

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 1545-0047

2019
Open to Public Inspection

For calendar year 2019 or tax year beginning

, and ending

Name of foundation JACK D. AND BEVERLY B. FINLEY CHARITABLE FOUNDATION		A Employer identification number 22-2604913
Number and street (or P O box number if mail is not delivered to street address) 631 SOQUILLI TRAIL		B Telephone number 770-893-1577
City or town, state or province, country, and ZIP or foreign postal code JASPER, GA 30143-4171		C If exemption application is pending, check here ► <input type="checkbox"/>
G Check all that apply: <input type="checkbox"/> Initial return <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Final return <input type="checkbox"/> Amended return <input type="checkbox"/> Address change <input type="checkbox"/> Name change		D 1. Foreign organizations, check here ► <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation ► <input type="checkbox"/>
H Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here ► <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ► \$ 1,391,180.	J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ► <input type="checkbox"/>
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)
Revenue		N/A
1 Contributions, gifts, grants, etc., received		
2 Check ► <input checked="" type="checkbox"/> if the foundation is not required to attach Sch. B		
Interest on savings and temporary cash investments	2,774.	2,774.
4 Dividends and interest from securities	45,110.	45,110.
5a Gross rents		
b Net rental income or (loss)		
6a Net gain or (loss) from sale of assets not on line 10	32,885.	
b Gross sales price for all assets on line 6a	68,215.	
7 Capital gain net income (from Part IV, line 2)		32,885.
8 Net short-term capital gain		
9 Income modifications		
10a Gross sales less returns and allowances		
b Less Cost of goods sold		
c Gross profit or (loss)		
11 Other income		
12 Total Add lines 1 through 11	80,769.	80,769.
Operating and Administrative Expenses		0.
13 Compensation of officers, directors, trustees, etc	0.	0.
14 Other employee salaries and wages		
15 Pension plans, employee benefits		
16a Legal fees		
b Accounting fees	3,950.	3,950.
c Other professional fees		
17 Interest	10.	10.
18 Taxes	363.	363.
19 Depreciation and depletion		
20 Occupancy		
21 Travel, conferences, and meetings		
22 Printing and publications		
23 Other expenses	10,604.	10,604.
24 Total operating and administrative expenses. Add lines 13 through 23	14,927.	14,927.
25 Contributions, gifts, grants paid	59,500.	59,500.
26 Total expenses and disbursements. Add lines 24 and 25	74,427.	14,927.
27 Subtract line 26 from line 12:		
a Excess of revenue over expenses and disbursements	6,342.	
b Net investment income (if negative, enter -0)		65,842.
c Adjusted net income (if negative, enter -0)		N/A

SCANNED MAY 20 2021

923501 12-17-19 LHA For Paperwork Reduction Act Notice, see instructions.	Form 990-PF (2019)
---	--------------------

**JACK D. AND BEVERLY B. FINLEY CHARITABLE
FOUNDATION**

Form 990-PF (2019)

22-2604913

Page 2

Part II Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only		Beginning of year	End of year
		(a) Book Value	(b) Book Value
1	Cash - non-interest-bearing		
2	Savings and temporary cash investments	4,923.	
3	Accounts receivable ►		
	Less: allowance for doubtful accounts ►		
4	Pledges receivable ►		
	Less: allowance for doubtful accounts ►		
5	Grants receivable		
6	Receivables due from officers, directors, trustees, and other disqualified persons		
7	Other notes and loans receivable ►		
	Less: allowance for doubtful accounts ►		
8	Inventories for sale or use		
9	Prepaid expenses and deferred charges		
10a	Investments - U.S. and state government obligations		
b	Investments - corporate stock	STMT 6	1,043,287.
c	Investments - corporate bonds	STMT 7	80,101.
11	Investments - land, buildings, and equipment basis		
	Less accumulated depreciation ►		
12	Investments - mortgage loans		
13	Investments - other		
14	Land, buildings, and equipment: basis ►		
	Less accumulated depreciation ►		
15	Other assets (describe ►)		
16	Total assets (to be completed by all filers - see the instructions. Also, see page 1, item 1)	1,128,311.	1,156,872.
			1,391,180..
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		
22	Other liabilities (describe ► <u>UBS PORTFOLIO LOAN</u>)	0.	22,219.
23	Total liabilities (add lines 17 through 22)	0.	22,219.
Net Assets or Fund Balances	Foundations that follow FASB ASC 958, check here ► <input type="checkbox"/>		
	and complete lines 24, 25, 29, and 30.		
	24 Net assets without donor restrictions		
25	Net assets with donor restrictions		
Net Assets or Fund Balances	Foundations that do not follow FASB ASC 958, check here ► <input checked="" type="checkbox"/>		
	and complete lines 26 through 30.		
26	Capital stock, trust principal, or current funds	1,185,707.	1,185,707.
27	Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.
28	Retained earnings, accumulated income, endowment, or other funds	-57,396.	-51,054.
29	Total net assets or fund balances	1,128,311.	1,134,653.
30	Total liabilities and net assets/fund balances	1,128,311.	1,156,872.

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 29 (must agree with end-of-year figure reported on prior year's return)	1,128,311.
2	Enter amount from Part I, line 27a	6,342.
3	Other increases not included in line 2 (itemize) ►	0.
4	Add lines 1, 2, and 3	1,134,653.
5	Decreases not included in line 2 (itemize) ►	0.
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 29	1,134,653.

Form 990-PF (2019)

JACK D. AND BEVERLY B. FINLEY CHARITABLE

Form 990-PF (2019)

FOUNDATION

22-2604913

Page 3

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (for example, real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)		(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a SEE ATTACHED SCHEDULE - UBS 87885		P		
b SEE ATTACHED SCHEDULE - UBS 87885		P		
c SEE ATTACHED SCHEDULE - UBS 87885		P		
d CAPITAL GAINS DIVIDENDS				
e				
(e) Gross sales price		(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g))
a	1,553.		1,546.	7.
b	10,682.		13,868.	-3,186.
c	38,361.		19,916.	18,445.
d	17,619.			17,619.
e				
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69.		(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))		
(i) 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				7.
b				-3,186.
c				18,445.
d				17,619.
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 32,885.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6). If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8		{ If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8 }		3 N/A

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

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

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

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

 Yes No

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2018	64,497.	1,222,237.	.052770
2017	61,457.	1,311,976.	.046843
2016	52,500.	1,239,267.	.042364
2015	56,800.	1,283,849.	.044242
2014	80,072.	1,345,289.	.059520

2 Total of line 1, column (d) 2 .245739

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 .049148

4 Enter the net value of noncharitable-use assets for 2019 from Part X, line 5 4 1,370,312.

5 Multiply line 4 by line 3 5 67,348.

6 Enter 1% of net investment income (1% of Part I, line 27b) 6 658.

7 Add lines 5 and 6 7 68,006.

8 Enter qualifying distributions from Part XII, line 4 8 59,500.

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

JACK D. AND BEVERLY B. FINLEY CHARITABLE

Form 990-PF (2019)

FOUNDATION

22-2604913

Page 4

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

1a Exempt operating foundations described in section 4940(d)(2), check here ► and enter "N/A" on line 1.

Date of ruling or determination letter. _____ (attach copy of letter if necessary-see instructions)

b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ► and enter 1% of Part I, line 27b

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-)

3 Add lines 1 and 2

4 Subtitle A (income) 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. If zero or less, enter -0-

6 Credits/Payments:

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 file (Form 8868)

d Backup withholding erroneously withheld

6a 720.

6b 0.

6c 0.

6d 0.

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 8 is more than line 7, enter amount owed

10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid

11 Enter the amount of line 10 to be: Credited to 2020 estimated tax ►

Refunded ►

7 720.

8 0.

9 597.

10

11

Part VII-A Statements Regarding Activities

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?

Yes

No

1a X

b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition

If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.

c Did the foundation file Form 1120-POL for this year?

d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year:

(1) On the foundation. ► \$ 0. (2) On foundation managers. ► \$ 0.

e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ► \$ 0.

2 Has the foundation engaged in any activities that have not previously been reported to the IRS?

If "Yes," attach a detailed description of the activities.

Yes

No

1b X

3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes

1c X

4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?

b If "Yes," has it filed a tax return on Form 990-T for this year?

N/A

5 Was there a liquidation, termination, dissolution, or substantial contraction during the year?

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. ►

FL

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 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

2

9

X

10

X

Form 990-PF (2019)

JACK D. AND BEVERLY B. FINLEY CHARITABLE
FOUNDATION

Form 990-PF (2019)

22-2604913

Page 5

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	11	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	12	X
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► N/A	13	X
14 The books are in care of ► JENA B. FINLEY Telephone no. ► 770-893-1577 Located at ► 631 SOQUILI TRAIL, JASPER, GA ZIP+4 ► 30143-4171		
15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - check here and enter the amount of tax-exempt interest received or accrued during the year	15	N/A
16 At any time during calendar year 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 ►	16	X

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

	Yes	No
File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.		
1a During the year, did the foundation (either directly or indirectly):		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	<input type="checkbox"/> Yes	X No
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	<input type="checkbox"/> Yes	X No
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	<input type="checkbox"/> Yes	X No
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	<input type="checkbox"/> Yes	X 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	X 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	X No
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions Organizations relying on a current notice regarding disaster assistance, check here	N/A	►
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2019?	1c	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 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 ►	<input type="checkbox"/> Yes	X No
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.)	N/A	
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ►	2b	
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	X No
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?	3b	
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?	4a	X
	4b	X

Form 990-PF (2019)

JACK D. AND BEVERLY B. FINLEY CHARITABLE FOUNDATION

Form 990-PF (2019)

FOUNDATION

22-2604913

Page 6

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	N/A	
Organizations relying on a current notice regarding disaster assistance, check here	► <input type="checkbox"/>	
c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?	N/A	
If "Yes," attach the statement required by Regulations section 53.4945-5(d).	<input type="checkbox"/>	Yes <input type="checkbox"/> No
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.		
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?	N/A	
8 Is the foundation subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment(s) during the year?	<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.

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
JENA B. FINLEY 631 SOQUILI TRAIL JASPER, GA 30143-4171	TRUSTEE	0.	0.	0.
	3.00			

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

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

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

Form 990-PF (2019)

JACK D. AND BEVERLY B. FINLEY CHARITABLE

Form 990-PF (2019)

FOUNDATION

22-2604913

Page 7

Part VIII **Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors** *(continued)***3 Five highest-paid independent contractors for professional services. If none, enter "NONE."**

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		

Total number of others receiving over \$50,000 for professional services ► 0

Part IX-A **Summary of Direct Charitable Activities**

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

Expenses

1	N/A	
2		
3		
4		

Part IX-B **Summary of Program-Related Investments**

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.

Amount

1	N/A	
2		0.

All other program-related investments. See instructions.

3		

Total. Add lines 1 through 3 ► 0.

Form 990-PF (2019)

**JACK D. AND BEVERLY B. FINLEY CHARITABLE
FOUNDATION**

Form 990-PF (2019)

22-2604913

Page 8

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	1,391,180.
b	Average of monthly cash balances	1b	0.
c	Fair market value of all other assets	1c	0.
d	Total (add lines 1a, b, and c)	1d	1,391,180.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	1,391,180.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	20,868.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	1,370,312.
6	Minimum investment return. Enter 5% of line 5	6	68,516.

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	68,516.
2a	Tax on investment income for 2019 from Part VI, line 5	2a	1,317.
b	Income tax for 2019. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	1,317.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	67,199.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	67,199.
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	67,199.

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	59,500.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8; and Part XIII, line 4	4	59,500.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	0.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	59,500.

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

Form 990-PF (2019)

JACK D. AND BEVERLY B. FINLEY CHARITABLE
FOUNDATION

Form 990-PF (2019)

22-2604913

Page 9

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2018	(c) 2018	(d) 2019
1 Distributable amount for 2019 from Part XI, line 7				67,199.
2 Undistributed income, if any, as of the end of 2019			59,071.	
a Enter amount for 2018 only				
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2019:				
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: ► \$ 59,500.			59,071.	
a Applied to 2018, but not more than line 2a				
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)		0.		
d Applied to 2019 distributable amount				429.
e Remaining amount distributed out of corpus		0.		
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:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5		0.		
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 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				66,770.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions)		0.		
8 Excess distributions carryover from 2014 not applied on line 5 or line 7		0.		
9 Excess distributions carryover to 2020. Subtract lines 7 and 8 from line 6a		0.		
10 Analysis of line 9:				
a Excess from 2015				
b Excess from 2016				
c Excess from 2017				
d Excess from 2018				
e Excess from 2019				

JACK D. AND BEVERLY B. FINLEY CHARITABLE

Form 990-PF (2019)

FOUNDATION

22-2604913

Page 10

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

N/A

1 a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2019, enter the date of the ruling



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

2 a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed	Prior 3 years				(e) Total
	(a) 2019	(b) 2018	(c) 2017	(d) 2016	
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4, for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities.					
Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon:					
a "Assets" alternative test - enter:					
(1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test - enter 2/3 of minimum investment return shown in Part X, line 6, for each year listed					
c "Support" alternative test - enter:					
(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(ii)					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

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

1 Information Regarding Foundation Managers:

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

NONE

b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest.

NONE

2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:

Check here ► if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc., to individuals or organizations under other conditions, complete items 2a, b, c, and d.

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

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

c Any submission deadlines:

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

JACK D. AND BEVERLY B. FINLEY CHARITABLE
FOUNDATION

22-2604913 Page 11

Form 990-PF (2019)

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
a Paid during the year				
AMERICAN CIVIL LIBERTIES UNION FOUNDATION 125 BROAD STREET 18TH FLOOR NEW YORK, NY 10004	NONE	PUBLIC CHARITY	FOR UNRESTRICTED USE IN TAX EXEMPT PURPOSE	5,000.
HUMAN RIGHTS CAMPAIGN FOUNDATION 1640 RHODE ISLAND AVENUE, NW WASHINGTON, DC 20036	NONE	PUBLIC CHARITY	FOR UNRESTRICTED USE IN TAX EXEMPT PURPOSE	4,000.
CREATIVE ARTS GUILD 520 WEST WAUGH STREET DALTON, GA 30720	NONE	PUBLIC CHARITY	FOR UNRESTRICTED USE IN TAX EXEMPT PURPOSE	5,000.
PROPUBLICA 155 AVENUE OF THE AMERICAS NEW YORK, NY 10013	NONE	PUBLIC CHARITY	FOR UNRESTRICTED USE IN TAX EXEMPT PURPOSE	5,000.
HORSES WITHOUT HUMANS 6191 N US HIGHWAY 129 BELL, FL 32619	NONE	PUBLIC CHARITY	FOR UNRESTRICTED USE IN TAX EXEMPT PURPOSE	5,000.
Total	SEE CONTINUATION SHEET(S)			► 3a 59,500.
b Approved for future payment				
NONE				
Total				► 3b 0.

923611 12-17-19

Form 990-PF (2019)

16200513 759427 E04617.FINLE

11
2019.03042 JACK D. AND BEVERLY B. FI E04617.1

JACK D. AND BEVERLY B. FINLEY CHARITABLE
FOUNDATION

22-2604913

Part XV | Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

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
COALITION FOR THE HOMELESS 2201 P ST NW WASHINGTON, DC 20037	NONE	PUBLIC CHARITY	FOR UNRESTRICTED USE IN TAX EXEMPT PURPOSE	1,000.
ISM FOUNDATION 1720 YOSEMITE STREET SEASIDE, CA 93955	NONE	PUBLIC CHARITY	FOR UNRESTRICTED USE IN TAX EXEMPT PURPOSE	6,000.
SAVE THE HORSES PO BOX 1123 BALL GROUND, GA 30107	NONE	PUBLIC CHARITY	FOR UNRESTRICTED USE IN TAX EXEMPT PURPOSE	2,500.
DOLI ATAMIAN CAMPERSHIP PROGRAM PO BOX 693 ACTON, MA 01720	NONE	PUBLIC CHARITY	FOR UNRESTRICTED USE IN TAX EXEMPT PURPOSE	5,000.
GEORGIA MOUNTAINS HOSPICE 70 CARING WAY JASPER, GA 30143	NONE	PUBLIC CHARITY	FOR UNRESTRICTED USE IN TAX EXEMPT PURPOSE	1,000.
ENVIRONMENTAL DEFENSE FUND 257 PARK AVENUE SOUTH NEW YORK, NY 10010	NONE	PUBLIC CHARITY	FOR UNRESTRICTED USE IN TAX EXEMPT PURPOSE	20,000.
Total from continuation sheets				35,500.

923631
04-01-19

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.

Enter gross amounts unless otherwise indicated.	Unrelated business income		Excluded by section 512, 513, or 514	(e) Related or exempt function income
	(a) Business code	(b) Amount		
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			14	2,774.
4 Dividends and interest from securities			14	45,110.
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	32,885.
9 Net income or (loss) from special events				
10 Gross profit or (loss) from sales of inventory				
11 Other revenue:				
a				
b				
c				
d				
e				
12 Subtotal. Add columns (b), (d), and (e)		0.	80,769.	0.
13 Total. Add line 12, columns (b), (d), and (e)			13	80,769.
(See worksheet in line 13 instructions to verify calculations.)				

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

JACK D. AND BEVERLY B. FINLEY CHARITABLE

22-2604913

FORM 990-PF INTEREST ON SAVINGS AND TEMPORARY CASH INVESTMENTS STATEMENT 1

SOURCE	(A) REVENUE PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME
UBS FINANCIAL SERVICES INC 87883	2,759.	2,759.	
UBS FINANCIAL SERVICES INC 87885	15.	15.	
TOTAL TO PART I, LINE 3	2,774.	2,774.	

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
ENTERPRISE PRODUCTS PARTNERS-CAPITAL GAINS	14.	0.	14.	14.	
UBS FINANCIAL SERVICES INC 87883	11,013.	0.	11,013.	11,013.	
UBS FINANCIAL SERVICES INC 87885	1,139.	0.	1,139.	1,139.	
UBS FINANCIAL SERVICES INC 87885	50,563.	17,619.	32,944.	32,944.	
TO PART I, LINE 4	62,729.	17,619.	45,110.	45,110.	

FORM 990-PF ACCOUNTING FEES STATEMENT 3

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING FEES	3,950.	3,950.		0.
TO FORM 990-PF, PG 1, LN 16B	3,950.	3,950.		0.

JACK D. AND BEVERLY B. FINLEY CHARITABLE

22-2604913

FORM 990-PF

TAXES

STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FOREIGN TAXES	363.	363.		0.
TO FORM 990-PF, PG 1, LN 18	363.	363.		0.

FORM 990-PF

OTHER EXPENSES

STATEMENT 5

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
INVESTMENT EXPENSES	10,604.	10,604.		0.
TO FORM 990-PF, PG 1, LN 23	10,604.	10,604.		0.

JACK D. AND BEVERLY B. FINLEY CHARITABLE

22-2604913

FORM 990-PF

CORPORATE STOCK

STATEMENT 6

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
ALTRIA GROUP INC	30,876.	57,397.
AMERICAN FDS GROWTH FD OF AMERICA	26,643.	41,221.
AT&T INC	22,578.	32,827.
TRUST FINL CORP SERIES H 5.625% PREFERRED CLBL		
PAR VALUE - 25.00 USD	25,000.	26,880.
BERKSHIRE HATHAWAY INC CL B	29,465.	81,767.
CAPITAL ONE FINCL CORP 5.2% PREFERRED CLBL PAR		
VALUE-25.00 USD	25,000.	25,720.
COHEN & STEERS LTD DURATION PFD & INCOME FD	20,001.	22,916.
DOMINION RESOURCES INC 5.25% DUE 7/30/76		
CALLABLE	25,000.	26,180.
DUKE ENERGY CORPORATION	18,782.	23,259.
EATON VANCE LARGE CAP VALUE FD CL A	24,660.	31,210.
EATON VANCE TAX ADVANTAGED DIVIDEND INCOME FUND	44,273.	51,091.
EATON VANCE TAX ADVANTAGED GLOBAL DIVIDEND		
INCOME FUND	36,924.	34,580.
ENTERPRISE PRODUCT PARTNERS LP	1,428.	79,439.
FIDELITY ADV NEW INSIGHTS FD	60,406.	78,574.
FIDUCIARY CLAYMORE MLP OPPORTUNITY FUND	40,537.	32,319.
FIRST EAGLE GLOBAL FUND CL A	82,100.	105,626.
GATEWAY FUND	31,998.	42,595.
JANUS HENDERSON GLOBAL EQUITY INC FD	53,115.	50,417.
KKR & CO LP DEL SER A 6.75% PREFERRED CLBL PAR		
VALUE-25.00 USD	20,000.	21,272.
LOOMIS SAYLES STRATEGIC INC FD	80,248.	83,468.
LORD ABBET FLOATING RATE FD	67,824.	64,303.
NUVEEN REAL ASSET INCOME FD	48,633.	53,154.
PIMCO CORPORATE & INCOME STRAT FUND	22,419.	30,554.
THE SOUTHERN COMPANY 5.25% DUE 10/01/76 CALLABLE	27,500.	28,974.
TOUCHSTONE SMALL COMPANY FD	76,175.	71,668.
VERIZON COMMUNICATIONS	60,596.	114,450.
WELLS FARGO & CO 5.5% PREFERRED CLBL PAR VALUE -		
25.00 USD	22,500.	23,490.
BANK OF AMERICA CO SER GG 6.0% PREFERRED CLBL	37,500.	41,235.
CALAMOS CONV OPPORTUNITIES & INCOME FUND	14,590.	14,344.
TOTAL TO FORM 990-PF, PART II, LINE 10B	1,076,771.	1,390,930.

FORM 990-PF

CORPORATE BONDS

STATEMENT 7

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
LEHMAN BROS HOLDGS 8.9% 5/31/22 NTS	80,101.	250.
TOTAL TO FORM 990-PF, PART II, LINE 10C	80,101.	250.