EXTENDED TO NOVEMBER 16, 2020 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.

For calendar year 2019 or tax year beginning	•	, and ending		
Name of foundation			A Employer identification	number
BILL AND SHARON ALLEN FAMIL		1	20-5854617	
Number and street (or P O box number if mail is not delivered to street add	dress)	Room/suite	B Telephone number	2.7
810 COLVILLE ROAD			704-375-59	
City or town, state or province, country, and ZIP or foreign pos CHARLOTTE, NC 28207	stal code		C If exemption application is pe	anding, check here
G Check all that apply: Initial return	Initial return of a f	ormer public charity	D 1. Foreign organizations	check here
Final return	Amended return	,		,
Address change	Name change	<u> </u>	 Foreign organizations med check here and attach cor 	eting the 85% test, mputation
H Check type of organization. X Section 501(c)(3) exer	mpt private foundation	\bigcirc] E If private foundation stat	tus was terminated
Section 4947(a)(1) nonexempt charitable trust 0	ther taxable private found	ation	under section 507(b)(1)	. —
I Fair market value of all assets at end of year J Accounting	g method. X Cash	Accrual	F If the foundation is in a	60-month termination
	er (specify)		under section 507(b)(1)	(B), check here
\$ 18,762,806. (Part I, column	n (d), must be on cash bas	SIS.)		I
Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received		有益 治主始。八十四 五	MAN/A MANAGE	
2 Check I if the foundation is not required to attach Sch. B Interest on savings and temporary		PR WINTER THE	1. 1994 A. L. A.	CHARLE BLACKER 4
3 cash investments	111,014.	111,014.		STATEMENT 13
4 Dividends and interest from securities	238,516.	234,339.		STATEMENT 24
5a Gross rents	APPLIED DE TO MA	HAME ROOM STORES	ly to the second	THE TALL COME 12 12 12 12 12 12 12 12 12 12 12 12 12
	685,046.	ATTACA TO THE STATE OF THE STAT	BRECE	VEDEN
6a Net gain or (loss) from sale of assets not on line 10 Usross sales price for all 4,438,301.	AND THE CONTRACTOR	Minds of The No. 1	. 7	TO PENER
	THE WATER	685,046.	OP CED G	# C 15 C 1 STATE (1
8 Net short-term capital gain	阿爾爾 电电流流流	AR 25.5% 12 15 15 15 15 15 15 15 15 15 15 15 15 15	SLP ZO	1020 M W
	\$176 47 15 15 15 15 15 15 15 15 15 15 15 15 15	松花玉田 金花		1117 4 13 13 13
Gross sales loce returns 10a and allowances	A. Caracher Parks H 自治。	· 网络斯拉斯 医多种性	RECOUNTED	AMON TOWN
	的 表现了各种的	という をはない	\$ 14 m 1 5 m 20 m	とうして はないない かんだ
c Gross profit or (loss)		1. 我们们的人看见的感觉。		政権が行う。一般が開
11 Other income	143,784.	118,099.		STATEMENT 33
12 Total. Add lines 1 through 11	2,178,360.	1,148,498.	<u></u>	新加速的
13 Compensation of officers, directors, trustees, etc	0.	0.	~	0.
14 Other employee salaries and wages				
15 Pension plans, employee benefits 2 16a Legal fees				
5 16a Legal fees b Accounting fees 5 STMT 4	4,195.	2,097.	<u>.</u>	2,098.
c Other professional fees STMT 5	165,251.	165,251.		0.
17 Interest 18 Taxes STMT 6 19 Depreciation and depletion 20 Occupancy 21 Travel, conferences, and meetings	14,679.	1,559.		0.
19 Depreciation and depletion				CONT. LECT. SEC. SEC.
튙 20 Occupancy				
	,			
22 Printing and publications				
22 Printing and publications 23 Other expenses STMT 7 24 Total operating and administrative expenses. Add lines 13 through 23	5,671.	5,671.	· -	0.
24 Total operating and administrative	100 706	174 570		2 000
expenses. Add lines 13 through 23	189,796. 773,500.	174,578.	or or or the state of the	2,098. 773,500.
25 Contributions, gifts, grants paid 26 Total expenses and disbursements.	113,300.	প্রকাশন এক করু চাইটে জান্ত করিছা বিষয়	The TANGER HX Sect. a	113,300.
Add lines 24 and 25	963,296.	174,578.		775,598.
27 Subtract line 26 from line 12:			Mark Sales	在小型工艺的关键
& Excess of revenue over expenses and disbursements	1,215,064.			
	できるのできます。	973,920.	企业工具工程工程	いた。一番の一個
c Adjusted net income (if negative, enter -0-)	中 等一段語話事業	1.图1200mg 1.100mg 1.1	N/A	1 如何是一个不是

923501 12-17-19 LHA For Paperwork Reduction Act Notice, see instructions.

Б	art	Balance Sheets Attached schedules and amounts in the description	Beginning of year	End o	f year
	arı	column should be for end-of year amounts only	(a) Book Value	(b) Book Value	(c) Fair Market Value
	1	Cash - non-interest-bearing			
	2	Savings and temporary cash investments	409,304.	429,170.	429,170.
	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	İ		
	7	Other notes and loans receivable			
		Less; allowance for doubtful accounts			
w	8	Inventories for sale or use			
Assets	9	Prepaid expenses and deferred charges			
Ąŝ	_	Investments - U.S. and state government obligations STMT 8	1,749,251.	1,877,466.	1,932,060.
		Investments - corporate stock STMT 9	8,056,503.	8,959,919.	12,587,157.
		Investments - corporate bonds STMT 10	1,205,122.	1,150,645.	1,217,038.
		Investments - land, buildings, and equipment basis	, ,	_,	
	'	Less accumulated depreciation			
	12	Investments - mortgage loans			
	13	Investments - other STMT 11	2,948,403.	2,567,333.	2,597,381.
	14	Land, buildings, and equipment: basis	·		
	'`	Less accumulated depreciation	 		
	15	Other assets (describe)			
		Total assets (to be completed by all filers - see the			
	'`	instructions. Also, see page 1, item I)	14,368,583.	14,984,533.	18,762,806.
	17	Accounts payable and accrued expenses			
	18	Grants payable			ì
	19	Deferred revenue			
Liabilities	20	Loans from officers, directors, trustees, and other disqualified persons			
를	21	Mortgages and other notes payable			
Ë	22	Other liabilities (describe			
					. 1
	23	Total liabilities (add lines 17 through 22)	0.	0.	ì
		Foundations that follow FASB ASC 958, check here			
		and complete lines 24, 25, 29, and 30.			` '
ë	24	Net assets without donor restrictions	!		,
Balances		Net assets with donor restrictions			
		Foundations that do not follow FASB ASC 958, check here			
or Fund		and complete lines 26 through 30.			· .
F	26	Capital stock, trust principal, or current funds	1,224,065.	1,224,065.	
ts	27	Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	. 1
Net Assets	28	Retained earnings, accumulated income, endowment, or other funds	13,144,518.	13,760,468.	
ţ	29	Total net assets or fund balances	14,368,583.	14,984,533.	j
ž					
	30	Total liabilities and net assets/fund balances	14,368,583.	14,984,533.	
P	art				
			• • • • • • • • • • • • • • • • • • • •	 1 1	
		net assets or fund balances at beginning of year - Part II, column (a), line	29		14 260 502
	•	t agree with end-of-year figure reported on prior year's return)		1	14,368,583.
		amount from Part I, line 27a		2	1,215,064.
		rincreases not included in line 2 (itemize)		3	15 502 647
		ines 1, 2, and 3	D THOMBAM	4	15,583,647.
		eases not included in line 2 (itemize) CAPITAL LOSS A	·	5	599,114.
Ď.	ı otal	net assets or fund balances at end of year (line 4 minus line 5) - Part II, co	olumn (b), line 29	6	14,984,533.

Page 2

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,			(b)	How a	cquired (c) Date	acquired lay, yr.)	(d) Date sold (mo., day, yr.)	
•	(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				ation	(1110., 0	iay, yi.)	(1110., day, yr.)	
l <u>a</u> b									
<u>C</u>				+-					
d									
e				Ì					
(e) Gross sales price	(f) Depreciation allowed (or allowable)		st or other basis expense of sale		(h) Gain or (loss) ((e) plus (f) minus (1))
a									
<u>b</u>									
<u>c</u>		-							
d 4,438,304.			3,753,25	8.					685,046
Complete only for assets showing g	ain in column (h) and owned by t					m (Gains (C	Col. (h) gain r	
(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) E:	xcess of col. (1)			còl´ (k), but i	not less than (from col. (h	-0-) or
a .									
b									
С									
d									
e						,			685,046
Papital gain net income or (net capital	If gain, also enter If (loss), enter -0	r in Part I, line I- in Part I, line	7 27	}	685,			685,046	
Net short-term capital gain or (loss)	as defined in sections 1222(5) an	ıd (6):							
If gain, also enter in Part I, line 8, col	umn (c).			\downarrow				37 / 3	
If (loss), enter -0- in Part I, line 8 Part V Qualification Und	er Section 4940(e) for	Deduced	Tay on Net	Inve	3 etm	ent Incor	na	N/A	
section 4940(d)(2) applies, leave this process. Section was the foundation liable for the section "Yes," the foundation doesn't qualify up	4942 tax on the distributable am nder section 4940(e). Do not com	plete this part	t. ·						Yes X No
Enter the appropriate amount in each	column for each year; see the in	structions bef	fore making any er	ntries.			,		
(a) Base period years Calendar year (or tax year beginning i			Net value of no		ıtable-			Dıstrıbı (col. (b) dıvı	(d) ition ratio ded by col. (c))
2018		3,600.	ļ			$\frac{0,116}{6,105}$.04403
2017		4,326.				6,195.	-		.04418
2016		9,937. 0,000.				2, <u>277.</u> 6,068.			.04248
2015 2014		3,756.				7,663.	1		.04373
COTT	1 3		1			.,			
Total of line 1, column (d)							2		.22201
Average distribution ratio for the 5-ye the foundation has been in existence	•	on line 2 by 5.1	0, or by the numbe	er of y	years			.04440	
Enter the net value of noncharitable-u	ise assets for 2019 from Part X. I	line 5			4 16,782,6			,782 <u>,</u> 660	
Multiply line 4 by line 3								745,200	
Enter 1% of net investment income (1% of Part I line 27h)						6		9,739
Add lines 5 and 6	5.1 2.1., 1110 2.10)						7		754,939
	set VII. lima 4							<u> </u>	
I Enter qualifying distributions from Pa If line 8 is equal to or greater than lin		1b, and comp	olete that part usin	g a 1%	∕6 tax r	ate.	8		775,598
See the Part VI instructions.									rm 990-PF (201

BILL AND SHARON ALLEN FAMILY FOUNDATION

Capital Gains and Lo	sses for Tax on Investment Income	<u> </u>			
(a) List and	d describe the kind(s) of property soli rick warehouse, or common stock, 20		(b) How acquir P - Purchase D - Donation	(c) Date acquired (mo , day, yr.)	(d) Date sold (mo., day, yr.)
1a ISHARES CORE M	SCI EAFE ETF ETF		P		03/04/19
	NT PARNTERS III,	LLC	P		12/31/19
c SALEM INVESTME		LLC	P	VARIOUS	12/31/19
d TOWNE BANK			P		05/19/19
	ERIAN MLP INFRAST		P	_	12/03/19
	 PUBLICALLY TRAI 		P		12/31/19
	 PUBLICALLY TRAI 	DED SECURITIES	P_	VARIOUS	12/31/19
h CAPITAL GAINS	DIVIDENDS				
_1					
-		***************************************		_	
<u>k</u>				+	
			 		
<u>m</u>		 			
<u>n</u> o		-	+		
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale		(h) Gain or (loss)	
a 13,019.	(or unormore)	13,846.	,-	,, p. c. (.) (g)	-827.
b 45,003.		13,040.			45,003.
c 10,363.					10,363.
d 99,713.		17,623.			82,090.
e 11,582.	• • • • • • • • • • • • • • • • • • • •	16,763.			-5,181.
f 855,503.		894,953.			-39,450.
g 3,389,590.		2,810,073.			579,517.
h 13,531.					13,531.
1					
1					
k			·		
<u> </u>					· · · · · · · · · · · · · · · · · · ·
<u>m</u>					
n					
Complete only for assets shown	l ng gain in column (h) and owned by t	the foundation on 12/31/69	4) 1	acres (from sel. (b))	
Complete only for assets shown	(J) Adjusted basis	(k) Excess of col (i)	Gains (exces	osses (from col. (h)) s of col. (h) gain ove	r col. (k),
(i) F M.V. as of 12/31/69	as of 12/31/69	over col. (j), if any		t not less than "-0-")	
a					-827.
b			· -		45,003.
С					10,363.
d					82,090.
е					-5,181.
<u>f</u>					-39,450.
<u>g</u>			<u> </u>		579,517.
<u>h</u>					13,531.
<u>1</u>			_		
					
K	 				
<u> </u>					
<u>m</u>					
<u>n</u>			-		
0	<u> </u>			_	
2 Capital gain net income or (net ca	apital loss) { If gain, also enter "-C	in Part I, line 7	2		685,046.
3 Net short-term capital gain or (los	,	`			·
If gain, also enter in Part I, line 8,		· (<i>o</i>).			
If (loss), enter "-0-" in Part I, line		J	3	N/A	

Exempt operating foundations of stepton of 940(0)(2), check hare		0-585		Page 4
Date of ruling or determination letter:		8 - see	instruction	ons)
b Domestic foundations that meet the section 4947(a) requirements in Part V, check here				96.772
of Part I, line 27b • All other domostic foundations enter 27k 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-) 3 Add lines 1 and 2 3 Usuhte A (numer) tax (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-) 5 Tax based on investment income. Subtract line 4 from line 3.1 Ezero or less, enter -0- 6 Credits/Payments/ a 2019 estimated tax payments and 2018 overpayment ordeted to 2019 5 Exempt foreign organizations: tax withhelid at source 6 Tax paid with application for certevision of time to file (Form 8868) 6 Bedicus withholding erroneously withheld 7 Total credits and payments. Add lines 8a through 6d 8 Enter any peasity for underpayment of estimated tax. Check here ☐ if Form 2220 is attached 9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount overpaid 10 the repayment. If files 7 is more than the total of lines 5 and 8, enter the amount overpaid 10 the repayment. If files 7 is more than the total of lines 5 and 8, enter the amount overpaid 10 total credits and payments. AGD during the year (either directly) for political purposas? See the instructions for the definition of the total credits and tax because the search of the sear		- A	Left Fare	
e. All other domestic foundations enter 2% of the 27h. Exempt foreign organizations, enter 4% of Part I, line 12, col. (b) 2 Tax unders extent 511 (demestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-) 3 Add lines 1 and 2 4 Subtle A (incume) tax (demestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-) 5 Tax based on westerment income. Subtract line 4 from line 3. If zero or less, enter -0-) 6 CredistPayments: 2 2019 estimated bux payments and 2018 overpayment credited to 2019 6 Exempt foreign organizations - tax withheld at source 7 Total credits and payments. Add on line 53 ath 0 is more file (form 8888) 6 Backow withholding remeously withhold 7 Total credits and payments. Add lines 5ath 0 is 10 from 2220 is attached 8 Enter any penalty for underpayment of estimated tax. Check here of the form 2220 is attached 9 Tax doe. If the total of lines 5 and 0 is more than line 7, enter amount ower of the company of the	b Domestic foundations that meet the section 4940(e) requirements in Part V, check here 🕨 🔀 and enter 1%	1 1 1 2 3 2 3	9	, 739.
e Au other domestic boundations enter 2-w of the 2-fb. Exempt company organizations, enter 4-w of rart i, line 12, bot (b) 1 2 Tax under scores 511 (domests scotion 4974(3)(1) trusts and taxebel foundations only, others, enter 4-0) 3 3 9,733 0 4 Subtitie A (moment) tax (domestic section 4947(a)(1) trusts and taxable foundations only, others, enter 4-0) 5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter 4-0 5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter 4-0 5 Treath 2-gments 2 or section 4947(a)(1) trusts and taxable foundations only, others, enter 4-0 5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter 4-0 5 Treath 2-gments 2 or section 4947(a)(1) trusts and taxable foundations only, others, enter 4-0 5 Treath 2-gments 2 or section 4947(a)(1) trusts and taxable foundations only, others, enter 4-0 5 Treath 2-gments 2 or section 4947(a)(1) trusts and taxable foundations only others. Subtract 2 or section 4947(a)(1) trusts and 2 or section 4947(a)(1) trusts 2 or section 4947(a)(1) trusts 2 or section 4947(a)(1) or 4942(b) 5 or called the 120 section 4947(b) 5 and 12 or 40 section 4948 and 12 or 40 section 4	1 13		19	- Y
3 A Subtitle A (mocno) tax (demestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-) 5 Tax based on investment facions. Subtract line 4 from line 3. If zero or less, enter -0- 6 CreditcPayments' 2019 estimated tax payments and 2016 overpayment credited to 2019 b Exempt foreign organizations - tax withheld at source 10 application for extension of time to the (Form 8868) 6 Backup withholding ernoecosity withheld 6 0 0	c All other domestic foundations enter 2% of line 276. Exempt foreign organizations, enter 4% of Part I, line 12, col. (b)	156 - 30	F	<u> व्यक्तरेत्व</u>
4 Subtile A (income) bx (domestic section 4947(a)(1) trusts and trazeble foundations only; others, enter -0-) 5 Tax based on wheelment income. Subtract line 4 from line 3. If zero or less, enter -0- 5 Tax based on wheelment income. Subtract line 4 from line 3. If zero or less, enter -0- 6 Gredits-Phymients' a 2019 estimated tax payments and 2016 overpayment credited to 2019 6 Exampt foreign organizations: -tax withhelid at source c Tax paid with application for extension of time to file (Form 8868) 6 Backup withhalding erroneously withheld 7 Total credits and payments. Add lines 6a through 6d 8 Incher any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached 9 Tax due. If the total of lines 5a and 8 is more than line 7, enter amount owed 9 Tax due. If the total of lines 5a and 8 is more than line 7, enter amount owed 9 Tax due. If the total of lines 5a and 8 is more than line 7, enter amount owed 9 Tax due. If the total of lines 5a date is more than line 7, enter amount overpaid 10 overpayment. If fine 7 is more than the total of lines 5a and 8, enter the amount overpaid 11 Enter the amount of fine 10 to be celentated tax 20 celestimated tax. 12 Jeff VII-A Statements Regarding Activities 1a During the tax year due for foundation and the properties of the definition of the state of the spend more than \$100 during the year (either directly or indirectly) for political expenditure is and copies of any materials published or distributed by the foundation in 6 form 1120-PGL in this year? 1 the amount (if any) of tax on political expenditures (section 4955) imposed during the year. 1 (1) On the foundation in Farm 1120-PGL in this year? 2 the first of the amount (if any) pad by the foundation during the year for political expenditure tax imposed on foundation managers. ► S	· · · · · · · · · · · · · · · · · · ·			770
S Tax based on investment fleorems. Subtract line of from line 3. If zero or less, enter -0- 6 Gridst-Payments' 2019 estimated bax payments and 2016 overpayment credited to 2019 b Exempt foreign organizations - tax withheld at source 1 Fax pad with application for extension of time to the [Form 8858] 6 Backup withholding erroneously withheld 6 Total credits and payments. Add lines 6a through 6d 8 Enter any penalty for underpayment of estimated tax. Check here			9	
6 ContrisPayments: a 2019 estimated bx payments and 2018 overpayment credited to 2019 b Exampt foreign organizations - tax withheld at source c Tax paid with application for extension of time to fite (Form 8668) d Backup withholding erroneously withheld 7 Total credits and payments. Add lines 6a through 6d 8 Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached 9 Tax due. If the total of lines 5 and 6 is more than line 7, enter amount owed 10 overpayment. If line 7 is more than the total of lines 5 and 6, enter the amount overpaid 10 overpayment. If line 7 is more than the total of lines 5 and 6, enter the amount overpaid 10 overpayment. If line 7 is more than the total of lines 5 and 6, enter the amount overpaid 10 overpayment. If line 7 is more than the total of lines 5 and 6, enter the amount overpaid 10 overpayment. If line 7 is more than the total of lines 5 and 6, enter the amount overpaid 10 overpayment. If line 7 is more than the total of lines 5 and 6, enter the amount overpaid 10 overpayment. If line 7 is more than the total of lines 5 and 6, enter the amount overpaid 10 overpayment. If line 7 is more than the total of lines 5 and 6, enter the amount overpaid 10 overpayment. If line 7 is more than the total of lines 5 and 6, enter the amount overpaid 10 overpayment. If line 7 is more than the total of lines 5 and 6, enter the amount overpaid 10 overpayment. If line 7 is more than the total of lines 5 and 6, enter the amount overpaid 11 overpayments if 1 lines 1 and 1 lines 1 li			0	
a 2019 estimated tax payments and 2018 overpayment credited to 2019 b Exempt foreign organizations - Tax withheld at source c Tax paid with application for extension of time to fite (Form 8869) d Backup withholding erroneously withheld 7 Total credits and payments. Add lines Sa through 6d 6d 0. 0. 1 2,400. 8 Enter any penalty for underpayment of estimated tax. Check here If Form 2220 is attached 9 Tax due. If the total films S and 6 is more than line 7, enter amount owed 10 Overpayment. If line? I smore than the total of lines S and 8, enter the amount owerpaid 11 Enter the amount of line 10 to be: Credited to 2020 estimated tax 12,661. Refunded 11 11 During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or inflerence in any political campaign? 12 During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or inflerence in any political campaign? 13 During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or inflerence in any political campaign? 14 During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or inflerence in any political campaign? 15 During the toundation in consection with the activities 16 During the toundation in the Form 1120-POL for this year? 2 Child the foundation in International organization or did it participate or inflerence in any political campaign? 2 Child the foundation in the Form 1120-POL for this year? 3 Like 2 X X Y X X X X X X X X X X X X X X X X		34	. ال اماد الاستان	, / 3 3 .
b Exempt foreign organizations - tax withheld at source c Tax paid with application for extension of time to file (Form 8868) d Backup withholding erroneously withheld 7 Total credits and payments. Add lines 5a through 6d R Enter any peasity for undersyment of estimated tax. Check here ☐ if Form 2220 is attached S Enter any peasity for undersyment of estimated tax. Check here ☐ if Form 2220 is attached S Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed O Overpayment. If fine 7 is more than the total of lines 5 and 8, enter the amount overpaid If Enter the amount of line 10 to be: Credited to 2200 estimated tax. 1 Enter the amount of line 10 to be: Credited to 2200 estimated tax. 2		3 200		two d
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Part VII-A Statements Regarding Activities				
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of each state as required by General Instruction G2 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 2019 or the tax year beginning in 2019? See the instructions for Part XIV If "Yes," complete Part XIV 10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses 10 X	8a Enter the states to which the foundation reports or with which it is registered. See instructions.		28 51 5	美国福
of each state as required by General Instruction G2 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 2019 or the tax year beginning in 2019? See the instructions for Part XIV If "Yes," complete Part XIV 10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses 10 X			国教员	
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11 All arry 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 Vest	Pa	art VII-A: Statements Regarding Activities (continued)			
section 57(I)(1)(3)* If Ves*, a trach schedule. See instructions If Ves*, a trach statement. See instructions If Ves*, a trach statement. See instructions Vester address > \(\) \(83.13	Yes	No
12 In the foundation make a distribution to a donor advesed fund over which the foundation or a disqualified person had advesory privileges? 13 In the foundation comply with the public respection requirements for its annual returns and exemption application? 14 Telephone no. 704-375-5937 15 Section 487(1)(1) nonexempt charactibe trusts filling from 950-PF in fleu of Form 1041-check there and enter the amount of tax-exempt interest received or accrued during the year and enter the amount of tax-exempt interest received or accrued during the year and enter the amount of tax-exempt interest received or accrued during the year of A any time during clientary year 151, did the foundation have an interest in or a signature or other authority over a bank. Secretice, or other instead account in a foreign country? 16 A any time during clientary year 151, did the foundation have an interest in or a signature or other authority over a bank. Secretic of the financial account in a foreign country? 18 File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. 19 File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. 19 File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. 19 File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. 19 File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. 19 File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. 19 File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. 19 File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. 19 File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. 19 File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. 19 File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. 19 File Form 4720 if any item	11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of			
If Yes, attach statement, See instructions Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► N/A 14 The books are not seen IN BILL ALIEN Located at # 810 COLVTILE ROAD, CHARLOTTE, NC 15 Section 4947(a)(1) nonexempt charitable trusts filing form 990-PF in fleu of Form 1041 - check here and enter the amount of tax-exempt interest received or accrued during the year 16 At any time during calender year 2019, 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 by the market content in a foreign country? File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. 18 During the year, did the foundation (lefter directly) or indirectly); (1) Engage in the sale or exchange, or leasing of property with a disqualited person? (2) Borrow money from, led money to, or otherwise extend credit to (or accept it from) a disqualitied person? (3) Firmship podus, services, or facilities to (or accept them from) a disqualitied person? (4) Pay compensation to, or pay or reimburse the expenses of, a disqualitied person? (5) Transfer any incorne or assets to a disqualitied person or in the foundation angreed to make a grant to or to employ the official for a period after termination of powerment service, if terminating within 90 days.) 16 If any answers 'Yes' to 14 (1/4), did any of the activation appeal on the acception described in a, other than excepted acts, that were not corrected before the first day of the taxy year to period places are assistance, check here 19 Out the foundation engage in a prior year in any of the acts described in 1s, other than excepted acts, that were not corrected before th		section 512(b)(13)? If "Yes," attach schedule. See instructions	11		Х
13 X	12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges?			
Website address ► N/A 14 The books are micro or ► BILL ALLEN Located at № 810 COLVILLE ROAD, CHARLOTTE, NC 15 Section 497(3)(1) nonexempt charitable trusts filing form 990-PF in fleu of Form 1041 - check here and either the amount of tax-exempt interest received or accound during the year 16 Al any time during calendary year 2019, 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," either 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 (lefter directly) or indirectly): (1) Engage in the sale or exchange, or lessing of property with a disqualified person? (2) Borrow money from, lend money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? (3) Firms long onds, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? (5) Transfer any income or assets to a disqualified person for make any of either available for the benefit or use of a disqualified person for make any of either available for the benefit or use of a disqualified person for make any of either available for the benefit or use of alloqualified person for make any of either available for the lend of the condition any early of make a grant to ro to employ the official for a period after termination of government Service, if terminating within 90 days.) 16) If any shore is "Yes" to 11(1)(6), did any of the acts fat to qualify under the exceptions described in Regulations section 53.4941(d):3 or in a current notice regarding disaster assistance? See instructions. 17) A Direction of the condition in make a grant to ro to employ t		If "Yes," attach statement. See instructions	12		X
14 The books are micrar of ▶ BILL ALLEN Telephone no. ▶ 704-375-5937 Located at № 810 COLVILLE ROAD, CHARLOTTE, NC 15 Section 4947(a)(1) nonexempt charitable trusts films form 990-PF in lieu of Form 1041 - check here and enter the amount of tax-exempt interest received or accrued during they are and enter the amount of tax-exempt interest received or accrued during they are securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country ▶ Part VII-B. Statements Regarding Activities for Which Form 4720 May Be Required File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. 1 Dempth eyear, did the foundation (either directly or indirectly): (1) Engage in the sale or exchange, or leasing of properly with a disqualified person? (2) Borrow money from, lend money, to, or otherwise extend credit to (or accept it from) a disqualified person? (3) Furnish goods, services, or facilities to or accept them from) a disqualified person? (4) Pay compensation to, or pay or remitorise the expenses of, a disqualified person? (5) Transfer any income or assets to a disqualified person for make any of either available for the benefit or use of a disqualified person? (6) Agree to pay money or property to a government official? (Exception, Check 'No' if the foundation agreed to make a great to or to employ the official for a period after termination of povernments environ, if a minimal within 90 days.) b If any answer is "Ses' to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.491 (d)-3 or in a current notice regarding disaster assistance, check here c) Did the foundation agreed to make a great to or to employ the official for a period after termination of povernments environ, it eminimally with 90 disaster) is the year's extremination of povernment environ toolice regarding disaster assistance, check here c	13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	
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(1) Engage in the sale or exchange, or leasing of property with a disqualified person? (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? (5) Transfer any income or assets to a disqualified person (or make any of either available tor the benefit or use of a disqualified person)? (6) Agree to pay money or property to a government official? (Exception, Check 'No' if the foundation of government service, if terminating within 90 days.) (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.) (7) If yes' to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 54/34 (1/3) or in a current notice regarding disaster assistance, check here (8) 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 Egyming in 2019? (8) Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(1)(3) or 4942(1)(5)) (8) At the eri of tax year (2019, did the foundation have any undistributed income (Part XIII, lines) (9) A at the eri of tax year (3) beginning before 2019? (1) Tyes, Tist the years is undistributed income? (1 applying section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (1 applying section 4942(a)(2) to all years listed, answer 'No' and attach statement - see instructions.) (9) If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. (9) If the foundatio		•	35.2	165	140
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? (5) Transfer any income or assests to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? (6) Agree to pay money or property to a government official? (Exception, Check No if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, it reminating within 90 days.) b If any answer is "Set to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.491 (i)-3 or in a current notice regarding disaster assistance? See instructions b If any answer is "Set to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.491 (i)-3 or in a current notice regarding disaster assistance? See instructions b If any answer is "Set to 1a(1)-(6), did 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 2019? 2 Taxes on faulture to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(i)(3) or 4942(i)(3) o	18		1		
a disqualified person?			F# 1		7.2
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?			14 . T	of it	, · · · ,
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? (6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) b) If any answer is "Se's to 1a(1)-(6), did any of the acts fall to qualify under the exceptions described in Regulations section 53.4941(0)-3 or in a current notice regarding disaster assistance? See instructions Organizations relying on a current notice regarding disaster assistance, check here D) If 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 2019? 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(1)(3) or			1.5		₹.,
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? (6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) b If any answer is "Yes" to 14(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53,494 (1d)-3 or in a current notice regarding disaster assistance? See instructions Organizations relying on a current notice regarding disaster assistance? See instructions N/A 1b 1c 1c 1d 1d 1d 1d 1d 1d 1d 1d			2.3	3.1	V
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(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions Organizations relying on a current notice regarding disaster assistance, check here c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2019? 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(i)(3) or 4942(i)(5)) a At the end of tax year 2019, did the foundation have any undistributed income (Part XIII, lines 6d and 6e) for tax year(s) beginning before 2019? If "Yes," list the years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.) N/A 2b If "Yes," did it have excess business holdings in 2019 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(r)) 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 Form 4720, Schedule C, to determine if the foundation had excess business holdings in 2019.) At 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 yea			100	,	1
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b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions Organizations relying on a current notice regarding disaster assistance, check here C Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2019? 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(n)(3) or 4942(n)(5)) a At the end of tax year (2019, did the foundation have any undistributed income (Part XIII, lines 6d and 6e) for tax year(s) beginning before 2019? If "Yes," list the years >			4	3.74	۳. ا
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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 2019? 2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)) At the end of tax year (2019, did the foundation have any undistributed income (Part XIII, lines 6d and 6e) for tax year(s) beginning before 2019? If 'Yes,' list the years b 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. 2b If 'Yes,' did it have excess business holdings in 2019 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 grift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Form 4720, Schedule C, to determine if the foundation had excess business holdings in 2019.) 4a 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 2019?		(-)	2	杂礼	724 C4
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defined in section 4942(j)(3) or 4942(j)(5)) a At the end of tax year 2019, did the foundation have any undistributed income (Part XIII, lines 6d and 6e) for tax year(s) beginning before 2019? If "Yes," list the years 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. D d Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? b If "Yes," did it have excess business holdings in 2019 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 Form 4720, Schedule C, to determine if the foundation had excess business holdings in 2019.) N/A 4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 4b 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 2019?			1c_		
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6d and 6e) for tax year(s) beginning before 2019? If "Yes," list the years ▶ 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. ▶ 3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? b If "Yes," did it have excess business holdings in 2019 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 Form 4720, Schedule C, to determine if the foundation had excess business holdings in 2019.) 1 A Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 1 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 2019?		defined in section 4942(j)(3) or 4942(j)(5))	.5.	17.14	. \$1
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. D			7 -	3,13	
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. 3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? b If "Yes," did it have excess business holdings in 2019 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 Form 4720, Schedule C, to determine if the foundation had excess business holdings in 2019.) Also Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2019?		6d and 6e) for tax year(s) beginning before 2019?	¥	. 4	12.2
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. 3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? b If "Yes," did it have excess business holdings in 2019 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 Form 4720, Schedule C, to determine if the foundation had excess business holdings in 2019.) N/A 4a 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 2019?			50.3	7-7-	7. 78
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.	ı	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect	32.9	, <i>3</i> , 5.	
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. Sa Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? Ves			<u> </u>	4-6	35.4
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? b If "Yes," did it have excess business holdings in 2019 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 Form 4720, Schedule C, to determine if the foundation had excess business holdings in 2019.) 4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2019?		,	2b		ļ,
during the year? b If "Yes," did it have excess business holdings in 2019 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 Form 4720, Schedule C, to determine if the foundation had excess business holdings in 2019.) 4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2019?	(: If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.	13.00	.4	
during the year? b If "Yes," did it have excess business holdings in 2019 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 Form 4720, Schedule C, to determine if the foundation had excess business holdings in 2019.) 4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2019?		>	* (*		45.7
b If "Yes," did it have excess business holdings in 2019 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 Form 4720, Schedule C, to determine if the foundation had excess business holdings in 2019.) 4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 4b 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 2019?	3		£	٠ <u>٠</u> ال	2.
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of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Form 4720, Schedule C, to determine if the foundation had excess business holdings in 2019.) 4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 4a 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 2019? 4b X	١		5.	1	2.3
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4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 4a 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 2019? 4b X		/_			12-5-7-7
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had not been removed from jeopardy before the first day of the tax year beginning in 2019? 4b X			,	71.	
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Form 990-PF (2019) BILL AND SHARON ALLEN FAI			20-58546	17	Page 6
Part VII-B Statements Regarding Activities for Which F	orm 4720 May Be Re	equired (contin	ued)		
5a During the year, did the foundation pay or incur any amount to:				Yes	No
(1) Carry on propaganda, or otherwise attempt to influence legislation (section	1 4945(e))?	Ye	es 🗶 No 📗	· .	,
(2) Influence the outcome of any specific public election (see section 4955); o	r to carry on, directly or indire				
any voter registration drive?			es 🔀 No 📗	, t 3	١. ا
(3) Provide a grant to an individual for travel, study, or other similar purposes	7	Ye	es 🗶 No 📗	· *	
(4) Provide a grant to an organization other than a charitable, etc., organization	n described in section		3	^ . ^ ·	- 4
4945(d)(4)(A)? See instructions			s X No		. '
(5) Provide for any purpose other than religious, charitable, scientific, literary,	or educational purposes, or fo		1	99	1 1
the prevention of cruelty to children or animals?		Ye	s 🗶 No 📙	4 "	1 1
b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify und	der the exceptions described in	n Regulations	. -		.
section 53.4945 or in a current notice regarding disaster assistance? See instru	ictions		N/A	5b	↓
Organizations relying on a current notice regarding disaster assistance, check h	iere			24	.
c If the answer is "Yes" to question 5a(4), does the foundation claim exemption fr			-	·	1 1
expenditure responsibility for the grant?	N	/A Ye	s No	1 4	1
If "Yes," attach the statement required by Regulations section 53.4945-5(d).			ļ.	۱,	. -
6a Did the foundation, during the year, receive any funds, directly or indirectly, to p	pay premiums on			-	
a personal benefit contract?		Ye	es 🛣 No 📙		
$oldsymbol{b}$ Did the foundation, during the year, pay premiums, directly or indirectly, on a p	ersonal benefit contract?		L	6b	X
If "Yes" to 6b, file Form 8870.				الله إرا م	1 1
7a At any time during the tax year, was the foundation a party to a prohibited tax s	helter transaction?	Ye	es 🗶 No 📙	`\	<u> </u>
b If "Yes," did the foundation receive any proceeds or have any net income attribu	table to the transaction?		N/A	7b	
8 Is the foundation subject to the section 4960 tax on payment(s) of more than \$	1,000,000 in remuneration or		:	4 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	1 1
excess parachute payment(s) during the year?			s X No	* 3	Ш
Part VIII Information About Officers, Directors, Truste	es, Foundation Man	agers, Highly			
Paid Employees, and Contractors					
1 List all officers, directors, trustees, and foundation managers and the		(-) Composition	(d) Contributions to	4) 5	
(a) Name and address	(b) Title, and average hours per week devoted	(c) Compensation (If not paid,	employee benefit plans and deferred	accoun	pense t, other
	to position	enter -0-)	compensation	allow	ances
" d i *	PRESIDENT/DIR	ECTOR			
810 COLVILLE ROAD			_		_
CHARLOTTE, NC 28207	0.00	0.	0.		<u>0.</u>
	TRUST OFFICER				
4500 CAMERON VALLY PKWY #400					_
CHARLOTTE, NC 28211	0.00	0.	0.		<u> </u>
11-211-22-2-4-4					
7-447					
2 Compensation of five highest-paid employees (other than those inc		enter "NONE."	(d) Contributions to	/_\ F	nares
(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week	(c) Compensation	employee benefit plans and deferred	(e) EX	pense t, other
—————————————————————————————————————	devoted to position	(0) 00	compensation		ances
NONE					
Total number of other employees paid over \$50,000			>		0
			Form	990-PF	(2019)

Page 8

P	art X Minimum Investment Return (All domestic foundations must complete this part. Foreign four	dations,	see instructions)
1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes.		 -
-	Average monthly fair market value of securities	1a	14,392,699.
	Average of monthly cash balances	1b	1,109,070.
	Fair market value of all other assets	1c	1,536,464.
	Total (add lines 1a, b, and c)	1d	17,038,233.
	Reduction claimed for blockage or other factors reported on lines 1a and		
٠	1c (attach detailed explanation) 1e 0.		
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	17,038,233.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	255,573.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	16,782,660.
6	Minimum investment return. Enter 5% of line 5	6	839,133.
	art XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations an		
<u> </u>	foreign organizations, check here and do not complete this part.)	a oor ta	
<u>-</u>	Minimum investment return from Part X, line 6	1	839,133.
2a	Tax on investment income for 2019 from Part VI, line 5		<u> </u>
b	Income tax for 2019. (This does not include the tax from Part VI)		
c	Add lines 2a and 2b	2c	9,739.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	829,394.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	829,394.
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	829,394.
P	art XII Qualifying Distributions (see instructions)		
1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
а	Expenses, contributions, gifts, etc total from Part I, column (d), line 26	1a	775,598.
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	775,598.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment		
	income. Enter 1% of Part I, line 27b	5	9,739.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	765,859.
	Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation of 4940(e) reduction of tax in those years.	ualifies fo	r the section

BILL AND SHARON ALLEN FAMILY FOUNDATION

Part XIII Undistributed Income (see	instructions)			
	(a) Corpus	(b) Years prior to 2018	(c) 2018	(d) 2019
Distributable amount for 2019 from Part XI, line 7				829,394.
2 Undistributed income, if any, as of the end of 2019				
a Enter amount for 2018 only		<u></u> .	774,275.	··· · · · · · · · · · · · · · · · · ·
b Total for prior years.				
		0.		
3 Excess distributions carryover, if any, to 2019:		i	İ	
a From 2014				
b From 2015				
c From 2016				
d From 2017				
e From 2018				
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2019 from				
Part XII, line 4 ► \$ 775,598.			774 275	
a Applied to 2018, but not more than line 2a			774,275.	
b Applied to undistributed income of prior		,		
years (Election required - see instructions)		0.		
c Treated as distributions out of corpus	ا م			
(Election required - see instructions)	0.			1,323.
d Applied to 2019 distributable amount	0.			1,343.
e Remaining amount distributed out of corpus	<u></u>			
5 Excess distributions carryover applied to 2019 (If an amount appears in column (d), the same amount must be shown in column (a))	0.			0.
6 Enter the net total of each column as indicated below:				
2 Corpus Add lines 3f, 4c, and 4e Subtract line 5	0.			
b Prior years' undistributed income Subtract				
line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which				
the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable				
amount - see instructions		0.		
e Undistributed income for 2018. Subtract line			_	
4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2019. Subtract				
lines 4d and 5 from line 1. This amount must be distributed in 2020				828,071.
7 Amounts treated as distributions out of				
corpus to satisfy requirements imposed by			i	
section 170(b)(1)(F) or 4942(g)(3) (Election	_			
may be required - see instructions)	0.			
8 Excess distributions carryover from 2014				
not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2020.		•		
Subtract lines 7 and 8 from line 6a				
10 Analysis of line 9:				
a Excess from 2015				
b Excess from 2016		Į		
c Excess from 2017				
d Excess from 2018	ļ			
e Excess from 2019		!		

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	D SHARON AL			20-58	54617 Page 10
Part XIV Private Operating Fo	`		I-A, question 9)	N/A	
1 a If the foundation has received a ruling of					
foundation and the ruling is effective for		_	▶ ∟_]	
b Check box to indicate whether the found		ng foundation described		4942(j)(3) or 4942(j)	942(_J)(5)
2 a Enter the lesser of the adjusted net	Tax year	#1 0010	Prior 3 years	1 (4) 0010	(a) Tabal
income from Part I or the minimum	(a) 2019	(b) 2018	(c) 2017	(d) 2016	(e) Total
investment return from Part X for					
each year listed					_
b 85% of line 2a					
c Qualifying distributions from Part XII,					
line 4, for each year listed					
d Amounts included in line 2c not					
used directly for active conduct of		\downarrow			
exempt activities					
e Qualifying distributions made directly					
for active conduct of exempt activities.					
Subtract line 2d from line 2c 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.					
 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 Informat any time during the			 if the foundation	 had \$5,000 or moi	re in assets
1 Information Regarding Foundation	 n Managers:	·			-
List any managers of the foundation who year (but only if they have contributed m	o have contributed more		ributions received by the	foundation before the clos	e of any tax
BILL ALLEN					
b List any managers of the foundation who other entity) of which the foundation has			(or an equally large porti	on of the ownership of a pa	rtnership or
NONE					
2 Information Regarding Contribute	on, Grant, Gift. Loan.	Scholarship, etc., Pr	ograms:		
Check here X if the foundation o the foundation makes gifts, grants, etc.,	nly makes contributions	to preselected charitable	organizations and does	not accept unsolicited requi b, c, and d.	ests for funds. If
a The name, address, and telephone numb	er or email address of th	e person to whom applic	cations should be addres	sed:	
b The form in which applications should b	e submitted and informat	tion and materials they s	hould include.		
c Any submission deadlines:		- :			
d Any restrictions or limitations on awards	s, such as by geographica	al areas, charitable fields,	kinds of institutions, or	other factors:	

Form **990-PF** (2019)

Total

Part XV Supplementary Information Grants and Contributions Paid During the Year (Continuation) If recipient is an individual, Foundation Purpose of grant or show any relationship to any foundation manager Amount status of contribution Name and address (home or business) recipient or substantial contributor PUBLIC CHARITY SUPPORT SPEACH CHARLOTTE SPEECH AND HEARING CENTER NONE 741 KENILWORTH AVE, STE 100 -LANGUAGE AND HEARING SERVICES TO THOSE IN CHARLOTTE, NC 28204 NEED 20,000. CLASSROOM CENTRAL NONE PUBLIC CHARITY COLLECTS AND 2116 WILKINSON BLVD DISTRIBUTES FREE CHARLOTTE, NC 28208 SCHOOL SUPPLIES 20,000. CLT BIKE CAMP NONE PUBLIC CHARITY BIKE CAMP TO PROMOTE HEALTHY LIFESTYLE AND 321 BALDWIN AVE CHARLOTTE, NC 28204 COMMUNITY INVOLVEMENT 5,000. ARTS PLUS NONE PUBLIC CHARITY ARTS EDUCATION ORGANIZATION 345 N. COLLEGE ST. #413 20,000. CHARLOTTE, NC 28202 NONE PUBLIC CHARITY HANDS-ON MUSEUM FOR DISCOVERY PLACE EDUCATIONAL OUTREACH 301 N TRYON ST CHARLOTTE, NC 28202 150,000. FINANCIAL ASSISTANCE EXTRA MILE EDUCATION FOUNDATION NONE PUBLIC CHARITY AND SCHOLARSHIP TWO GATEWAY CENTER, SUITE 348, 603 STANWIX STREET PITTSBURGH, PA 15222 SUPPORT TO UNDER-RESOURCED CHILDREN FOR PAROCHIAL 2,500. GIRLS ON THE RUN INTERNATIONAL NONE PUBLIC CHARITY PROGRAMS FOR PRETEEN 120 COTTAGE PLACE GIRLS CHARLOTTE, NC 28207 25,000. JOE MARTIN ALS NONE PUBLIC CHARITY OVERNIGHT SUMMER CAMP FOR KIDS WITH ALS 100 N TRYON ST #3420 7,500. CHARLOTTE, NC 28202 KNOTHOLE FOUNDATION PUBLIC CHARITY PROMOTE BASEBALL IN NONE 7531 TUCKASEEGEE RD UNDERSERVED CHARLOTTE, NC 28214 COMMUNITIES 100,000. NONE PUBLIC CHARITY ENRICHMENT LIFESPAN, INC 200 CLANTON ROAD OPPORTUNITUES FOR CHARLOTTE, NC 28217 CHILDREN AND ADULTS WITH INTELLECTUAL AND DEVELOPMENTAL 30,000. 701,000. Total from continuation sheets

Supplementary Information Part XV Grants and Contributions Paid During the Year (Continuation) If recipient is an individual, Recipient Foundation Purpose of grant or show any relationship to **Amount** any foundation manager status of contribution Name and address (home or business) recipient or substantial contributor MUSCULAR DYSTROPHY ASSOCIATION NONE PUBLIC CHARITY HELP FOR SUPPORT 1515 MOCKINGBIRD LANE, #701 GROUPS, EQUIPMENT CHARLOTTE, NC 28209 ASSITANCE, AND SUMMER CAMPS FOR KIDS 20,000. NONE PUBLIC CHARITY OVER THE EDGE CYCLING CLUB CYCLING PROGRAMS FOR 2325 CROYDON RD THOSE IN NEED CHARLOTTE, NC 28207 3,500. PHILIPS ACADEMY OF NORTH CAROLINA, NONE PUBLIC CHARITY SCHOOL FOR STUDENTS INC. WITH LEARNING 3115 PROVIDENCE ROAD DISABILITIES AND CHARLOTTE, NC 28211 AUTISM 30,000. PUBLIC CHARITY YOUTH HEALTH, FITNESS PIRATES CHARITIES NONE AND EDUCATION PROGRAMS 115 FEDERAL STREET PITTSBURGH, PA 15212 30,000. RANGERS FOUNDATION NONE PUBLIC CHARITY YOUTH HEALTH, FITNESS, AND EDUCATION PROGRAMS 150 EDMISTON DRIVE 30,000. GLASGOW G51 2XD WORK WITH STUDENTS TO RIGHT MOVES FOR YOUTH, INC. NONE PUBLIC CHARITY IMPROVE SCHOOL 2211 W. MOREHEAD STREET CHARLOTTE, NC 28208 ATTENDANCE, IMPROVE BEHAVIOR, AND ENGAGE IN EDUCATION. 25,000. PUBLIC CHARITY PUTTING SPOKES GROUP NONE 6009 OLD WELL HOUSE RD UNDERPRIVILEGED YOUNG CHARLOTTE, NC 28226 PEOPLE ON COMMUNITY BIKES 5,000. SUSTAIN CHARLOTTE NONE PUBLIC CHARITY EDUCATION AND 2151 HAWKINS ST, STE 200 COMMUNITY BASED APPROACH TO CHARLOTTE NC 28203 SUSTAINABILITY OF THE CHARLOTTE AREA 35,000. THE IVEY PUBLIC CHARITY SUPPORT AND ACTIVITY NONE 6030 SOUTH PARK DRIVE CENTER FOR ADULTS CHARLOTTE, NC 28210 LIVING WITH MEMORY LOSS AND THEIR CAREGIVERS 50,000. HEALTH, FITNESS, AND YMCA OF GREATER CHARLOTTE NONE PUBLIC CHARITY EDUCATION PROGRAMS 8100 OLD MALLARD CREEK ROAD CHARLOTTE, NC 28262 30,000. Total from continuation sheets

3 Grants and Contributions Paid During the	Year (Continuation)			
Recipient	If recipient is an individual, show any relationship to	Foundation	Purpose of grant or	Amount
Name and address (home or business)	any foundation manager or substantial contributor	status of recipient	contribution	Amount
FREEDOM COMMUNITIES	NONE	PUBLIC CHARITY	A FAMILY CENTERED	
2225 FREEDOM DR SUITE 5			COMMUNITY	
CHARLOTTE, NC 28208			TRANSFORMATION	
·			ORGANIZATION IN THE	
			FREEDOM DRIVE CORRIDOR	20,00
THE BRADLEY CENTER	NONE	PUBLIC CHARITY	A YOUTH DEVELOPMENT	
5180 CAMPBELLS RUN RD			ORGANIZATION PROPERTY OF THE P	
PITTSBURGH, PA 15205			OVERCOMING BEHAVIOR	
	İ		ISSUES	2,50
CAROLINA THREAD TRAIL	NONE	PUBLIC CHARITY	ASSIST COMMUNITIES	
4530 PARK RD SUITE 420		-	PLAN AND DEVELOP	
CHARLOTTE, NC 28209			CONNECTING TRAILS IN A	
		1	15 COUNTY AREA	
		<u> </u>	SURROUNDING CHARLOTTE	40,00
	,			,
- Procedure				
		Ì		
		 		
				•
7				**
	<u>-</u>	1		

Part XV Supplementary Information SHARON ALLEN FAMILY FOUNDATION 20-5854617
3a Grants and Contributions Paid During the Year Continuation of Purpose of Grant or Contribution
NAME OF RECIPIENT - EXTRA MILE EDUCATION FOUNDATION
FINANCIAL ASSISTANCE AND SCHOLARSHIP SUPPORT TO UNDER-RESOURCED
CHILDREN FOR PAROCHIAL SCHOOLS
NAME OF RECIPIENT - LIFESPAN, INC
ENRICHMENT OPPORTUNITUES FOR CHILDREN AND ADULTS WITH INTELLECTUAL AND
DEVELOPMENTAL DISABILITIES
NAME OF RECIPIENT - FREEDOM COMMUNITIES
A FAMILY CENTERED COMMUNITY TRANSFORMATION ORGANIZATION IN THE FREEDOM
DRIVE CORRIDOR OF WEST CHARLOTTE
,
· · · · · · · · · · · · · · · · · · ·

Enter gross amounts unless otherwise indicated.	Unrelated	business income		by section 512, 513, or 514	(e)
	(a) Business code	(b) Amount	Exclu- sion code	(d) Amount	Related or exempt function income
1 Program service revenue:	code				·
a		· · · · · · · · · · · · · · · · · · ·	+ +		·
b			+ +		
<u> </u>			+ +		
d			+ +		- 1
e			+ +		
f			+ +		
g Fees and contracts from government agen	cies		+ +		
2 Membership dues and assessments	 		+ +	· -	
3 Interest on savings and temporary cash			14	111,014.	
investments			14	238,516.	
4 Dividends and interest from securities	 		+	230,310.	
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			14	143,784.	
7 Other investment income			+ + ++	. 143,704.	
8 Gain or (loss) from sales of assets other			18	COE 046	
than inventory	 		10	685,046.	
9 Net income or (loss) from special events	 		+ +		
O Gross profit or (loss) from sales of inventory			+		
1 Other revenue					
a			+		···
b			+		
c			+		
d	——————————————————————————————————————		+	•	
e		0.	 	1,178,360.	(
2 Subtotal. Add columns (b), (d), and (e)	<u> </u>	<u></u>			1,178,360
3 Total. Add line 12, columns (b), (d), and (e)	Invitations V			13	1,170,300
See worksheet in line 13 instructions to verify ca					
Part XVI-B Relationship of A	ctivities to the Accon	nplishment of Ex	empt P	urposes	
Line No. Explain below how each activity for			A contribut	ed importantly to the accomp	lishment of
▼ the foundation's exempt purpose	s (other than by providing fund	ls for such purposes).			
				.	
	· · · · · · · · · · · · · · · · · · ·				
				<u> </u>	
	<u>.</u>				
					-
				<u></u>	
					
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	. <u>.</u> .				
		<u>-</u>			
İ					

Form **990-PF** (2019)

923621 12-17-19

Forr	n 990-PF (2019) BILL AND SHARON ALLEN FAMILY FOUNDATION 20-	5854617	Pa	ige 13
ř	art XVII Information Regarding Transfers to and Transactions and Relationships With Non-	charitable		
	Exempt Organizations			
1	Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c)		Yes	No
	(other than section 501(c)(3) organizations) or in section 527, relating to political organizations?			
а	Transfers from the reporting foundation to a noncharitable exempt organization of	<u></u>		
	(1) Cash	1a(1)		X
	(2) Other assets	1a(2)		X
b	Other transactions;	3	-	
	(1) Sales of assets to a noncharitable exempt organization	1b(1)		Х

Transfers from the reporting foundation to a noncharitable exempt organization of		
(1) Cash	1a(1)	X
(2) Other assets	1a(2)	X
Other transactions:	<u> </u>	
(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
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.

(a) Line no	(b) Amount involved	(c) Name of noncharitable exempt organization	(d) Description of transfers, transactions, and sharing arrangements
		N/A	

2a	is the foundation directly or indirectly affiliated with, or related to, of	ne or more tax-exempt organiz	ations described	
	in section 501(c) (other than section 501(c)(3)) or in section 527?			Yes X No
b	If "Yes," complete the following schedule.			
	(a) Name of organization	(b) Type of organization	(c) Description of rela	tionship
	N/A			
	/			
Się He	Under penalties of perjury, I declare that I have examined this return, including and belief, it is true, correct, and complete Declaration of preparer (other that I have examined this return, including and belief, it is true, correct, and complete Declaration of preparer (other that I have examined this return, including and belief, it is true, correct, and complete Declaration of preparer (other that I have examined this return, including and belief, it is true, correct, and complete Declaration of preparer (other that I have examined this return, including and belief, it is true, correct, and complete Declaration of preparer (other that I have examined this return, including and belief, it is true, correct, and complete Declaration of preparer (other that I have examined this return, including and belief, it is true, correct, and complete Declaration of preparer (other that I have examined this return).	ng accompanying schedules and sta an taxpayer) is based on all informati	tements, and to the best of my knowledge on of which prepare has any knowledge PRESIDENT/DIREC TOR	May the IRS discuss this return with the preparer shown below? See instr

	Print/Type preparer's name	Preparer's signature	Date	Check	ıf	PTIN	
				self- employ	ed		
Paid	JEREMY NAESS	1-2 W. N-	09/11/2020			P01	306905
Preparer Use Only	Firm's name ► DIXON HUGHES	COOMAN LLP		Firm's EIN	▶ 5	6-07	47981
	Firm's address ► 4350 CONGRE	•	0.0			- 4 >	
	CHARLOTTE,	NC 28209		Phone no	<u>(7</u>	04)	<u> 367-7020</u>

Schedule B

(Form 990, 990-EZ, or 990-PF)

Department of the Treasury Internal Revenue Service

Schedule of Contributors

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

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

OMB No 1545-0047

2019

Employer identification number Name of the organization BILL AND SHARON ALLEN FAMILY FOUNDATION 20-5854617 Organization type (check one) Filers of: Section: ☐ 501(c)(Form 990 or 990-EZ) (enter number) organization 4947(a)(1) nonexempt charitable trust not treated as a private foundation 527 political organization Form 990-PF X 501(c)(3) exempt private foundation 4947(a)(1) nonexempt charitable trust treated as a private foundation 501(c)(3) taxable private foundation Check if your organization is covered by the General Rule or a Special Rule. Note: Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule See instructions General Rule X For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions **Special Rules** For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of (1) \$5,000, or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1 Complete Parts I and II ____ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 exclusively for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I, II, and III For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions exclusively for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an exclusively religious, charitable, etc., purpose Don't complete any of the parts unless the General Rule applies to this organization because it received nonexclusively religious, charitable, etc., contributions totaling \$5,000 or more during the year

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

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

certify that it doesn't meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF)

Schedule B (Form 990, 990-EZ, or 990-PF) (2019)

Employer identification number

BILL AND SHARON ALLEN FAMILY FOUNDATION

20-5854617

Part I	Contributors (see instructions) Use duplicate copies of Part I if additional	I space is needed	
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	BILL ALLEN 810 COLVILLE ROAD CHARLOTTE, NC 28207	\$500,000.	Person X Payroll
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
2	SHARON ALLEN 810 COLVILLE ROAD CHARLOTTE, NC 28207	\$500,000.	Person X Payroll
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person Payroll Oncash Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person Payroll Noncash (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person Payroll Oncash Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person Payroll Oncash Ocuplete Part II for noncash contributions)

Name of organization

Employer identification number

BILL AND SHARON ALLEN FAMILY FOUNDATION

20-5854617

	AND DIRECT ADDRESS TARTED TO COMMITTEE		3034017
Part II	Noncash Property (see instructions) Use duplicate copies of Part II if	additional space is needed	·
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
		- - - \$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
		s	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
		. . . \$	

Employer identification number

	AND SHARON ALLEN FAMILY	FOUNDATION	20-5854617			
art III	Exclusively religious, charitable, etc., contribution from any one contributor. Complete columns (a)	ons to organizations described in s	section 501(c)(7), (8), or (10) that total more than \$1,000 for the			
	completing Part III, enter the total of exclusively religious, c	haritable, etc., contributions of \$1,000 or	r less for the year (Enter this info once)			
	Use duplicate copies of Part III if additional s	pace is needed				
a) No. from			4 10 20 11 14 14 14 14 14 14 14 14 14 14 14 14			
Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held			
	*					
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┢	I	(e) Transfer of git				
		(e) Transfer of gi	n.			
	T	1710 . 4	Deletional in additional to be added a			
	Transferee's name, address, an	<u> </u>	Relationship of transferor to transferee			
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(a) No. from	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held			
Part I	(5), 1. post of 3	(0, 000 0. g	(2, 2 - 2 - 2 - 2 - 2 - 2 - 2 - 2 - 2 - 2			
		(e) Transfer of git	ft			
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	Transferee's name, address, an	Relationship of transferor to transferee				
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(a) No. from	(h) Durmono of sift	(c) Use of gift	(d) Description of how gift is held			
Part I	(b) Purpose of gift	(c) use of gift	(a) Description of now girt is neigh			
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		(e) Transfer of git	ft			
	1,700					
	Transferee's name, address, an	d ZIP + 4	Relationship of transferor to transferee			
(a) No.						
from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held			
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r	- w	(e) Transfer of git	ft			
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	Transferenie name address en	d 71D ± 4	Relationship of transferor to transferee			
ŀ	Transferee's name, address, an	<u>u zir + 4</u>	nelationally of transferor to transferee			
						
						
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FORM 990-PF INTER	EST ON SAVING	S AND TE	EMPORARY	CASH	INVESTMENTS	STATEMENT 1
SOURCE		REV	(A) JENUE BOOKS		(B) INVESTMENT INCOME	(C) ADJUSTED NET INCOME
AMORTIZATION - BONI MERRILL LYNCH - 571 OID ADJUSTMENT PNC INTEREST INCOME SALEM INVESTMENT PA SALEM INVESTMENT PA US GOVT INTEREST -	174E41 E ARTNERS III ARTNERS IV		-6,475. 79,993. 1,892. 15,298. 0. 452. 19,854.		-6,475. 79,993. 1,892. 15,298. 0. 452. 19,854.	-
TOTAL TO PART I, L	INE 3		111,014.		111,014.	
FORM 990-PF	DIVIDENDS	AND INTE	EREST FR	OM SECT	JRITIES	STATEMENT 2
SOURCE	GROSS AMOUNT	CAPITA GAINS DIVIDEN	5 R	(A) EVENUE R BOOKS		(C) T- ADJUSTED ME NET INCOME
HAWTHORNE MERRILL LYNCH - 57174E41	17,381. 234,666.	13.5	0. 531.	17,383	•	
TO PART I, LINE 4	252,047.		531.			
		OTHER	INCOME			STATEMENT 3
DESCRIPTION			(A) REVEN PER BO	UE .	(B) NET INVEST- MENT INCOME	(C) ADJUSTED
INCOME FROM SALEM INCOME FROM SALEM INCOME FROM SALEM INCOME FROM SALEM INCOME FROM SALEM INCOME FROM SALEM INCOME FROM SALEM INCOME FROM SALEM INCOME FROM SALEM INCOME FROM SALEM INCOME.		_		7,602.	-21,468	
PARTNERS IV, LP TOTAL TO FORM 990-F	PF, PART I, L	- INE 11	<u> </u>	3,784.	118,099	

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FORM 990-PF	ACCOUNTI	NG FEES	S	TATEMENT 4
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING FEES	4,195.	2,097.		2,098.
TO FORM 990-PF, PG 1, LN 16B	4,195.	2,097.		2,098.
FORM 990-PF C	THER PROFES	SIONAL FEES	, S	TATEMENT 5
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
CUSTODIAN FEES BOOKKEEPING FEES	121,251. 44,000.			0 . 0 .
TO FORM 990-PF, PG 1, LN 16C	165,251.	165,251.		0.
FORM 990-PF	TAX	ES	S	татемент 6
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FOREIGN TAXES EXCISE TAXES	·1,559. 13,120.	1,559.		0.
TO FORM 990-PF, PG 1, LN 18	14,679.	1,559.		0.
FORM 990-PF	OTHER E	XPENSES	S	TATEMENT 7
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
OTHER DEDUCTIONS FROM SALEM	2,926.	2,926.		0.
INVESTMENT PARTNERS III, LLC OTHER DEDUCTIONS FROM SALEM				
	2,745.	2,745.		0

FORM 990-PF U.S. AND STATE/C	TTY GOV	ERNMENT	OBLIGATIONS	STATEMENT 8
DESCRIPTION	U.S. GOV'T	OTHER GOV'T	BOOK VALUE	FAIR MARKET VALUE
TOTAL GOVERNMENT SECURITIES - SEE ATTACHED	<u> </u>		1,877,466.	1,932,060
TOTAL U.S. GOVERNMENT OBLIGATIONS		-	1,877,466.	1,932,060
TOTAL STATE AND MUNICIPAL GOVERNMEN	T OBLIG	ATIONS	_	
TOTAL TO FORM 990-PF, PART II, LINE	10A	=	1,877,466.	1,932,060
FORM 990-PF COR	PORATE	STOCK		STATEMENT 9
DESCRIPTION			BOOK VALUE	FAIR MARKET VALUE
TOTAL CORPORATE STOCKS (ML 571-15340,74E41,17668,22906,28731)-	SEE AT	TACHED	8,959,919.	12,587,157
TOTAL TO FORM 990-PF, PART II, LINE	10B	=	8,959,919.	12,587,157
FORM 990-PF COR	PORATE	BONDS	•	STATEMENT 10
				FAIR MARKET
DESCRIPTION			BOOK VALUE	VALUE
DESCRIPTION TOTAL CORPORATE BONDS - SEE ATTACHE	:D	-	1,150,645.	1,217,038

FORM 990-PF	OTHER	INVESTMENTS		STATEMENT 11
DESCRIPTION		VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
SALEM III INVESTMENTS		COST	559,669.	559,669.
PNC BANK CD/MMA		COST	325,651.	325,651.
SALEM IV INVESTMENTS		COST	976,795.	976,795.
TOTAL MUTUAL FUNDS/CEF (ML		COST		
571-22906,74E41,15340,28731) SE	Œ			
ATTACHED			705,218.	716,612.
BONDS - ACCRUED INTEREST		COST	0.	18,654.
TOTAL TO FORM 990-PF, PART II,	LINE 3	L3	2,567,333.	2,597,381.