

Form **990-PF****Return of Private Foundation**

or Section 4947(a)(1) Trust Treated as Private Foundation

OMB No 1545-0047

2019

Open to Public Inspection

Department of the Treasury
Internal Revenue Service

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

ANONYMOUS TRUST
U/A DATED 2-4-2008

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

PO BOX 31143

Room/suite

A Employer identification number

26-6220561

B Telephone number

(919) 571-3332

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

RALEIGH, NC 27622C If exemption application is pending, check here ☐ **le**

G Check all that apply:

☐ Initial return☐ Initial return of a former public charity☐ Final return☐ Amended return☐ Address change☐ Name changeD 1. Foreign organizations, check here ☐2. Foreign organizations meeting the 85% test, check here and attach computation ☐E If private foundation status was terminated under section 507(b)(1)(A), check here ☐F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐Check type of organization: ☒ Section 501(c)(3) exempt private foundation☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation **04**

Fair market value of all assets at end of year (from Part II, col. (c), line 16)

\$ 228,759,994. (Part I, column (d), must be on cash basis)J Accounting method: ☒ Cash ☐ Accrual☐ Other (specify) _____**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

2 Check ☒ if the foundation is not required to attach Sch B

3 Interest on savings and temporary cash investments

4 Dividends and interest from securities

5,153,721.**5,133,121.****STATEMENT 1**

5a Gross rents

b Net rental income or (loss)

6a Net gain or (loss) from sale of assets not on line 10

b Gross sales price for all assets on line 6a **9,483,628.****1,035,469.****1,035,469.**

7 Capital gain net income (from Part IV, line 2)

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

2,389.**2,389.****STATEMENT 2**

12 Total Add lines 1 through 11

6,191,579.**6,170,979.**

13 Compensation of officers, directors, trustees, etc

388,750.**0.****388,750.**

14 Other employee salaries and wages

15 Pension plans, employee benefits

90,240.**0.****90,240.**16a Legal fees **STMT 3****14,655.****0.****14,655.**b Accounting fees **STMT 4****24,475.****0.****24,475.**c Other professional fees **STMT 5****175,668.****175,078.****0.**

17 Interest

18 Taxes **STMT 6****160,763.****0.****0.**

19 Depreciation and depletion

20 Occupancy

21,375.**0.****21,375.**

21 Travel, conferences, and meetings

7,340.**0.****7,340.**

22 Printing and publications

23 Other expenses **STMT 7****45,213.****0.****45,213.**

24 Total operating and administrative expenses Add lines 13 through 23

928,479.**175,078.****592,048.**

25 Contributions, gifts, grants paid

7,613,260.**7,613,260.**

26 Total expenses and disbursements Add lines 24 and 25

8,541,739.**175,078.****8,205,308.**

27 Subtract line 26 from line 12:

a Excess of revenue over expenses and disbursements

-2,350,160.

b Net investment income (if negative, enter -0-)

5,995,901.

c Adjusted net income (if negative, enter -0-)

N/A

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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	(c) Fair Market Value
Assets	1	Cash - non-interest-bearing					
	2	Savings and temporary cash investments			4,850,127.	4,201,608.	4,201,608.
	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	STMT 10		24,422,418.	25,474,157.	26,829,219.
	b	Investments - corporate stock	STMT 11		67,158,992.	66,522,864.	169,658,578.
	c	Investments - corporate bonds	STMT 12		27,093,270.	24,486,334.	25,511,487.
Liabilities	11	Investments - land, buildings, and equipment basis ▶					
		Less: accumulated depreciation ▶					
	12	Investments - mortgage loans					
	13	Investments - other	STMT 13		2,152,191.	2,624,875.	2,559,102.
	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 I)			125,676,998.	123,309,838.	228,759,994.
	17	Accounts payable and accrued expenses					
	18	Grants payable					
Net Assets or Fund Balances	19	Deferred revenue					
	20	Loans from officers, directors, trustees, and other disqualified persons					
	21	Mortgages and other notes payable					
	22	Other liabilities (describe ▶)	STATEMENT 14)		55,540.	49,956.	
	23	Total liabilities (add lines 17 through 22)			55,540.	49,956.	
		Foundations that follow FASB ASC 958, check here ▶ ☐					
		and complete lines 24, 25, 29, and 30.					
	24	Net assets without donor restrictions					
	25	Net assets with donor restrictions					
		Foundations that do not follow FASB ASC 958, check here ▶ ☒					
		and complete lines 26 through 30					
	26	Capital stock, trust principal, or current funds			125,621,458.	123,259,882.	
	27	Paid-in or capital surplus, or land, bldg., and equipment fund			0.	0.	
	28	Retained earnings, accumulated income, endowment, or other funds			0.	0.	
	29	Total net assets or fund balances			125,621,458.	123,259,882.	
	30	Total liabilities and net assets/fund balances			125,676,998.	123,309,838.	

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	125,621,458.
2	Enter amount from Part I, line 27a	2	-2,350,160.
3	Other increases not included in line 2 (itemize) ▶ SEE STATEMENT 8	3	224,118.
4	Add lines 1, 2, and 3	4	123,495,416.
5	Decreases not included in line 2 (itemize) ▶ SEE STATEMENT 9	5	235,534.
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 29	6	123,259,882.

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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 PUBLICLY TRADED SECURITIES NORTHERN TRUST	P		
b PUBLICLY TRADED SECURITIES RAYMOND JAMES	P		
c			
d			
e			

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) ((e) plus (f) minus (g))
a 6,394,196.		6,311,852.	82,344.
b 3,089,432.		2,136,307.	953,125.
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69.			(i) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
(j) FMV as of 12/31/69	(k) Adjusted basis as of 12/31/69	(l) Excess of col. (i) over col. (j), if any	
a			82,344.
b			953,125.
c			
d			
e			

2 Capital gain net income or (net capital loss)	If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7	2	1,035,469.
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	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	6,359,500.	207,434,231.	.030658
2017	13,964,168.	200,939,223.	.069494
2016	9,277,637.	180,666,764.	.051352
2015	9,018,637.	186,932,251.	.048245
2014	6,458,740.	183,614,108.	.035176

2 Total of line 1, column (d)	2	.234925
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	.046985
4 Enter the net value of noncharitable-use assets for 2019 from Part X, line 5	4	212,748,786.
5 Multiply line 4 by line 3	5	9,996,002.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	59,959.
7 Add lines 5 and 6	7	10,055,961.
8 Enter qualifying distributions from Part XII, line 4	8	8,205,308.

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.

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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		1	119,918.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations, enter 4% of Part I, line 12, col. (b)			
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-)		2	0.
3 Add lines 1 and 2		3	119,918.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-)		4	0.
5 Tax based on investment income Subtract line 4 from line 3. If zero or less, enter -0-		5	119,918.
6 Credits/Payments:			
a 2019 estimated tax payments and 2018 overpayment credited to 2019	6a	152,789.	
b Exempt foreign organizations - tax withheld at source	6b	0.	
c Tax paid with application for extension of time to file (Form 8868)	6c	0.	
d Backup withholding erroneously withheld	6d	0.	
7 Total credits and payments. Add lines 6a through 6d	7	152,789.	
8 Enter any penalty for underpayment of estimated tax. Check here ☒ if Form 2220 is attached	8	117.	
9 Tax due If the total of lines 5 and 8 is more than line 7, enter amount owed	9		
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	32,754.	
11 Enter the amount of line 10 to be: Credited to 2020 estimated tax	11	32,754.	Refunded

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition. 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.		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation ☐ \$ 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.		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		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T		X
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?	X	
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	X	
8a Enter the states to which the foundation reports or with which it is registered. See instructions. ☐ NC		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	X	
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		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

N/A

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Part VII-A Statements Regarding Activities (continued)

	Yes	No
11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule. See instructions		X
12 Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement. See instructions		X
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► <u>N/A</u>	X	
14 The books are in care of ► <u>THE NORTHERN TRUST COMPANY</u> Telephone no. ► <u>(312) 630-6000</u> Located at ► <u>50 SOUTH LASALLE STREET, CHICAGO, IL</u> ZIP+4 ► <u>60603</u>		
15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - check here and enter the amount of tax-exempt interest received or accrued during the year		
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 ►		X

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

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

	Yes	No
1a During the year, did the foundation (either directly or indirectly): (1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☒ No (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☒ 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)? ☐ Yes ☒ 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.) ☐ Yes ☒ 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		
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?		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? ☐ Yes ☒ No 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.) <u>N/A</u> 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? ☐ Yes ☒ 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.) <u>N/A</u>		
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?		X

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

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))?

☐ Yes ☒ No

(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?

☐ Yes ☒ No

(3) Provide a grant to an individual for travel, study, or other similar purposes?

☒ Yes ☐ No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions

☐ Yes ☒ 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?

☐ Yes ☒ No

b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance? See instructions

Organizations relying on a current notice regarding disaster assistance, check here

▶ ☐

5b

X

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

☐ Yes ☐ No

If "Yes," attach the statement required by Regulations section 53.4945-5(d).

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?

☐ Yes ☒ No

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

If "Yes" to 6b, file Form 8870.

6b

X

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?

☐ Yes ☒ No

b If "Yes," did the foundation receive any proceeds or have any net income attributable 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 excess parachute payment(s) during the year?

☐ Yes ☒ 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
SEE STATEMENT 15		388,750.	90,240.	0.

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

▶ 0

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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
THE NORTHERN TRUST COMPANY 50 SOUTH LASALLE STREET, CHICAGO, IL 60603	INVESTMENT ADVISORY	104,277.
RAYMOND JAMES & ASSOCIATES, INC. - 3515 GLENWOOD AVENUE, STE 200, RALEIGH, NC 27612	INVESTMENT ADVISORY	71,391.

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	
All other program-related investments. See instructions.	
3	
Total. Add lines 1 through 3	0.

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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	215,988,615.
b	Average of monthly cash balances	1b	
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	215,988,615.
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	215,988,615.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	3,239,829.
5	Net value of noncharitable-use assets Subtract line 4 from line 3. Enter here and on Part V, line 4	5	212,748,786.
6	Minimum investment return Enter 5% of line 5	6	10,637,439.

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	10,637,439.
2a	Tax on investment income for 2019 from Part VI, line 5	2a	119,918.
b	Income tax for 2019. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	119,918.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	10,517,521.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	10,517,521.
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	10,517,521.

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	8,205,308.
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	8,205,308.
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	8,205,308.

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.

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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				10,517,521.
2 Undistributed income, if any, as of the end of 2019				
a Enter amount for 2018 only			8,037,869.	
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: ► \$ 8,205,308.				
a Applied to 2018, but not more than line 2a			8,037,869.	
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				167,439.
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:	0.			
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				10,350,082.
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				

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N/A

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

☐ 4942(1)(3) or ☐ 4942(1)(5)

- b** 85% of line 2a

- c** Qualifying distributions from Part XII,
line 4, for each year listed

- d** Amounts included in line 2c not used directly for active conduct of exempt activities

- e Qualifying distributions made directly for active conduct of exempt activities.

Subtract line 2d from line 2c

- 3** Complete 3a, b, or c for the alternative test relied upon:

- a "Assets" alternative test - enter:
(1) Value of all assets

- (2) Value of assets qualifying under section 4942(j)(3)(B)(i)

- b** "Endowment" alternative test - enter 2/3 of minimum investment return shown in Part X, line 6, for each year listed

- c "Support" alternative test - enter:**

- (1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)

- (2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)

- (3) Largest amount of support from an exempt organization**

- (4) Gross investment income

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

SEE STATEMENT 16

- 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:**

ANONYMOUS TRUST

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year				
SEE ATTACHED STATEMENT 17				7,613,260.
Total			▶ 3a	7,613,260.
b Approved for future payment				
SEE ATTACHED STATEMENT 18				2,434,238.
Total			▶ 3b	2,434,238.

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

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

b If "Yes," complete the following schedule.

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

Sign Here   

Signature of officer or trustee Date 3/27/20 Title Trustee

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

Form **990-PF** (2019)

FORM 990-PF	DIVIDENDS AND INTEREST FROM SECURITIES				STATEMENT 1
SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME
RAYMOND JAMES	1,559,322.	0.	1,559,322.	1,559,322.	
RAYMOND JAMES					
ACCRUED INTEREST					
PAID 2018 FOR 2019	-1,093.	0.	-1,093.	-1,093.	
THE NORTHERN TRUST					
CO	3,595,492.	0.	3,595,492.	3,574,892.	
TO PART I, LINE 4	5,153,721.	0.	5,153,721.	5,133,121.	

FORM 990-PF	OTHER INCOME			STATEMENT 2
DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME	
THE NORTHERN TRUST COMPANY				
1099-MISC	2,389.	2,389.		
TOTAL TO FORM 990-PF, PART I, LINE 11	2,389.	2,389.		

FORM 990-PF	LEGAL FEES			STATEMENT 3
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
LEGAL FEES	14,655.	0.		14,655.
TO FM 990-PF, PG 1, LN 16A	14,655.	0.		14,655.

FORM 990-PF	ACCOUNTING FEES			STATEMENT	4
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
ACCOUNTING FEES	9,475.	0.		9,475.	
BOOKKEEPING FEES	15,000.	0.		15,000.	
TO FORM 990-PF, PG 1, LN 16B	24,475.	0.		24,475.	

FORM 990-PF	OTHER PROFESSIONAL FEES			STATEMENT	5
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
FIDUCIARY FEES THE NORTHERN TRUST COMPANY	104,277.	103,687.		0.	
FIDUCIARY FEES RAYMOND JAMES & ASSOCIATES, INC.	71,391.	71,391.		0.	
TO FORM 990-PF, PG 1, LN 16C	175,668.	175,078.		0.	

FORM 990-PF	TAXES			STATEMENT	6
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
FOREIGN TAXES PAID ON DIVIDENDS	15,763.	0.		0.	
EXCISE TAX	145,000.	0.		0.	
TO FORM 990-PF, PG 1, LN 18	160,763.	0.		0.	

FORM 990-PF	OTHER EXPENSES			STATEMENT	7
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
POSTAGE, MAILING SERVICE	825.	0.		825.	
OFFICE EXPENSE	2,778.	0.		2,778.	
TELEPHONE	3,095.	0.		3,095.	
INSURANCE (OTHER THAN HEALTH)	2,957.	0.		2,957.	
MEMBERSHIP, DUES & SUBSCRIPTIONS	4,194.	0.		4,194.	
BUSINESS GIFTS	455.	0.		455.	
COMPUTER & WEB EXPENSE	7,985.	0.		7,985.	
MEALS	1,539.	0.		1,539.	
MILEAGE REIMBURSEMENT	21,385.	0.		21,385.	
TO FORM 990-PF, PG 1, LN 23	45,213.	0.		45,213.	

FORM 990-PF	OTHER INCREASES IN NET ASSETS OR FUND BALANCES	STATEMENT	8
DESCRIPTION	AMOUNT		
INTEREST AND DIVIDENDS RECEIVED IN 2019 FOR 2018	224,118.		
TOTAL TO FORM 990-PF, PART III, LINE 3	224,118.		

FORM 990-PF	OTHER DECREASES IN NET ASSETS OR FUND BALANCES	STATEMENT	9
DESCRIPTION	AMOUNT		
INTEREST AND DIVIDENDS RECEIVED IN 2020 FOR 2019	233,995.		
NONDEDUCTIBLE MEALS	1,539.		
TOTAL TO FORM 990-PF, PART III, LINE 5	235,534.		

FORM 990-PF	U.S. AND STATE/CITY GOVERNMENT OBLIGATIONS	STATEMENT	10
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DESCRIPTION	U.S. GOV'T	OTHER GOV'T	BOOK VALUE	FAIR MARKET VALUE
SEE ATTACHED SCHEDULE		X	25,474,157.	26,829,219.
TOTAL U.S. GOVERNMENT OBLIGATIONS				
TOTAL STATE AND MUNICIPAL GOVERNMENT OBLIGATIONS			25,474,157.	26,829,219.
TOTAL TO FORM 990-PF, PART II, LINE 10A			25,474,157.	26,829,219.

FORM 990-PF	CORPORATE STOCK	STATEMENT	11
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
SEE ATTACHED SCHEDULE	66,522,864.	169,658,578.
TOTAL TO FORM 990-PF, PART II, LINE 10B	66,522,864.	169,658,578.

FORM 990-PF	CORPORATE BONDS	STATEMENT	12
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
SEE ATTACHED SCHEDULE	24,486,334.	25,511,487.
TOTAL TO FORM 990-PF, PART II, LINE 10C	24,486,334.	25,511,487.

FORM 990-PF	OTHER INVESTMENTS	STATEMENT	13
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DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
SEE ATTACHED SCHEDULE	COST	2,624,875.	2,559,102.
TOTAL TO FORM 990-PF, PART II, LINE 13		2,624,875.	2,559,102.

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LINE		BEGINNING OF YEAR		END OF YEAR	
		(a) BOOK VALUE	(b) BOOK VALUE	(c) FAIR MARKET VALUE	
10a	INVESTMENTS- U S AND				
	STATE GOVERNMENT OBLIGATIONS				
	ADELANTO CALIF PUB UTIL AUTH REV 4 25%	606,737	606,180		656,238
	ADMINISTRATORS OF THE TULANE EDL FD LA REV 5 0%	450,000	450,000		531,010
	ARIZONA BRD REGENTS CTFS PARTN 3 09%	246,800	246,800		258,672
	BALDWIN CNTY ALA 4 25%	494,675	494,675		528,970
	BRISTOL VA 4 888%	506,272	506,133		530,055
	CANAVERAL FLA PORT AUTH REV 4 494%	511,719	511,258		538,365
	CHARLESTON CNTY SC SPL SOURCE 3 535%	573,275	573,275		594,998
	CHICAGO ILL BRD ED 5.082%	600,000	600,000		606,426
	CLEARLAKE CALIF REDEV AGY SUCCESSOR AGY 4 0%	500,000	500,000		523,045
	COLUMBUS-FRANKLIN CNTY OHIO FIN AUTH 3 3%	496,250	496,250		500,260
	COMMONWEALTH FING AUTH PA REV 4 144%	504,684	504,523		548,765
	CORPUS CHRISTI TEX REGL TRANSN AUTH SYS REV 6 1%	770,205	769,161		864,247
	DUNDEE TWP ILL PK DIST 6 0%	132,707	132,707		155,430
	EFFINGHAM CNTY GA INDL DEV AUTH 3 625%	726,247	726,247		805,515
	FLORIDA HURRICANE CATASTROPHE FD 2 995%	304,337	302,190		301,926
	FORT LAUDERDALE FL SPL OBLIG 5 143%	745,005	745,005		793,965
	FULTON CNTY GA DEV AUTH REV 5 21%	506,687	506,312		594,235
	GRAND PRAIRIE TEX SALES TAX REV 4 0%	471,480	467,834		476,001
	GUILFORD CNTY NC PUB FACS CORP 4 564%	329,833	329,833		360,906
	HAGERSTOWN MD 5 2%	252,720	252,381		250,632
	HEALTH CARE AUTH FOR BAPTIST HEALTH ALA 5 5%	237,033	237,033		311,937
	HIGH POINT NC LTD OBLIG 3.69%	500,531	500,501		519,560
	ILLINOIS ST 5.727%	506,024	504,029		503,995
	JACKSON OHIO CITY SCH DIST 2 35%	433,795	433,795		436,796
	MADISON CNTY ILL CMNTY UNIT SCH DIST 2.9%	494,525	494,525		505,860
	MISSISSIPPI ST 3.429%	250,000	250,000		270,028
	MISSISSIPPI ST 3 529%	250,000	250,000		272,743
	NC EASTN MUN PWR AGY PWR SYS REV SER	282,660	281,223		290,260
	NC MED CARE COMMN RETIREMENT FACS 4 0%	-	520,175		522,105
	NC STATE UNIV NC RALEIGH REV 2 573%	869,759	869,759		893,900
	NC STATE UNIV NC RALEIGH REV 4 0%	-	119,997		133,997
	NEW HAMPSHIRE ST HSG FIN AUTH 3 689%	376,470	346,214		364,465
	NORTH AUGUSTA SC PUB FACS CORP REV 4 687%	510,503	510,144		532,385

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LINE		BEGINNING OF YEAR		END OF YEAR	
		(a) BOOK VALUE	(b) BOOK VALUE	(c) FAIR MARKET VALUE	
	NORTH CHARLESTON SC LTD OBLIG 4 049%	508,182	507,572	541,725	
	OAKLAND CALIF PENSION OBLIG 3 6%	506,737	503,412	506,800	
	OKLAHOMA DEV FNI AUTH LEASE REV 4.25%	446,736	446,562	465,846	
	PEORIA CNTY ILL SCH DIST NO 150 5 35%	250,000		250,692	
	PEORIA CNTY ILL SCH DIST NO 150 5 45%	160,000	160,000	160,450	
	PERRY CNTY KY SCH DIST FIN CORP 5.0%	310,415	309,748	314,775	
	PHENIX CITY ALA 5.25%	160,000	160,000	173,568	
	PHENIX CITY ALA 5 25%	337,667	337,667	368,472	
	RALEIGH DURHAM NC ARPT AUTH ARPT REV	510,897	511,146	519,491	
	RICHLAND FACS CORP SC INSTALLMENT PUR 2 982%	-	463,450	456,495	
	ROYAL OAK MICH 4 524%	491,207	490,639	521,479	
	SAN FRANCISCO CALIF CITY & CNTY REDEV 4.375%	501,217	501,191	536,305	
	SOUTH CAROLINA JOBS ECONOMIC DEV AUTH 3 925%	1,333,823	1,331,653	1,337,508	
	SOUTHWEST HIGHER ED AUTH INC TEX REV 4 156%	444,375	444,375	524,035	
	ST LUCIE CNTY FLA REV 3 919%	494,320	494,320	524,395	
	TAFT TEX INDPT SCH DIST 4 207%	531,243	529,998	537,280	
	UNION CITY CALIF CMNTY REDEV AGY SUCCESSOR 3.5%	260,000	260,000	271,918	
	UNIVERSITY HAWAII REV 3 28%	503,090	502,788	524,840	
	UNIVERSITY NC CHAPEL HILL REV3 326%	252,736	252,637	263,253	
	UNIVERSITY NC CHAPEL HILL REV 5 75%	508,840	508,840	501,485	
	UNIVERSITY NC CHARLOTTE REV TAXABLE	500,000	500,000	503,585	
	VICTOR VALLEY CALIF CMNTY COLLEGE DIST 3.498%	970,000	970,000	1,047,130	
	TOTAL LINE 10a (OTHER GOVERNMENT)	24,422,418	25,474,157	26,829,219	

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			(a) BOOK VALUE	(b) BOOK VALUE	(c) FAIR MARKET VALUE	
10b	INVESTMENTS-CORPORATE STOCK					
	ABBOTT LABORATORIES	27,600	919,370	919,370	2,397,336	
	ANADARKO PETE CORPORATION	16,900	1,315,149	-	-	
	ALPHABET INCORPORATED CAP STK CLASS C	745	-	999,221	996,080	
	AMAZON COM INCORPORATED	570	-	998,611	1,053,269	
	APPLE INCORPORATED	8,300	530,723	530,723	2,437,295	
	CATERPILLAR INC DEL	11,950	1,115,516	1,115,516	1,764,776	
	CHEVRON CORPORATION	13,000	1,454,913	1,454,913	1,566,630	
	CIGNA CORP NEW COM	47	982	978	9,611	
	COCA-COLA COMPANY	32,800	1,232,344	1,232,344	1,815,480	
	CORTEVA INC	7,000	165,148	165,148	206,920	
	COSTCO WHOLESALE CORPORATION	8,000	815,061	815,061	2,351,360	
	CVS HEALTH CORPORATION	23,200	749,983	1,453,951	1,723,528	
	DEERE & COMPANY	10,700	961,998	961,998	1,853,882	
	DISCOVER FINL SVCS COM	7,380	11,311	11,311	625,972	
	DOLLAR GENERAL CORP	16,650	747,975	747,975	2,597,067	
	DOW INCORPORATED	7,000	322,459	322,459	383,110	
	DUPONT DE NEMOURS INCORPORATED	7,000	473,256	473,256	449,400	
	EXXON MOBIL CORPORATION	16,000	1,423,046	1,423,046	1,116,480	
	FEDEX CORPORATION	7,200	928,123	928,123	1,088,712	
	FIRST CITIZENS BANCSHARES INC NC CL A	73,080	251,896	251,896	38,893,907	
	GENERAL ELECTRIC CO	19,262	163,679	163,679	214,964	
	INTL BUSINESS MACHINES CORP	12,000	2,093,360	2,093,360	1,608,480	
	JPMORGAN CHASE & COMPANY	15,000	821,148	-	-	
	JOHNSON & JOHNSON	13,400	966,686	966,686	1,954,658	
	KANSAS CITY SOUTHERN COM NEW	6,500	745,335	745,335	995,540	
	KRAFT HEINZ COMPANY	16,800	774,962	774,962	539,784	
	LINCOLN NATIONAL CORP	216,500	9,392	9,392	12,775,665	
	MACQUARIE INFRASTRUCTURE CORPORATION	32,150	747,957	1,419,881	1,377,306	
	MCDONALDS CORP	12,000	1,099,845	1,099,845	2,371,320	
	MERCK & CO INC NEW	2,312	64,324	64,324	210,276	
	MFC SPDR S&P 500 ETF TRUST UNITS SER I	106,944	15,453,876	15,453,876	34,420,996	
	MFC ISHARES TR MSCI EAFE ETF FD	63,453	3,428,958	3,428,958	4,406,176	
	MFC ISHARES TR MSCI EMERGING MKTS INDEX FD ETF	41,233	1,721,698	1,721,698	1,850,125	

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LINE	BEGINNING OF YEAR		END OF YEAR	
	(a) BOOK VALUE	(b) BOOK VALUE	(c) FAIR MARKET VALUE	
MFC ISHARES TR RUSSELL 2000 ETF FD	41,258	3,425,046	3,425,046	6,835,213
MFC SPDR S&P MIDCAP 400 ETF TR UNIT SER	37,972	6,830,238	6,830,238	14,253,929
MORGAN STANLEY COM	14,760	57,276	57,276	754,531
MOTOROLA SOLUTIONS, INC	14,400	829,632	829,632	2,320,416
NORFOLK SOUTHERN CORP	12,850	913,238	913,238	2,494,570
NUCOR CORP	5,000	163,786	163,786	281,400
PRINCIPAL FINL GROUP INC	100	-	-	5,500
PFIZER INC	44,200	1,172,031	1,172,031	1,731,756
PROCTER & GAMBLE CO	15,000	1,085,349	1,085,349	1,873,500
PUTNAM SHORT DURATION INCOME FUND CLASS A	383,580	6,237,613	3,854,873	3,854,981
PUTNAM SHORT DURATION INCOME FUND CLASS A	149,254	1,500,006	1,500,006	1,500,000
SALESFORCE COM INCORPORATED	3,150	-	501,263	512,316
SOUTHERN COMPANY	10,000	444,516	444,516	637,000
UNITED PARCEL SVC INC CL B	14,800	1,161,299	1,161,299	1,732,488
UNITED PARCEL SVC INC CL B	5,000	310,300	310,300	585,300
VERIZON COMMUNICATIONS INC	20,700	907,630	907,630	1,270,980
WABTEC CORP COM	103	-	7,926	8,013
VISA, INC COM CLASS A	15,200	610,053	610,053	2,856,080
YADKIN VY CO COM NEW	9	506	506	94,500
TOTAL LINE 10b		67,158,992	66,522,864	169,658,578

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10c INVESTMENTS-CORPORATE BONDS

	BEGINNING OF YEAR		END OF YEAR	
	(a) BOOK VALUE	(b) BOOK VALUE	(c) FAIR MARKET VALUE	
AMERITECH CAP FDG CORP 6 875%	356,155	350,930	370,989	
ANALOG DEVICES INC 4 5%	305,958	305,733	324,030	
ANALOG DEVICES INC 2 5%	493,120	493,120	503,720	
APPLE INC 2 4%	246,125	246,125	254,266	
APPLE INC 2.85%	251,961	251,190	253,857	
AT&T INC 3 0%	249,200	249,200	255,387	
AT&T INC 4 125%	256,541	255,770	270,984	
AUTOZONE INC 2 5%	198,602	198,602	201,096	
BARCLAYS BK PLC MEDIUM TERM NTS 5%	250,000	250,000	252,331	
BELLSOUTH TELECOMMUNICATIONS INC 7 0%	470,505	461,607	479,391	
BERKSHIRE HATHAWAY INC 3 0%	300,054	300,042	309,893	
BOSTON UNIV 5 2%	253,669	253,669	336,087	
BROOKFIELD FIN INC 4.85%	-	506,665	572,557	
CAPITAL ONE FINL CORP 3.75%	477,000	477,000	533,354	
CBRE SVCS INC 4 875%	528,307	524,998	557,485	
CBS CORP NEW 3 5%	504,196	503,607	523,255	
CH ROBINSON WORLDWIDE INC 4 2%	497,400	497,400	546,024	
COMCAST CABLE COMMUNICATIONS INC 8 5%	331,040	322,847	344,031	
CONOCOPHILLIPS CO 3 35%	161,338	161,338	192,595	
CVS HEALTH CORP 2 875%	48,628	48,628	50,733	
DEERE & CO 2 6%	250,334	250,242	254,703	
DEERE & CO 7 125%	282,180	277,212	290,355	
DIRECTTV HLDGS LLC 5.15%	314,317	313,978	337,797	
DIRECTTV HLDGS LLC 6 0%	308,664	308,461	361,597	
DOLLAR GEN CORP NEW 3.25%	252,519	251,988	258,225	
ENBRIDGE INC BNDS 3 5%	381,704	380,739	392,118	
ENERGY TRANSFER PARTNERS L P 4 05%	162,384	162,384	190,300	
ENERGY TRANSFER PARTNERS L P 4 75%	307,495	306,629	324,888	
EQUIFAX INC. NTS 2 3%	291,852	291,852	300,912	
EXELON GENERATION CO LLC 4 0%	408,486	404,298	403,907	
FEDEX CORP 3 9%	326,326	326,326	338,454	
FEDEX CORP 3 3%	247,758	247,758	258,528	
FORD MOTOR CO DEL 6.625%	684,183	675,087	642,101	
GEICO CORP 7 35%	-	295,997	293,002	
FORD MOTOR CO LLC MED TRM NTS 4 6%	500,000	500,000	491,483	

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LINE		BEGINNING OF YEAR		END OF YEAR	
		(a) BOOK VALUE	(b) BOOK VALUE	(c) FAIR MARKET VALUE	
	GENERAL ELEC CAP CORP INTERNOTES 2 06586%	244,360	244,360	235,044	
	GEORGIA PWR CO 4 25%	501,523	-	-	
	HCA INC SR SECD NT 6 5%	524,140	-	-	
	HEWLETT PACKARD CO 6 0%	404,798	404,696	443,521	
	HORACE MANN EDUCATORS CORP NEW 4 5%	513,390	511,698	527,862	
	HORACE MANN SCH NEW YORK 2 476%	243,975	243,975	250,776	
	HYATT HOTELS CORP 4 85%	406,157	405,452	442,954	
	JEFFERIES GROUP LLC 5.0%	498,142	-	-	
	JOHNSON & JOHNSON 2.45%	304,140	303,627	304,673	
	JP MORGAN CHASE & CO 3 375%	249,965	249,965	259,796	
	KEMPER CORP DEL 4 35%	253,502	253,022	265,869	
	LAM RESH CORP 2 8%	251,754	251,065	252,695	
	L3 TECHNOLOGIES INC 3 85%	264,077	263,629	268,922	
	LEGG MASON INC 4 75%	412,183	410,772	437,907	
	MACY'S RETAIL HLDGS INC 4 5%	127,819	127,819	134,193	
	MARRIOTT INTERNATIONAL INC 4 5%	309,854	309,412	330,687	
	MISSION HEALTH SYS INC 4 424%	260,700	-	-	
	MORGAN STANLEY 3 95%	492,025	492,025	536,453	
	MORGAN STANLEY MEDIUM TERM 4.0%	253,998	253,391	263,029	
	MVC CAPITAL INC 6.25%	500,000	500,000	503,574	
	MPLX LP 4 875%	530,353	525,748	543,597	
	NORDSTROM INC 6 95%	296,638	292,605	300,790	
	NEW JERSEY BELL TEL CO 8.0%	280,245	272,045	281,158	
	OCEANEERING INTL INC 4 65%	509,620	508,181	490,000	
	OXFORD SQUARE CAPITAL CORP 6 25%	-	500,000	507,000	
	PACCAR FINANCIAL CORP MTN 1 65%	433,554	433,554	448,776	
	PFIZER INC 2 75%	99,215	99,215	103,462	
	PROTECTIVE LIFE CORP 7 375%	506,045	-	-	
	QUEST DIAGNOSTICS INC 4 25%	504,723	503,940	538,428	
	SHELL INTL FIN B V 4.3%	502,352	-	-	
	SOUTHERN POWER CO 4 15%	299,724	297,954	310,256	
	SPECTRA ENERGY PARTNERS LP 4 75%	534,275	528,500	544,466	
	TECH DATA CORP 4 95%	260,937	259,847	258,231	
	TEVA PHARMACEUTICAL FIN NETH 3 15%	47,268	47,268	41,625	
	THOMSON REUTERS CORPORATION 3 85%	376,796	373,698	374,474	
	THOMSON REUTERS CORPORATION 3 95%	256,230	254,215	255,358	

ANONYMOUS TRUST U/A DATED 2-4-2008
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LINE	BEGINNING OF YEAR	END OF YEAR	
	(a) BOOK VALUE	(b) BOOK VALUE	(c) FAIR MARKET VALUE
TIME WARNER COS INC 6 625%	303,213	299,065	313,553
TOYOTA MTR CR CORP MEDIUM TERM NTS	250,000	-	-
TUPPERWARE BRANDS CORP 4 75%	309,233	305,630	302,353
UNITED TECHNOLOGIES CORP 4 5%	263,050	262,313	261,956
VIACOM INC NEW 7 875%	161,847	159,093	168,267
VIACOM INC NEW 3 45%	243,590	243,590	256,610
W P CAREY INC 4 6%	310,869	308,376	317,406
WELLS FARGO & CO MEDIUM TERM NTS VAR RT	250,000	-	-
WELLS FARGO & CO MEDIUM TERM NTS VAR RT	500,000	-	-
WHIRLPOOL CORP MEDIUM TERM NTS 4 7%	522,169	516,090	529,045
WHIRLPOOL CORP MEDIUM TERM NTS 4 85%	419,746	412,002	414,818
ZIMMER BIOMET HLDGS INC 3 55%	207,075	207,075	221,468
TOTAL LINE 10c	27,093,270	24,486,334	25,511,487

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LINE

990PF PAGE 2 LINE	END OF YEAR SHARES HELD	BEGINNING OF YEAR		END OF YEAR	
		(a) BOOK VALUE	(b) BOOK VALUE	(c) FAIR MARKET VALUE	
13 INVESTMENTS-OTHER					
	20,000	540,714	540,714	522,600	
ENERGY LA LLC IST MTG BD 6%					
PREFERRED PRIORITY INCOME FD INC TERM	20,000	-	500,000	501,600	
RIVERNORTH MARKETPLACE LENDING CORP SER A	20,000	500,000	472,684	521,702	
TELEPHONE & DATA SYS INC PFD	20,000	554,382	554,382	507,000	
UNITED STATES CELLULAR CORP SR NT	20,000	557,095	557,095	506,200	
TOTAL LINE 13		2,152,191	2,624,875	2,559,102	

FORM 990-PF	OTHER LIABILITIES	STATEMENT	14
DESCRIPTION	BOY AMOUNT	EOY AMOUNT	
OUTSTANDING CHECKS(NET)	7,403.	3,518.	
PAYROLL LIABILITIES WITHHELD	11,637.	7,563.	
ACCRUED SEP	36,500.	38,875.	
TOTAL TO FORM 990-PF, PART II, LINE 22	55,540.	49,956.	

FORM 990-PF	PART VIII - LIST OF OFFICERS, DIRECTORS TRUSTEES AND FOUNDATION MANAGERS	STATEMENT	15
NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN EXPENSE CONTRIB ACCOUNT
ANNE B. FAIRCLOTH 207 N. CHESTNUT STREET CLINTON, NC 28328	TRUSTEE 0.00	0.	0. 0.
MARIA M. LYNCH PO BOX 30515 RALEIGH, NC 27622	TRUSTEE 0.00	0.	0. 0.
MARGARET TURLINGTON P.O. BOX 2087 CLINTON, NC 28329	SCHOLARSHIP COORDINATOR 30.00	73,750.	15,751. 0.
KIMBERLY K BREEDEN 16 NATURES WAY DUNN, NC 28334	SIMPLY EAST FUND DIRECTOR 40.00	140,000.	35,580. 0.
DEBORAH M AIKEN 1504 CONSETT COURT RALEIGH, NC 27613	EXECUTIVE DIRECTOR 40.00	175,000.	38,909. 0.
TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII		388,750.	90,240. 0.

FORM 990-PF

GRANT APPLICATION SUBMISSION INFORMATION
PART XV, LINES 2A THROUGH 2D

STATEMENT 16

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

MARGARET TURLINGTON, COORDINATOR
PO BOX 2087
CLINTON, NC 28329

TELEPHONE NUMBER

NAME OF GRANT PROGRAM

910-385-6716

THE SIMPLE GIFTS FUND SAMPSON COUNTY LOVE OF
LEARNING GRANT PROGRAM

RESTRICTIONS AND LIMITATIONS ON AWARDS

GRANTS FOR SCHOOLS UP TO \$3,000 AND INDIVIDUAL STIPENDS UP TO \$1,000 WILL BE AWARDED THREE TIMES ANNUALLY FOR THE ADVANCEMENT OF EDUCATORS AND THEIR STUDENTS, IN ORDER TO ENABLE TEACHERS TO PROVIDE ILLUMINATING PROGRAMS AND OPPORTUNITIES FOR STUDENTS IN THE CLASSROOM, AFTER SCHOOL, IN THE SUMMER OR ON WEEKENDS. THE GOAL IS TO INSPIRE THE IMPROVEMENT OF PUBLIC EDUCATION BY ENGAGING STUDENTS IN CRITICAL THINKING AND PROBLEM SOLVING THAT DEEPENS KNOWLEDGE OF SUBJECT MATTER. APPLICANTS MUST BE A TEN-MONTH TEACHER, GUIDANCE COUNSELOR OR MEDIA COORDINATOR IN A SAMPSON COUNTY OR CLINTON CITY PUBLIC K-12 SCHOOL; HAVE A MINIMUM OF TWO YEARS CLASSROOM TEACHING EXPERIENCE; BE A FULL TIME EDUCATOR SPENDING AT LEAST 50% OF THE TIME IN THE CLASSROOM OR A CLASSROOM-LIKE SETTING; HAVE THE INTENTION OF RETURNING TO TEACHING IN SAMPSON COUNTY IN THE CONSECUTIVE SCHOOL YEAR AND HAVE THE PROPOSAL REVIEWED AND APPROVED BY THE SCHOOL PRINCIPAL. GRANT FUNDS MAY BE USED FOR RESOURCE MATERIALS, SUPPLIES, EQUIPMENT, TRANSPORTATION, TECHNOLOGY OR STIPENDS. ALTHOUGH FUNDS MAY BE USED TO SUPPORT THE PROFESSIONAL DEVELOPMENT NECESSARY TO IMPLEMENT THE PROJECT, THE MAJORITY OF GRANT FUNDS MUST BE SPENT ON MATERIALS OR EDUCATIONAL EXPERIENCES FOR STUDENTS. EDUCATORS ARE ELIGIBLE TO APPLY OR REAPPLY FOR GRANTS IN SUBSEQUENT APPLICATION PERIODS. FUNDS MAY NOT BE USED FOR LOBBYING OR RELIGIOUS PURPOSES.

FORM 990-PF

GRANT APPLICATION SUBMISSION INFORMATION
PART XV, LINES 2A THROUGH 2D

STATEMENT 16

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

MARGARET TURLINGTON, COORDINATOR
PO BOX 2087
CLINTON, NC 28329

TELEPHONE NUMBER

NAME OF GRANT PROGRAM

910-385-6716

THE SIMPLE GIFTS SCHOLARSHIP PROGRAM

FORM AND CONTENT OF APPLICATIONS

SIMPLE GIFTS SCHOLARSHIP APPLICATION (AVAILABLE AT THE WEBSITE [HTTP://WWW.SIMPLEGIFTSFUND.ORG](http://www.simplegiftsfund.org)), A CURRENT RESUME, THREE RECOMMENDATIONS (TEACHER, PEER, ADDITIONAL), TRANSCRIPTS OF ACADEMIC RECORDS, A COPY OF THE US DEPARTMENT OF EDUCATION/STUDENT AID REPORT, A COPY OF THE FINANCIAL AWARD LETTER FROM THE COLLEGE/UNIVERSITY TO BE ATTENDED, A COPY OF THE LETTER(S) NOTIFYING THE APPLICANT OF SCHOLARSHIPS OR FELLOWSHIPS GRANTED.

ANY SUBMISSION DEADLINES

DECEMBER 1 FOR THE FOLLOWING ACADEMIC YEAR.

RESTRICTIONS AND LIMITATIONS ON AWARDS

THE SIMPLE GIFTS SCHOLARSHIP IS WORTH UP TO \$50,000 PER YEAR TO EARN A FOUR YEAR DEGREE AT AN OUT OF STATE LIBERAL ARTS COLLEGE OR UNIVERSITY. ELIGIBLE STUDENTS MUST BE A UNITED STATES CITIZEN AND A RESIDENT OF NORTH CAROLINA; HAVE ATTENDED A HIGH SCHOOL LOCATED IN SAMPSON COUNTY, NORTH CAROLINA FOR A MINIMUM OF TWO SCHOOL YEARS OR BE SCHEDULED TO COMPLETE A MINIMUM OF TWO YEARS AT THE TIME OF GRADUATION; BE SCHEDULED TO BECOME A HIGH SCHOOL GRADUATE IN THE YEAR OF THE APPLICATION OR BE A GRADUATE OF SAMPSON COMMUNITY COLLEGE; HAVE BEEN ACCEPTED INTO AND BE PLANNING TO ATTEND AN ACCREDITED LIBERAL ARTS COLLEGE OR UNIVERSITY; RANK IN THE TOP TWENTY-FIVE PERCENT OF HIS OR HER HIGH SCHOOL GRADUATING CLASS; AND HAVE AN UNMET FINANCIAL NEED.

FORM 990-PF

GRANT APPLICATION SUBMISSION INFORMATION
PART XV, LINES 2A THROUGH 2D

STATEMENT 16

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

MARGARET TURLINGTON, COORDINATOR
PO BOX 2087
CLINTON, NC 28329

TELEPHONE NUMBER

NAME OF GRANT PROGRAM

910-385-6716

THE SIMPLE GIFTS FUND SAMPSON COUNTY TEACHERS
FELLOWSHIP GRANT PROGRAM

FORM AND CONTENT OF APPLICATIONS

APPLICANTS COMMITTING TO A SIX WEEK FULL TIME SUMMER PROJECT MUST SUBMIT A PERSONAL INFORMATION FORM WITH A DESCRIPTION OF THE PROJECT, A BUDGET AND A COPY OF A VALID NORTH CAROLINA TEACHING LICENSE ACCOMPANIED BY A RECOMMENDATION LETTER.

ANY SUBMISSION DEADLINES

PUBLICIZED ON THE SIMPLE GIFTS WEBSITE AND FLYERS TO SAMPSON COUNTY AND CLINTON CITY SCHOOLS.

RESTRICTIONS AND LIMITATIONS ON AWARDS

THE ONE TIME GRANTS ARE FOR \$8,000 EACH AND WILL NOT BE RENEWED. THE GRANTS ARE BASED SOLELY ON MERIT AND THE PROPOSALS WILL BE JUDGED ON SUBSTANCE, CLARITY, FEASIBILITY AND RESEARCH. THE SELECTION COMMITTEE WILL REVIEW THE EXPECTED DIRECT AND INDIRECT BENEFITS OF THE GRANT PROPOSAL TO THE TEACHER, HIS OR HER STUDENTS AND THE SCHOOL SYSTEM. THE GRANTS ARE AVAILABLE TO TEACHERS, GUIDANCE COUNSELORS AND LIBRARY MEDIA SPECIALISTS THAT HAVE BEEN EMPLOYED BY SAMPSON COUNTY OR CLINTON CITY SCHOOLS FOR AT LEAST ONE YEAR. THE APPLICANT MUST BE NORTH CAROLINA CERTIFIED IN GRADES K-12 AND BE EMPLOYED FULLTIME. THE GRANTS WILL BE TAXABLE TO THE RECIPIENT AND WILL STATE THAT THE RECIPIENT WILL REPAY THE TRUST IF THE PROJECT CANNOT BE COMPLETED.

FORM 990-PF

GRANT APPLICATION SUBMISSION INFORMATION
PART XV, LINES 2A THROUGH 2D

STATEMENT 16

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

KIMBERLY BREEDEN, DIRECTOR
128 E. BROAD STREET
DUNN, NC 28334

TELEPHONE NUMBER

NAME OF GRANT PROGRAM

910-292-2580

SIMPLY EAST FUND

RESTRICTIONS AND LIMITATIONS ON AWARDS

SIMPLY EAST FUND SEEKS TO IMPROVE THE QUALITY OF LIFE FOR THE ECONOMICALLY CHALLENGED BY SUPPORTING SOCIAL SERVICE ORGANIZATIONS THAT HAVE IMPACT AND ARE DOING THE MOST GOOD IN EASTERN NORTH CAROLINA. THE ORGANIZATION MUST HAVE EXPENSES OF \$5 MILLION AND UNDER; BE A 501(C)(3) IN NORTH CAROLINA AND THE PROJECTS MUST BE FOR THE BENEFIT OF ORGANIZATIONS BASED IN EASTERN NORTH CAROLINA. THE ELIGIBLE REQUESTS MAY BE FOR GENERAL OPERATING SUPPORT; SUPPORT FOR ONGOING OR NEW PROGRAMS OR PROJECTS; CAPITAL REQUESTS FOR CONSTRUCTION, RENOVATION, PURCHASE OF A BUILDING OR ENDOWMENTS; HEALTH/HUMAN SERVICES PROGRAMS; YOUTH EDUCATION PROGRAMS/SCHOOLS. THE GRANT RANGE IS \$10,000 AND HIGHER. A LETTER OF INQUIRY CONSISTING OF A COVER PAGE, LOI DETAIL AND PROJECT BUDGET, ORGANIZATION BUDGET, BOARD OF DIRECTORS ROSTER, 501(C)(3) LETTER AND MOST RECENT AUDIT MAY BE SUBMITTED VIA EMAIL TO KBREEDEN@ANONYMOUSTRUST.ORG. ACCEPTANCE OF A LETTER OF INQUIRY DOES NOT IMPLY FUNDING. ACCEPTANCE OF LETTER OF INQUIRY IS ACCEPTED BY REQUEST AFTER ADVANCE CONVERSATIONS. THE GRANT DECISION IS MADE WITHIN 60 DAYS FROM RECEIPT OF THE LETTER OF INQUIRY.

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GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

IF RECIPIENT IS AN
INDIVIDUAL, SHOW
ANY RELATIONSHIP
TO ANY FOUNDATION

RECIPIENT NAME AND ADDRESS (HOME OR BUSINESS)	IF RECIPIENT IS AN INDIVIDUAL, SHOW ANY RELATIONSHIP TO ANY FOUNDATION MANAGER OR SUBSTANTIAL CONTRIBUTOR	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
ALLIANCE FRANCAIS DE RALEIGH, DURHAM CHAPEL HILL 5510 MUNFORD ROAD RALEIGH, NC 27612	N/A	PUBLIC CHARITY	GRANT FOR GENERAL OPERATING SUPPORT AND SALARY OF DIRECTOR	40,000
AMERICAN RED CROSS 100 N. PEARTREE LANE RALEIGH, NC 27610	N/A	PUBLIC CHARITY	DISASTER RELIEF FOR HURRICANE DORIAN	25,000
BAPTISTS ON MISSION PO BOX 1107 CARY, NC 27512	N/A	PUBLIC CHARITY	DISASTER RELIEF FOR HURRICANE FLORENCE ROBESON COUNTY	100,000
BERTIE COUNTY HIVE HOUSE PO BOX 598 LEWISTON, NC 27849	N/A	PUBLIC CHARITY	GRANT FOR GENERAL OPERATING SUPPORT TO HELP PROVIDE OPPORTUNITIES FOR YOUNG PEOPLE FROM UNDERREPRESENTED BACKGROUNDS IN BERTIE COUNTY THE POSSIBILITY TO ACQUIRE THE KEYS TO SUCCESS THROUGH WORKFORCE DEVELOPMENT; AFTERSCHOOL AND SUMMER PROGRAMS; FOOD PANTRY; COMPUTER TRAINING	65,000
BERTIE COUNTY YMCA, INC. 1102 N. KING STREET WINDSOR, NC 27983	N/A	PUBLIC CHARITY	CHALLENGE GRANT FOR GENERAL OPERATING SUPPORT	15,000

GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

RECIPIENT NAME AND ADDRESS (HOME OR BUSINESS)	IF RECIPIENT IS AN INDIVIDUAL, SHOW ANY RELATIONSHIP TO ANY FOUNDATION MANAGER OR SUBSTANTIAL CONTRIBUTOR	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
BERTIE COUNTY YMCA, INC. 1102 N. KING STREET WINDSOR, NC 27983	N/A	PUBLIC CHARITY	SUPPORT FOR CAMP HAPPY FOR UP TO 75 STUDENTS SUMMER OF 2019	30,000
BIG BROTHERS BIG SISTERS OF THE TRIANGLE 808 AVIATION PARKWAY, SUITE 900 MORRISVILLE, NC 27560	N/A	PUBLIC CHARITY	GRANT TO SUPPORT THE AGENCY'S WORK TO SUPPORT A HEIGHTENED APPROACH TO DIVERSITY, EQUALITY AND INCLUSION	65,000
BIG BROTHERS BIG SISTERS OF THE TRIANGLE 808 AVIATION PARKWAY, SUITE 900 MORRISVILLE, NC 27560	N/A	PUBLIC CHARITY	CHALLENGE GRANT FOR GENERAL OPERATING SUPPORT FOR PROGRAMS THAT STRIVE TO HELP STUDENTS STAY IN SCHOOL, AVOID RISKY BEHAVIORS AND JOIN GANGS, AND IMPROVE ACADEMIC PERFORMANCE	50,000
BOYS & GIRLS CLUBS OF CUMBERLAND COUNTY PO BOX 48155 FAYETTEVILLE, NC 28331	N/A	PUBLIC CHARITY	GRANT FOR GENERAL OPERATING SUPPORT TO ENABLE ALL YOUNG PEOPLE, ESPECIALLY THOSE WHO NEED US MOST, TO REACH THEIR FULL POTENTIAL AS PRODUCTIVE, CARING, RESPONSIBLE CITIZENS	50,000

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GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

NAME AND ADDRESS (HOME OR BUSINESS)	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
BOYS & GIRLS CLUBS OF THE TAR RIVER REGION PO BOX 1622 ROCKY MOUNT, NC 27802		N/A	PUBLIC CHARITY	GRANT FOR GENERAL OPERATING SUPPORT TO HELP CONTINUE ADVANCING THE MISSION TO INSPIRE AND ENABLE ALL YOUNG PEOPLE, ESPECIALLY THOSE WHO NEED IT THE MOST, TO REACH THEIR FULL POTENTIAL AS PRODUCTIVE, RESPONSIBLE AND CARING CITIZENS	50,000
BOYS & GIRLS CLUBS OF THE COASTAL PLAIN 621 W. FIRE TOWER ROAD WINTERVILLE, NC 28590		N/A	PUBLIC CHARITY	GRANT FOR GENERAL OPERATING SUPPORT FOR BOYS & GIRLS CLUB OF WASHINGTON, NC (\$50,000) AND FUNDING FOR INAUGURAL CLUB ACADEMY IN MARTIN COUNTY FOR 3RD AND 4TH GRADERS (\$150,000)	200,000
BOYS AND GIRLS CLUBS OF WAYNE COUNTY PO BOX 774 GOLDSBORO, NC 27533		N/A	PUBLIC CHARITY	GRANT FOR GENERAL OPERATING SUPPORT TO ENABLE ALL YOUNG PEOPLE, ESPECIALLY THOSE WHO NEED US MOST, TO REACH THEIR FULL POTENTIAL AS PRODUCTIVE, CARING, RESPONSIBLE CITIZENS	40,000
BOYS & GIRLS HOMES OF NC PO BOX 127 LAKE WACCAMAW, NC 28450		N/A	PUBLIC CHARITY	GRANT FOR GENERAL OPERATING SUPPORT TO PROVIDE A COMPREHENSIVE ARRAY OF RESIDENTIAL AND COMMUNITY BASED SERVICES TO MEET THE NEEDS OF VULNERABLE CHILDREN BY ADDRESSING THEIR PHYSICAL, EMOTIONAL, SOCIAL, EDUCATIONAL AND SPIRITUAL DEVELOPMENT	50,000

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GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

RECIPIENT NAME AND ADDRESS (HOME OR BUSINESS)		IF RECIPIENT IS AN INDIVIDUAL, SHOW ANY RELATIONSHIP TO ANY FOUNDATION MANAGER OR SUBSTANTIAL CONTRIBUTOR	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
COMMUNITIES SUPPORTING SCHOOLS OF WAYNE COUNTY PO BOX 11557 GOLDSBORO, NC 27532		N/A	PUBLIC CHARITY	GRANT FOR GENERAL OPERATING SUPPORT TO PROVIDE OPPORTUNITIES FOR STUDENTS TO STAY IN SCHOOL, GRADUATE, AND BE SUCCESSFUL IN LIFE THROUGH THE SUCCESS COACH PROGRAM	30,000
CONETOE FAMILY LIFE CENTER PO BOX 203 CONETOE, NC 27819		N/A	PUBLIC CHARITY	GRANT FOR GENERAL OPERATING SUPPORT TO IMPROVE THE HEALTH OF THE YOUTH AND COMMUNITY BY THE BUILDING OF A SUSTAINABLE FARM, SUMMER YOUTH PROGRAM, COMMERCIAL KITCHEN AND FOOD TRUCK OPERATION	30,000
THE DOWN EAST PARTNERSHIP FOR CHILDREN PO BOX 1245 ROCKY MOUNT, NC 28702		N/A	PUBLIC CHARITY	GRANT FOR GENERAL OPERATING SUPPORT FOR THE DAY TO DAY OPERATIONS OF THE FAMILY RESOURCE CENTER	60,000
DUKE UNIVERSITY ALUMNI AND DEVELOPMENT RECORDS BOX 90581 DURHAM, NC 27708		N/A	EDUCATIONAL INSTITUTION	ANNE-MARIE BRYAN PROFESSORSHIP FUND	1,250,000

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GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

RECIPIENT NAME AND ADDRESS (HOME OR BUSINESS)		IF RECIPIENT IS AN INDIVIDUAL, SHOW ANY RELATIONSHIP TO ANY FOUNDATION MANAGER OR SUBSTANTIAL CONTRIBUTOR	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
DUKE UNIVERSITY ALUMNI AND DEVELOPMENT RECORDS BOX 90581 DURHAM, NC 27708		N/A	EDUCATIONAL INSTITUTION	GRANT TO FUND 3 DCAC ADVISORS IN SAMPSON COUNTY AND ONE IN JOHNSTON COUNTY FOR ONE YEAR, 5 COLLEGE PREP BOOTCAMPs, 3 ATTENDEES TO ATTEND DUKE CAC SUMMER TRAINING, DATA COLLECTION AND STORY TELLING	222,000
EASTERN NC INTERNSHIP PROGRAM 801 N MAIN STREET TARBORO, NC 27886		N/A	PUBLIC CHARITY	GRANT TO SUPPORT THE COST OF TWO INTERNS IN EDGEcombe COUNTY FOR THE SUMMER OF 2019	6,400
EAST CAROLINA UNIVERSITY FOUNDATION 2200 SOUTH CHARLES BOULEVARD GREENVILLE, NC 27858		N/A	EDUCATIONAL INSTITUTION	GRANT TO SUPPORT EAST CAROLINA UNIVERSITY'S COLLEGE OF EDUCATION PARTNERSHIP TEACH PROGRAM. \$150,000 WILL BE USED TO PROVIDE SCHOLARSHIP SUPPORT TO 15 PARTNERSHIP TEACH FELLOWS IN TIER 1 COUNTIES IN EASTERN NORTH CAROLINA AND \$75,000 WILL BE USED TO FUND MURSION AND INSTRUCTIONAL SUPPORT	225,000
EASTERN CAROLINA UNIVERSITY MEDICAL & HEALTH SCIENCES FOUNDATION, INC. 525 MOYE BOULEVARD GREENVILLE, NC 27834		N/A	EDUCATIONAL INSTITUTION	GRANT TO SUPPORT THE EAST CAROLINA UNIVERSITY SCHOOL OF DENTAL MEDICINE. \$144,531 WILL BE USED TO SUPPORT THE HYDE COUNTY DENTAL SERVICE PROJECT AND \$56,000 WILL BE USED TO SUPPORT PREPARING TOMORROW'S DENTISTS	200,531

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GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

RECIPIENT NAME AND ADDRESS (HOME OR BUSINESS)	IF RECIPIENT IS AN INDIVIDUAL, SHOW ANY RELATIONSHIP TO ANY FOUNDATION MANAGER OR SUBSTANTIAL CONTRIBUTOR	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
ENVIRONMENTAL DEFENSE FUND 4000 WESTCHASE BLVD, SUITE 510 RALEIGH, NC 27607	N/A	PUBLIC CHARITY	GENERAL OPERATING SUPPORT TO HELP BRING LASTING SOLUTIONS TO THE MOST SERIOUS ENVIRONMENTAL PROBLEMS AFFECTING THE AGRICULTURAL SOUTHEASTERN LANDSCAPE	200,000
FAYETTEVILLE AREA HABITAT FOR HUMANITY 310 GREEN STREET FAYETTEVILLE, NC 28301	N/A	PUBLIC CHARITY	GRANT TO FUND THE COST OF AN ORGANIZATIONAL ASSESSMENT AND EXECUTIVE DIRECTOR SEARCH	29,113
THE FILLING STATION, INC. PO BOX 222 POLLOCKSVILLE, NC 28573	N/A	PUBLIC CHARITY	GRANT FOR GENERAL OPERATING SUPPORT TO HELP MEET THE NEEDS OF JONES COUNTY RESIDENTS AS IT RELATES TO NUTRITION, EDUCATION AND CONNECTION	15,000
FOUNDATION FOR FARMWORKERS 1126 16TH ST NW, STE 210 WASHINGTON, DC 20036-4804	N/A	PUBLIC CHARITY	GRANT TO SUPPORT THE PROGRAMS THAT BETTER SUPPORT THE FARMWORKERS AND THEIR FAMILIES IN EASTERN NORTH CAROLINA	10,000
FRIENDS OF THE MUSEUM OF NATURAL SCIENCES 11 WEST JONES STREET RALEIGH, NC 27601	N/A	PUBLIC CHARITY	2019 EDUCATORS OF EXCELLENCE INSTITUTE TEACHERS FELLOWSHIPS	10,850
FRIENDS OF NC MUSEUM OF NATURAL SCIENCES 11 WEST JONES STREET RALEIGH, NC 27601	N/A	PUBLIC CHARITY	SEVEN YELLOWSTONE IN WINTER SCHOLARSHIPS	12,600

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NAME AND ADDRESS (HOME OR BUSINESS)	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
GO GLOBAL NC 68 T.W. ALEXANDER DRIVE RESEARCH TRIANGLE PARK, NC 27709		N/A	PUBLIC CHARITY	GRANT FOR EXECUTIVE DIRECTOR EDNC	6,500
GO GLOBAL NC 68 T.W. ALEXANDER DRIVE RESEARCH TRIANGLE PARK, NC 27709		N/A	PUBLIC CHARITY	FUNDING TO SUPPORT A COHORT OF 8 EASTERN NC TEACHERS TO PARTICIPATE IN THE GLOBAL TEACHERS 2019 MEXICAL PROGRAM	45,500
THE GREEN CHAIR PROJECT 1853 CAPITAL BOULEVARD RALEIGH, NC 27604		N/A	PUBLIC CHARITY	GRANT FOR GENERAL OPERATING SUPPORT TO HELP REUSE DONATED HOUSEHOLD FURNISHINGS TO RENEW LIVES OF 50 FAMILIES WHO ARE RECOVERING AFTER HOMELESSNESS, CRISIS OR DISASTER IN EASTERN NORTH CAROLINA	110,000
GROWINGCHANGE.ORG PO BOX 1902 LAURINGBURG, NC 28353		N/A	PUBLIC CHARITY	GRANT FOR GENERAL OPERATING SUPPORT FOR A YOUTH EMPOWERED, NONPROFIT ORGANIZATION DESIGNED TO ADDRESS TOUGH PROBLEMS THAT CHALLENGE NORTH CAROLINA BY RECLAIMING, ATTAINING AND SUSTAINING THROUGH WORK WITH YOUNG MALES WORKING 6-20 HOURS A WEEK AT A CLOSED PRISON	25,000

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HEALTH EDUCATION FOUNDATION OF EASTERN NORTH CAROLINA, INC 1631 S. WESLEYAN BOULEVARD ROCKY MOUNT, NC 27803	N/A	PUBLIC CHARITY	UNRESTRICTED GRANT TO BE USED TO CONTINUE THE WORK OF THE RURAL OPPORTUNITY INSTITUTE IN EASTERN NC FOR TRAINING AND SKILL BUILDING, EVIDENCE BASED TECHNOLOGY AND DESIGN WORK	129,000
HEARTS & HANDS FOR HAITI 6612 CREEDMOOR ROAD RALEIGH, NC 27613	N/A	PUBLIC CHARITY	GENERAL HAITI DONATIONS, STAN & PATTY WIEBE, EDUCATION FUND, HAITI LEADERSHIP SUPPORT, HEARTS AND HANDS FOR HAITI	70,000
HIGOL C/O BECKMAN ENTERPRISES, INC. 732 NINTH STREET, #574 DURHAM, NC 27705	N/A	PUBLIC CHARITY	EXECUTIVE DIRECTOR INTENSIVE TRAINING FOR E. CALLAHAN AND S. BENNETT	1,100
INTERFAITH PRISON MINISTRY FOR WOMEN 112 SOUTH SALISBURY STREET RALEIGH, NC 27601	N/A	PUBLIC CHARITY	CHALLENGE GRANT FOR GENERAL OPERATING SUPPORT TO HELP PROVIDE CRITICAL CHAPLAINCY SERVICES AND TRANSITIONAL EDUCATION/SUPPORT FOR WOMEN IN PRISON	35,000
INTERFAITH PRISON MINISTRY FOR WOMEN 112 SOUTH SALISBURY STREET RALEIGH, NC 27601	N/A	PUBLIC CHARITY	GRANT FOR THE PLANNING OF A WOMEN'S RE-ENTRY MODEL	75,000

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STATUS OF
RECIPIENT

RECIPIENT

NAME AND ADDRESS (HOME OR BUSINESS)

PURPOSE OF GRANT OR
CONTRIBUTION

AMOUNT

INTERFAITH PRISON MINISTRY FOR WOMEN
112 SOUTH SALISBURY STREET
RALEIGH, NC 27601

N/A

PUBLIC
CHARITY

GENERAL OPERATING SUPPORT TO HELP
PROVIDE CRITICAL CHAPLAINCY SERVICES AND
TRANSITIONAL EDUCATION/SUPPORT FOR
WOMEN IN PRISON

60,000

IPAS
PO BOX 9990
CHAPEL HILL, NC 27515

N/A

PUBLIC
CHARITY

GRANT FOR GENERAL OPERATING SUPPORT
RELATED TO THE WORK TO PROVIDE WOMEN AND
GIRLS ACCESS TO THE REPRODUCTIVE CARE
THEY NEED IN EL SALVADOR, HONDURAS,
GUATEMALA AND NICARAGUA

75,000

JUNIOR ACHIEVEMENT OF EASTERN NORTH
CAROLINA
4904 WATERS EDGE DRIVE, SUITE 155
RALEIGH, NC 27606

N/A

PUBLIC
CHARITY

GRANT FOR GENERAL OPERATING SUPPORT TO
HELP PROVIDE STUDENTS IN EASTERN NC WITH
GRADE SPECIFIC PROGRAMS THAT HELP THEM
MAKE THE CONNECTION BETWEEN WHAT THEY
LEARN IN SCHOOL AND HOW IT CAN APPLY TO
THEIR LIVES AND CAREER OPTIONS

30,000

L'ECOLE FRENCH SCHOOL OF RALEIGH
5510 MUNFORD ROAD
RALEIGH, NC 27612

N/A

EDUCATIONAL
INSTITUTION

ADMINISTRATIVE SUPPORT INCLUDING
RENT ASSISTANCE OF \$60,000 AND EXECUTIVE
DIRECTOR'S SALARY OF \$30,000

90,000

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LOAVES AND FISHES CUMBERLAND COUNTY PO BOX 36216 FAYETTEVILLE, NC 28303		N/A	PUBLIC CHARITY	GRANT FOR GENERAL OPERATING SUPPORT FOR THE WORK OF FEEDING THE HOMELESS AND FOOD INSECURE	15,000
THE MADEIRA SCHOOL 8328 GEORGETOWN PIKE MCLEAN, VA 22102		N/A	EDUCATIONAL INSTITUTION	ALL THE DIFFERENCE: DORM MODERNIZATION FUND	1,000,000
MDC 307 W MAIN STREET DURHAM, NC 27701		N/A	PUBLIC CHARITY	GRANT TO SUPPORT WORK ENTITLED "STRENGTHENING THE TALENT DEVELOPMENT SYSTEM IN WILSON COUNTY, NC"	110,647
MEN AND WOMEN UNITED FOR YOUTH AND FAMILIES PO BOX 315 DELCO, NC 28436		N/A	PUBLIC CHARITY	GRANT FOR GENERAL OPERATING SUPPORT TO HELP EMPOWER PEOPLE AND STRENGTHEN FAMILIES TO BUILD UP RURAL COMMUNITIES	25,000
MICHAEL'S ANGELS GIRLS CLUB 216 N MAIN STREET TARBORO, NC 27886		N/A	PUBLIC CHARITY	GRANT FOR GENERAL OPERATING SUPPORT TO HELP YOUNG GIRLS IN THE TARBORO AREA CONVERT IDLENESS TO ACTION THROUGH AFTERSCHOOL PROGRAMS	25,000

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NEW RIVER YMCA PO BOX 599 JACKSONVILLE, NC 28541	N/A	PUBLIC CHARITY	GRANT FOR GENERAL OPERATING SUPPORT FOR WORK WITH AQUATICS SAFETY, AFTERSCHOOL AND SUMMER PROGRAMS	50,000
NC CONFERENCE OF UNITED METHODIST CHURCH 200 E. 8TH STREET LUMBERTON, NC 28358	N/A	PUBLIC CHARITY	RELIEF EFFORTS OF HURRICANE FLORENCE IN LUMBERTON/ROBESON COUNTY, NC FOR THE REBUILDING MATERIALS, NECESSITIES NEEDED FOR THE BUILD/REBUILD OF HOMES IN THIS AREA	100,000
NORTH CAROLINA DENTAL SOCIETY FOUNDATION 1600 EVANS ROAD CARY, NC 27513	N/A	PUBLIC CHARITY	MISSION OF MERCY CLINIC IN CRAVEN COUNTY	35,000
NC DEPARTMENT OF PUBLIC INSTRUCTION ATTENTION LATEESA ALLEN MSC 6312 RALEIGH, NC 27699	N/A	EDUCATIONAL INSTITUTION	HARVARD TURNAROUND SCHOOL LEADERSHIP PROGRAM	10,000
NC NETWORK OF GRANTMAKERS 3737 GLENWOOD AVE., SUITE 460 RALEIGH, NC 27612	N/A	PUBLIC CHARITY	CHALLENGE GRANT FOR INVEST EARLY NORTH CAROLINA	5,000

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NC OPERA 612 WADE AVENUE, SUITE 100 RALEIGH, NC 27605	N/A	PUBLIC CHARITY	GENERAL OPERATING SUPPORT TO HELP PRESENT OPERATIC PERFORMANCES AT THE HIGHEST LEVEL THROUGHOUT THE TRIANGLE REGION	5,000
NC STATE UNIVERSITY INSTITUTE FOR EMERGING ISSUES CAMPUS BOX 7406 RALEIGH, NC 27695	N/A	EUCATIONAL INSTITUTION	GRANT SUPPORTING THE WORK WITH FOUR EASTERN NC COMMUNITY ORGANIZATIONS AFFILIATED WITH THE ReCONNECT NC INITIATIVE, PROVIDING FORTY REGISTRATION SCHOLARSHIPS FOR PARTICIPANTS FROM EASTERN NC ATTENDING THE ReCONNECT RURAL AND URBAN EMERGING ISSUES FORUM	130,000
NC SYMPHONY 3700 GLENWOOD AVENUE, SUITE 130 RALEIGH, NC 27612	N/A	PUBLIC CHARITY	GRANT FOR THE MUSIC EDUCATION CONCERTS AND PROGRAMS IN JONES COUNTY	45,000
NC YOUTH VIOLENCE PREVENTION CENTER 800 N. WALNUT STREET LUMBERTON, NC 28358	N/A	PUBLIC CHARITY	GRANT FOR GENERAL OPERATING SUPPORT TO INCREASE THE QUALITY OF LIFE FOR THE YOUTH, CHILDREN AND FAMILIES IN SOUTHEASTERN NC BY REDIRECTING YOUTH TOWARD A VIOLENCE FREE FUTURE, HELP SUPPORT THE TEEN COURT, AFTERSCHOOL AND PARENTING WISELY PROGRAMS	50,000

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PARTNERS IN MINISTRY PO BOX 1621 LAURINBURG, NC 28352	N/A	PUBLIC CHARITY	GRANT FOR GENERAL OPERATING SUPPORT FOR STRENGTHENING YOUTH IN SCIENCE, TECHNOLOGY, ENGINEERING AND MATH AFTERSCHOOL AND SUMMER PROGRAMS FOR STUDENTS IN GRADES 3-8	50,000
PENLAND SCHOOL OF CRAFTS PO BOX 37 PENLAND, NC 28765	N/A	PUBLIC CHARITY	GENERAL OPERATING SUPPORT TO BRING WORKSHOPS TO AN INTERNATIONAL CENTER FOR CRAFT EDUCATION IN THE BLUE RIDGE MOUNTAINS OF NORTH CAROLINA	10,000
REACH OUT AND READ CAROLINAS 18 PLOTT DRIVE SYLVA, NC 28799	N/A	PUBLIC CHARITY	GRANT FOR REACH OUT AND READ CAROLINAS WHICH HELPS CHILDREN AND FAMILIES READ, SING, AND PLAY TOGETHER-INCREASING A POSITIVE SENSE OF FAMILY, COMMUNITY AND SELF	57,500
RELIGIOUS COMMUNITY SERVICES, INC. PO BOX 704 NEW BERN, NC 28560	N/A	PUBLIC CHARITY	CHALLENGE GRANT FOR GENERAL OPERATING SUPPORT FOR EXPENSES RELATED TO SHELTER EXPANSION AND SHELTER PROGRAMS	50,000
ROANOKE CHOWAN COMMUNITY HEALTH CENTER 120 HEALTH CENTER DRIVE AHOSKIE, NC 27910	N/A	PUBLIC CHARITY	GRANT TO SUPPORT THE IMPLEMENTATION OF THE MISS KENDRA PROGRAM IN ALL HERTFORD COUNTY ELEMENTARY CLASSROOMS	60,000

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ROBESON COUNTY DISASTER RECOVERY COMMITTEE, INC. 802 N. CEDAR STREET LUMBERTON, NC 28358		N/A	PUBLIC CHARITY	GRANT FOR GENERAL OPERATING SUPPORT TO HELP WITH EFFORTS TO CONTINUE TO HELP VICTIMS RECOVER FROM HURRICANE MATTHEW	50,000
SAMARA'S VILLAGE, INC. 1450F FIFTY LAKES DRIVE BSL SOUTHPORT, NC 28461		N/A	PUBLIC CHARITY	GRANT FOR GENERAL OPERATING SUPPORT TO HELP YOUNG FAMILIES RAISE HEALTHY BABIES BY PROVIDING TEEN PREGNANCY AND PARENTING SUPPORT THROUGH HOME VISITOR COACHES FOR THE MOMS AND FATHERHOOD MENTORS FOR THE DADS	10,000
SAMPSON COUNTY ARTS COUNCIL 709 COLLEGE STREET CLINTON, NC 28328		N/A	PUBLIC CHARITY	GRANT FOR ADMINISTRATIVE SUPPORT TO ENRICH THE CULTURAL LIVES OF THE CITIZENS OF SAMPSON COUNTY BY NURTURING AND SUPPORTING EXCELLENCE IN THE ARTS; PROMOTING, PRESENTING AND ENCOURAGING EDUCATIONAL ACTIVITIES, AND OTHERWISE ENHANCING THE GROWTH AND APPRECIATION OF THE VISUAL, LITERARY AND PERFORMING ARTS	25,000
SIMPLY GIRLS INC. 406 W. BROAD STREET DUNN, NC 28334		N/A	PUBLIC CHARITY	GRANT FOR GENERAL OPERATING SUPPORT TO SERVE GIRLS AGES 5-18 IN AFTER SCHOOL AND SUMMER PROGRAMS; INSPIRING ALL GIRLS TO BE SMART, HEALTHY, STRONG, BOLD AND PROUD	150,000

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TEACH FOR AMERICA 1151 FALLS ROAD, SUITE 2023 ROCKY MOUNT, NC 27804		N/A	PUBLIC CHARITY	GRANT TO SUPPORT WORK IN EASTERN NC INCLUDING CONTINUING TO IMPLEMENT EASTERN NC RESIDENCY PROGRAMS, STRENGTHEN LOCAL APPROACH TO PROGRAMMING AND COMMUNITY BASED COALITION BUILDING, GROW AND ACTIVATE ALUMNI NETWORK	250,000
TEACH FOR AMERICA PO BOX 12331 DURHAM, NC 27709		N/A	PUBLIC CHARITY	CHALLENGE GRANT TO SUPPORT WORK IN EASTERN NC INCLUDING CONTINUING TO IMPLEMENT EASTERN NC RESIDENCY PROGRAM, STRENGTHEN LOCAL APPROACH TO PROGRAMMING AND COMMUNITY BASED COALITION BUILDING, GROW AND ACTIVATE ALUMNI NETWORK	250,000
UNC SCHOOL OF GOVERNMENT FOUNDATION CAMPUS BOX 3330 CHAPEL HILL, NC 27599		N/A	EDUCATIONAL INSTITUTION	GRANT TO SUPPORT UP TO 10 LEAD FOR NORTH CAROLINA FELLOWS IN TIER 1 COUNTIES IN EASTERN NORTH CAROLINA	150,600
UNC WORLD VIEW CAMPUS BOX 8011 CHAPEL HILL, NC 27599		N/A	PUBLIC CHARITY	GRANT TO ENROLL 8 TEACHERS FROM SAMPSON AND BLADEN COUNTIES IN THE WORLD VIEW STUDY VISIT PROGRAM TO COSTA RICA	44,300

TOTAL AWARDS, GRANTS AND GIFTS

6,596,641

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LOVE OF LEARNING GRANTS:				
BUTLER AVENUE ELEMENTARY SCHOOL 301 WEST BUTLER AVENUE CLINTON, NC 28328	N/A	EDUCATIONAL INSTITUTION	HOSTING THE DYNAMIC DUO IN THE COMMUNITY	2,400
BUTLER AVENUE ELEMENTARY SCHOOL 301 WEST BUTLER AVENUE CLINTON, NC 28328	N/A	EDUCATIONAL INSTITUTION	AUTHOR EVENT WITH THE DYNAMIC DUO	3,000
BUTLER AVENUE ELEMENTARY SCHOOL 301 WEST BUTLER AVENUE CLINTON, NC 28328	N/A	EDUCATIONAL INSTITUTION	BRING INVENTION TO LIFE	2,931
CLEMENT ELEMENTARY SCHOOL 3220 MAXWELL ROAD AUTRYVILLE, NC 28318	N/A	EDUCATIONAL INSTITUTION	CHRISTY BULLARD-THE UNDERLYING STORY	2,364
CLEMENT ELEMENTARY SCHOOL 3220 MAXWELL ROAD AUTRYVILLE, NC 28318	N/A	EDUCATIONAL INSTITUTION	AREA SCHOOLS PARTNERING TO HOST THE DYNAMIC DUO	3,000
CLINTON CITY SCHOOLS 300 WESTOVER ROAD CLINTON, NC 28328	N/A	EDUCATIONAL INSTITUTION	REGIONAL LOVE OF LEARNING PD	3,000

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NAME AND ADDRESS (HOME OR BUSINESS)					
CLINTON CITY SCHOOLS 300 WESTOVER ROAD CLINTON, NC 28328		N/A	EDUCATIONAL INSTITUTION	MURISON	3,750
CLINTON CITY SCHOOLS 300 WESTOVER ROAD CLINTON, NC 28328		N/A	EDUCATIONAL INSTITUTION	EUROPE 2020	3,000
CLINTON CITY SCHOOLS 300 WESTOVER ROAD CLINTON, NC 28328		N/A	EDUCATIONAL INSTITUTION	SEE PROGRAM	3,000
CLINTON HIGH SCHOOL 340 INDIAN TOWN ROAD CLINTON, NC 28328		N/A	EDUCATIONAL INSTITUTION	KATHY RIVERA COMMUNITY RESILIENCY	3,000
CLINTON HIGH SCHOOL 340 INDIAN TOWN ROAD CLINTON, NC 28328		N/A	EDUCATIONAL INSTITUTION	HEALTH SCIENCE CAREERS	920
DUKE UNIVERSITY OFFICE OF UNIVERSITY DEVELOPMENT BOX 90600 DURHAM, NC 27708		N/A	EDUCATIONAL INSTITUTION	DUKECAC COLLEGE OPPORTUNITY PROGRAMMING	1,980

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NAME AND ADDRESS (HOME OR BUSINESS)

AMOUNT

HARGROVE ELEMENTARY SCHOOL 7725 FAISON HWY FAISON, NC 28341	N/A	EDUCATIONAL INSTITUTION	CELEBRATING LITERACY WITH THE SISTERS	3,000
HOBBTON ELEMENTARY SCHOOL 12361 HOBBTON HWY NEWTON GROVE, NC 28366	N/A	EDUCATIONAL INSTITUTION	LIGHTS, CAMERA, ACTION: LIFESTYLES OF THE RICH AND FAMOUS TARHEELS	1,206
HOBBTON HIGH SCHOOL 12201 HOBBTON HIGHWAY NEWTON GROVE, NC 28366	N/A	EDUCATIONAL INSTITUTION	HITTING THE ROAD WITH AMERICA; THE COLONIAL TRIANGLE TOUR	3,000
HOBBTON HIGH SCHOOL 12201 HOBBTON HIGHWAY NEWTON GROVE, NC 28366	N/A	EDUCATIONAL INSTITUTION	WE DREAM OF PAINTING OUR DREAMS #2	1,990
HOBBTON HIGH SCHOOL 12201 HOBBTON HIGHWAY NEWTON GROVE, NC 28366	N/A	EDUCATIONAL INSTITUTION	2019 BROADWAY TEACHERS WORKSHOP	3,000
HOBBTON HIGH SCHOOL 12201 HOBBTON HIGHWAY NEWTON GROVE, NC 28366	N/A	EDUCATIONAL INSTITUTION	ALL THE WORLDS A STAGE	3,000

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HOBBDON HIGH SCHOOL 12201 HOBBDON HIGHWAY NEWTON GROVE, NC 28366	N/A	EDUCATIONAL INSTITUTION	EXPANDING HISTORICAL KNOWLEDGE THROUGH CULTURAL AND HISTORICAL EXPERIENCES	3,000
HOBBDON HIGH SCHOOL 12201 HOBBDON HIGHWAY NEWTON GROVE, NC 28366	N/A	EDUCATIONAL INSTITUTION	THE POWER OF ART #2	3,000
HOBBDON HIGH SCHOOL 12201 HOBBDON HIGHWAY NEWTON GROVE, NC 28366	N/A	EDUCATIONAL INSTITUTION	OH SAY CAN YOU SEE?	3,000
HOBBDON HIGH SCHOOL 12201 HOBBDON HIGHWAY NEWTON GROVE, NC 28366	N/A	EDUCATIONAL INSTITUTION	NC TO DC	3,000
JONES COUNTY SCHOOLS 320 W. JONES ST TRENTON, NC 28585	N/A	EDUCATIONAL INSTITUTION	STRUMMING ALONG WITH UKULELES	2,455
LANGDON C KERR ELEMENTARY 112 KIMBROUGH ROAD CLINTON, NC 28328	N/A	EDUCATIONAL INSTITUTION	AREA SCHOOLS PARTNERING TO HOST THE DYNAMIC DUO	3,000

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MIDWAY ELEMENTARY SCHOOL 15375 SPIVEYS CORNER HIGHWAY DUNN, NC 28334	N/A	EDUCATIONAL INSTITUTION	FOR THE LOVE OF READING	2,770
MIDWAY ELEMENTARY SCHOOL 15375 SPIVEYS CORNER HIGHWAY DUNN, NC 28334	N/A	EDUCATIONAL INSTITUTION	JULIMAR AREVALO WATCH ESL STUDENTS SOAR	2,867
MIDWAY ELEMENTARY SCHOOL 15375 SPIVEYS CORNER HIGHWAY DUNN, NC 28334	N/A	EDUCATIONAL INSTITUTION	READING OPENS DOORS FOR ESL STUDENTS	3,000
MIDWAY HIGH SCHOOL 15274 SPIVEY'S CORNER ROAD NEWTON GROVE, NC 28366	N/A	EDUCATIONAL INSTITUTION	LEARN, DISCOVER-AQUAPONICS!	558
MIDWAY HIGH SCHOOL 15274 SPIVEY'S CORNER ROAD NEWTON GROVE, NC 28366	N/A	EDUCATIONAL INSTITUTION	THE STRENGTH AND POWER OF DIVERSITY	2,340
MIDWAY HIGH SCHOOL 15274 SPIVEY'S CORNER ROAD NEWTON GROVE, NC 28366	N/A	EDUCATIONAL INSTITUTION	LORI KNOWLES GUYS & DOLLS	3,000

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MIDWAY HIGH SCHOOL 15274 SPIVEY'S CORNER ROAD NEWTON GROVE, NC 28366	N/A	EDUCATIONAL INSTITUTION	MONTICELLO AND THE LEGACY OF SLAVERY	3,000
MIDWAY HIGH SCHOOL 15274 SPIVEY'S CORNER ROAD NEWTON GROVE, NC 28366	N/A	EDUCATIONAL INSTITUTION	JANEL COCHRAN-CATCH AND RELEASE	3,000
MIDWAY MIDDLE SCHOOL 1115 ROBERT'S GROVE ROAD DUNN, NC 28334	N/A	EDUCATIONAL INSTITUTION	LESLIE BOWDEN-MAKING HISTORY: THE FINALE	2,100
MIDWAY MIDDLE SCHOOL 1115 ROBERT'S GROVE ROAD DUNN, NC 28334	N/A	EDUCATIONAL INSTITUTION	LEESA HODGES-I BELIEVE IN THE FUTURE OF AGRICULTURE	2,350
MIDWAY MIDDLE SCHOOL 1115 ROBERT'S GROVE ROAD DUNN, NC 28334	N/A	EDUCATIONAL INSTITUTION	CHRIS SENGGER-DISCOVERING SCIENCE FICTION	3,000
PLAIN VIEW ELEMENTARY 4140 PLAIN VIEW HIGHWAY DUNN, NC 28334	N/A	EDUCATIONAL INSTITUTION	JENNIFER DAVIS-KNOWLEDGE THROUGH NOVELS: SCIENCE FICTION MARGARET PETERSON HADDIX AUTHOR VISIT	2,364

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ROSEBORO ELEMENTARY 180 BUTLER ISLAND ROAD ROSEBORO, NC 28382	N/A	EDUCATIONAL INSTITUTION	ENGAGING LEARNING THROUGH ART	3,000
SAMPSON EARLY COLLEGE HIGH SCHOOL 1801 SUNSET AVENUE CLINTON, NC 28328	N/A	EDUCATIONAL INSTITUTION	DEFYING GRAVITY WITH EDUCATIONAL LEAPS AND BOUNDS	2,845
SAMPSON EARLY COLLEGE HIGH SCHOOL 1801 SUNSET AVENUE CLINTON, NC 28328	N/A	EDUCATIONAL INSTITUTION	MICHELLE SMOAK-EXPLORING OUR NATION'S CAPITAL	3,000
SAMPSON MIDDLE SCHOOL 1201 W. ELIZABETH STREET CLINTON, NC 28328	N/A	EDUCATIONAL INSTITUTION	SYMPHONY PROGRAM EXPENSES	125
SAMPSON MIDDLE SCHOOL 1201 W. ELIZABETH STREET CLINTON, NC 28328	N/A	EDUCATIONAL INSTITUTION	A WIN WIN FOR ALL!	2,500
SAMPSON MIDDLE SCHOOL 1201 W. ELIZABETH STREET CLINTON, NC 28328	N/A	EDUCATIONAL INSTITUTION	KEEP THE KIDS PLAYING	3,000

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GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

RECIPIENT NAME AND ADDRESS (HOME OR BUSINESS)	IF RECIPIENT IS AN INDIVIDUAL, SHOW ANY RELATIONSHIP TO ANY FOUNDATION MANAGER OR SUBSTANTIAL CONTRIBUTOR	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
SAMPSON MIDDLE SCHOOL 1201 W. ELIZABETH STREET CLINTON, NC 28328	N/A	EDUCATIONAL INSTITUTION	ALISON RAY-MARGARET PETERSON HADDIX AUTHOR VISIT	2,000
SAMPSON MIDDLE SCHOOL 1201 W. ELIZABETH STREET CLINTON, NC 28328	N/A	EDUCATIONAL INSTITUTION	CODE RED	2,000
SAMPSON MIDDLE SCHOOL 1201 W. ELIZABETH STREET CLINTON, NC 28328	N/A	EDUCATIONAL INSTITUTION	BOOKS, BOOKS AND MORE BOOKS	3,000
SUNSET AVENUE SCHOOL 505 SUNSET AVENUE CLINTON, NC 28328	N/A	EDUCATIONAL INSTITUTION	BRINGING ANIMAL STUDY TO LIFE	2,828
SUNSET AVENUE SCHOOL 505 SUNSET AVENUE CLINTON, NC 28328	N/A	EDUCATIONAL INSTITUTION	JENNIFER HILL-RON CLARK ACADEMY	3,000
UNION ELEMENTARY SCHOOL 10400 TAYLORS BRIDGE HWY CLINTON, NC 28328	N/A	EDUCATIONAL INSTITUTION	MEXICAN FOLK ART	3,000

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SUBSTANTIAL
CONTRIBUTOR

FOUNDATION
STATUS OF
RECIPIENT

PURPOSE OF GRANT OR
CONTRIBUTION

AMOUNT

RECIPIENT

NAME AND ADDRESS (HOME OR BUSINESS)

UNION HIGH SCHOOL 1189 KADER MERRITT ROAD ROSE HILL, NC 28458	N/A	EDUCATIONAL INSTITUTION	A CHANCE TO SHINE	3,000
UNION INTERMEDIATE SCHOOL 1190 EDMOND MATHIS ROAD CLINTON, NC 28328	N/A	EDUCATIONAL INSTITUTION	MEETING A REAL NC AUTHOR: JOYCE HOSTETTER	1,687
UNION INTERMEDIATE SCHOOL 1190 EDMOND MATHIS ROAD CLINTON, NC 28328	N/A	EDUCATIONAL INSTITUTION	CAREN LONG-UNION INTERMEDIATE SCHOOL MAKERFAIRE	3,000
UNION MIDDLE SCHOOL 455 RIVER ROAD CLINTON, NC 28328	N/A	EDUCATIONAL INSTITUTION	MAKING CHINA ACCESSIBLE TO SAMPSON COUNTY	3,000
CASEY JACKSON AVERY 2404 KING ROAD CLINTON, NC 28328	NONE	INDIVIDUAL	GRANT	200
ALENA CARROLL 3570 LAMB RD GARLAND, NC 28441	NONE	INDIVIDUAL	GRANT	200

GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

RECIPIENT		IF RECIPIENT IS AN INDIVIDUAL, SHOW ANY RELATIONSHIP TO ANY FOUNDATION		FOUNDATION STATUS OF RECIPIENT		PURPOSE OF GRANT OR CONTRIBUTION		AMOUNT
NAME AND ADDRESS (HOME OR BUSINESS)		MANAGER OR SUBSTANTIAL CONTRIBUTOR						
VELICIA EVERETT 107 BRANCH DRIVE BURGAW, NC 28425		NONE		INDIVIDUAL	GRANT			200
JENNIFER AVANT DIRKS 404 BUTLER DRIVE CLINTON, NC 28328		NONE		INDIVIDUAL	GRANT			200
VEVLYN P LOWE 907 LAKEVIEW DRIVE CLINTON, NC 28328		NONE		INDIVIDUAL	TEACHER STIPEND			1,000
HOLLIS MARTIN WHITE 2066 CONCORD SCHOOL RD CLINTON, NC 28328		NONE		INDIVIDUAL	LIASON-OUTWARD BOUND PROGRAM			500
HOLLIS MARTIN WHITE 2066 CONCORD SCHOOL RD CLINTON, NC 28328		NONE		INDIVIDUAL	GRANT			200
TOTAL LOVE OF LEARNING GRANTS								138,830

GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

RECIPIENT		IF RECIPIENT IS AN INDIVIDUAL, SHOW ANY RELATIONSHIP TO ANY FOUNDATION MANAGER OR SUBSTANTIAL CONTRIBUTOR		FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
NAME AND ADDRESS (HOME OR BUSINESS)						
SIMPLE GIFTS SCHOLARSHIPS:						
ABILENE CHRISTIAN UNIVERSITY 1600 CAMPUS COURT ABILENE, TX 79699		NONE		INDIVIDUAL	SCHOLARSHIP FOR GERALD ZUNGIA	29,250
BRANDEIS UNIVERSITY 415 SOUTH STREET WALTHAM, MA 02453		NONE		INDIVIDUAL	SCHOLARSHIP FOR THALIA PLATA	8,593
BRIDGEWATER COLLEGE 402 EAST COLLEGE STREET BRIDGEWATER, VA 22812		NONE		INDIVIDUAL	SCHOLARSHIP FOR ISAI CRUZ	6,600
BRIDGEWATER COLLEGE 402 EAST COLLEGE STREET BRIDGEWATER, VA 22812		NONE		INDIVIDUAL	SCHOLARSHIP FOR MARC LOPEZ	5,554
CEDAR CREST COLLEGE 100 COLLEGE DRIVE ALLEN TOWN, PA 18104		NONE		INDIVIDUAL	SCHOLARSHIP FOR PERLA GUILLERMO	37,027
DARTMOUTH COLLEGE 207 PARKHURST HALL HANOVER, NH 03755		NONE		INDIVIDUAL	SCHOLARSHIP FOR MADISON D THORNTON	1,736

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EMERSON COLLEGE 120 BOYLSTON ST BOSTON, MA 02116-4624		NONE	INDIVIDUAL	SCHOLARSHIP FOR THALIA PLATA		22,500
EMMANUEL COLLEGE PO BOX 129 FRANKLIN SPRINGS, GA 30639		NONE	INDIVIDUAL	SCHOLARSHIP FOR RYLEA TEW		7,500
THE GEORGE WASHINGTON UNIVERSITY 1918 F ST NW WASHINGTON, DC 20052		NONE	INDIVIDUAL	SCHOLARSHIP FOR CAROLINE CZARKOWSKA		28,950
HAMPDEN-SYDNEY COLLEGE 80 COLLEGE ROAD HAMPDEN SYDNEY, VA 23943		NONE	INDIVIDUAL	SCHOLARSHIP FOR GRAY SUTTER		33,000
HAMPDEN-SYDNEY COLLEGE 80 COLLEGE ROAD HAMPDEN SYDNEY, VA 23943		NONE	INDIVIDUAL	SCHOLARSHIP FOR SPELL CARR		15,000
HARVARD UNIVERSITY MASSACHUSETTS HALL CAMBRIDGE, MA 02138		NONE	INDIVIDUAL	SCHOLARSHIP FOR AARON VISER		10,000

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GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

NAME AND ADDRESS (HOME OR BUSINESS)	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
HOLLINS UNIVERSITY PO BOX 9658 ROANOKE, VA 24020		NONE	INDIVIDUAL	SCHOLARSHIP FOR KAYLA MORRIS	9,250
HOLLINS UNIVERSITY PO BOX 9658 ROANOKE, VA 24020		NONE	INDIVIDUAL	SCHOLARSHIP FOR DANIELLE SAWYER	11,000
HOWARD UNIVERSITY 2400 SIXTH STREET, NW WASHINGTON, DC 20059		NONE	INDIVIDUAL	SCHOLARSHIP FOR KALEB L MCLAURIN	53,200
HOWARD UNIVERSITY 2400 SIXTH STREET, NW WASHINGTON, DC 20059		NONE	INDIVIDUAL	SCHOLARSHIP FOR JANET THOMPSON	29,850
ITHACA COLLEGE 953 DANBY ROAD ITHACA, NY 14850		NONE	INDIVIDUAL	SCHOLARSHIP FOR LUCAS JACKSON	27,819
LEHIGH UNIVERSITY 27 MEMORIAL DRIVE BETHLEHEM, PA 18015-3093		NONE	INDIVIDUAL	SCHOLARSHIP FOR AMAYA APOLINARIO	23,000

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RECIPIENT NAME AND ADDRESS (HOME OR BUSINESS)	IF RECIPIENT IS AN INDIVIDUAL, SHOW ANY RELATIONSHIP TO ANY FOUNDATION		FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
	MANAGER OR SUBSTANTIAL CONTRIBUTOR				
MARYMOUNT MANHATTEN COLLEGE 221 EAST 71ST STREET NEW YORK, NY 10021	NONE		INDIVIDUAL	SCHOLARSHIP FOR AUSTIN KONNOR BROWN	24,200
MARYVILLE COLLEGE 502 E. LAMAR ALEXANDER PKWY MARYVILLE, TN 37804	NONE		INDIVIDUAL	SCHOLARSHIP FOR BRIANNA GIBSON	14,000
MERCER UNIVERSITY 1501 MERCER UNIVERSITY DRIVE MACON, GA 31207	NONE		INDIVIDUAL	SCHOLARSHIP FOR FRANCISCO ROSAS-GOMEZ	13,300
MIDDLEBURY COLLEGE 14 OLD CHAPEL ROAD MIDDLEBURY, VT 05753	NONE		INDIVIDUAL	SCHOLARSHIP FOR NYREKE PETERS	2,750
MOREHOUSE COLLEGE 830 WESTVIEW DRIVE, SW ATLANTA, GA 30314-3773	NONE		INDIVIDUAL	SCHOLARSHIP FOR ISAIAH WILSON	33,588
NC OUTWARD BOUND SCHOOL 2582 RICEVILLE ROAD ASHEVILLE, NC 28805	NONE		INDIVIDUALS	EIGHT FIRST YEAR SCHOLARS	20,505

GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

RECIPIENT NAME AND ADDRESS (HOME OR BUSINESS)	IF RECIPIENT IS AN INDIVIDUAL, SHOW ANY RELATIONSHIP TO ANY FOUNDATION		FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
	MANAGER OR SUBSTANTIAL CONTRIBUTOR				
OHIO WESLEYAN UNIVERSITY 61 S. SANDUSKY STREET DELAWARE, OH 43015	NONE		INDIVIDUAL	SCHOLARSHIP FOR JOSE ARMENDARIZ	55,379
PRATT INSTITUTE 200 WILLOUGHBY AVENUE BROOKLYN, NY 11205	NONE		INDIVIDUAL	SCHOLARSHIP FOR CALEB WETTIG	54,600
RANDOLPH COLLEGE 2500 RIVERMONT AVENUE LYNCHBURG, VA 24503	NONE		INDIVIDUAL	SCHOLARSHIP FOR KAYLA A MORRIS	18,500
RANDOLPH MACON COLLEGE 114 COLLEGE AVENUE ASHLAND, VA 23005	NONE		INDIVIDUAL	SCHOLARSHIP FOR NATHALI DIAZ AGUILAR	16,200
RANDOLPH MACON COLLEGE 114 COLLEGE AVENUE ASHLAND, VA 23005	NONE		INDIVIDUAL	SCHOLARSHIP FOR KYLIE CASHWELL	14,000
RANDOLPH MACON COLLEGE 114 COLLEGE AVENUE ASHLAND, VA 23005	NONE		INDIVIDUAL	SCHOLARSHIP FOR EDYE CARR	18,000

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	MANAGER OR SUBSTANTIAL CONTRIBUTOR				
RHODES COLLEGE 2000 NORTH PARKWAY MEMPHIS, TN 38112	NONE		INDIVIDUAL	SCHOLARSHIP FOR HANNAH ROBINSON	22,000
ROANOKE COLLEGE 221 COLLEGE LANE SALEM, VA 24153	NONE		INDIVIDUAL	SCHOLARSHIP FOR ROSA JARAMILLO	25,500
ROANOKE COLLEGE 221 COLLEGE LANE SALEM, VA 24153	NONE		INDIVIDUAL	SCHOLARSHIP FOR CAROLINA DAUGHTRY	31,815
ROANOKE COLLEGE 221 COLLEGE LANE SALEM, VA 24153	NONE		INDIVIDUAL	SCHOLARSHIP FOR MARIA MEZA	19,500
SAVANNAH COLLEGE OF ART & DESIGN PO BOX 2701 SAVANNAH, GA 31402	NONE		INDIVIDUAL	SCHOLARSHIP FOR LEAH MOORE	17,936
SIMMONS UNIVERSITY PO BOX 414104 BOSTON, MA 02241-4104	NONE		INDIVIDUAL	SCHOLARSHIP FOR HEIDI WETTIG	20,000

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RECIPIENT		IF RECIPIENT IS AN INDIVIDUAL, SHOW ANY RELATIONSHIP TO ANY FOUNDATION		FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION		AMOUNT
NAME AND ADDRESS (HOME OR BUSINESS)		MANAGER OR SUBSTANTIAL CONTRIBUTOR					
UNIVERSITY OF THE PACIFIC 3601 PACIFIC AVENUE STOCKTON, CA 95211		NONE		INDIVIDUAL	SCHOLARSHIP FOR MONICA ODEH		15,000
UNIVERSITY OF ROCHESTER OFFICE OF BURSAR 330 MELIORA HALL ROCHESTER, NY 14627		NONE		INDIVIDUAL	SCHOLARSHIP, EXPENSES FOR SERGIO AGUILAR DIAZ		5,637
VIRGINIA WESLEYAN COLLEGE 5817 WESLEYAN DRIVE VIRGINIA BEACH, VA 23455		NONE		INDIVIDUAL	SCHOLARSHIP ANALAYSIA DAVIS		23,700
KYLIE CASHWELL 200 TOMAHAWK TRAIL CLINTON, NC 28328		NONE		INDIVIDUAL	INTERNSHIP FUNDING		2,300
SERGIO AGUILAR DIAZ 296 CARSON LANE CLINTON, NC 28328		NONE		INDIVIDUAL	INTERNSHIP FUNDING		2,400
CAROLINA O DAUGHTRY 6788 HOBBS HWY CLINTON, NC 28328		NONE		INDIVIDUAL	INTERNSHIP FUNDING		1,935

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NAME AND ADDRESS (HOME OR BUSINESS)						
ROSA HAYDEE JARAMILLO 816 MAYNARD RD GODWIN, NC 28344		NONE		INDIVIDUAL	INTERNSHIP FUNDING	2,160
NYREKE PETERS 391 KINGS POND LANE CLINTON, NC 28328		NONE		INDIVIDUAL	INTERNSHIP FUNDING	3,762
THALIA PLATA 407 W. BUTLER AVENUE CLINTON, NC 28328		NONE		INDIVIDUAL	INTERNSHIP FUNDING	150
ROBERT G. SUTTER 2560 SOUTHEAST BLVD CLINTON, NC 28328		NONE		INDIVIDUAL	INTERNSHIP FUNDING	2,400
AMERICAN EXPRESS AND CHASE CARD SERVICES		NONE		INDIVIDUAL	EXPENSES FOR COLLEGE INTERVIEWS, VISITS AND BOOKS	4,743

TOTAL SIMPLE GIFTS SCHOLARSHIPS

845,789

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TEACHER GRANTS.						
AMANDA CARTER BASS 117 QUIET WATER LANE CLINTON, NC 28328	NONE			INDIVIDUAL	TEACHER GRANT	8,000
ELGIN SCOTT LEWIS 504 BEAVER DAM DRIVE CLINTON, NC 28328	NONE			INDIVIDUAL	TEACHER GRANT	8,000
APRIL LEWIS 504 BEAVER DAM DRIVE CLINTON, NC 28328	NONE			INDIVIDUAL	TEACHER GRANT	8,000
RAGAN PEARSON 106 REYNARD PATH CLINTON, NC 28328	NONE			INDIVIDUAL	TEACHER GRANT	8,000
TOTAL TEACHER GRANTS						32,000
TOTAL QUALIFYING GRANTS AND CONTRIBUTIONS						7,613,260

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GRANTS AND CONTRIBUTIONS APPROVED FOR FUTURE PAYMENT

IF RECIPIENT IS AN
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SUBSTANTIAL
CONTRIBUTOR

RECIPIENT NAME AND ADDRESS (HOME OR BUSINESS)	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
BIG BROTHERS BIG SISTERS OF THE TRIANGLE 808 AVIATION PARKWAY, SUITE 900 MORRISVILLE, NC 27560	N/A PUBLIC CHARITY	CHALLENGE GRANT FOR GENERAL OPERATING SUPPORT	50,000
BLUE RIDGE PARKWAY FOUNDATION 717 S MARSHALL STREET, SUITE 105B WINSTON SALEM, NC 27101	N/A PUBLIC CHARITY	CHALLENGE GRANT FOR "THE TRAILS AND VIEWS FOREVER" PROJECT	300,000
BOYS AND GIRLS CLUBS OF THE COASTAL PLAIN 621 WEST FIRE TOWER ROAD WINTERVILLE, NC 28590	N/A PUBLIC CHARITY	FUNDING FOR INAUGURAL CLUB ACADEMY IN MARTIN COUNTY FOR 3RD AND 4TH GRADERS	150,000
BOYS AND GIRLS CLUBS OF CUMBERLAND COUNTY PO BOX 48155 FAYETTEVILLE, NC 28331	N/A PUBLIC CHARITY	CHALLENGE GRANT FOR GENERAL OPERATING SUPPORT	25,000
BOYS AND GIRLS CLUBS OF WAYNE COUNTY PO BOX 774 GOLDSBORO, NC 27533	N/A PUBLIC CHARITY	CHALLENGE GRANT FOR GENERAL OPERATING SUPPORT	25,000
BOYS AND GIRLS HOMES OF NORTH CAROLINA PO BOX 127 LAKE WACCAMAW, NC 28450	N/A PUBLIC CHARITY	CHALLENGE GRANT FOR GENERAL OPERATING SUPPORT	50,000

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SUBSTANTIAL
CONTRIBUTOR

RECIPIENT NAME AND ADDRESS (HOME OR BUSINESS)	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
COMMUNITIES SUPPORTING SCHOOLS OF WAYNE COUNTY PO BOX 11557 GOLDSBORO, NC 27532	N/A	CHALLENGE GRANT FOR GENERAL OPERATING SUPPORT OF THE SUCCESS COACH PROGRAM	10,000
ENVIRONMENTAL DEFENSE FUND 4000 WESTCHASE BLVD, SUITE 510 RALEIGH, NC 27607	N/A	GRANT FOR GENERAL OPERATING SUPPORT TO BE PAID OVER THE NEXT TWO YEARS	400,000
FAYETTEVILLE AREA HABITAT FOR HUMANITY 310 GREEN STREET FAYETTEVILLE, NC 28301	N/A	GRANT TO FUND THE COST OF AN ORGANIZATIONAL ASSESSMENT AND EXECUTIVE DIRECTOR SEARCH	1,138
THE FILLING STATION, INC 221 MAIN STREET, PO BOX 222 POLLOCKSVILLE, NC 28573	N/A	CHALLENGE GRANT FOR GENERAL OPERATING SUPPORT	5,000
THE MADEIRA SCHOOL 8328 GEORGETOWN PIKE MCLEAN, VA 22102	N/A	ALL THE DIFFERENCE: DORM MODERNIZATION FUND	1,000,000
NC RURAL CENTER 4021 CARYA DRIVE RALEIGH, NC 27610	N/A	\$50,000 CHALLENGE GRANT AND A \$12,500 GRANT FOR THE EASTERN NORTH CAROLINA HOMEGROWN LEADERS PROGRAM	62,500

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TO ANY FOUNDATION

RECIPIENT NAME AND ADDRESS (HOME OR BUSINESS)	IF RECIPIENT IS AN INDIVIDUAL, SHOW ANY RELATIONSHIP TO ANY FOUNDATION MANAGER OR SUBSTANTIAL CONTRIBUTOR	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
NORTH CAROLINA SYMPHONY 3700 GLENWOOD AVENUE, SUITE 130 RALEIGH, NORTH CAROLINA 27612	N/A	PUBLIC CHARITY	SYMPHONY ACTIVITIES FOR JONES COUNTY	90,000
SIMPLY GIRLS INC 406 W BROAD STREET DUNN, NC 28334	N/A	PUBLIC CHARITY	CHALLENGE GRANT OF \$15,000 AND GRANT OF \$150,000 FOR GENERAL OPERATING SUPPORT TO SERVE GIRLS AGES 5-18 IN AFTER SCHOOL AND SUMMER PROGRAMS, INSPIRING ALL GIRLS TO BE SMART, HEALTHY, STRONG, BOLD AND PROUD	165,000
UNC SCHOOL OF GOVERNMENT CAMPUS BOX 3330 KNAPP SANDERS BUILDING 400 SOUTH ROAD CHAPEL HILL, NC 27599	N/A	EDUCATIONAL INSTITUTION	GRANT TO SUPPORT STIPENDS FOR UP TO 10 FELLOWS THAT WILL BE PLACED IN TIER ONE RURAL COMMUNITIES IN EASTERN NC	150,600
TOTAL				2,434,238