

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

07/01, 2018, and ending

06/30, 2019

Name of foundation

CU PROVIDENT BENEVOLENT FOUNDATION-WACH

Number and street (or P.O. box number if mail is not delivered to street address)

6325 S RAINBOW BLVD STE 300

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

LAS VEGAS, NV 89118

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) ▶ \$ 24,676,646.

J Accounting method.

☒ Cash☐ Accrual☐ Other (specify)

(Part I, column (d) must be on cash basis.)

A Employer identification number

58-1881092

B Telephone number (see instructions)

919-881-6497

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).)

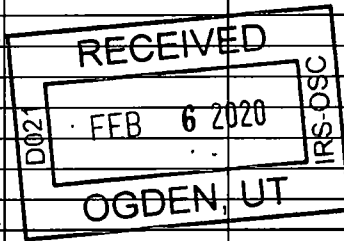
(a) Revenue and expenses per books

(b) Net investment income

(c) Adjusted net income

(d) Disbursements for charitable purposes (cash basis only)

	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received (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.				
4 Dividends and interest from securities	310,225.	305,618.		STMT 1
5a Gross rents				
b Net rental income or (loss)				
6a Net gain or (loss) from sale of assets not on line 10	894,142.			
b Gross sales price for all assets on line 6a	6,127,022.			
7 Capital gain net income (from Part IV, line 2)		894,142.		
8 Net short-term capital gain				
9 Income modifications				
10a Gross sales less returns and allowances				
b Less Cost of goods sold				
c Gross profit or (loss) (attach schedule)				
11 Other income (attach schedule)	395,264.	395,264.		STMT 3
12 Total. Add lines 1 through 11	1,599,631.	1,595,024.		
13 Compensation of officers, directors, trustees, etc.	78,000.			78,000.
14 Other employee salaries and wages		NONE	NONE	
15 Pension plans, employee benefits		NONE	NONE	
16a Legal fees (attach schedule)				
b Accounting fees (attach schedule)				
c Other professional fees (attach schedule)	143,401.	104,604.		38,797.
17 Interest				
18 Taxes (attach schedule) (see instructions)	28,315.	4,456.		
19 Depreciation (attach schedule) and depletion				
20 Occupancy				
21 Travel, conferences, and meetings		NONE	NONE	
22 Printing and publications		NONE	NONE	
23 Other expenses (attach schedule)	25,040.	50.		24,990.
24 Total operating and administrative expenses. Add lines 13 through 23.	274,756.	109,110.	NONE	141,787.
25 Contributions, gifts, grants paid	1,199,000.			1,199,000.
26 Total expenses and disbursements. Add lines 24 and 25.	1,473,756.	109,110.	NONE	1,340,787.
27 Subtract line 26 from line 12				
a Excess of revenue over expenses and disbursements	125,875.			
b Net investment income (if negative, enter -0-)		1,485,914.		
c Adjusted net income (if negative, enter -0-)				



5-62

SCANNED JUN 26 2020

Received in
Batching Ogden
FEB 10 2020

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		384.		
	2	Savings and temporary cash investments		346,626.	684,522.	684,522.
	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 ▶	NONE			
	8	Inventories for sale or use				
	9	Prepaid expenses and deferred charges				
	10a	Investments - U S and state government obligations (attach schedule)	STMT 7	796,467.	918,584.	929,398.
	b	Investments - corporate stock (attach schedule)	STMT 8	11,416,824.	11,164,306.	13,003,145.
	c	Investments - corporate bonds (attach schedule)	STMT 9	2,401,678.	1,921,270.	1,960,870.
	11	Investments - land, buildings, and equipment basis Less accumulated depreciation (attach schedule) ▶				
12	Investments - mortgage loans					
13	Investments - other (attach schedule)	STMT 11	701,874.	957,452.	949,964.	
14	Land, buildings, and equipment basis Less accumulated depreciation (attach schedule) ▶					
15	Other assets (describe ▶ <u>ASSETS HELD BY NORTHERN TRUST</u>)		6,148,627.	6,260,941.	7,148,747.	
16	Total assets (to be completed by all filers - see the instructions. Also, see page 1, item I)		21,812,480.	21,907,075.	24,676,646.	
Liabilities	17	Accounts payable and accrued expenses				
	18	Grants payable				
	19	Deferred revenue				
	20	Loans from officers, directors, trustees, and other disqualified persons . .				
	21	Mortgages and other notes payable (attach schedule)				
	22	Other liabilities (describe ▶)				
23	Total liabilities (add lines 17 through 22)			NONE		
Net Assets or Fund Balances		Foundations that follow SFAS 117, check here . . . ▶ <input type="checkbox"/>				
		and complete lines 24 through 26, and lines 30 and 31.				
	24	Unrestricted				
	25	Temporarily restricted				
	26	Permanently restricted				
		Foundations that do not follow SFAS 117, check here ▶ <input checked="" type="checkbox"/>				
		and complete lines 27 through 31.				
	27	Capital stock, trust principal, or current funds		21,812,480.	21,907,075.	
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)		21,812,480.	21,907,075.		
31	Total liabilities and net assets/fund balances (see instructions)		21,812,480.	21,907,075.		

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	21,812,480.
2	Enter amount from Part I, line 27a	2	125,875.
3	Other increases not included in line 2 (itemize) ▶ <u>SEE STATEMENT 12</u>	3	9,409.
4	Add lines 1, 2, and 3	4	21,947,764.
5	Decreases not included in line 2 (itemize) ▶ <u>SEE STATEMENT 13</u>	5	40,689.
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	21,907,075.

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (for example, real estate, 2-story brick warehouse, or common stock, 200 shs. MLC Co.)			(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1 a PUBLICLY TRADED SECURITIES					
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 6,127,022.		5,232,880.	894,142.		
b					
c					
d					
e					
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) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any			
a			894,142.		
b					
c					
d					
e					
2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }			2	894,142.	
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 doesn't qualify under section 4940(e). Do not complete this part.

1 Enter the appropriate amount in each column for each year, see the instructions before making any entries.			
(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2017	1,358,070.	25,029,584.	0.054259
2016	1,101,345.	23,723,587.	0.046424
2015	1,240,059.	23,373,604.	0.053054
2014	1,102,487.	24,822,888.	0.044414
2013	903,166.	23,853,947.	0.037862
2 Total of line 1, column (d)			2 0.236013
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 0.047203
4 Enter the net value of noncharitable-use assets for 2018 from Part X, line 5			4 24,212,392.
5 Multiply line 4 by line 3.			5 1,142,898.
6 Enter 1% of net investment income (1% of Part I, line 27b)			6 14,859.
7 Add lines 5 and 6			7 1,157,757.
8 Enter qualifying distributions from Part XII, line 4 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.			8 1,340,787.

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 checked="" type="checkbox"/> and enter 1% of Part I, line 27b		1 14,859.
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 NONE
3 Add lines 1 and 2		3 14,859.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only, others, enter -0-)		4 NONE
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-		5 14,859.
6 Credits/Payments		
a 2018 estimated tax payments and 2017 overpayment credited to 2018	6a 31,409.	
b Exempt foreign organizations - tax withheld at source	6b NONE	
c Tax paid with application for extension of time to file (Form 8868)	6c NONE	
d Backup withholding erroneously withheld	6d	
7 Total credits and payments. Add lines 6a through 6d		7 31,409.
8 Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached		8
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed		9
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid		10 16,550.
11 Enter the amount of line 10 to be: Credited to 2019 estimated tax <input checked="" type="checkbox"/> 14,860. Refunded <input type="checkbox"/> 1,690.		11

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

Part VII-A Statements Regarding Activities (continued)

	Yes	No
11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule. See instructions		X
12 Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement. See instructions		X
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address <u>N/A</u>	X	
14 The books are in care of <u>WELLS FARGO BANK NA</u> Telephone no. <u>(919) 881-6497</u> Located at <u>150 FAYETTEVILLE STREET, RALEIGH, NC</u> ZIP+4 <u>27601-1395</u>		
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 <u></u>		X

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

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

	Yes	No
1a During the year, did the foundation (either directly or indirectly)		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	<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 Organizations relying on a current notice regarding disaster assistance, check here <u></u>		
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2018?		X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))		
a At the end of tax year 2018, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2018? If "Yes," list the years <u></u>	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions)		
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here <u></u>		
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)		
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2018?		X

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			
	Organizations relying on a current notice regarding disaster assistance, check here	<input type="checkbox"/>	5b	
c	If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?	<input type="checkbox"/> Yes <input type="checkbox"/> No		
	If "Yes," attach the statement required by Regulations section 53.4945-5(d).			
6a	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? If "Yes" to 6b, file Form 8870.		6b	X
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b	If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?		7b	
8	Is the foundation subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment(s) during the year?	<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, and foundation managers and their compensation. See instructions.

[illegible]

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				
		-0-	-0-	-0-

Total number of other employees paid over \$50,000	NONE
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Form **990-PF** (2018)

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
NONE		NONE

Total number of others receiving over \$50,000 for professional services **NONE**

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	NONE	
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	NONE	
2		
All other program-related investments See instructions		
3	NONE	

Total. Add lines 1 through 3

Form **990-PF** (2018)

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	16,821,668.
b	Average of monthly cash balances	1b	634,705.
c	Fair market value of all other assets (see instructions).	1c	7,124,736.
d	Total (add lines 1a, b, and c)	1d	24,581,109.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	
2	Acquisition indebtedness applicable to line 1 assets	2	NONE
3	Subtract line 2 from line 1d.	3	24,581,109.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	368,717.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	24,212,392.
6	Minimum investment return. Enter 5% of line 5	6	1,210,620.

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	1,210,620.
2a	Tax on investment income for 2018 from Part VI, line 5	2a	14,859.
b	Income tax for 2018. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b.	2c	14,859.
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	1,195,761.
4	Recoveries of amounts treated as qualifying distributions.	4	NONE
5	Add lines 3 and 4	5	1,195,761.
6	Deduction from distributable amount (see instructions).	6	NONE
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1.	7	1,195,761.

Part XII Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
a	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26.	1a	1,340,787.
b	Program-related investments - total from Part IX-B.	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes.	2	NONE
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	NONE
b	Cash distribution test (attach the required schedule)	3b	NONE
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	1,340,787.
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	14,859.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	1,325,928.

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				1,195,761.
2 Undistributed income, if any, as of the end of 2018				
a Enter amount for 2017 only.			933,353.	
b Total for prior years 20____, 20____, 20____		NONE		
3 Excess distributions carryover, if any, to 2018				
a From 2013	NONE			
b From 2014	NONE			
c From 2015	NONE			
d From 2016	NONE			
e From 2017	NONE			
f Total of lines 3a through e	NONE			
4 Qualifying distributions for 2018 from Part XII, line 4 ▶ \$ 1,340,787.				
a Applied to 2017, but not more than line 2a			933,353.	
b Applied to undistributed income of prior years (Election required - see instructions)		NONE		
c Treated as distributions out of corpus (Election required - see instructions)	NONE			
d Applied to 2018 distributable amount				407,434.
e Remaining amount distributed out of corpus	NONE			
5 Excess distributions carryover applied to 2018 (If an amount appears in column (d), the same amount must be shown in column (a).)	NONE			NONE
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	NONE			
b Prior years' undistributed income. Subtract line 4b from line 2b.		NONE		
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		NONE		
d Subtract line 6c from line 6b. Taxable amount - see instructions		NONE		
e Undistributed income for 2017. Subtract line 4a from line 2a. Taxable amount - see instructions				
f Undistributed income for 2018. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2019.				788,327.
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)	NONE			
8 Excess distributions carryover from 2013 not applied on line 5 or line 7 (see instructions)	NONE			
9 Excess distributions carryover to 2019. Subtract lines 7 and 8 from line 6a	NONE			
10 Analysis of line 9				
a Excess from 2014	NONE			
b Excess from 2015	NONE			
c Excess from 2016	NONE			
d Excess from 2017	NONE			
e Excess from 2018	NONE			

NOT APPLICABLE

b Check box to indicate whether the foundation is a private operating foundation described in section

4942(j)(3) or		4942(j)(5)
---------------	--	------------

[illegible]

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year SEE STATEMENT 47				1,199,000.
Total			▶ 3a	1,199,000.
b Approved for future payment				
Total			▶ 3b	

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated

	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions.)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue					
a _____					
b _____					
c _____					
d _____					
e _____					
f _____					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities			14	310,225.	
5 Net rental income or (loss) from real estate					
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal property					
7 Other investment income					
8 Gain or (loss) from sales of assets other than inventory			18	894,142.	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue a _____					
b SEE STATEMENT 48				395,264.	
c _____					
d _____					
e _____					
12 Subtotal. Add columns (b), (d), and (e)				1,599,631.	
13 Total. Add line 12, columns (b), (d), and (e)					1,599,631.

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

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

Line No.



Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes). (See instructions.)

NOT APPLICABLE

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

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

[illegible]

- 2a** Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) (other than section 501(c)(3)) or in section 527? ☐ Yes ☒ No

- b** If "Yes," complete the following schedule.

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

**Sign
Here**

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

Signature of officer or trustee

01/16/2020
Date


► Trustee
Title

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

POA: PROVIDENT BENEVOLENT

**Paid
Preparer
Use Only**

Print/Type preparer's name
DEBRA GORDY VE

Preparer's signature 

Date	01/16/2020
------	------------

Check ☐ if self-employed

PTIN	P01030672
------	-----------

Firm's name	▶ WELLS FARGO BANK, N.A.
Firm's address	▶ 1525 W W.T. HARRIS BLVD. D1114-044 CHARLOTTE, NC 28262

Firm's EIN ► 94-3080771

Phone no 800-691-8916

Form **990-PF** (2018)

FORM 990PF, PART I - DIVIDENDS AND INTEREST FROM SECURITIES

=====

DESCRIPTION -----	REVENUE AND EXPENSES PER BOOKS -----	NET INVESTMENT INCOME -----
ABERDEEN EMERG MARKETS-INST #5840	16,383.	16,383.
JOHCM INTERNATIONAL SEL-I #180	3,096.	3,096.
INV BALANCE RISK COMM STR-Y #8611	719.	719.
AMERICAN EXPRESS CRE 2.200% 3/03/20	1,045.	1,045.
BANK OF AMERICA CORP 3.300% 1/11/23	1,072.	1,072.
BANK OF NOVA SCOTIA 2.450% 9/19/22	1,383.	1,383.
BROOKFIELD GL LISTED RE-Y #2065	18,838.	14,491.
CITIGROUP INC 2.650% 10/26/20	1,325.	1,325.
ENTERPRISE PRODUCTS 2.550% 10/15/19	1,913.	1,913.
FED HOME LN BK 1.125% 7/14/21	1,628.	1,628.
FED NATL MTG ASSN 1.500% 11/30/20	1,200.	1,200.
FED HOME LN MTG CORP 2.500% 5/15/27	1,202.	1,202.
FEDERATED STRAT VAL DIV FD IS #662	56,513.	56,513.
FID ADV EMER MKTS INC- CL I #607	22,950.	22,690.
FIDELITY NEW MRKTS INC-Z #3323	7,117.	7,117.
FIDELITY NEW MRKTS INC-I	16,043.	16,043.
GLAXOSMITHKLINE CAPI 2.850% 5/08/22	1,397.	1,397.
GOLDMAN SACHS GROUP 5.250% 7/27/21	3,150.	3,150.
HARBOR CAPITAL APRCTION-INST #2012	3,120.	3,120.
OAKMARK FUND-INST #2876	2,285.	2,285.
ISHARES MSCI EAFE ETF	9,839.	9,839.
JPMORGAN U.S. L/C CORE PLUS-S #1002	5,124.	5,124.
JPMORGAN HIGH YIELD-I #3580	3,172.	3,172.
MERGER FUND-INST #301	8,401.	8,401.
VR METLIFE INC 3.048% 12/15/22	43.	43.
FEDERATED MM TREAS OBLIG INST	3,370.	3,370.
MORGAN STANLEY 2.750% 5/19/22	963.	963.
ORACLE CORP 2.500% 5/15/22	1,875.	1,875.
OPPENHEIMER DEVELOPING MKT-I #799	1,879.	1,879.
PEPSICO INC 4.500% 1/15/20	3,375.	3,375.
PFIZER INC 2.100% 5/15/19	1,575.	1,575.
PRINCIPAL REAL EST SEC-R6 #4269	21,167.	21,167.

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FORM 990PF, PART I - DIVIDENDS AND INTEREST FROM SECURITIES

=====

DESCRIPTION -----	REVENUE AND EXPENSES PER BOOKS -----	NET INVESTMENT INCOME -----
PRINCIPAL MIDCAP FUND-R6 #4268	2,376.	2,376.
T ROWE PRICE INST FLOAT RATE #170	4,072.	4,072.
ROYCE PREMIER FUND #265	259.	259.
SEMPRA ENERGY 2.875% 10/01/22	37.	37.
SOUTHWEST AIRLINES 2.750% 11/16/22	963.	963.
TCW EMRG MKTS INCM-I 4721	19,473.	19,473.
TOUCHSTONE MID CAP-INST #353	9,193.	9,193.
US BANCORP 2.350% 1/29/21	1,763.	1,763.
US TREASURY NOTE 2.375% 1/31/23	1,168.	1,168.
US TREASURY NOTE 2.750% 5/31/23	2,637.	2,637.
US TREASURY NOTE 2.000% 11/30/22	1,800.	1,800.
US TREASURY NOTE 2.625% 11/15/20	2,431.	2,431.
US TREASURY NOTE 1.125% 9/30/21	1,406.	1,406.
US TREASURY NOTE 1.625% 7/31/20	2,031.	2,031.
UNITED TECHNOLOGIES 3.100% 6/01/22	8.	8.
WF SHRT TRM HI YLD-INS #3170	4,238.	4,238.
WESTPAC BANKING CORP 2.100% 5/13/21	1,050.	1,050.
WORLD FINANCIAL NETW 2.230% 8/15/22	238.	238.
GAI CORBIN MULTI STRATEGY FUND	21,944.	21,944.
FEDERATED TREAS OBL FD 68	9,976.	9,976.
	-----	-----
TOTAL	310,225.	305,618.
	=====	=====

CU PROVIDENT BENEVOLENT FOUNDATION-WACH

58-1881092

FORM 990PF, PART I - OTHER INCOME
=====

DESCRIPTION -----	REVENUE AND EXPENSES PER BOOKS -----	NET INVESTMENT INCOME -----
NORTHERN TRUST DIVIDENDS	139,995.	139,995.
NORTHERN TRUST INTEREST	58,436.	58,436.
NORTHERN TRUST ST CAP GAIN DIVIDENDS	1,080.	1,080.
NORTHERN TRUST OTHER RECEIPTS	174.	174.
NORTHERN TRUST LT GAINS	166,647.	166,647.
NORTHERN TRUST LT CAP GAIN DIVIDENDS	28,932.	28,932.
	-----	-----
TOTALS	395,264.	395,264.
	=====	=====

CU PROVIDENT BENEVOLENT FOUNDATION-WACH

58-1881092

FORM 990PF, PART I - OTHER PROFESSIONAL FEES

=====

DESCRIPTION -----	REVENUE AND EXPENSES PER BOOKS -----	NET INVESTMENT INCOME -----	CHARITABLE PURPOSES -----
NORTHERN TRUST MGMT FEES	7,288.	7,288.	
WELLS FARGO GRANT ADMIN FEE	38,797.		38,797.
WELLS FARGO MGMT FEES	97,316.	97,316.	
	-----	-----	-----
TOTALS	143,401.	104,604.	38,797.
	=====	=====	=====

CU PROVIDENT BENEVOLENT FOUNDATION-WACH

58-1881092

FORM 990PF, PART I - TAXES
=====

DESCRIPTION -----	REVENUE AND EXPENSES PER BOOKS -----	NET INVESTMENT INCOME -----
FEDERAL ESTIMATES - PRINCIPAL	23,859.	
FOREIGN TAXES ON QUALIFIED FOR	4,443.	4,443.
FOREIGN TAXES ON NONQUALIFIED	13.	13.
	-----	-----
TOTALS	28,315.	4,456.
	=====	=====

CU PROVIDENT BENEVOLENT FOUNDATION-WACH

58-1881092

FORM 990PF, PART I - OTHER EXPENSES

=====

DESCRIPTION -----	REVENUE AND EXPENSES PER BOOKS -----	NET INVESTMENT INCOME -----	CHARITABLE PURPOSES -----
OFFICE RENT	20,621.		20,621.
OFFICE EXPENSES	4,369		4,369.
NORTHERN TRUST CLASS ACTION FE	50.	50.	
	-----	-----	-----
TOTALS	25,040.	50.	24,990.
	=====	=====	=====

CU PROVIDENT BENEVOLENT FOUNDATION-WACH

58-1881092

FORM 990PF, PART II - U.S. AND STATE OBLIGATIONS

=====

DESCRIPTION -----	BEGINNING BOOK VALUE -----	ENDING BOOK VALUE -----	ENDING FMV ---
3135G0F73 FED NATL MTG ASSN	78,481.	78,481.	79,608.
912828XM7 US TREASURY NOTE	126,108.	155,885.	154,485.
3130A8QS5 FED HOME LN BK	129,109.	29,794.	29,626.
912828T34 US TREASURY NOTE	123,979.	123,979.	123,350.
9128283U2 US TREASURY NOTE	49,607.	100,172.	102,234.
9128284S6 US TREASURY NOTE	99,707.	99,707.	103,824.
912828M80 US TREASURY NOTE	89,511.	89,511.	90,812.
912828PC8 US TREASURY NOTE	99,965	99,992.	101,027.
9128284X5 US TREASURY NOTE		40,425.	41,616.
9128286G0 US TREASURY NOTE		100,638.	102,816.
	-----	-----	-----
TOTALS	796,467.	918,584.	929,398
	=====	=====	=====

CU PROVIDENT BENEVOLENT FOUNDATION-WACH

58-1881092

FORM 990PF, PART II - CORPORATE STOCK

=====

DESCRIPTION -----	BEGINNING BOOK VALUE -----	ENDING BOOK VALUE -----	ENDING FMV ---
314172560 FEDERATED STRAT VAL	1,200,000.	1,200,000.	1,406,251.
411511306 HARBOR INTERNATIONAL F	834,451.		
411511504 HARBOR CAPITAL APRCT	811,060.	811,060.	1,578,780.
780905451 ROYCE PREMIER FUND W	459,536.		
89155H256 TOUCHSTONE SMALLCAP	248,577.		
4812A2389 JPMORGAN U.S. L/C CO	1,370,000.	1,134,328.	1,183,905.
74253Q580 PRINCIPAL INV R/E SE	695,000.		
74253Q747 PRINCIPAL MIDCAP FD-	525,000.		
19765Y688 COLUMBIA SEL LRG CAP	1,475,000.	1,475,000.	1,042,853.
63872T729 ASG MANAGED FUTURES	275,000.		
74925K581 BOSTON P LNG/SHRT RE	475,000.		
003021714 ABERDEEN EMERG MARKE	780,000.	780,000.	963,922.
00770G847 JOHCM INTERNATIONAL	168,200.	268,200.	322,713.
112740303 BROOKFIELD GL LISTED	475,000.	466,182.	480,410.
00888Y508 INV BALANCE RISK COM	350,000.	350,000.	319,613.
89155T649 TOUCHSTONE MID CAP-I	525,000.	525,000.	945,192.
277923264 EATON VANCE GLOB MAC	250,000.		
413838780 OAKMARK FUND-INST #2	300,000.	300,000.	276,314.
589509207 MERGER FUND-INST #30	200,000.	200,000.	200,480.
000843201 ACAP STRATEGIC FUND-		600,000.	637,597.
00143W859 INV OPP DEVELOP MRKT		300,000.	333,508.
256206103 DODGE & COX INT'L ST		350,000.	381,302.
543069405 LONGLEAF PARTNERS IN		350,000.	383,228.
74256W568 PRINCIPAL REAL EST S		695,000.	884,024.
74256W584 PRINCIPAL MIDCAP FUN		625,000.	941,125.
780905600 ROYCE PREMIER FUND #		459,536.	421,329.
89609H704 TRIBUTARY SMALL CO-I		275,000.	300,599.
TOTALS	11,416,824.	11,164,306.	13,003,145.

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31

STATEMENT 8

CU PROVIDENT BENEVOLENT FOUNDATION-WACH

58-1881092

FORM 990PF, PART II - CORPORATE BONDS

=====

DESCRIPTION -----	BEGINNING BOOK VALUE -----	ENDING BOOK VALUE -----	ENDING FMV ---
29379VBD4 ENTERPRISE PRODUCTS	74,986.	74,986.	74,977.
4812C0803 JPMORGAN HIGH YIELD-	82,895.		
713448BN7 PEPSICO INC	83,549.	83,549.	75,902.
717081DL4 PFIZER INC	75,368.		
77958B402 T ROWE PRICE INST FL	115,193.		
94987W752 WF SHRT TRM HI YLD-I	177,738.		
172967KB6 CITIGROUP INC	49,539.	49,539.	50,176.
91159HHL7 US BANCORP	75,243.	75,243.	75,224.
961214CV3 WESTPAC BANKING CORP	49,845.	49,845.	49,893.
315920702 FID ADV EMER MKTS IN	1,197,415.		
38141GGQ1 GOLDMAN SACHS GROUP	67,984.	67,984.	63,417.
0258M0EE5 AMERICAN EXPRESS CRE	49,310.	49,310.	49,948.
06051GEU9 BANK OF AMERICA CORP	35,285.	35,285.	36,077.
064159KD7 BANK OF NOVA SCOTIA	72,044.	72,044.	75,689.
377373AD7 GLAXOSMITHKLINE CAPI	49,154.	49,154.	50,840.
61744YAH1 MORGAN STANLEY	34,984.	34,984.	35,367.
68389XBB0 ORACLE CORP	76,103.	76,103.	75,803.
844741BD9 SOUTHWEST AIRLINES	35,043.	35,043.	35,208.
026874CY1 AMERICAN INTL GROUP		20,452.	21,193.
06406HCV9 BANK OF NEW YORK MEL		30,816.	31,351.
14040HBU8 CAPITAL ONE FINANCIA		19,798.	20,505.
448055AK9 HUSKY ENERGY INC		30,947.	31,265.
46625HRL6 JPMORGAN CHASE & CO		29,815.	30,308.
494550BS4 KINDER MORGAN ENER		20,524.	21,094.
59156RBF4 VR METLIFE INC		30,320.	30,722.
7591EPAM2 REGIONS FINANCIAL CO		29,901.	30,216.
816851AT6 SEMPRA ENERGY		19,497.	20,157.
86562MBF6 SUMITOMO MITSUI FINL		31,358.	31,810.
87234N765 TCW EMRG MKTS INCM-I		843,420.	881,748.

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32

STATEMENT 9

CU PROVIDENT BENEVOLENT FOUNDATION-WACH

58-1881092

FORM 990PF, PART II - CORPORATE BONDS

=====

DESCRIPTION -----	BEGINNING BOOK VALUE -----	ENDING BOOK VALUE -----	ENDING FMV ---
913017BV0 UNITED TECHNOLOGIES		30,305.	30,692.
91529YAK2 UNUM GROUP		31,048.	31,288.
	-----	-----	-----
TOTALS	2,401,678.	1,921,270.	1,960,870.
	=====	=====	=====

CU PROVIDENT BENEVOLENT FOUNDATION-WACH

58-1881092

FORM 990PF, PART II - OTHER INVESTMENTS

=====

DESCRIPTION -----	COST/ FMV C OR F -----	BEGINNING BOOK VALUE -----	ENDING BOOK VALUE -----	ENDING FMV ---
GTC997004 GAI CORBIN MULTI STR	C	616,459.	415,364.	395,484.
3137AQQD3 FED HOME LN MTG CORP	C	55,312.	42,088.	41,758.
981464DG2 WORLD FINANCIAL NETW	C	30,103.		
GAR997710 GRAHAM ABSOLUTE RETU	C		500,000.	512,722.
TOTALS		701,874.	957,452.	949,964.
		=====	=====	=====

FORM 990PF, PART III - OTHER INCREASES IN NET WORTH OR FUND BALANCES
=====

DESCRIPTION -----	AMOUNT -----
STOCK MERGER CIGNA CORP	9,309.
STOCK MERGER BOA (BAC)	100.

TOTAL	9,409.
	=====

FORM 990PF, PART III - OTHER DECREASES IN NET WORTH OR FUND BALANCES
=====

DESCRIPTION -----	AMOUNT -----
NORTHERN TRUST DIV POST DATE AFTER TYE	2,656.
BALANCE ADJ BETWEEN NORTHERN TRUST/WFB	23,580.
NORTHERN TRUST INC RECLASSIFIED AS ROC	5,635.
2018 ROC	8,818.

TOTAL	40,689.
	=====

FORM 990PF, PART VIII - LIST OF OFFICERS, DIRECTORS, AND TRUSTEES

=====

OFFICER NAME:

Janet Wornall

ADDRESS:

2934 Saint Andrews Lane
Charlotte, NC 28205

TITLE:

Director

AVERAGE HOURS PER WEEK DEVOTED TO POSITION: .26

COMPENSATION 78,000.

COMPENSATION EXPLANATION:

Foundation and Charitable purposes

TOTAL COMPENSATION:

78,000.

=====

RECIPIENT NAME:
FAMILY PROMISE OF GASTON COUNTY
ADDRESS:
PO BOX 67
GASTONIA, NC 28053
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
FAMILY SHELTER PROGRAM
FOUNDATION STATUS OF RECIPIENT:
PC
AMOUNT OF GRANT PAID 2,000.

RECIPIENT NAME:
CLASSROOM CENTRAL INC
ADDRESS:
2116 WILKINSON BLVD
CHARLOTTE, NC 28208
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
GENERAL SUPPORT
FOUNDATION STATUS OF RECIPIENT:
PC
AMOUNT OF GRANT PAID 15,000.

RECIPIENT NAME:
THE BELL FOUNDATION
ADDRESS:
601 E 5TH STREET STE 460
CHARLOTTE, NC 28202
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
BRIDGING THE ACADEMIC ACHIEVEMENT GAP
FOUNDATION STATUS OF RECIPIENT:
PC
AMOUNT OF GRANT PAID 5,000.

RECIPIENT NAME:

PAT'S PLACE CHILD
ADVOCACY CENTER INC

ADDRESS:

1819 EAST BLVD
CHARLOTTE, NC 28203

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

GENERAL SUPPORT

FOUNDATION STATUS OF RECIPIENT:

PC

AMOUNT OF GRANT PAID 20,000.

RECIPIENT NAME:

Hospital Hospitality House of WS

ADDRESS:

1970 BALDWIN LN
Winston-Salem, NC 27103

RELATIONSHIP:

NA

PURPOSE OF GRANT:

FINANCIAL ASSISTANCE LOW-INCOME FAM.

FOUNDATION STATUS OF RECIPIENT:

PC

AMOUNT OF GRANT PAID 5,000.

RECIPIENT NAME:

YMCA OF AVERY COUNTY

ADDRESS:

PO BOX 707
LINVILLE, NC 28646

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

AVERY PARTNERSHIP FOR HEALTH

FOUNDATION STATUS OF RECIPIENT:

PC

AMOUNT OF GRANT PAID 5,000.

RECIPIENT NAME:

AUTISM SOCIETY OF NC INC

ADDRESS:

505 OBERLIN ROAD STE 230

RALEIGH, NC 27605

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

GENERAL SUPPORT

FOUNDATION STATUS OF RECIPIENT:

PC

AMOUNT OF GRANT PAID 15,000.

RECIPIENT NAME:

CRISIS CONTROL MINISTRY

INC

ADDRESS:

200 EAST TENTH STREET

WINSTON SALEM, NC 27101

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

GENERAL SUPPORT

FOUNDATION STATUS OF RECIPIENT:

PC

AMOUNT OF GRANT PAID 15,000.

RECIPIENT NAME:

CROSSROADS CORP. FOR

AFFORDABLE HOUSING

ADDRESS:

3242 COMMONWEALTH AVE

CHARLOTTE, NC 28205

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

GENERAL SUPPORT

FOUNDATION STATUS OF RECIPIENT:

PC

AMOUNT OF GRANT PAID 30,000.

RECIPIENT NAME:
BABY BUNDLES
ADDRESS:
PO BOX 12303
CHARLOTTE, NC 28220
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
GENERAL SUPPORT
FOUNDATION STATUS OF RECIPIENT:
PC
AMOUNT OF GRANT PAID 15,000.

RECIPIENT NAME:
ABC OF NC CHILD DEVELOPMENT CTR
ADDRESS:
905 FRIEDBERG CHURCH RD
WINSTON SALEM, NC 27127
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
SERVICE EXPANSION
FOUNDATION STATUS OF RECIPIENT:
PC
AMOUNT OF GRANT PAID 10,000.

RECIPIENT NAME:
CROSBY SCHOLARS COMMUNITY PARTNERSHIP
ADDRESS:
2701 UNIVERSITY PARKWAY
WINSTON SALEM, NC 27105
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
GENERAL SUPPORT
FOUNDATION STATUS OF RECIPIENT:
PC
AMOUNT OF GRANT PAID 5,000.

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RECIPIENT NAME:

HOPE CHEST FOR WOMEN

ADDRESS:

PO BOX 5294

ASHEVILLE, NC 28813

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

WOMEN'S CANCER PATIENT SUPPORT

FOUNDATION STATUS OF RECIPIENT:

PC

AMOUNT OF GRANT PAID 5,000.

RECIPIENT NAME:

CHARLOTTE BILINGUAL

PRESCHOOL INC

ADDRESS:

4019 CENTRAL AVE

CHARLOTTE, NC 28205

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

GENERAL SUPPORT

FOUNDATION STATUS OF RECIPIENT:

PC

AMOUNT OF GRANT PAID 50,000.

RECIPIENT NAME:

DREAM CENTER OF GASTON COUNTY INC

ADDRESS:

2782 FAIRVIEW RD

GASTONIA, NC 28052

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

DREAM CENTER ACADEMY

FOUNDATION STATUS OF RECIPIENT:

PC

AMOUNT OF GRANT PAID 5,000.

RECIPIENT NAME:
CHARLOTTE BRIDGE HOME INC
ADDRESS:
1512 E 4TH ST
CHARLOTTE, NC 28204
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
SUPPORT OF VETERAN TRANSITION
FOUNDATION STATUS OF RECIPIENT:
PC
AMOUNT OF GRANT PAID 20,000.

RECIPIENT NAME:
HEART MATH TUTORING, INC.
ADDRESS:
POB 30623
CHARLOTTE, NC 28230
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
GENERAL SUPPORT
FOUNDATION STATUS OF RECIPIENT:
PC
AMOUNT OF GRANT PAID 10,000.

RECIPIENT NAME:
CHARLOTTE LAB SCHOOL
ADDRESS:
301 E 9TH STREET
CHARLOTTE, NC 28202
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
GENERAL SUPPORT
FOUNDATION STATUS OF RECIPIENT:
PC
AMOUNT OF GRANT PAID 10,000.

RECIPIENT NAME:
AMERICAN NATIONAL RED CROSS
CAROLINA PIEDMONT REGION
ADDRESS:
2425 PARK ROAD
CHARLOTTE, NC 28203
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
GENERAL SUPPORT
FOUNDATION STATUS OF RECIPIENT:
PC
AMOUNT OF GRANT PAID 20,000.

RECIPIENT NAME:
R BRUCE IRONS CAMP FUND
ADDRESS:
725 PROVIDENCE RD STE 326
CHARLOTTE, NC 28207
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
GENERAL SUPPORT
FOUNDATION STATUS OF RECIPIENT:
PC
AMOUNT OF GRANT PAID 20,000.

RECIPIENT NAME:
BOY SCOUTS OF AMERICA
ADDRESS:
1410 EAST SEVENTH STREET
CHARLOTTE, NC 28204
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
CAREER EXPLORATION PROGRAM
FOUNDATION STATUS OF RECIPIENT:
PC
AMOUNT OF GRANT PAID 5,000.

RECIPIENT NAME:

SAFE ALLIANCE - FKA UNITED
FAMILY SERVICES

ADDRESS:

601 E 5TH ST SUITE 400
CHARLOTTE, NC 28202

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

DOMESTIC VIOLENCE SERVICES

FOUNDATION STATUS OF RECIPIENT:

PC

AMOUNT OF GRANT PAID 20,000.

RECIPIENT NAME:

METROLINA ASSN FOR THE BLIND

ADDRESS:

704 LOUISE AVENUE
CHARLOTTE, NC 28204

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

GENERAL SUPPORT

FOUNDATION STATUS OF RECIPIENT:

PC

AMOUNT OF GRANT PAID 15,000.

RECIPIENT NAME:

COMMUNITY LINK

ADDRESS:

601 EAST 5TH STREET
CHARLOTTE, NC 28202

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

GENERAL SUPPORT

FOUNDATION STATUS OF RECIPIENT:

PC

AMOUNT OF GRANT PAID 10,000.

RECIPIENT NAME:

YONG WOMENS CHRISTIAN ASSOCIATION OF
THE CENTRAL CAROLINA'S INC.

ADDRESS:

3420 PARK RD
CHARLOTTE, NC 28209

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

GENERAL SUPPORT

FOUNDATION STATUS OF RECIPIENT:

PC

AMOUNT OF GRANT PAID 10,000.

RECIPIENT NAME:

BETHLEHIEM CENTER OF CHARLOTTE

ADDRESS:

2702 NORFOLK AVENUE
CHARLOTTE, NC 28203

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

GENERAL SUPPORT

FOUNDATION STATUS OF RECIPIENT:

PC

AMOUNT OF GRANT PAID 5,000.

RECIPIENT NAME:

GIRL SCOUTS HORNETS NEST
COUNCIL

ADDRESS:

7007 IDLEWILD ROAD
CHARLOTTE, NC 28215

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

COMMUNITY OUTREACH

FOUNDATION STATUS OF RECIPIENT:

PC

AMOUNT OF GRANT PAID 5,000.

RECIPIENT NAME:
CHARLOTTE RESCUE MISSION
ADDRESS:
PO BOX 33000
CHARLOTTE, NC 28233
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
GENERAL SUPPORT
FOUNDATION STATUS OF RECIPIENT:
PC
AMOUNT OF GRANT PAID 20,000.

RECIPIENT NAME:
UNITED WAY OF ASHEVILLE AND
BUNCOMBE COUNTY
ADDRESS:
50 SOUTH FRENCH BROAD AVE
ASHEVILLE, NC 28801
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
NC 2-1-1 ASHEVILLE CENTER
FOUNDATION STATUS OF RECIPIENT:
PC
AMOUNT OF GRANT PAID 14,500.

RECIPIENT NAME:
FLORENCE CRITTENTON
SERVICES, INC
ADDRESS:
P O BOX 36392
CHARLOTTE, NC 28236
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
THE MATERNITY PROGRAM
FOUNDATION STATUS OF RECIPIENT:
PC
AMOUNT OF GRANT PAID 10,000.

RECIPIENT NAME:
BOYS & GIRLS CLUB OF
CABARRUS COUNTY
ADDRESS:
247 SPRING ST NW
CONCORD, NC 28025
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
AFTER SCHOOL PROGRAM
FOUNDATION STATUS OF RECIPIENT:
PC
AMOUNT OF GRANT PAID 20,000.

RECIPIENT NAME:
CARE RING
ADDRESS:
601 E 5TH STREET STE 140
CHARLOTTE, NC 28202
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
GENERAL SUPPORT
FOUNDATION STATUS OF RECIPIENT:
PC
AMOUNT OF GRANT PAID 5,000.

RECIPIENT NAME:
MINT MUSEUM OF ART INC
ADDRESS:
500 S TRYON ST
CHARLOTTE, NC 28202
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
GRIER HEIGHTS COMMUNITY ARTS
FOUNDATION STATUS OF RECIPIENT:
PC
AMOUNT OF GRANT PAID 15,000.

FORM 990PF, PART XV, LINE 3a - CONTRIBUTIONS, GIFTS, GRANTS PAID

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RECIPIENT NAME:

JUNIOR ACHIEVEMENT OF
CENTRAL CAROLINAS

ADDRESS:

201 SOUTH TRYON ST
CHARLOTTE, NC 28202

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

JA BIZTOWN

FOUNDATION STATUS OF RECIPIENT:

PC

AMOUNT OF GRANT PAID 25,000.

RECIPIENT NAME:

MENTAL HEALTH ASSOC OF
CENTRAL CAROLINAS

ADDRESS:

3701 LATROBE DRIVE
CHARLOTTE, NC 28211

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

SUICIDE PREVENTION

FOUNDATION STATUS OF RECIPIENT:

PC

AMOUNT OF GRANT PAID 15,000.

RECIPIENT NAME:

JUNIOR ACHIEVEMENT OF THE TRIAD

ADDRESS:

3220 NORTHLINE AVE
GREENSBORO, NC 27408

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

READY FO LIFE/READY FOR WORK

FOUNDATION STATUS OF RECIPIENT:

PC

AMOUNT OF GRANT PAID 10,000.

RECIPIENT NAME:
CHARLOTTE SPEECH AND
HEARING CENTER
ADDRESS:
210 EAST WOODLAWN RD
CHARLOTTE, NC 28217
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
HEARING SERVICES BANK
FOUNDATION STATUS OF RECIPIENT:
PC
AMOUNT OF GRANT PAID 20,000.

RECIPIENT NAME:
ADDICTION RECOVERY CARE
ADDRESS:
1931 UNION CROSS RD
WINSTON SALEM, NC 27107
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
CAMPAIGN FOR SPRINGWOOD
FOUNDATION STATUS OF RECIPIENT:
PC
AMOUNT OF GRANT PAID 5,000.

RECIPIENT NAME:
HORIZONS RESIDENTIAL CARE CENTER
ADDRESS:
103 HORIZONS LANE
RURAL HILL, NC 27045
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
AMAZINGLY ABLED
FOUNDATION STATUS OF RECIPIENT:
PC
AMOUNT OF GRANT PAID 2,000.

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RECIPIENT NAME:
THE RELATIVES, INC
ADDRESS:
119 EAST 8TH ST
CHARLOTTE, NC 28205
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
GENERAL SUPPORT
FOUNDATION STATUS OF RECIPIENT:
PC
AMOUNT OF GRANT PAID 5,000.

RECIPIENT NAME:
SPECIAL OLYMPICS NORTH
CAROLINA, INC
ADDRESS:
2200 GATEWAY CENTRE BLVD
MORRISVILLE, NC 27560
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
UNITED CHAMPIONS SCHOOLS INCLUSION
FOUNDATION STATUS OF RECIPIENT:
PC
AMOUNT OF GRANT PAID 12,000.

RECIPIENT NAME:
CABARRUS MEALS ON WHEELS
ADDRESS:
1701 SOUTH MAIN ST
KANNAPOLIS, NC 28081
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
FOOD FOR SENIORS
FOUNDATION STATUS OF RECIPIENT:
PC
AMOUNT OF GRANT PAID 17,000.

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RECIPIENT NAME:

PISGAH LEGAL SERVICES

ADDRESS:

PO BOX 2276

ASHEVILLE, NC 28802

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

GENERAL SUPPORT

FOUNDATION STATUS OF RECIPIENT:

PC

AMOUNT OF GRANT PAID 25,000.

RECIPIENT NAME:

FRIENDSHIP TRAYS INC

ADDRESS:

2401A DISTRIBUTION STREET

CHARLOTTE, NC 28203

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

GENERAL SUPPORT

FOUNDATION STATUS OF RECIPIENT:

PC

AMOUNT OF GRANT PAID 20,000.

RECIPIENT NAME:

KINDERMOURN

ADDRESS:

1320 HARDING PLACE

CHARLOTTE, NC 28204

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

HELPING THE HURT

FOUNDATION STATUS OF RECIPIENT:

PC

AMOUNT OF GRANT PAID 15,000.

RECIPIENT NAME:
COUNCIL FOR CHILDRENS
RIGHTS INC
ADDRESS:
601 E 5TH ST STE 200
CHARLOTTE, NC 28202
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
LEGAL ADVOCACY FOR CHILDREN
FOUNDATION STATUS OF RECIPIENT:
PC
AMOUNT OF GRANT PAID 15,000.

RECIPIENT NAME:
ASHEVILLE AREA HABITAT
FOR HUMANITY
ADDRESS:
33 MEADOW ROAD
ASHEVILLE, NC 28803
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
GENERAL SUPPORT
FOUNDATION STATUS OF RECIPIENT:
PC
AMOUNT OF GRANT PAID 15,000.

RECIPIENT NAME:
HABITAT FOR HUMANITY OF CLT
ADDRESS:
PO BOX 220287
CHARLOTTE, NC 28222
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
CRITICAL HOME REPAIR
FOUNDATION STATUS OF RECIPIENT:
PC
AMOUNT OF GRANT PAID 10,000.

RECIPIENT NAME:
CRISIS ASSISTANCE
MINISTRY
ADDRESS:
500 A SPRATT STREET
CHARLOTTE, NC 28206
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
GENERAL SUPPORT
FOUNDATION STATUS OF RECIPIENT:
PC
AMOUNT OF GRANT PAID 15,000.

RECIPIENT NAME:
THE WESTERN YOUTH NETWORK INC
ADDRESS:
155 WYN WAY
BOONE, NC
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
AT RISK KID AFTER SCHOOL PROGRAM
FOUNDATION STATUS OF RECIPIENT:
PC
AMOUNT OF GRANT PAID 5,000.

RECIPIENT NAME:
MENS SHELTER OF CHARLOTTE
INC
ADDRESS:
1210 N TRYON ST
CHARLOTTE, NC 28206
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
MOVING MEN HOME
FOUNDATION STATUS OF RECIPIENT:
PC
AMOUNT OF GRANT PAID 10,000.

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RECIPIENT NAME:
HOSPITALITY HOUSE OF
CHARLOTTE
ADDRESS:
1400 SCOTT AVENUE
CHARLOTTE, NC 28203
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
OVERNIGHT LODGING PROGRAM
FOUNDATION STATUS OF RECIPIENT:
PC
AMOUNT OF GRANT PAID 15,000.

RECIPIENT NAME:
ROWAN HELPING MINISTRIES
ADDRESS:
226 N LONG STREET
SALISBURY, NC 28144
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
CRISIS ASSISTANCE
FOUNDATION STATUS OF RECIPIENT:
PC
AMOUNT OF GRANT PAID 10,000.

RECIPIENT NAME:
HOMEWARD BOUND OF W NC INC
ADDRESS:
218 PATTON AVENUE
ASHEVILLE, NC 28801
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
GENERAL SUPPORT
FOUNDATION STATUS OF RECIPIENT:
PC
AMOUNT OF GRANT PAID 5,000.

RECIPIENT NAME:
COMMUNITIES IN SCHOOL OF
HIGH POINT
ADDRESS:
PO BOX 6735
HIGH POINT, NC 27262
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
VOCATIONAL VISIONS
FOUNDATION STATUS OF RECIPIENT:
PC
AMOUNT OF GRANT PAID 1,000.

RECIPIENT NAME:
EAST STOKES OUTREACH
MINISTRY
ADDRESS:
301 W THIRD STREET
CHARLOTTE, NC 28236
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
GENERAL SUPPORT
FOUNDATION STATUS OF RECIPIENT:
PC
AMOUNT OF GRANT PAID 10,000.

RECIPIENT NAME:
THE LEARNING COLLABORATIVE
ADDRESS:
3045 NORTH DAVIDSON ST
CHARLOTTE, NC 28205
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
FAMILY SCHOOL READINESS PROGRAMMING
FOUNDATION STATUS OF RECIPIENT:
PC
AMOUNT OF GRANT PAID 45,000.

RECIPIENT NAME:
RURAL ADVANCEMENT FDN
ADDRESS:
PO BOX 640
PITTSBORO, NC 27312
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
GENERAL SUPPORT
FOUNDATION STATUS OF RECIPIENT:
PC
AMOUNT OF GRANT PAID 10,000.

RECIPIENT NAME:
HOUSE OF MERCY INC
ADDRESS:
701 MERCY DRIVE
BELMONT, NC 28012
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
GENERAL SUPPORT
FOUNDATION STATUS OF RECIPIENT:
PC
AMOUNT OF GRANT PAID 6,000.

RECIPIENT NAME:
WITH FRIENDS INC
ADDRESS:
2098 KEITH DR
GASTONIA, NC 28054
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
YOUTH SHLETER SERVICE
FOUNDATION STATUS OF RECIPIENT:
PC
AMOUNT OF GRANT PAID 5,000.

RECIPIENT NAME:
National Assistance league
ADDRESS:
PO BOX 471112
Charlotte, NC 28247
RELATIONSHIP:
NA
PURPOSE OF GRANT:
OPERATION SCHOOL BELL
FOUNDATION STATUS OF RECIPIENT:
PC
AMOUNT OF GRANT PAID 6,000.

RECIPIENT NAME:
RIGHT MOVES FOR YOUTH INC
ADDRESS:
2211 W MOREHEAD ST
CHARLOTTE, NC 28208
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
DROPOUT PREVENTION PROGRAM
FOUNDATION STATUS OF RECIPIENT:
PC
AMOUNT OF GRANT PAID 10,000.

RECIPIENT NAME:
GROWING TOGETHER PRESCHOOL
ADDRESS:
3301 BOULDER COURT
RALEIGH, NC 27607
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
GENERAL SUPPORT
FOUNDATION STATUS OF RECIPIENT:
PC
AMOUNT OF GRANT PAID 10,000.

RECIPIENT NAME:
CHARLOTTE CENTER FOR URBAN MINISTRY
ADDRESS:
PO BOX 31335
CHARLOTTE, NC 28231
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
BASIC NEEDS FOR THE HOMELESS
FOUNDATION STATUS OF RECIPIENT:
PC
AMOUNT OF GRANT PAID 10,000.

RECIPIENT NAME:
MOUNTAIN MEDIATION
ADDRESS:
PO BOX 1802
SYLVA, NC 28779
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
YOUTH RESTORATIVE JUSTICE
FOUNDATION STATUS OF RECIPIENT:
PC
AMOUNT OF GRANT PAID 5,000.

RECIPIENT NAME:
ABUNDANT LIVING ADULT
DAY SERVICES
ADDRESS:
P O BOX 947
SALISBURY, NC 28145
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
GENERAL SUPPORT
FOUNDATION STATUS OF RECIPIENT:
PC
AMOUNT OF GRANT PAID 10,000.

RECIPIENT NAME:
ADA JENKINS FAMILIES AND CAREERS
ADDRESS:
PO BOX 1842
DAVIDSON, NC 28036
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
HUMAN SERVICES PROGRAM
FOUNDATION STATUS OF RECIPIENT:
PC
AMOUNT OF GRANT PAID 10,000.

RECIPIENT NAME:
CHRIST OUR SHEPHERD
MINISTRIES INC
ADDRESS:
226 WEST JOHN ST
MATTHEWS, NC 28105
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
TUITION SCHOLARSHIPS
FOUNDATION STATUS OF RECIPIENT:
PC
AMOUNT OF GRANT PAID 10,000.

RECIPIENT NAME:
CATAWBA RIVERKEEPER FOUNDATION
ADDRESS:
421 MINUET LANE SUITE 205
CHARLOTTE, NC 28217
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
GENERAL SUPPORT
FOUNDATION STATUS OF RECIPIENT:
PC
AMOUNT OF GRANT PAID 10,000.

RECIPIENT NAME:
COMMUNITY CULINARY SCHOOL OF
CHARLOTTE
ADDRESS:
2401- A DISTRIBUTION ST
CHARLOTTE, NC 28203
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
WORKSHOP DEVELOPMEN
FOUNDATION STATUS OF RECIPIENT:
PC
AMOUNT OF GRANT PAID 15,000.

RECIPIENT NAME:
DILWORTH CENTER FOR CHEMICAL
DEPENDENCY
ADDRESS:
2240 PARK ROAD
CHARLOTTE, NC 28203
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
INTENSIVE OUTPATIENT TREATMENT PROGRAM
FOUNDATION STATUS OF RECIPIENT:
PC
AMOUNT OF GRANT PAID 10,000.

RECIPIENT NAME:
FREEDOM SCHOOL
PARTNERS INC
ADDRESS:
PO BOX 37363
CHARLOTTE, NC 28237
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
SUMMER PROGRAM
FOUNDATION STATUS OF RECIPIENT:
PC
AMOUNT OF GRANT PAID 15,000.

RECIPIENT NAME:
DRESS FOR SUCCESS CHARLOTTE
ADDRESS:
500 CLANTON RD STE A
CHARLOTTE, NC 28217
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
BREAKING THE CYCLE OF POVERTY
FOUNDATION STATUS OF RECIPIENT:
PC
AMOUNT OF GRANT PAID 5,000.

RECIPIENT NAME:
CABARRUS COOPERATIVE
CHRISTIAN MINISTRY
ADDRESS:
246 COUNTRY CLUB DR
CONCORD, NC 28025
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
PROGRAM SERVICES
FOUNDATION STATUS OF RECIPIENT:
PC
AMOUNT OF GRANT PAID 25,000.

RECIPIENT NAME:
BIG BROTHERS AND BIG SISTERS
OF CHARLOTTE
ADDRESS:
3801 E INDEPENDENCE BLVD
CHARLOTTE, NC 28205
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
MENTORING PROGRAM SERVICES
FOUNDATION STATUS OF RECIPIENT:
PC
AMOUNT OF GRANT PAID 5,000.

RECIPIENT NAME:

CHARLOTTE COMM HEALTH CLINIC
INC

ADDRESS:

8401 MEDICAL PLAZA DR STE 300
CHARLOTTE, NC 28262

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

GENERAL SUPPORT

FOUNDATION STATUS OF RECIPIENT:

PC

AMOUNT OF GRANT PAID 15,000.

RECIPIENT NAME:

WS INDUSTRIES FOR THE
BLIND INC

ADDRESS:

7730 N POINT BLVD
WINSTON SALEM, NC 27106

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

GENERAL SUPPORT

FOUNDATION STATUS OF RECIPIENT:

PC

AMOUNT OF GRANT PAID 15,000.

RECIPIENT NAME:

CHARLOTTE SYMPHONY ORCHESTRA

ADDRESS:

128 SOUTH TRYON ST
CHARLOTTE, NC 28202

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

GENERAL SUPPORT

FOUNDATION STATUS OF RECIPIENT:

PC

AMOUNT OF GRANT PAID 5,000.

RECIPIENT NAME:
FOUNDATION FOR THE CAROLINAS
ADDRESS:
220 N TRYON STREET
CHARLOTTE, NC 28202
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
CHARLOTTE HOUSING AUTH SCHOLARSHIP FUND
FOUNDATION STATUS OF RECIPIENT:
PC
AMOUNT OF GRANT PAID 15,000.

RECIPIENT NAME:
ASHEVILLE ART MUSEUM
ADDRESS:
P O BOX 1717
ASHEVILLE, NC 28802
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
GENERAL SUPPORT
FOUNDATION STATUS OF RECIPIENT:
PC
AMOUNT OF GRANT PAID 5,000.

RECIPIENT NAME:
HOPE HAVEN INC
ADDRESS:
3815 NORTH TRYON STREET
CHARLOTTE, NC 28206
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
SERENITY HOUSE EXPENSES
FOUNDATION STATUS OF RECIPIENT:
PC
AMOUNT OF GRANT PAID 25,000.

RECIPIENT NAME:
MATTHEWS HELP CENTER
ADDRESS:
PO BOX 91
MATTHEWS, NC 28106
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
FUNDING FOR SERVING
FOUNDATION STATUS OF RECIPIENT:
PC
AMOUNT OF GRANT PAID 5,000.

RECIPIENT NAME:
MANNA FOOD BANK INC
ADDRESS:
627 SWANNANOA RIVER RD
ASHEVILLE, NC 28805
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
GENERAL SUPPORT
FOUNDATION STATUS OF RECIPIENT:
PC
AMOUNT OF GRANT PAID 15,000.

RECIPIENT NAME:
CHARLOTTE FAMILY
HOUSING INC
ADDRESS:
300 HAWTHORNE LANE
CHARLOTTE, NC 28204
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
GENERAL SUPPORT
FOUNDATION STATUS OF RECIPIENT:
PC
AMOUNT OF GRANT PAID 10,000.

RECIPIENT NAME:
HABITAT FOR HUMANITY OF
DURHAM
ADDRESS:
215 N CHURCH ST
DURHAM, NC 27701
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
DURHAM HABITAT REPAIRS
FOUNDATION STATUS OF RECIPIENT:
PC
AMOUNT OF GRANT PAID 10,000.

RECIPIENT NAME:
RICHMOND COUNTY HOSPICE
ADDRESS:
1119 N US HIGHWAY 1
ROCKINGHAM, NC 28379
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
WISHING WELL PROGRAM
FOUNDATION STATUS OF RECIPIENT:
PC
AMOUNT OF GRANT PAID 2,000.

RECIPIENT NAME:
TURNING POINT
ADDRESS:
PO BOX 952
MONROE, NC 28111
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
TREE HOUSE CHILDREN'S ADVOCACY
FOUNDATION STATUS OF RECIPIENT:
PC
AMOUNT OF GRANT PAID 15,000.

RECIPIENT NAME:
AIDS LEADERSHIP FOOTHILLS AREA ALLIANCE
ADDRESS:
1120 FARIGROCVE CHURCH RD
HICKORY, NC 28602
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
GENERAL SUPPORT
FOUNDATION STATUS OF RECIPIENT:
PC
AMOUNT OF GRANT PAID 5,000.

RECIPIENT NAME:
THE CANCER SUPPORT COMMUNITY
EAST TENNESSEE INC
ADDRESS:
2230 SUTHERLAND AVENUE
KNOXVILLE, TN 37919
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
EDUCATIONAL PROGRAMS
FOUNDATION STATUS OF RECIPIENT:
PC
AMOUNT OF GRANT PAID 15,500.

RECIPIENT NAME:
SUPPORTIVE HOUSING
COMMUNITIES INC
ADDRESS:
2120 N DAVIDSON ST
CHARLOTTE, NC 28205
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
PERMANENT HOUSING FOR HOMELESS
FOUNDATION STATUS OF RECIPIENT:
PC
AMOUNT OF GRANT PAID 15,000.

RECIPIENT NAME:

ARTS+

ADDRESS:

345 NORTH COLLEGE STREET
CHARLOTTE, NC 28202

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

FINANCIAL AID

FOUNDATION STATUS OF RECIPIENT:

PC

AMOUNT OF GRANT PAID 5,000.

RECIPIENT NAME:

CHILDRENS CENTER OF THE
CUMBERLANDS

ADDRESS:

P O BOX 4314
ONEIDA, TN 37841

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

SANE MEDICAL CARE PROGRAM

FOUNDATION STATUS OF RECIPIENT:

PC

AMOUNT OF GRANT PAID 15,000.

RECIPIENT NAME:

ON EAGLES WINGS MINISTRIES INC

ADDRESS:

PO BOX 38587
CHARLOTTE, NC 28278

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

GENERAL SUPPORT

FOUNDATION STATUS OF RECIPIENT:

PC

AMOUNT OF GRANT PAID 10,000.

RECIPIENT NAME:
WINSTON SALEM STREET
SCHOOL
ADDRESS:
415 W CLEMMONSVILLE RD
WINSTON SALEM, NC 27127
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
GENERAL SUPPORT
FOUNDATION STATUS OF RECIPIENT:
PC
AMOUNT OF GRANT PAID 10,000.

RECIPIENT NAME:
HOSPICE HOUSE FDN OF WNC INC
ADDRESS:
PO BOX 815
FRANKLIN, NC 28744
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
FACILITY CONSTRUCTION
FOUNDATION STATUS OF RECIPIENT:
PC
AMOUNT OF GRANT PAID 25,000.

RECIPIENT NAME:
GOOD SAMARITAN MEDICAL CLINIC
ADDRESS:
PO BOX 537
CHESTER, SC 29706
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
GENERAL SUPPORT
FOUNDATION STATUS OF RECIPIENT:
PC
AMOUNT OF GRANT PAID 6,000.

CU PROVIDENT BENEVOLENT FOUNDATION-WACH

58-1881092

FORM 990PF, PART XV, LINE 3a - CONTRIBUTIONS, GIFTS, GRANTS PAID

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RECIPIENT NAME:

WESTERN NORTH CAROLINA SUPERHEROES

ADDRESS:

PO BOX 973

FLETCHER,

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

GENERAL SUPPORT

FOUNDATION STATUS OF RECIPIENT:

PC

AMOUNT OF GRANT PAID 15,000.

TOTAL GRANTS PAID:

1,199,000.

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CU PROVIDENT BENEVOLENT FOUNDATION-WACH

58-1881092

FORM 990-PF, PART XVI-A - ANALYSIS OF OTHER REVENUE
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DESCRIPTION -----		AMOUNT -----	RELATED OR EXEMPT FUNCTION INCOME -----
NORTHERN TRUST DIV	1	139,995.	
NORTHERN TRUST INT	1	58,436.	
NORTHERN TRUST ST	1	1,080.	
NORTHERN TRUST OTH	1	174	
NORTHER TRUST LT G	1	166,647.	
NORTHERN TRUST LT	1	28,932.	