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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 01-01-2018, and ending 12-31-2018

Name of foundation
SOUTHERN COMPANY CHARITABLE FOUNDATION
INC

Number and street (or P O box number if mail is not delivered to street address)
241 RALPH MCGILL BLVD NE BIN 10095

City or town, state or province, country, and ZIP or foreign postal code
ATLANTA, GA 303083374

G Check all that apply

☐ Initial return

☐ Initial return of a former public charity

☐ Final return

☐ Amended return

☐ Address change

☐ Name change

H Check type of organization

☒ Section 501(c)(3) exempt private foundation

☐ Section 4947(a)(1) nonexempt charitable trust

☐ Other taxable private foundation

I Fair market value of all assets at end of year (from Part II, col (c), line 16) ▶ \$ 58,919,068

J Accounting method

☐ Cash

☒ Accrual

☐ Other (specify) (Part I, column (d) must be on cash basis)

A Employer identification number
58-2514027

B Telephone number (see instructions)
(404) 506-6784

C If exemption application is pending, check here ▶ ☐

D 1. Foreign organizations, check here ▶ ☐
2 Foreign organizations meeting the 85% test, check here and attach computation ▶ ☐

E If private foundation status was terminated under section 507(b)(1)(A), check here ▶ ☐

F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ▶ ☐

Part I

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

	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)			
	2 Check ▶ <input checked="" type="checkbox"/> If the foundation is not required to attach Sch B			
	3 Interest on savings and temporary cash investments	1,395	1,395	
	4 Dividends and interest from securities	1,493,316	1,493,316	
	5a Gross rents			
	b Net rental income or (loss)			
	6a Net gain or (loss) from sale of assets not on line 10	1,753,228		
	b Gross sales price for all assets on line 6a			
		15,474,979		
	7 Capital gain net income (from Part IV, line 2)		1,753,228	
	8 Net short-term capital gain			
	9 Income modifications			
Operating and Administrative Expenses	10a Gross sales less returns and allowances			
	b Less Cost of goods sold			
	c Gross profit or (loss) (attach schedule)			
	11 Other income (attach schedule)	131	131	
	12 Total. Add lines 1 through 11	3,248,070	3,248,070	
	13 Compensation of officers, directors, trustees, etc	0	0	0
	14 Other employee salaries and wages			
	15 Pension plans, employee benefits			
	16a Legal fees (attach schedule)			
	b Accounting fees (attach schedule)	15,206	7,706	7,500
	c Other professional fees (attach schedule)	342,487	342,487	0
	17 Interest			
	18 Taxes (attach schedule) (see instructions)	86,252	79,572	0
	19 Depreciation (attach schedule) and depletion			
	20 Occupancy			
	21 Travel, conferences, and meetings			
22 Printing and publications				
23 Other expenses (attach schedule)	38,544	12,240	26,304	
24 Total operating and administrative expenses. Add lines 13 through 23	482,489	442,005	33,804	
25 Contributions, gifts, grants paid	18,050,857		2,085,856	
26 Total expenses and disbursements. Add lines 24 and 25	18,533,346	442,005	2,119,660	
	27 Subtract line 26 from line 12			
	a Excess of revenue over expenses and disbursements	-15,285,276		
	b Net investment income (if negative, enter -0-)		2,806,065	
c Adjusted net income (if negative, enter -0-)				

For Paperwork Reduction Act Notice, see instructions.

Cat No 11289X

Form 990-PF (2018)

Part II Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions.)		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash—non-interest-bearing			
	2 Savings and temporary cash investments	5,655,389	649,628	649,628
	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 (attach schedule) (see instructions)			
	7 Other notes and loans receivable (attach schedule) ▶ _____ Less allowance for doubtful accounts ▶ _____			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges	51,501	32,821	32,821
	10a Investments—U S and state government obligations (attach schedule)			
	b Investments—corporate stock (attach schedule)	46,823,774	39,286,149	39,286,149
	c Investments—corporate bonds (attach schedule)	13,856,792	13,800,051	13,800,051
	11 Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12 Investments—mortgage loans			
	13 Investments—other (attach schedule)	4,822,693	5,083,453	5,083,453
	14 Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
15 Other assets (describe ▶ _____)	439,243	66,966	66,966	
16 Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	71,649,392	58,919,068	58,919,068	
Liabilities	17 Accounts payable and accrued expenses	76,224	78,100	
	18 Grants payable	14,066,571	25,031,571	
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable (attach schedule)			
	22 Other liabilities (describe ▶ _____)	34,954	0	
	23 Total liabilities (add lines 17 through 22)	14,177,749	25,109,671	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here <input checked="" type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.			
	24 Unrestricted	57,471,643	33,809,397	
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here <input type="checkbox"/> and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds			
	28 Paid-in or capital surplus, or land, bldg, and equipment fund			
	29 Retained earnings, accumulated income, endowment, or other funds			
30 Total net assets or fund balances (see instructions)	57,471,643	33,809,397		
31 Total liabilities and net assets/fund balances (see instructions) .	71,649,392	58,919,068		

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	57,471,643
2 Enter amount from Part I, line 27a	2	-15,285,276
3 Other increases not included in line 2 (itemize) ▶ _____	3	62,832
4 Add lines 1, 2, and 3	4	42,249,199
5 Decreases not included in line 2 (itemize) ▶ _____	5	8,439,802
6 Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30 .	6	33,809,397

Part IV Capital Gains and Losses for Tax on Investment Income

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

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

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

2 Capital gain net income or (net capital loss)	<div> <div>If gain, also enter in Part I, line 7</div> <div>If (loss), enter -0- in Part I, line 7</div> </div>	2	1,753,228
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8		3	

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

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

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

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



Yes



No

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2017	7,429,281	64,781,154	0 114683
2016	6,582,632	50,204,140	0 131117
2015	6,286,014	62,633,936	0 100361
2014	1,539,070	63,369,898	0 024287
2013	1,301,591	48,549,046	0 026810
2 Total of line 1, column (d)			2 0 397258
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 0 079452
4 Enter the net value of noncharitable-use assets for 2018 from Part X, line 5			4 64,599,703
5 Multiply line 4 by line 3			5 5,132,576
6 Enter 1% of net investment income (1% of Part I, line 27b)			6 28,061
7 Add lines 5 and 6			7 5,160,637
8 Enter qualifying distributions from Part XII, line 4			8 2,119,660

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

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

1a	Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1 Date of ruling or determination letter _____ (attach copy of letter if necessary—see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b	1	56,121
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	56,121
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	56,121
6	Credits/Payments		
a	2018 estimated tax payments and 2017 overpayment credited to 2018	6a	88,942
b	Exempt foreign organizations—tax withheld at source	6b	
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	88,942
8	Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8	0
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	32,821
11	Enter the amount of line 10 to be Credited to 2019 estimated tax <input type="checkbox"/> 32,821 Refunded <input type="checkbox"/>	11	0

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a	No
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? (see Instructions for definition). 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	No
c Did the foundation file Form 1120-POL for this year?	1c	No
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation <input type="checkbox"/> \$ 0 (2) On foundation managers <input type="checkbox"/> \$ 0		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input type="checkbox"/> \$ 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	No
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes	3	No
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a	No
b If "Yes," has it filed a tax return on Form 990-T for this year?	4b	
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T	5	No
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	Yes
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), and Part XV	7	Yes
8a Enter the states to which the foundation reports or with which it is registered (see instructions) <input type="checkbox"/> GA, CA		
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	Yes
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2018 or the taxable year beginning in 2018? See the instructions for Part XIV. If "Yes," complete Part XIV	9	No
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10	No

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule. See instructions.	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement. See instructions.	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ▶ N/A	13	Yes	
14	The books are in care of ▶ RITA BREEN Telephone no ▶ (404) 506-3390			

Located at **▶** 241 RALPH MCGILL BLVD BIN 10095 ATLANTA GA ZIP+4 **▶** 30308

15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —check here ▶ <input type="checkbox"/>			
	and enter the amount of tax-exempt interest received or accrued during the year ▶ 15			
16	At any time during calendar year 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?	16	Yes	No
	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)		Yes	No
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days). <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions. <input type="checkbox"/>	1b		
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?	1c		No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2018, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2018? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	If "Yes," list the years ▶ 20____, 20____, 20____, 20____			
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions).	2b		
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ▶ 20____, 20____, 20____, 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
b	If "Yes," did it have excess business holdings in 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).	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2018?	4b		No

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

		Yes	No
5a During the year did the foundation pay or incur any amount to			
(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(3) Provide a grant to an individual for travel, study, or other similar purposes?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions.	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b If any answer is "Yes" to 5a(1)–(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance? See instructions.		5b	
Organizations relying on a current notice regarding disaster assistance check here.	▶ <input type="checkbox"/>		
c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?	<input type="checkbox"/> Yes <input type="checkbox"/> No		
<i>If "Yes," attach the statement required by Regulations section 53.4945–5(d)</i>			
6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	6b	No
b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?			
<i>If "Yes" to 6b, file Form 8870</i>			
7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	7b	
b If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?			
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 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
See Additional Data Table				

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

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

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


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

3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE".		
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
OFI DEV 6803 SOUTH TUCSON WAY CENTENNIAL, CO 80112	INVESTMENT FEES	94,469
EARNEST PARTNERS 1180 PEACHTREE ST NE 2300 ATLANTA, GA 30309	INVESTMENT FEES	73,161
SUNTRUST 2226 SUNDOWN DR NE ATLANTA, GA 30345	INVESTMENT FEES	71,012
Total number of others receiving over \$50,000 for professional services. 		3

Part IX-A Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1	
2	
3	
4	

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

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1	
2	
All other program-related investments. See instructions.	
3	
Total. Add lines 1 through 3 	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	65,253,392
b	Average of monthly cash balances.	1b	330,063
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	65,583,455
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	65,583,455
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	983,752
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	64,599,703
6	Minimum investment return. Enter 5% of line 5.	6	3,229,985

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	3,229,985
2a	Tax on investment income for 2018 from Part VI, line 5.	2a	56,121
b	Income tax for 2018 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	56,121
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	3,173,864
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	3,173,864
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	3,173,864

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	2,119,660
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	2,119,660
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b. See instructions.	5	0
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	2,119,660

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

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2017	(c) 2017	(d) 2018
1 Distributable amount for 2018 from Part XI, line 7				3,173,864
2 Undistributed income, if any, as of the end of 2018				
a Enter amount for 2017 only.			0	
b Total for prior years 20____, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2018				
a From 2013.				
b From 2014.				
c From 2015.				2,103,589
d From 2016.				4,101,277
e From 2017.				4,248,341
f Total of lines 3a through e.	10,453,207			
4 Qualifying distributions for 2018 from Part XII, line 4 ▶ \$ <u>2,119,660</u>				
a Applied to 2017, but not more than line 2a			0	
b Applied to undistributed income of prior years (Election required—see instructions).		0		
c Treated as distributions out of corpus (Election required—see instructions).	0			
d Applied to 2018 distributable amount.				2,119,660
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))	1,054,204			1,054,204
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	9,399,003			
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 instructions			0	
f Undistributed income for 2018 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2019				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions).	0			
8 Excess distributions carryover from 2013 not applied on line 5 or line 7 (see instructions).	0			
9 Excess distributions carryover to 2019. Subtract lines 7 and 8 from line 6a	9,399,003			
10 Analysis of line 9				
a Excess from 2014.				
b Excess from 2015.				1,049,385
c Excess from 2016.				4,101,277
d Excess from 2017.				4,248,341
e Excess from 2018.				

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)

2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed

	Tax year	Prior 3 years			(e) Total
	(a) 2018	(b) 2017	(c) 2016	(d) 2015	
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))

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

SOUTHERN COMPANY CHARITABLE FOUNDAT
241 RALPH MCGILL BLVD BIN 10095
ATLANTA, GA 30308
(404) 506-6784

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

BRIEF LETTER, COPY OF 501(C)(3) TAX EXEMPT LETTER, AUDITED FINANCIALS, BRIEF DESCRIPTION OF THE ORGANIZATION REQUESTING SUPPORT, LIST OF ITS OFFICERS BOARD MEMBERS, AMOUNT REQUESTED. CONTACT THE ORGANIZATION AT (404) 506-6784 FOR DETAIL INFORMATION

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

CONTACT THE ORGANIZATION AT (404) 506-6784 FOR DETAIL INFORMATION

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 <i>Paid during the year</i> See Additional Data Table				
Total ► 3a				
b <i>Approved for future payment</i> GEORGIA TECH FOUNDATION INC 760 SPRING ST NW ATLANTA, GA 303081123		PC	PLEDGE AUTHORIZING UP TO \$30M TO SUPPORT BOTH CURRENT OPERATIONS AND FOR A PERMANENT ENDOWMENT, DIRECTED TOWARD THE ATTRACTION AND RETENTION OF EMINENT TEACHER/SCHOLARS	15,000,000
GROVE PARK FOUNDATION INC 1566 DONALD LEE HOLLOWELL PKWY NW STE 105 ATLANTA, GA 30138		PC	GROVE PARK PROMISE EQUITABLE AND THRIVING CAPITAL CAMPAIGN PLEDGE OF \$500,000 ANNUALLY BEGINNING IN 2018	1,000,000
Total ► 3b				

Enter gross amounts unless otherwise indicated

[illegible]

Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

	Yes	No
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1a(1)		No
1a(2)		No

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1b(1)	No
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1b(2)	No
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1b(3)		No
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1b(4)	No
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1b(5)		No
--------------	--	-----------

1b(6)		No
--------------	--	-----------

1c		No
-----------	--	-----------

value
ue

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

(a) Name of organization	(b) Type of organization	(c) Description of relationship
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Signature of officer or trustee _____ Date _____ Title _____

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

List and describe the kind(s) of property sold (e g , real estate, (a) 2-story brick warehouse, or common stock, 200 shs MLC Co)		(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
1	OFI	P	2018-12-31	2018-12-31
1	BARROW	P	2018-12-31	2018-12-31
	DE PRINCE	P	2018-12-31	2018-12-31
	EARNEST	P	2018-12-31	2018-12-31
	CG DISTRIBUTIONS - MS PPF	P	2018-12-31	2018-12-31
	DONDIV DISTRI - MS PPF	P	2018-12-31	2018-12-31
	ABERDEEN	P	2018-12-31	2018-12-31
	LAZARD	P	2018-12-31	2018-12-31

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

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
495,000		328,658	166,342
5,565,544		4,869,213	696,331
5,192,686		4,990,132	202,554
4,054,497		3,421,165	633,332
13,449			13,449
62,833		62,833	0
90,970			90,970
		49,750	-49,750

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(I) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			166,342
			696,331
			202,554
			633,332
			13,449
			0
			90,970
			-49,750

Form 990PF Part VIII Line 1 - List all officers, directors, trustees, foundation managers and their compensation				
(a) Name and address	Title, and average hours per week (b) devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances
ARTHUR M BEATTIE JAN 1- MAY 312018	VICE PRESIDENT 1 00	0	0	0
30 IVAN ALLEN JR BLVD BIN SC1503 ATLANTA, GA 30308				
MICHAEL K ANDERSON	PRESIDENT 1 50	0	0	0
241 RALPH MCGILL BLVD BIN 10230 ATLANTA, GA 30308				
MARK S LANTRIP	DIRECTOR 1 00	0	0	0
30 IVAN ALLEN JR BLVD BIN SC1501 ATLANTA, GA 30308				
CHRISTOPHER C WOMACK	DIRECTOR 1 00	0	0	0
30 IVAN ALLEN JR BLVD BIN SC1508 ATLANTA, GA 30308				
DREW EVANS JAN 1- MAY 312018	VICE PRESIDENT 1 00	0	0	0
30 IVAN ALLEN JR BLVD BIN SC1501 ATLANTA, GA 30308				
RITA M BREEN	SECRETARY, NON-VOTING OFFICER 1 50	0	0	0
241 RALPH MCGILL BLVD BIN 10095 ATLANTA, GA 30308				
VALERIE D SEARCY	ASST SECRETARY, NON-VOTING OFFICER 1 50	0	0	0
241 RALPH MCGILL BLVD BIN 10095 ATLANTA, GA 30308				
ROGER STEFFENS	TREASURER 1 50	0	0	0
30 IVAN ALLEN JR BLVD BIN SC1216 ATLANTA, GA 30308				
DEKIA SCOTT	ASST TREASURER 1 50	0	0	0
30 IVAN ALLEN JR BLVD BIN SC1216 ATLANTA, GA 30308				

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
DIAN FOSSEY GORILLA FUND INTERNATIONAL 800 CHEROKEE AVE SW ATLANTA, GA 30315		PC	2018 GENERAL OPERATING SUPPORT FOR OPERATIONS IN RWANDA AND CONGO	25,000
HRJ CHARITIES INC 555 BRYANT STREET NO 230 PALO ALTO, CA 94301		PC	A NIGHT TO REMEMBER ALADDIN THE HIT BROADWAY MUSICAL PARTNERING WITH EMORY WINSHIP CANCER INSTITUTE NO SCCF PARTICIPATION FRIDAY SEPTEMBER 21, 2018	25,000
UNITED YOUTH ADULT CONFERENCE 2 INC 1718 FAIRBURN ROAD SW ATLANTA, GA 30331		PC	ARTHUR LANGFORD JR TEEN LEADERSHIP PROGRAM	5,000
Total ▶ 3a				2,085,856

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
CARE INC SOUTHEAST REGIONAL HEADQUARTERS ATLANTA, GA 303032440		PC	CARE'S 2018 IMPACT AWARDS DINNER (NO PARTICIPATION)	10,000
AMERICAN RED CROSS - METROPOLITAN ATLANTA CHAPTER 1955 MONROE DRIVE NE ATLANTA, GA 30324		PC	DISASTER RELIEF FUND FOR HURRICANE FLORENCE AND SIGNIFICANT STORMS DURING THE 2018 HURRICANE SEASON	100,000
HURRICANE MICHAEL EMPLOYEE DISASTER RELIEF 241 RALPH MCGILL BLVD ATLANTA, GA 30308		NC	DOLLAR FOR DOLLAR MATCH, UP TO \$350K FOR DONATIONS MADE BY SOUTHERN COMPANY SYSTEM EMPLOYEES AND RETIREES IN SUPPORT OF SOUTHERN COMPANY EMPLOYEES SIGNIFICANTLY IMPACTED BY HURRICANE MICHAEL	65,734
Total ► 3a				2,085,856

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
PLANNED PARENTHOOD SOUTH ATLANTIC 4822 ALBEMARLE ROAD SUITE 104 CHARLOTTE, NC 28205		PC	DONATION ON BEHALF OF THE RETIREMENT OF SOTHERN COMPANY BOARD OF DIRECTORS MEMBER LINDA P HUDSON TO SUPPORT HE CAPITAL CAMPAIGN FOR THE NEW CHARLOTTE HEALTH CENTER	5,000
COMMUNITY FOUNDATION FOR GREATER ATLANTA INC 191 PEACHTREE STREET NE ATLANTA, GA 30303		PC	EMORY BRAIN HEALTH CENTER AND GPB "YOUR FANTASTIC MIND" DOCUMENTARY	300,000
GROVE PARK FOUNDATION INC 1566 DONALD LEE HOLLOWELL PKWY NW STE 105 ATLANTA, GA 30318		PC	1ST PAYMENT OF A 3 YEAR PLEDGE GROVE PARK PROMISE EQUITABLE AND THRIVING CAPITAL CAMPAIGN PLEDGE OF \$500,000 ANNUALLY FOR THREE YEARS FOR A TOTAL OF \$1.5M	500,000
Total ► 3a				2,085,856

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
THE UNIVERSITY OF MISSISSIPPI FOUNDATION 406 UNIVERSITY AVE OXFORD, MS 38655		PC	3RD PAYMENT OF A 4 YEAR PLEDGE GOVERNOR HALEY BARBOUR ENDOWMENT FOR THE STUDY OF AMERICAN POLITICS PLEDGE OF \$25,000 ANNUALLY FOR FOUR YEARS FOR A TOTAL OF \$100,000	25,000
FELLOWSHIP OF CHRISTIAN ATHLETES 8701 LEEDS ROAD KANSAS CITY, MO 64129		PC	"FUTURE PAYMENT - FINAL PAYMENT OF A 2 YEAR PLEDGE LEADERSHIP TRAINING, CAMP RESOURCES, ONE WAY TO PLAY DRUG FREE PROGRAMS , "2ND CHANCE CAMPS, DEVELOPMENT TRAINING	10,000
SOUTHEAST ALABAMA SICKLE CELL ASSOCIATION INC PO BOX 1079 TUSKEGEE, AL 360871079		PC	IN MEMORY OF AKIRA HOLLIS ON BEHALF OF SHANNON SAMPSON, SOUTHERN NUCLEAR SOCOMMITTED AWARD WINNER	1,000
Total ► 3a				2,085,856

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
MARTIN LUTHER KING SR COMMUNITY RESOURCES COLLABORATIVE 101 JACKSON STREET NE ATLANTA, GA 30312		PC	MULTIFAITH INITIATIVE TO END MASS INCARCERATION	100,000
HIGHWAY TO HOPE INCPO BOX 553 HAZLEHURST, GA 315390553		PC	ON BEHALF OF JEFF BULLARD, SOUTHERN NUCLEAR SOCOMMITTED AWARD WINNER	1,000
GIRLS INCORPORATED OF CENTRAL ALABAMA 5201 8TH AVE S BIRMINGHAM, AL 352124102		PC	ON BEHALF OF NATALIE MILLS, SOUTHERN COMPANY SERVICES SOCOMMITTED AWARD WINNER	1,000
Total ▶ 3a				2,085,856

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
THE UNIVERSITY OF TENNESSEE FOUNDATION INC 1525 UNIVERSITY AVENUE ROOM 223 KNOXVILLE, TN 379214848		PC	ON BEHALF OF RETIRING EVP AND CFO ARTHUR P BEATTIE	25,000
BOYS & GIRLS CLUBS OF HAWK- HOUSTON 329 CHICKASAW ST DOTHAN, AL 363034446		PC	ON BEHALF OF SAMANTHA BOSWELL, SOUTHERN NUCLEAR SOCOMMITTED AWARD WINNER	1,000
UNIVERSITY OF ALABAMA UAB COMPREHENSIVE CANCER CENTER BIRMINGHAM, AL 352943300		PC	ON BEHALF OF TODD HUMPHRIES, ALABAMA POWER SOCOMMITTED AWARD WINNER	1,000
Total ▶ 3a				2,085,856

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
THE GREATER PINEBELT COMMUNITY FOUNDATION 1501 ADELINE ST HATTIESBURG, MS 394014978		PC	ON BEHALF OF WARREN A HOOD, JR SOUTHERN COMPANY BOARD MEMBER	5,000
NATIONAL URBAN TECHNOLOGY CENTER INC C/O GSM SERVICES URBAN TECH DONATIONS LONG ISLAND, NY 11101		PC	MARYJO - 11/07/19 07 48PM WORKSHEET PRIVATE FOUNDATION	5,000
UNITED NATIONS FOUNDATION 1750 PENNSYLVANIA AVE NW SUITE 300 WASHINGTON, DC 200064500		PC	OPERATING EXPENSES IN HONOR OF TED TURNER	5,000
Total ► 3a				2,085,856

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
ATLANTA HISTORICAL SOCIETY INC 130 WEST PACES FERRY ROAD NW ATLANTA, GA 30305		PC	REQUEST TO SOUTHERN COMPANY CHARITABLE FOUNDATION, INC TO SUPPORT ATLANTA HISTORY CENTER CYCLORAMA STREETSCAPE IMPROVEMENTS	50,000
THE UNIVERSITY OF MISSISSIPPI FOUNDATION 406 UNIVERSITY AVE OXFORD, MS 38655		PC	SENATOR THAD COCHRAN SCHOLARSHIP ENDOWMENT	250,000
ATLANTA VOLUNTEER LAWYERS FOUNDATION INC 235 PEACHTREE STREET SUITE 1750 ATLANTA, GA 30303		PC	STANDING WITH OUR NEIGHBORS	25,000
Total ▶ 3a				2,085,856

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
PURPOSE BUILT COMMUNITIES FOUNDATION INC 3445 PEACHTREE RD NE SUITE 175 ATLANTA, GA 303261234		PC	TO SUPPORT WORK IN COMMUNITY REVITALIZATION, INCLUDING EDUCATION, IN ATLANTA AND ACROSS THE COUNTRY	250,000
AGNES SCOTT COLLEGE 141 E COLLEGE AVE DECATUR, GA 300303770		PC	EDUCATIONAL MATCHING GIFT	549
ALASKA BIBLE COLLEGE 248 E ELMWOOD AVE PALMER, AK 99645		PC	EDUCATIONAL MATCHING GIFT	5,000
Total ▶ 3a				2,085,856

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
BIRMINGHAM-SOUTHERN COLLEGE BOX 549003 BIRMINGHAM, AL 35254		PC	EDUCATIONAL MATCHING GIFT	975
ASSOCIATION OF GRADUATES OF THE UNITED STATES MILITARY ACADEMY 698 MILLS RD WEST POINT, NY 10996		PC	EDUCATIONAL MATCHING GIFT	50
AUBURN UNIVERSITY FOUNDATION 317 SOUTH COLLEGE STREET AUBURN, AL 368495149		PC	EDUCATIONAL MATCHING GIFT	84,230
Total ► 3a				2,085,856

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
BALL STATE UNIVERSITY FOUNDATION 2000 W UNIVERSITY AVE MUNCIE, IN 47306		PC	EDUCATIONAL MATCHING GIFT	2,500
BOARD OF THE UNIVERSITY OF ALABAMA PO BOX 870101 TUSCALOOSA, AL 35487		PC	EDUCATIONAL MATCHING GIFT	19,717
CARNEGIE MELLON UNIVERSITY 6 PPG PLACE PITTSBURGH, PA 152225409		PC	EDUCATIONAL MATCHING GIFT	9,500
Total ▶ 3a				2,085,856

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
CLEMSON UNIVERSITY FOUNDATION PO BOX 1889 CLEMSON, SC 296331889		PC	EDUCATIONAL MATCHING GIFT	100
COLLEGE HEIGHTS FOUNDATION INC 1906 COLLEGE HEIGHTS BOULEVARD BOWLING GREEN, KY 42101		PC	EDUCATIONAL MATCHING GIFT	1,000
CORPORATION OF MERCER UNIVERSITY 1501 MERCER UNIVERSITY DRIVE MACON, GA 31207		PC	EDUCATIONAL MATCHING GIFT	550
Total ► 3a				2,085,856

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
UNIVERSITY OF MISSOURI - COLUMBIA 407 REYNOLDS ALUMNI CENTER COLUMBIA, MO 65211		PC	EDUCATIONAL MATCHING GIFT	6,500
DAVIDSON COLLEGEBOX 7174 DAVIDSON, NC 280357174		PC	EDUCATIONAL MATCHING GIFT	50
EMORY UNIVERSITY 1762 CLIFTON ROAD ATLANTA, GA 30322		PC	EDUCATIONAL MATCHING GIFT	6,025
Total ▶ 3a				2,085,856

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
GARDNER-WEBB UNIVERSITY POBOX 997 BOILING SPRINGS, NC 28017		PC	EDUCATIONAL MATCHING GIFT	1,500
GEORGIA COLLEGE & STATE UNIVERSITY FOUNDATION INC CAMPUS BOX 113 MILLEDGEVILLE, GA 31061		PC	EDUCATIONAL MATCHING GIFT	5,000
GEORGIA SOUTHERN UNIVERSITY FOUNDATION INC PO BOX 8053 STATESBORO, GA 30460		PC	EDUCATIONAL MATCHING GIFT	2,200
Total ▶ 3a				2,085,856

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
GEORGIA STATE UNIVERSITY FOUNDATION INC PO BOX 3963 ATLANTA, GA 30302		PC	EDUCATIONAL MATCHING GIFT	1,650
GEORGIA TECH FOUNDATION INC 190 NORTH AVENUE ATLANTA, GA 30313		PC	EDUCATIONAL MATCHING GIFT	49,701
HILLSDALE COLLEGE 33 EAST COLLEGE STREET HILLSDALE, MI 49242		PC	EDUCATIONAL MATCHING GIFT	100
Total ▶ 3a				2,085,856

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
JACKSONVILLE STATE UNIVERSITY FOUNDATION 700 PELHAM RD N ROCK HOUSE JACKSONVILLE, AL 362651602		PC	EDUCATIONAL MATCHING GIFT	1,250
KENNESAW STATE UNIVERSITY FOUNDATION INC MD 9101 KENNESAW, GA 30144		PC	EDUCATIONAL MATCHING GIFT	3,150
LINCOLN UNIVERSITY 1570 BALTIMORE PIKE LINCOLN UNIVERSITY, PA 19352		PC	EDUCATIONAL MATCHING GIFT	1,000
Total ▶ 3a				2,085,856

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
MACALESTER COLLEGE 1600 GRAND AVE SAINT PAUL, MN 551051801		PC	EDUCATIONAL MATCHING GIFT	1,000
MARION MILITARY INSTITUTE 1101 WASHINGTON ST MARION, AL 367563213		PC	EDUCATIONAL MATCHING GIFT	50
MARS HILL UNIVERSITYPO BOX 370 MARS HILL, NC 287540370		PC	EDUCATIONAL MATCHING GIFT	100
Total ▶ 3a				2,085,856

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
MISSISSIPPI STATE UNIVERSITY FOUNDATION INC PO BOX 6149 MISSISSIPPI STATE, MS 39762		PC	EDUCATIONAL MATCHING GIFT	8,900
MOREHOUSE COLLEGE 830 WESTVIEW DR SW ATLANTA, GA 303143773		PC	EDUCATIONAL MATCHING GIFT	2,000
MOREHOUSE COLLEGE 830 WESTVIEW DR SW ATLANTA, GA 303143773		PC	EDUCATIONAL MATCHING GIFT	2,000
Total ▶ 3a				2,085,856

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
MOREHOUSE SCHOOL OF MEDICINE INC 720 WESTVIEW DRIVE SW ATLANTA, GA 303101495		PC	EDUCATIONAL MATCHING GIFT	1,000
MORTAR BOARD INC-UNIVERSITY OF ALABAMA-BIRMINGHAM 1720 2ND AVE S AB-1230 BIRMINGHAM, AL 352940112		PC	EDUCATIONAL MATCHING GIFT	2,650
NORTH CAROLINA STATE UNIVERSITY FOUNDATION INC BOX 7474 RALEIGH, NC 276957474		PC	EDUCATIONAL MATCHING GIFT	250
Total ▶ 3a				2,085,856

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
NORTHWESTERN UNIVERSITY 2020 RIDGE AVENUE EVANSTON, IL 602084305		PC	EDUCATIONAL MATCHING GIFT	3,750
OGLETHORPE UNIVERSITY INC 4484 PEACHTREE ROAD NE ATLANTA, GA 30319		PC	EDUCATIONAL MATCHING GIFT	500
OKLAHOMA STATE UNIVERSITY FOUNDATION PO BOX 1749 STILLWATER, OK 74076		PC	EDUCATIONAL MATCHING GIFT	2,500
Total ▶ 3a				2,085,856

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
POINT PARK UNIVERSITY 201 WOOD STREET PITTSBURGH, PA 15222		PC	EDUCATIONAL MATCHING GIFT	5,000
PRESBYTERIAN COLLEGE 503 SOUTH BROAD STREET CLINTON, SC 29325		PC	EDUCATIONAL MATCHING GIFT	1,030
PURDUE RESEARCH FOUNDATION - PURDUE FOUNDATION INC 403 WEST WOOD STREET LAFAYETTE, IN 479072007		PC	EDUCATIONAL MATCHING GIFT	5,000
Total ▶ 3a				2,085,856

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
ROLLINS COLLEGE1000 HOLT AVENUE WINTER PARK, FL 32789		PC	EDUCATIONAL MATCHING GIFT	1,000
ROSE HULMAN INSTITUTE OF TECHNOLOGY 5500 WABASH AVENUE TERRE HAUTE, IN 478033920		PC	EDUCATIONAL MATCHING GIFT	400
SAMFORD UNIVERSITY 800 LAKESHORE DR BIRMINGHAM, AL 352290001		PC	EDUCATIONAL MATCHING GIFT	400
Total ▶ 3a				2,085,856

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
SAMFORD UNIVERSITY 800 LAKESHORE DR BIRMINGHAM, AL 352290001		PC	EDUCATIONAL MATCHING GIFT	1,000
SPELMAN COLLEGE350 SPELMAN LN SW ATLANTA, GA 30314		PC	EDUCATIONAL MATCHING GIFT	240
STATE UNIVERSITY OF WEST GEORGIA FOUNDATION INC 1600 MAPLE STREET CARROLLTON, GA 301180001		PC	EDUCATIONAL MATCHING GIFT	1,000
Total ▶ 3a				2,085,856

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
TREVECCA NAZARENE UNIVERSITY 333 MURFREESBORO RD NASHVILLE, TN 372102834		PC	EDUCATIONAL MATCHING GIFT	1,000
TREVECCA NAZARENE UNIVERSITY 333 MURFREESBORO RD NASHVILLE, TN 372102834		PC	EDUCATIONAL MATCHING GIFT	1,250
TRUSTEES OF PRINCETON UNIVERSITY 330 ALEXANDER STREET PRINCETON, NJ 085435357		PC	EDUCATIONAL MATCHING GIFT	200
Total ▶ 3a				2,085,856

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
TULANE UNIVERSITYPO BOX 61075 NEW ORLEANS, LA 70161		PC	EDUCATIONAL MATCHING GIFT	750
UNIVERSITY OF ALABAMA ALUMNI ASSOCIATION ALUMNI HALL PO BOX 870101 TUSCALOOSA, AL 354860017		PC	EDUCATIONAL MATCHING GIFT	865
UNIVERSITY OF ALABAMA AT BIRMINGHAM 1720 SECOND AVENUE SOUTH AB1230 BIRMINGHAM, AL 352940112		PC	EDUCATIONAL MATCHING GIFT	6,015
Total ▶ 3a				2,085,856

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
UNIVERSITY OF ARKANSAS FOUNDATION INC 535 RESEARCH CENTER BLVD STE 120 FAYETTEVILLE, AR 72701		PC	EDUCATIONAL MATCHING GIFT	3,500
UNIVERSITY OF COLORADO FOUNDATION 4740 WALNUT STREET BOULDER CO, CO 803012538		PC	EDUCATIONAL MATCHING GIFT	250
UNIVERSITY OF DAYTON 300 COLLEGE PARK DAYTON, OH 454697056		PC	EDUCATIONAL MATCHING GIFT	600
Total ▶ 3a				2,085,856

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Name and address (home or business)				
a <i>Paid during the year</i>				
UNIVERSITY OF FLORIDA FOUNDATION INC PO BOX 14425 GAINESVILLE, FL 326042425		PC	EDUCATIONAL MATCHING GIFT	525
UNIVERSITY OF GEORGIA FOUNDATION 394 S MILLEDGE AVE ATHENS, GA 306025582		PC	EDUCATIONAL MATCHING GIFT	9,895
UNIVERSITY OF ILLINOIS FOUNDATION POBOX 3429 CHAMPAIGN, IL 61826		PC	EDUCATIONAL MATCHING GIFT	2,500
Total ▶ 3a				2,085,856

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Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
UNIVERSITY OF KENTUCKY OFFICE OF CONTROLLER & TREASURER 210 MALABU DRIVE SUITE 200 LEXINGTON, KY 40502		PC	EDUCATIONAL MATCHING GIFT	2,500
UNIVERSITY OF MINNESOTA FOUNDATION 200 OAK ST SE STE 500 MINNEAPOLIS, MN 554552010		PC	EDUCATIONAL MATCHING GIFT	75
UNIVERSITY OF MISSISSIPPI FOUNDATION 406 UNIVERSITY AVE OXFORD, MS 38655		PC	EDUCATIONAL MATCHING GIFT	100
Total ▶ 3a				2,085,856

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
UNIVERSITY OF MONTEVALLO FOUNDATION STATION 6215 MONTEVALLO, AL 351150000		PC	EDUCATIONAL MATCHING GIFT	5,500
UNIVERSITY OF NEBRASKA FOUNDATION PO BOX 82555 LINCOLN, NE 685012555		PC	EDUCATIONAL MATCHING GIFT	100
UNIVERSITY OF NORTH ALA FOUNDATION BOX 5113 FLORENCE, AL 356320001		PC	EDUCATIONAL MATCHING GIFT	2,830
Total ▶ 3a				2,085,856

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
UNIVERSITY OF NORTH CAROLINA AT CHAPEL HILL PO BOX 309 CHAPEL HILL, NC 27514		PC	EDUCATIONAL MATCHING GIFT	200
UNIVERSITY OF NOTRE DAME 1100 GRACE HALL NOTRE DAME, IN 46556		PC	EDUCATIONAL MATCHING GIFT	1,500
UNIVERSITY OF SOUTHERN CALIFORNIA 3551 TROUSDALE PKWY ATT CENTER LOS ANGELES, CA 900890001		PC	EDUCATIONAL MATCHING GIFT	5,000
Total ▶ 3a				2,085,856

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
UNIVERSITY OF TEXAS AT ARLINGTON BOX 19198 ARLINGTON, TX 760190198		PC	EDUCATIONAL MATCHING GIFT	750
VANDERBILT UNIVERSITY VANDERBILT UNIVERSITY VU STATION B 357727 NASHVILLE, TN 372350001		PC	EDUCATIONAL MATCHING GIFT	100
VIRGINIA TECH FOUNDATION INC 902 PRICES FORK ROAD-0336 BLACKSBURG, VA 240610001		PC	EDUCATIONAL MATCHING GIFT	2,000
Total ▶ 3a				2,085,856

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
WASHINGTON & LEE UNIVERSITY DEVELOPMENTAL BLDG LEXINGTON, VA 24450		PC	EDUCATIONAL MATCHING GIFT	50
WOFFORD COLLEGE 429 NORTH CHURCH STREET SPARTANBURG, SC 293033612		PC	EDUCATIONAL MATCHING GIFT	5,000
Total ▶ 3a				2,085,856

TY 2018 Accounting Fees Schedule

Name: SOUTHERN COMPANY CHARITABLE FOUNDATION
INC

EIN: 58-2514027

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING	15,206	7,706		7,500

TY 2018 Investments Corporate Bonds Schedule

Name: SOUTHERN COMPANY CHARITABLE FOUNDATION
INC

EIN: 58-2514027

Investments Corporate Bonds Schedule

Name of Bond	End of Year Book Value	End of Year Fair Market Value
LAZARD FIXED INCOME	13,800,051	13,800,051

TY 2018 Investments Corporate Stock Schedule

Name: SOUTHERN COMPANY CHARITABLE FOUNDATION
INC

EIN: 58-2514027

Investments Corporation Stock Schedule

Name of Stock	End of Year Book Value	End of Year Fair Market Value
ABERDEEN EMERGING MARKETS	2,372,110	2,372,110
EARNEST PARTNERS	8,007,219	8,007,219
BARROW	8,147,127	8,147,127
DRZ SVC	3,889,621	3,889,621
OFI DEVELOPMENT INTERNATIONAL	16,870,072	16,870,072

TY 2018 Investments - Other Schedule

Name: SOUTHERN COMPANY CHARITABLE FOUNDATION
INC

EIN: 58-2514027

Investments Other Schedule 2

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
REAL ESTATE FUNDS	FMV	2,821,438	2,821,438
HEDGE FUNDS	FMV	2,262,015	2,262,015

TY 2018 Other Assets Schedule

Name: SOUTHERN COMPANY CHARITABLE FOUNDATION
INC

EIN: 58-2514027

Other Assets Schedule

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
DIVIDENDS RECEIVABLE	38,042	37,184	37,184
INTEREST RECEIVABLE	1,201	757	757
STOCK RECEIVABLE	400,000	7,350	7,350
OTHER RECEIVABLES		21,675	21,675

TY 2018 Other Decreases Schedule

Name: SOUTHERN COMPANY CHARITABLE FOUNDATION
INC

EIN: 58-2514027

Description	Amount
UNREALIZED LOSSES ON INVESTMENTS	8,439,802

TY 2018 Other Expenses Schedule

Name: SOUTHERN COMPANY CHARITABLE FOUNDATION
INC

EIN: 58-2514027

Other Expenses Schedule

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
MEMBERSHIP DUES	15,050	0		15,050
MISCELLANEOUS	13,829	2,575		11,254
FORM K-1 LAZARD PORTFOLIO DEDUCTIONS	8,354	8,354		0
FORM K-1 OFI INTERNATIONAL	76	76		0
FORM K-1 ABERDEEN PORTFOLIO EXPENSE	1,235	1,235		0

TY 2018 Other Income Schedule

Name: SOUTHERN COMPANY CHARITABLE FOUNDATION
INC

EIN: 58-2514027

Other Income Schedule

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
EARNEST PARTNERS	131	131	131

TY 2018 Other Increases Schedule

Name: SOUTHERN COMPANY CHARITABLE FOUNDATION
INC

EIN: 58-2514027

Description	Amount
INCOME PER BOOKS NOT REPORTABLE ON TAX	62,832

TY 2018 Other Liabilities Schedule

Name: SOUTHERN COMPANY CHARITABLE FOUNDATION
INC

EIN: 58-2514027

Description	Beginning of Year - Book Value	End of Year - Book Value
STOCK PAYABLE	34,954	0

TY 2018 Other Professional Fees Schedule

Name: SOUTHERN COMPANY CHARITABLE FOUNDATION
INC

EIN: 58-2514027

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT FEES	341,034	341,034		0
BANKING FEES	1,453	1,453		0

TY 2018 Taxes Schedule

Name: SOUTHERN COMPANY CHARITABLE FOUNDATION
INC

EIN: 58-2514027

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOREIGN TAXES PAID	79,572	79,572		0
FEDERAL EXCISE TAX	6,680	0		0