>(mo., day, yr.) |
|--|----------------------------|---|---|-------------------------------------|
| 1  | 11100 AT&T INC             | P   | 2018-02-28                              | 2018-06-15                          |
| 1  | 24 FORD MOTOR COMPANY      | P   | 2017-09-26                              | 2018-07-02                          |
|  | 4 GENERAL ELECTRIC COMPANY | P   | 2017-09-15                              | 2018-09-14                          |
|  | 1 GRACE W R & CO           | P   | 2018-04-18                              | 2018-12-14                          |
|  | 19 HALLIBURTON COMPANY     | P   |   |                                     |
|  | 3 HANESBRAND INC           | P   | 2018-08-17                              | 2018-12-14                          |
|  | 6 MONSANTO CO NEW          | P   | 2017-06-15                              | 2018-06-07                          |
|  | 4 ROYAL DUTCH SHELL PLC    | P   | 2018-12-04                              | 2018-12-14                          |
|  | 6 SCHLUMBERGER LTD         | P   | 2018-09-20                              | 2018-12-04                          |
|  | 1 TARGET CORP              | P   | 2018-12-07                              | 2018-12-14                          |

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

| (e) Gross sales price | (f) Depreciation allowed<br>(or allowable) | (g) Cost or other basis<br>plus expense of sale | (h) Gain or (loss)<br>(e) plus (f) minus (g) |
|-----------------------|--|---|--|
| 4                     |  | 4   | 0  |
| 264                   |  | 287   | -23  |
| 50                    |  | 95  | -45  |
| 61                    |  | 68  | -7   |
| 712                   |  | 978   | -266   |
| 41                    |  | 55  | -14  |
| 768                   |  | 707   | 61   |
| 238                   |  | 254   | -16  |
| 271                   |  | 370   | -99  |
| 67                    |  | 68  | -1   |

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

| Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69 |                                      |   | (l) Gains (Col. (h) gain minus<br>col. (k), but not less than -0-) or<br>Losses (from col. (h)) |
|---|--------------------------------------|---|---|
| (i) F M V as of 12/31/69  | (j) Adjusted basis<br>as of 12/31/69 | (k) Excess of col. (i)<br>over col. (j), if any |   |
|   |                                      |   | 0   |
|   |                                      |   | -23   |
|   |                                      |   | -45   |
|   |                                      |   | -7  |
|   |                                      |   | -266  |
|   |                                      |   | -14   |
|   |                                      |   | 61  |
|   |                                      |   | -16   |
|   |                                      |   | -99   |
|   |                                      |   | -1  |

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

| List and describe the kind(s) of property sold (e.g., real estate,<br>(a) 2-story brick warehouse, or common stock, 200 shs MLC Co.) | (b)<br>How acquired<br>P—Purchase<br>D—Donation | (c)<br>Date acquired<br>(mo, day, yr) | (d)<br>Date sold<br>(mo, day, yr) |
|--|---|---------------------------------------|-----------------------------------|
| 1 TEXAS INSTRUMENTS INC  | P   | 2018-02-15                            | 2018-12-14                        |
| 1 3 TIME WARNER INC NEW CHG  | P   | 2018-02-28                            | 2018-06-15                        |
| 1,000 US TREASURY NOTES 1 3750%  | P   | 2017-10-17                            | 2018-08-13                        |
| 1,000 US TREASURY NOTES 2 2500%  | P   | 2018-04-16                            | 2018-12-14                        |
| 1 WHIRLPOOL CORP   | P   | 2017-08-01                            | 2018-05-21                        |
| 1 NXP SEMICONDUCTORS NV  | P   | 2018-07-26                            | 2018-12-14                        |
| 9 259 AT & T INC   | P   |                                       |                                   |
| 2 AMGEN INC  | P   |                                       |                                   |
| 6 APPLE INC  | P   |                                       |                                   |
| 14 BANK OF AMERICA CORP  | P   |                                       |                                   |

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

| (e) Gross sales price | (f) Depreciation allowed<br>(or allowable) | (g) Cost or other basis<br>plus expense of sale | (h) Gain or (loss)<br>(e) plus (f) minus (g) |
|-----------------------|--|---|--|
| 95                    |  | 102   | -7   |
| 161                   |  | 143   | 18   |
| 988                   |  | 997   | -9   |
| 994                   |  | 997   | -3   |
| 166                   |  | 177   | -11  |
| 78                    |  | 93  | -15  |
| 282                   |  | 319   | -37  |
| 389                   |  | 318   | 71   |
| 1,081                 |  | 772   | 309  |
| 403                   |  | 246   | 157  |

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

| Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69 |                                      |   | (l) Gains (Col (h) gain minus<br>col (k), but not less than -0-) or<br>Losses (from col (h)) |
|---|--------------------------------------|---|--|
| (i) F M V as of 12/31/69  | (j) Adjusted basis<br>as of 12/31/69 | (k) Excess of col (i)<br>over col (j), if any |  |
|   |                                      |   | -7   |
|   |                                      |   | 18   |
|   |                                      |   | -9   |
|   |                                      |   | -3   |
|   |                                      |   | -11  |
|   |                                      |   | -15  |
|   |                                      |   | -37  |
|   |                                      |   | 71   |
|   |                                      |   | 309  |
|   |                                      |   | 157  |

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

| List and describe the kind(s) of property sold (e.g., real estate,<br>(a) 2-story brick warehouse, or common stock, 200 shs MLC Co.) | (b)<br>How acquired<br>P—Purchase<br>D—Donation | (c)<br>Date acquired<br>(mo., day, yr.) | (d)<br>Date sold<br>(mo., day, yr.) |
|--|---|---|-------------------------------------|
| 10,000 BANK OF AMERICA CORP INTERNOTES   | P   |   |                                     |
| 1 3 CHEVRON CORPORATION  | P   |   |                                     |
| 10 CITIGROUP INC NEW   | P   |   |                                     |
| 8 CONOCO PHILIPS   | P   |   |                                     |
| 6 CORNING INC  | P   | 2015-07-31                              | 2018-12-14                          |
| 1 DISNEY WALT COMPANY  | P   | 2015-11-17                              | 2018-12-14                          |
| 11 DOWDUPONT INC   | P   |   |                                     |
| 2 DUKE ENERGY CORP   | P   | 2015-10-06                              | 2018-12-14                          |
| 2 EXXON MOBIL CORP   | P   | 2015-06-25                              | 2018-12-14                          |
| 184 FORD MOTOR COMPANY   | P   |   |                                     |

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

| (e) Gross sales price | (f) Depreciation allowed<br>(or allowable) | (g) Cost or other basis<br>plus expense of sale | (h) Gain or (loss)<br>(e) plus (f) minus (g) |
|-----------------------|--|---|--|
| 10,000                |  | 10,000  | 0  |
| 351                   |  | 258   | 93   |
| 639                   |  | 501   | 138  |
| 534                   |  | 342   | 192  |
| 189                   |  | 113   | 76   |
| 112                   |  | 117   | -5   |
| 685                   |  | 369   | 316  |
| 181                   |  | 146   | 35   |
| 151                   |  | 169   | -18  |
| 2,002                 |  | 2,553   | -551   |

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

| Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69 |                                      |   | (l) Gains (Col. (h) gain minus<br>col. (k), but not less than -0-) or<br>Losses (from col. (h)) |
|---|--------------------------------------|---|---|
| (i) FMV as of 12/31/69  | (j) Adjusted basis<br>as of 12/31/69 | (k) Excess of col. (i)<br>over col. (j), if any |   |
|   |                                      |   | 0   |
|   |                                      |   | 93  |
|   |                                      |   | 138   |
|   |                                      |   | 192   |
|   |                                      |   | 76  |
|   |                                      |   | -5  |
|   |                                      |   | 316   |
|   |                                      |   | 35  |
|   |                                      |   | -18   |
|   |                                      |   | -551  |

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

| List and describe the kind(s) of property sold (e.g., real estate,<br>(a) 2-story brick warehouse, or common stock, 200 shs MLC Co.) | (b)<br>How acquired<br>P—Purchase<br>D—Donation | (c)<br>Date acquired<br>(mo, day, yr) | (d)<br>Date sold<br>(mo, day, yr) |
|--|---|---------------------------------------|-----------------------------------|
| 2 GARRETT MOTION INC   | P   |                                       |                                   |
| 1 55 GENERAL ELECTRIC COMPANY  | P   |                                       |                                   |
| 1 HOME DEPOT INC   | P   | 2015-04-07                            | 2018-12-14                        |
| 37 INTEL CORP  | P   |                                       |                                   |
| 1 INTERNATIONAL BUSINESS MACHINE CORP  | P   | 2012-03-26                            | 2018-12-14                        |
| 12 JP MORGAN CHASE & CO  | P   |                                       |                                   |
| 6 MERCK & CO INC   | P   |                                       |                                   |
| 8 MICROSOFT CORP   | P   |                                       |                                   |
| 3 NEXTERA ENERGY INC   | P   | 2016-06-08                            |                                   |
| 2 NIKE INC CLASS B   | P   | 2017-01-24                            | 2018-12-14                        |

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

| (e) Gross sales price | (f) Depreciation allowed<br>(or allowable) | (g) Cost or other basis<br>plus expense of sale | (h) Gain or (loss)<br>(e) plus (f) minus (g) |
|-----------------------|--|---|--|
| 29                    |  | 14  | 15   |
| 681                   |  | 1,505   | -824   |
| 172                   |  | 116   | 56   |
| 1,666                 |  | 860   | 806  |
| 120                   |  | 206   | -86  |
| 1,274                 |  | 445   | 829  |
| 449                   |  | 290   | 159  |
| 856                   |  | 206   | 650  |
| 506                   |  | 367   | 139  |
| 145                   |  | 107   | 38   |

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

| Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69 |                                      |   | (l) Gains (Col (h) gain minus<br>col (k), but not less than -0-) or<br>Losses (from col (h)) |
|---|--------------------------------------|---|--|
| (i) F M V as of 12/31/69  | (j) Adjusted basis<br>as of 12/31/69 | (k) Excess of col (i)<br>over col (j), if any |  |
|   |                                      |   | 15   |
|   |                                      |   | -824   |
|   |                                      |   | 56   |
|   |                                      |   | 806  |
|   |                                      |   | -86  |
|   |                                      |   | 829  |
|   |                                      |   | 159  |
|   |                                      |   | 650  |
|   |                                      |   | 139  |
|   |                                      |   | 38   |

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

| List and describe the kind(s) of property sold (e.g., real estate,<br>(a) 2-story brick warehouse, or common stock, 200 shs MLC Co.) | (b)<br>How acquired<br>P—Purchase<br>D—Donation | (c)<br>Date acquired<br>(mo., day, yr.) | (d)<br>Date sold<br>(mo., day, yr.) |
|--|---|---|-------------------------------------|
| 2 PNC FINANCIAL SERVICES   | P   | 2011-11-21                              |                                     |
| 1 2 PEPSICO INC  | P   | 2016-01-19                              |                                     |
| 3 PROCTOR & GAMBLE CO  | P   | 2015-03-27                              |                                     |
| 3 33304 RESIDEO TECHNOLOGIES   | P   |   |                                     |
| 55 SCHLUMBERGER LTD  | P   |   |                                     |
| 1 3M CO  | P   | 2016-03-01                              | 2018-12-14                          |
| 5 TIFFANY & CO   | P   | 2012-08-08                              |                                     |
| 7 TIME WARNER INC  | P   | 2017-05-24                              | 2018-06-15                          |
| 2 UNION PACIFIC CORP   | P   | 2011-11-03                              | 2018-12-14                          |
| 1,000 US TREASURY NOTES 1 3750%  | P   | 2017-10-17                              | 2018-12-14                          |

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

| (e) Gross sales price | (f) Depreciation allowed<br>(or allowable) | (g) Cost or other basis<br>plus expense of sale | (h) Gain or (loss)<br>(e) plus (f) minus (g) |
|-----------------------|--|---|--|
| 262                   |  | 103   | 159  |
| 227                   |  | 190   | 37   |
| 275                   |  | 247   | 28   |
| 73                    |  | 37  | 36   |
| 2,503                 |  | 4,113   | -1,610                                       |
| 196                   |  | 159   | 37   |
| 574                   |  | 291   | 283  |
| 376                   |  | 360   | 16   |
| 285                   |  | 102   | 183  |
| 990                   |  | 997   | -7   |

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

| Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69 |                                      |   | (I) Gains (Col. (h) gain minus<br>col. (k), but not less than -0-) or<br>Losses (from col. (h)) |
|---|--------------------------------------|---|---|
| (i) F M V as of 12/31/69  | (j) Adjusted basis<br>as of 12/31/69 | (k) Excess of col. (i)<br>over col. (j), if any |   |
|   |                                      |   | 159   |
|   |                                      |   | 37  |
|   |                                      |   | 28  |
|   |                                      |   | 36  |
|   |                                      |   | -1,610  |
|   |                                      |   | 37  |
|   |                                      |   | 283   |
|   |                                      |   | 16  |
|   |                                      |   | 183   |
|   |                                      |   | -7  |

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

| List and describe the kind(s) of property sold (e.g., real estate,<br>(a) 2-story brick warehouse, or common stock, 200 shs MLC Co.) | (b)<br>How acquired<br>P—Purchase<br>D—Donation | (c)<br>Date acquired<br>(mo., day, yr.) | (d)<br>Date sold<br>(mo., day, yr.) |
|--|---|---|-------------------------------------|
| 13,000 US TREASURY NOTES 7500%   | P   |   |                                     |
| 1 1,000 US TREASURY NOTES 1 3750%  | P   | 2015-09-24                              | 2018-12-14                          |
| 1,000 US TREASURY NOTES 1 7500%  | P   | 2017-02-16                              | 2018-12-14                          |
| 1 UNITED HEALTHCARE INC  | P   | 2015-03-27                              | 2018-12-14                          |
| 3 WALMART INC  | P   | 2016-02-18                              |                                     |
| 6 WELLS FARGO & CO   | P   | 2011-03-09                              |                                     |
| 8 WHIRLPOOL CORP   | P   |   |                                     |
| 6 MEDTRONIC PLC  | P   | 2015-01-27                              |                                     |
| 1 CHUBB LTD  | P   | 2012-03-16                              | 2018-12-14                          |
| 5 BANCO LATINOAMERICANO DE   | P   | 2014-03-24                              |                                     |

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

| (e) Gross sales price | (f) Depreciation allowed<br>(or allowable) | (g) Cost or other basis<br>plus expense of sale | (h) Gain or (loss)<br>(e) plus (f) minus (g) |
|-----------------------|--|---|--|
| 13,000                |  | 12,968  | 32   |
| 977                   |  | 999   | -22  |
| 972                   |  | 992   | -20  |
| 265                   |  | 117   | 148  |
| 273                   |  | 190   | 83   |
| 291                   |  | 197   | 94   |
| 1,320                 |  | 1,301   | 19   |
| 562                   |  | 454   | 108  |
| 128                   |  | 73  | 55   |
| 91                    |  | 133   | -42  |

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

| Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69 |                                      |   | (l) Gains (Col. (h) gain minus<br>col. (k), but not less than -0-) or<br>Losses (from col. (h)) |
|---|--------------------------------------|---|---|
| (i) F M V as of 12/31/69  | (j) Adjusted basis<br>as of 12/31/69 | (k) Excess of col. (i)<br>over col. (j), if any |   |
|   |                                      |   | 32  |
|   |                                      |   | -22   |
|   |                                      |   | -20   |
|   |                                      |   | 148   |
|   |                                      |   | 83  |
|   |                                      |   | 94  |
|   |                                      |   | 19  |
|   |                                      |   | 108   |
|   |                                      |   | 55  |
|   |                                      |   | -42   |

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

| (a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co.) | (b) How acquired<br>P—Purchase<br>D—Donation | (c) Date acquired<br>(mo., day, yr.) | (d) Date sold<br>(mo., day, yr.) |
|---|--|--------------------------------------|----------------------------------|
| 32 CISCO SYSTEMS INC  | P  |                                      |                                  |
| 1 2 COSTCO WHSL CORP  | P  | 2005-07-22                           | 2018-12-14                       |
| 3 GARRETT MOTION INC  | P  | 2005-05-16                           |                                  |
| 111 GENERAL ELECTRIC COMPANY  | P  | 2010-03-09                           |                                  |
| 3 HONEYWELL INT'L INC   | P  | 2005-05-16                           |                                  |
| 3 JOHNSON & JOHNSON   | P  | 2002-06-14                           | 2018-12-14                       |
| 2 NORFOLK SOUTHERN CORP   | P  | 2007-08-01                           | 2018-12-14                       |
| 32 PFIZER INC   | P  | 2005-05-16                           |                                  |
| 49996 RESIDEO TECHNOLOGIES  | P  | 2005-05-16                           |                                  |
| 6 VERIZON COMMUNICATIONS  | P  | 2007-03-27                           |                                  |

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

| (e) Gross sales price | (f) Depreciation allowed<br>(or allowable) | (g) Cost or other basis<br>plus expense of sale | (h) Gain or (loss)<br>(e) plus (f) minus (g) |
|-----------------------|--|---|--|
| 1,411                 |  | 649   | 762  |
| 414                   |  | 91  | 323  |
| 4                     |  | 1   | 3  |
| 1,626                 |  | 1,826   | -200   |
| 426                   |  | 105   | 321  |
| 398                   |  | 170   | 228  |
| 302                   |  | 105   | 197  |
| 1,324                 |  | 898   | 426  |
| 11                    |  | 3   | 8  |
| 337                   |  | 212   | 125  |

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

| Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69 |                                   |  | (l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h)) |
|---|-----------------------------------|--|---|
| (i) F M V as of 12/31/69  | (j) Adjusted basis as of 12/31/69 | (k) Excess of col. (i) over col. (j), if any |   |
|   |                                   |  | 762   |
|   |                                   |  | 323   |
|   |                                   |  | 3   |
|   |                                   |  | -200  |
|   |                                   |  | 321   |
|   |                                   |  | 228   |
|   |                                   |  | 197   |
|   |                                   |  | 426   |
|   |                                   |  | 8   |
|   |                                   |  | 125   |

**TY 2018 Accounting Fees Schedule**

**Name:** HARRY & ZACKIA SHAIA CHARITABLE  
FOUNDATION

**EIN:** 54-1991934

| <b>Category</b> | <b>Amount</b> | <b>Net Investment<br/>Income</b> | <b>Adjusted Net<br/>Income</b> | <b>Disbursements<br/>for Charitable<br/>Purposes</b> |
|-----------------|---------------|----------------------------------|--------------------------------|--|
| ACCOUNTING FEES | 3,700         | 0                                |                                | 3,700  |

**TY 2018 Investments Corporate Stock Schedule**

**Name:** HARRY & ZACKIA SHAlA CHARITABLE  
FOUNDATION

**EIN:** 54-1991934

**Investments Corporation Stock Schedule**

| <b>Name of Stock</b>                   | <b>End of Year Book Value</b> | <b>End of Year Fair Market Value</b> |
|--|-------------------------------|--------------------------------------|
| 3M CO - 4/5                            | 983                           | 939                                  |
| ALPHABET INC VOTING CAP STK CL A - 0/2 | 2,222                         | 2,065                                |
| AMGEN INC - 17/15                      | 2,353                         | 2,883                                |
| APPLE INC - 32/26                      | 3,039                         | 4,021                                |
| AT&T INC - 81/78                       | 2,704                         | 2,234                                |
| BANCO LATINOAMERICANO - 54/49          | 1,321                         | 837                                  |
| BANK OF AMERICA - 80/66                | 1,130                         | 1,614                                |
| CHEVRON CORPORATION - 21/27            | 2,766                         | 2,915                                |
| CHUBB LTD - 15/16                      | 1,333                         | 2,050                                |
| CISCO SYSTEMS INC - 142/110            | 2,263                         | 4,665                                |
| CITIGROUP INC NEW - 69/64              | 3,168                         | 3,307                                |
| CONOCOPHILLIPS - 38/36                 | 1,736                         | 2,203                                |
| CORNING INC - 63/57                    | 1,037                         | 1,689                                |
| COSTCO WHSL CORP NEW - 20/18           | 1,018                         | 3,611                                |
| DISNEY WALT COMPANY - 11/12            | 1,251                         | 1,305                                |
| DOWDUPONT INC - 80/69                  | 2,513                         | 3,662                                |
| DUKE ENERGY CORP - 27/25               | 1,908                         | 2,136                                |
| EXXON MOBILE CORP - 25/23              | 1,859                         | 1,558                                |
| GRACE W R & CO - 0/9                   | 614                           | 575                                  |
| HANESBRANDS INC - 0/34                 | 623                           | 414                                  |
| HOME DEPOT INC - 12/12                 | 1,429                         | 2,042                                |
| HONEYWELL INTERNATIONAL INC - 24/21    | 1,270                         | 2,734                                |
| INTEL CORP - 118/81                    | 2,135                         | 3,757                                |
| INTERNATIONAL BUSINESS MACHINES - 9/9  | 1,649                         | 1,016                                |
| JOHNSON & JOHNSON - 29/26              | 1,642                         | 3,319                                |
| JP MORGAN CHASE & CO - 68/56           | 2,538                         | 5,454                                |
| MEDTRONICS PLC - 41/35                 | 2,670                         | 3,134                                |
| MERCK & CO INC NEW - 58/52             | 2,723                         | 3,948                                |
| MICROSOFT CORP - 74/66                 | 2,317                         | 6,582                                |
| NEXTERA ENERGY INC - 13/10             | 1,222                         | 1,723                                |

**Investments Corporation Stock Schedule**

| <b>Name of Stock</b>                 | <b>End of Year Book Value</b> | <b>End of Year Fair Market Value</b> |
|--------------------------------------|-------------------------------|--------------------------------------|
| NIKE INC CLASS B - 0/21              | 1,151                         | 1,540                                |
| NORFOLK SOUTHERN CORP - 22/20        | 1,163                         | 2,924                                |
| NXP SEMICONDUCTORS 0/18              | 1,663                         | 1,317                                |
| PEPSICO INCORPORATED - 13/11         | 1,091                         | 1,203                                |
| PFIZER INC - 134/102                 | 3,022                         | 4,426                                |
| PNC FINANCIAL SERVICES GROUP - 21/19 | 1,092                         | 2,211                                |
| PROCTOR & GAMBLE CO - 22/19          | 1,574                         | 1,729                                |
| ROYAL DUTCH SHELL PLC - 0/42         | 2,665                         | 2,499                                |
| TARGET CORP - 0/9                    | 609                           | 590                                  |
| TEXAS INSTRUMENTS INC - 0/6          | 614                           | 560                                  |
| TIFFANY & CO - 15/10                 | 593                           | 795                                  |
| UNION PACIFIC CORP - 25/23           | 1,232                         | 3,117                                |
| UNITEDHEALTH GROUP INC - 9/8         | 926                           | 1,957                                |
| VERIZON COMM COM - 67/61             | 2,943                         | 3,402                                |
| WAL-MART STORES INC - 24/21          | 1,477                         | 1,941                                |
| WELLS FARGO CO - 63/57               | 2,322                         | 2,621                                |

**TY 2018 Investments Government Obligations Schedule**

**Name:** HARRY & ZACKIA SHAIYA CHARITABLE  
FOUNDATION

**EIN:** 54-1991934

**US Government Securities - End  
of Year Book Value:**

48,710

**US Government Securities - End  
of Year Fair Market Value:**

48,370

**State & Local Government  
Securities - End of Year Book  
Value:**

0

**State & Local Government  
Securities - End of Year Fair  
Market Value:**

0

**TY 2018 Other Expenses Schedule**

**Name:** HARRY & ZACKIA SHAIYA CHARITABLE  
FOUNDATION

**EIN:** 54-1991934

**Other Expenses Schedule**

| Description                                 | Revenue and Expenses per Books | Net Investment Income | Adjusted Net Income | Disbursements for Charitable Purposes |
|---|--------------------------------|-----------------------|---------------------|---------------------------------------|
| INVESTMENT MANAGEMENT FEES                  | 1,903                          | 1,903                 |                     | 0                                     |
| FOREIGN TAXES WITHHELD                      | 1                              | 1                     |                     | 0                                     |
| POSTAGE                                     | 3                              | 0                     |                     | 3                                     |
| BANK CHARGES                                | 80                             | 0                     |                     | 80                                    |
| LUNCHEONS FOR BENEFICIARIES OF SCHOLARSHIPS | 672                            | 0                     |                     | 672                                   |

**TY 2018 Other Income Schedule**

**Name:** HARRY & ZACKIA SHAIA CHARITABLE  
FOUNDATION

**EIN:** 54-1991934

**Other Income Schedule**

| Description          | Revenue And Expenses Per Books | Net Investment Income | Adjusted Net Income |
|----------------------|--------------------------------|-----------------------|---------------------|
| MISCELLANEOUS INCOME | 54                             | 54                    | 54                  |
| MARKET DISCOUNT      | 25                             | 25                    | 25                  |

**TY 2018 Taxes Schedule**

**Name:** HARRY & ZACKIA SHAIA CHARITABLE  
FOUNDATION

**EIN:** 54-1991934

| <b>Category</b> | <b>Amount</b> | <b>Net Investment<br/>Income</b> | <b>Adjusted Net<br/>Income</b> | <b>Disbursements<br/>for Charitable<br/>Purposes</b> |
|-----------------|---------------|----------------------------------|--------------------------------|--|
| EXCISE TAXES    | 300           | 300                              |                                | 0  |
| SCC FEE         | 25            | 0                                |                                | 25   |

**Schedule B**  
(Form 990, 990-EZ,  
or 990-PF)  
Department of the Treasury  
Internal Revenue Service

**Schedule of Contributors**  
▶ Attach to Form 990, 990-EZ, or 990-PF  
▶ Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for the latest information

OMB No 1545-0047  
**2018**

**Name of the organization**  
HARRY & ZACKIA SHAIA CHARITABLE  
FOUNDATION

**Employer identification number**  
54-1991934

**Organization type** (check one)

**Filers of:**

**Section:**

Form 990 or 990-EZ

501(c)( ) (enter number) organization

4947(a)(1) nonexempt charitable trust **not** treated as a private foundation

527 political organization

Form 990-PF

501(c)(3) exempt private foundation

4947(a)(1) nonexempt charitable trust treated as a private foundation

501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.

**Note.** Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

**General Rule**

For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or other property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions.

**Special Rules**

For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33<sup>1</sup> 3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.

For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I, II, and III.

For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Don't complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling \$5,000 or more during the year. . . . ▶ \$ \_\_\_\_\_

**Caution.** An organization that isn't covered by the General Rule and/or the Special Rules doesn't file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2, of its Form 990, or check the box on line H of its Form 990-EZ or on its Form 990PF, Part I, line 2, to certify that it doesn't meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

|   |   |
|---|---|
| <b>Name of organization</b><br>HARRY & ZACKIA SHAI A CHARITABLE<br>FOUNDATION | <b>Employer identification number</b><br>54-1991934 |
|---|---|

**Part I** **Contributors** (See instructions) Use duplicate copies of Part I if additional space is needed

| (a)<br>No. | (b)<br>Name, address, and ZIP + 4                               | (c)<br>Total contributions | (d)<br>Type of contribution  |
|------------|---|----------------------------|--|
| 1          | DR FREDERIC RAHAL<br>113 BROOKSCHASE LANE<br>RICHMOND, VA 23229 | \$ 300                     | Person <input checked="" type="checkbox"/><br>Payroll <input type="checkbox"/><br>Noncash <input type="checkbox"/><br><small>(Complete Part II for noncash contributions )</small> |
| 2          | MR HARRY SHAI A JR<br>300 DESOTA DRIVE<br>RICHMOND, VA 23229    | \$ 5,000                   | Person <input checked="" type="checkbox"/><br>Payroll <input type="checkbox"/><br>Noncash <input type="checkbox"/><br><small>(Complete Part II for noncash contributions )</small> |
| .          |   | \$                         | Person <input type="checkbox"/><br>Payroll <input type="checkbox"/><br>Noncash <input type="checkbox"/><br><small>(Complete Part II for noncash contributions )</small>            |
| .          |   | \$                         | Person <input type="checkbox"/><br>Payroll <input type="checkbox"/><br>Noncash <input type="checkbox"/><br><small>(Complete Part II for noncash contributions )</small>            |
| .          |   | \$                         | Person <input type="checkbox"/><br>Payroll <input type="checkbox"/><br>Noncash <input type="checkbox"/><br><small>(Complete Part II for noncash contributions )</small>            |
| .          |   | \$                         | Person <input type="checkbox"/><br>Payroll <input type="checkbox"/><br>Noncash <input type="checkbox"/><br><small>(Complete Part II for noncash contributions )</small>            |
| .          |   | \$                         | Person <input type="checkbox"/><br>Payroll <input type="checkbox"/><br>Noncash <input type="checkbox"/><br><small>(Complete Part II for noncash contributions )</small>            |



|   |   |
|---|---|
| <b>Name of organization</b><br>HARRY & ZACKIA SHAIJA CHARITABLE<br>FOUNDATION | <b>Employer identification number</b><br>54-1991934 |
|---|---|

**Part III** Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of exclusively religious, charitable, etc., contributions of \$1,000 or less for the year. (Enter this information once. See instructions.) ▶ \$ \_\_\_\_\_  
Use duplicate copies of Part III if additional space is needed

| (a)<br>No. from Part I | (b) Purpose of gift | (c) Use of gift | (d) Description of how gift is held |
|------------------------|---------------------|-----------------|-------------------------------------|
|                        | _____               | _____           | _____                               |
|                        | _____               | _____           | _____                               |

|                                       |  |
|---------------------------------------|--|
| (e) Transfer of gift                  |  |
| Transferee's name, address, and ZIP 4 | Relationship of transferor to transferee |
| _____                                 | _____                                    |
| _____                                 | _____                                    |

| (a)<br>No. from Part I | (b) Purpose of gift | (c) Use of gift | (d) Description of how gift is held |
|------------------------|---------------------|-----------------|-------------------------------------|
|                        | _____               | _____           | _____                               |
|                        | _____               | _____           | _____                               |

|                                       |  |
|---------------------------------------|--|
| (e) Transfer of gift                  |  |
| Transferee's name, address, and ZIP 4 | Relationship of transferor to transferee |
| _____                                 | _____                                    |
| _____                                 | _____                                    |

| (a)<br>No. from Part I | (b) Purpose of gift | (c) Use of gift | (d) Description of how gift is held |
|------------------------|---------------------|-----------------|-------------------------------------|
|                        | _____               | _____           | _____                               |
|                        | _____               | _____           | _____                               |

|                                       |  |
|---------------------------------------|--|
| (e) Transfer of gift                  |  |
| Transferee's name, address, and ZIP 4 | Relationship of transferor to transferee |
| _____                                 | _____                                    |
| _____                                 | _____                                    |

| (a)<br>No. from Part I | (b) Purpose of gift | (c) Use of gift | (d) Description of how gift is held |
|------------------------|---------------------|-----------------|-------------------------------------|
|                        | _____               | _____           | _____                               |
|                        | _____               | _____           | _____                               |

|                                       |  |
|---------------------------------------|--|
| (e) Transfer of gift                  |  |
| Transferee's name, address, and ZIP 4 | Relationship of transferor to transferee |
| _____                                 | _____                                    |
| _____                                 | _____                                    |