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Form **990-PF**

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

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

▶Do not enter social security numbers on this form as it may be made public.

▶Go to *www.irs.gov/Form990PF* for instructions and the latest information.

OMB No 1545-0047

2019

Open to Public Inspection

For calendar year 2019 or tax year beginning , and ending

Name of foundation THE SUNSHINE LADY FOUNDATION, INC.	A Employer identification number 56-1977987
Number and street (or P O box number if mail is not delivered to street address) P.O. BOX 1074 / Room/suite	B Telephone number (see instructions) 252-240-2788
City or town, state or province, country, and ZIP or foreign postal code MOREHEAD CITY NC 28557	C If exemption application is pending, check here ▶ ☐
G Check all that apply ☐ Initial return ☐ Initial return of a former public charity ☐ Final return ☐ Amended return ☐ Address change ☐ Name change	D 1 Foreign organizations, check here ▶ ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ▶ ☐
H Check type of organization ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation	E If private foundation status was terminated under section 507(b)(1)(A), check here ▶ ☐
I Fair market value of all assets at end of year (from Part II, col (c), line 16) ▶ $ 25,493,092 J Accounting method ☒ Cash ☐ Accrual ☐ Other (specify) (Part I, column (d), must be on cash basis)	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ▶ ☐

03 04 04 6

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

			(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1	Contributions, gifts, grants, etc , received (attach schedule)	261,161			
	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	20,438	20,438	20,438	
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10	2,902,047			
	b	Gross sales price for all assets on line 6a 8,924,595				
	7	Capital gain net income (from Part IV, line 2)		8,923,993		
	8	Net short-term capital gain				
	9	Income modifications				
	10a	Gross sales less returns and allowances				
	b	Less Cost of goods sold				
	c	Gross profit or (loss) (attach schedule)				
	11	Other income (attach schedule)				
	12	**Total.** Add lines 1 through 11	3,183,646	8,944,431	20,438	
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc	0			
	14	Other employee salaries and wages	191,609	19,161		172,448
	15	Pension plans, employee benefits	121,078	12,108		108,970
	16a	Legal fees (attach schedule) See Stmt 1	27,427			27,427
	b	Accounting fees (attach schedule) Stmt 2	2,000	200		1,800
	c	Other professional fees (attach schedule)				
	17	Interest				
	18	Taxes (attach schedule) (see instructions) Stmt 3	166,000			166,000
	19	Depreciation (attach schedule) and depletion Stmt 4				
	20	Occupancy	8,324	832		7,492
	21	Travel, conferences, and meetings	8,858			8,858
	22	Printing and publications				
	23	Other expenses (att sch) Stmt 5	35,661			35,661
	24	**Total operating and administrative expenses.** Add lines 13 through 23	560,957	32,301	0	528,656
	25	Contributions, gifts, grants paid	7,504,752			7,504,752
	26	**Total expenses and disbursements.** Add lines 24 and 25	8,065,709	32,301	0	8,033,408
	27	Subtract line 26 from line 12				
	a	**Excess of revenue over expenses and disbursements**	-4,882,063			
	b	**Net investment income** (if negative, enter -0-)		8,912,130		
	c	**Adjusted net income** (if negative, enter -0-)			20,438	

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For Paperwork Reduction Act Notice, see instructions.

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Part II Balance Sheets

Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)

			Beginning of year (a) Book Value	End of year (b) Book Value	(c) Fair Market Value
Assets	1	Cash – non-interest-bearing	579,784	875,235	875,235
	2	Savings and temporary cash investments	762,002	1,607,036	1,607,036
	3	Accounts receivable ▶			
		Less allowance for doubtful accounts ▶			
	4	Pledges receivable ▶			
		Less allowance for doubtful accounts ▶			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7	Other notes and loans receivable (att. schedule) ▶			
		Less allowance for doubtful accounts ▶ 0			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10a	Investments – U.S and state government obligations (attach schedule)			
	b	Investments – corporate stock (attach schedule) See Stmt 6	29,303,970	23,010,821	23,010,821
	c	Investments – corporate bonds (attach schedule)			
	11	Investments – land, buildings, and equipment basis ▶			
		Less accumulated depreciation (attach sch) ▶			
	12	Investments – mortgage loans			
	13	Investments – other (attach schedule)			
	14	Land, buildings, and equipment basis ▶ 1,727			
		Less accumulated depreciation (attach sch) ▶ Stmt 7 1,727			
	15	Other assets (describe ▶)			
	16	Total assets (to be completed by all filers – see the instructions Also, see page 1, item I)	30,645,756	25,493,092	25,493,092
Liabilities	17	Accounts payable and accrued expenses			
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶)			
	23	**Total liabilities** (add lines 17 through 22)	0	0	
Net Assets or Fund Balances		**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			
	27	Paid-in or capital surplus, or land, bldg , and equipment fund			
	28	Retained earnings, accumulated income, endowment, or other funds	30,645,756	25,493,092	
	29	**Total net assets or fund balances** (see instructions)	30,645,756	25,493,092	
	30	**Total liabilities and net assets/fund balances** (see instructions)	30,645,756	25,493,092	

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	30,645,756
2	Enter amount from Part I, line 27a	2	-4,882,063
3	Other increases not included in line 2 (itemize) ▶	3	
4	Add lines 1, 2, and 3	4	25,763,693
5	Decreases not included in line 2 (itemize) ▶ See Statement 8	5	270,601
6	Total net assets or fund balances at end of year (line 4 minus line 5) – Part II, column (b), line 29	6	25,493,092

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:	D		
b	28 SHARES CL A BERKSHIRE HATHAWAY	D		
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				
b	8,924,595		602	8,923,993
c				
d				
e				

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

	(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
a				
b				8,923,993
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	8,923,993
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) See instructions If (loss), enter -0- in Part I, line 8	3	

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☒ No

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2018	6,633,312	33,116,169	0.200304
2017	3,062,035	33,613,021	0.091097
2016	4,902,293	31,195,280	0.157149
2015	6,554,506	21,138,172	0.310079
2014	8,205,976	19,053,819	0.430674

2 Total of line 1, column (d)	2	1.189303
3 Average distribution ratio for the 5-year base period – divide the total on line 2 by 5 0, or by the number of years the foundation has been in existence if less than 5 years	3	0.237861
4 Enter the net value of noncharitable-use assets for 2019 from Part X, line 5	4	27,543,595
5 Multiply line 4 by line 3	5	6,551,547
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	89,121
7 Add lines 5 and 6	7	6,640,668
8 Enter qualifying distributions from Part XII, line 4	8	8,033,408

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

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

1a	Exempt operating foundations described in section 4940(d)(2), check here ▶ ☐ 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	89,121
c	All other domestic foundations enter 2% of line 27b Exempt foreign organizations, enter 4% of Part I, line 12, col (b)				
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only, others, enter -0-)			2	0
3	Add lines 1 and 2			3	89,121
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only, others, enter -0-)			4	0
5	**Tax based on investment income.** Subtract line 4 from line 3 If zero or less, enter -0-			5	89,121
6	Credits/Payments				
a	2019 estimated tax payments and 2018 overpayment credited to 2019	6a	178,153		
b	Exempt foreign organizations – tax withheld at source	6b			
c	Tax paid with application for extension of time to file (Form 8868)	6c			
d	Backup withholding erroneously withheld	6d			
7	Total credits and payments Add lines 6a through 6d			7	178,153
8	Enter any **penalty** for underpayment of estimated tax Check here ☐ if Form 2220 is attached			8	
9	**Tax due.** If the total of lines 5 and 8 is more than line 7, enter **amount owed** ▶			9	
10	**Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶			10	89,032
11	Enter the amount of line 10 to be **Credited to 2020 estimated tax** ▶ 89,032 Refunded ▶			11	

Part VII-A Statements Regarding Activities

			Yes	No
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a		X
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition	1b		X
	If the answer is "Yes" to **1a** or **1b**, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities			
c	Did the foundation file **Form 1120-POL** for this year?	1c		X
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation ▶ $ ______ (2) On foundation managers ▶ $ ______			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ▶ $ ______			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities	2		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	3	X	
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		X
b	If "Yes," has it filed a tax return on **Form 990-T** for this year? N/A	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? N/A If "Yes," attach the statement required by *General Instruction T*	5		
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	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	7	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	8b	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 instructions for Part XIV If "Yes," complete Part XIV	9	X	
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10		X

2

Part VII-A . Statements Regarding Activities *(continued)*

			Yes	No
11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule See instructions	11		X
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement See instructions	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	

Website address ▶ WWW.SUNSHINELADY.ORG

14 The books are in care of ▶ JUDY WOOTEN Telephone no ▶ 252-240-2788
P.O. BOX 1074
Located at ▶ MOREHEAD CITY NC ZIP+4 ▶ 28557

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of **Form 1041** – check here ▶ ☐
and enter the amount of tax-exempt interest received or accrued during the year ▶ | 15 |

			Yes	No
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?	16		X
	See the instructions for exceptions and filing requirements for FinCEN Form 114 If "Yes," enter the name of the foreign country ▶			

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

			Yes	No
	File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			
1a	During the year, did the foundation (either directly or indirectly)			
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ 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 N/A	1b		
	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?	1c		X
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2019, did the foundation have any undistributed income (Part XIII, lines 6d and 6e) for tax year(s) beginning before 2019? ☐ Yes ☒ No			
	If "Yes," list the years ▶ 20 , 20 , 20 , 20			
b	Are there any years listed in 2a for which the foundation is **not** applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to **all** years listed, answer "No" and attach statement – see instructions) N/A	2b		
c	If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here ▶ 20 , 20 , 20 , 20			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ 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) N/A	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		X
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2019?	4b		X

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

				Yes	No
5a	During the year did the foundation pay or incur any amount to				
	(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	☐ 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	N/A	5b		
	Organizations relying on a current notice regarding disaster assistance, check here	▶ ☐			
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?		6b		X
	If "Yes" to 6b, file Form 8870				
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	☐ 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. See instructions.

(a) Name and address		(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
DIANE GRIMSLEY P.O. BOX 1074	MOREHEAD CITY NC 28557	PRESIDENT/TR 15.00	0	0	0
MITTY BEAL P.O. BOX 1074	MOREHEAD CITY NC 28557	VICE PRESIDE 15.00	0	0	0
REBECCA CURRIE P.O. BOX 1074	MOREHEAD CITY NC 28557	SECRETARY 15.00	0	0	0

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

(a) Name and address of each employee paid more than $50,000		(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
ANNE EWING P.O. BOX 1074	MOREHEAD CITY NC 28557	EXEC DIRECTO 40.00	75,000	50,250	0
JUDITH WOOTEN P.O. BOX 1074	MOREHEAD CITY NC 28557	OFFICE MANAG 27.50	45,000	30,150	0
MARY ELLEN BOX P.O. BOX 1074	MOREHEAD CITY NC 28557	SCHOLARSHIP 30.00	31,875	21,356	0

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

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

3 Five highest-paid independent contractors for professional services. See instructions. If none, enter "NONE."

(a) Name and address of each person paid more than $50,000	(b) Type of service	(c) Compensation
NONE		
Total number of others receiving over $50,000 for professional services ▶		

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 PRISON EDUCATION. GRANT AMOUNT: $2,879,250.60	215,215
2 DOMESTIC VIOLENCE ORGANIZATIONS. GRANT AMOUNT:$905,229	67,663
3 EDUCATIONAL ORGANIZATIONS/SCHOOLS. GRANT AMOUNT: $752,021.89	56,211
4 HOUSING (HOMELESS/RESPITE) GRANT: $709,089.00	53,002

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

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1 N/A	
2	
All other program-related investments See instructions 3	
Total. Add lines 1 through 3 ▶	

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	25,966,743
b	Average of monthly cash balances	1b	2,038,562
c	Fair market value of all other assets (see instructions)	1c	0
d	**Total** (add lines 1a, b, and c)	1d	28,005,305
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	28,005,305
4	Cash deemed held for charitable activities Enter 1½% of line 3 (for greater amount, see instructions) See Statement 9	4	461,710
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3 Enter here and on Part V, line 4	5	27,543,595
6	**Minimum investment return.** Enter 5% of line 5	6	1,377,180

Part XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations, check here ▶ [X] and do not complete this part)

1	Minimum investment return from Part X, line 6	1	
2a	Tax on investment income for 2019 from Part VI, line 5 2a		
b	Income tax for 2019 (This does not include the tax from Part VI) 2b		
c	Add lines 2a and 2b	2c	
3	Distributable amount before adjustments Subtract line 2c from line 1	3	
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	
6	Deduction from distributable amount (see instructions)	6	
7	**Distributable amount** as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1	7	

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	8,033,408
b	Program-related investments – total from Part IX-B	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes	2	
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	8,033,408
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b See instructions	5	89,121
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	7,944,287

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

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2018	(c) 2018	(d) 2019
1 Distributable amount for 2019 from Part XI, line 7				
2 Undistributed income, if any, as of the end of 2019				
a Enter amount for 2018 only				
b Total for prior years 20_____ , 20_____ , 20_____				
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				
4 Qualifying distributions for 2019 from Part XII, line 4 ▶ $ 8,033,408				
a Applied to 2018, but not more than line 2a				
b Applied to undistributed income of prior years (Election required – see instructions)				
c Treated as distributions out of corpus (Election required – see instructions)				
d Applied to 2019 distributable amount				
e Remaining amount distributed out of corpus	8,033,408			
5 Excess distributions carryover applied to 2019 (If an amount appears in column (d), the same amount must be shown in column (a))				
6 **Enter the net total of each column as indicated below:**				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	8,033,408			
b Prior years' undistributed income Subtract line 4b from line 2b				
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				
d Subtract line 6c from line 6b Taxable amount – see instructions				
e Undistributed income for 2018 Subtract line 4a from line 2a Taxable amount – see instructions				
f Undistributed income for 2019 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2020				
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)				
8 Excess distributions carryover from 2014 not applied on line 5 or line 7 (see instructions)				
9 **Excess distributions carryover to 2020.** Subtract lines 7 and 8 from line 6a				
10 Analysis of line 9				
a Excess from 2015				
b Excess from 2016				
c Excess from 2017				
d Excess from 2018				
e Excess from 2019				

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

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

b Check box to indicate whether the foundation is a private operating foundation described in section [X] 4942(j)(3) or [ ] 4942(j)(5)

	Tax year (a) 2019	Prior 3 years (b) 2018	(c) 2017	(d) 2016	(e) Total
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed	20,438	19,553	9,459	601	50,051
b 85% of line 2a	17,372	16,620	8,040	511	42,543
c Qualifying distributions from Part XII, line 4, for each year listed	8,033,408	6,633,312	3,062,035	4,902,293	22,631,048
d Amounts included in line 2c not used directly for active conduct of exempt activities	7,447,730	5,945,557	2,431,970	3,265,698	19,090,955
e Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c	585,678	687,755	630,065	1,636,595	3,540,093
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	918,120	1,103,872	1,120,434	1,039,843	4,182,269
c "Support" alternative test – enter (1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

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

1 **Information Regarding Foundation Managers:**

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

N/A

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

N/A

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

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

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

THE SUNSHINE LADY FOUNDATION, INC. 252-240-2788
P.O. BOX 1074 MOREHEAD CITY NC 28557

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

SEE ATTACHED APPLICATIONS

c Any submission deadlines

SEE ATTACHED APPLICATIONS

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

SEE ATTACHED APPLICATIONS

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*				
MOREHEAD CITY GRANTS P.O. BOX 1074 MOREHEAD CITY NC 28557	NONE	N/A	SEE ATTACHMENT	7,504,752
Total			▶ 3a	7,504,752
b *Approved for future payment*				
N/A				
Total			▶ 3b	

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue					
a			18		
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities			14	20,438	
5 Net rental income or (loss) from real estate					
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal property					
7 Other investment income					
8 Gain or (loss) from sales of assets other than inventory			18	2,902,047	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue a					
b					
c					
d					
e					
12 Subtotal Add columns (b), (d), and (e)		0		2,922,485	0

13 Total. Add line 12, columns (b), (d), and (e) 13 2,922,485

(See worksheet in line 13 instructions to verify calculations)

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

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes) (See instructions)
N/A	

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

			Yes	No
1	Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?			
a	Transfers from the reporting foundation to a noncharitable exempt organization of			
	(1) Cash	1a(1)		X
	(2) Other assets	1a(2)		X
b	Other transactions			
	(1) Sales of assets to a noncharitable exempt organization	1b(1)		X
	(2) Purchases of assets from a noncharitable exempt organization	1b(2)		X
	(3) Rental of facilities, equipment, or other assets	1b(3)		X
	(4) Reimbursement arrangements	1b(4)		X
	(5) Loans or loan guarantees	1b(5)		X
	(6) Performance of services or membership or fundraising solicitations	1b(6)		X
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c		X

d If the answer to any of the above is "Yes," complete the following schedule Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received

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

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

b If "Yes," complete the following schedule

(a) Name of organization	(b) Type of organization	(c) Description of relationship
N/A		

Sign Here

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

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

Diane Grumsley | 5-15-20 | PRESIDENT/TREAS

Signature of officer or trustee | Date | Title

Paid Preparer Use Only

Print/Type preparer's name	Preparer's signature	Date	Check ☐ if self-employed
DEBRA F. HARVELL, CPA	Debra F. Harvell	05/14/20	
Firm's name ▶ Harvell & Company		PTIN	P00428207
Firm's address ▶ 407 N 35th St		Firm's EIN ▶	56-1638995
Morehead City, NC 28557-3107		Phone no	252-726-7010

Schedule B
(Form 990, 990-EZ, or 990-PF)
Department of the Treasury
Internal Revenue Service

Schedule of Contributors

▶ Attach to Form 990, Form 990-EZ, or Form 990-PF.
▶ Go to *www.irs.gov/Form990* for the latest information.

OMB No 1545-0047

2019

Name of the organization	Employer identification number
THE SUNSHINE LADY FOUNDATION, INC.	56-1977987

Organization type (check one)

Filers of:	**Section:**
Form 990 or 990-EZ	☐ 501(c)( ) (enter number) organization
	☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation
	☐ 527 political organization
Form 990-PF	☒ 501(c)(3) exempt private foundation
	☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation
	☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule.**
Note: Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule See instructions

General Rule

☒ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling $5,000 or more (in money or property) from any one contributor Complete Parts I and II See instructions for determining a contributor's total contributions

Special Rules

☐ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the $33^{1}/_{3}$% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of **(1)** $5,000, or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1 Complete Parts I and II

☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than $1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals Complete Parts I (entering "N/A" in column (b) instead of the contributor name and address), II, and III

☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc , purposes, but no such contributions totaled more than $1,000 If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc , purpose Don't complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc , contributions totaling $5,000 or more during the year ▶ $

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

Name of organization: THE SUNSHINE LADY FOUNDATION, INC.

Employer identification number: 56-1977987

Part I **Contributors** (see instructions). Use duplicate copies of Part I if additional space is needed

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	THE ESTATE OF SARAH STANNARD KENT S BERK, SPECIAL ADMINISTRATOR 14220 N NORTHSIGHT BLVD SUITE 135 SCOTTSDALE AZ 85260	$ 252,661	Person [X] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions)
2	THE ROXANNE AND HENRY BRANDT FNDN 617 WEST END AVE APT 5B NEW YORK NY 10024-1607	$ 8,500	Person [X] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions)
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions)
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions)
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions)
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions)

Federal Statements

Statement 1 - Form 990-PF, Part I, Line 16a - Legal Fees

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
Indirect Legal Fees	$ 27,427	$	$	$ 27,427
Total	$ 27,427	$ 0	$ 0	$ 27,427

Statement 2 - Form 990-PF, Part I, Line 16b - Accounting Fees

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
Indirect Accounting Fees	$ 2,000	$ 200	$	$ 1,800
Total	$ 2,000	$ 200	$ 0	$ 1,800

Statement 3 - Form 990-PF, Part I, Line 18 - Taxes

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
EXCISE TAXES	$ 166,000	$	$	$ 166,000
Total	$ 166,000	$ 0	$ 0	$ 166,000

Federal Statements

Statement 4 - Form 990-PF, Part I, Line 19 - Depreciation

Description							
Date Acquired	Cost Basis	Prior Year Depreciation	Method	Life	Current Year Depreciation	Net Investment Income	Adjusted Net Income
2 FILING CABINETS							
4/07/99	$ 554	$ 554	S/L	7	$	$	$
CHAIR, MAT, BOOKCASES							
9/02/99	610	610	S/L	7			
FILING CABINETS							
7/16/01	563	563	S/L	7			
Total	$ 1,727	$ 1,727			$ 0	$ 0	$ 0

Statement 5 - Form 990-PF, Part I, Line 23 - Other Expenses

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
	$	$	$	$
Expenses				
ADP FEES	2,524			2,524
BANK CHARGES	1			1
CONSULTING FEES	2,300			2,300
CONTINUING EDUCATION	350			350
DUES & SUBSCRIPTIONS	3			3
ENTERTAINMENT	448			448
GIFTS	1,121			1,121
INSURANCE	6,444			6,444
OFFICE SUPPLIES	6,296			6,296
POSTAGE & SHIPPING	4,607			4,607
PRINTING	607			607
REPAIRS & MAINTENANCE	622			622
TELEPHONE	8,526			8,526
UTILITIES	1,812			1,812
Total	$ 35,661	$ 0	$ 0	$ 35,661

Federal Statements

Statement 6 - Form 990-PF, Part II, Line 10b - Corporate Stock Investments

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
BERKSHIRE HATHAWAY CLASS A	$ 26,316,000	$ 19,696,220	Market	$ 19,696,220
BERKSHIRE HATHAWAY CLASS B	2,987,970	3,314,601	Market	3,314,601
Total	$ 29,303,970	$ 23,010,821		$ 23,010,821

Statement 7 - Form 990-PF, Part II, Line 14 - Land, Building, and Equipment

Description	Beginning Net Book	End Cost / Basis	End Accumulated Depreciation	Net FMV
FILING CABINET, BOOKCASES, CHAIR MAT	$	$ 1,727	$ 1,727	$
Total	$ 0	$ 1,727	$ 1,727	$ 0

Federal Statements

Statement 8 - Form 990-PF, Part III, Line 5 - Other Decreases

Description	Amount
UNREALIZED LOSS ON INVESTMENTS	$ 270,601
Total	$ 270,601

Statement 9 - Form 990-PF, Part X, Line 4 - Cash Deemed Held - Greater Amount Explanation

Description	Amount
The Sunshine Lady Foundation, Inc. required a minimum cash balance of $461,710.42 in order to cover current administrative expenses and normal charitable disbursements during the month of January 2020. Of this total amount, $20,951.94 was needed for administrative expenses and $440,758.48 was disbursed for charitable and educational purposes.	461,710
Total	461,710

Form 990-PF, Part XV, Line 2b - Application Format and Required Contents

Description
SEE ATTACHED APPLICATIONS

Form 990-PF, Part XV, Line 2c - Submission Deadlines

Description
SEE ATTACHED APPLICATIONS

Form 990-PF, Part XV, Line 2d - Award Restrictions or Limitations

Description
SEE ATTACHED APPLICATIONS

Sunshine Lady Foundation, Inc. - Grants 2019

Recipient	Purpose	Grant Amount
Camps		
Camp CaPella	Camp for children/adults with disabilities	100,000.00
Community Organizations		
for Families		
Salvation Army of Carteret County	Capital campaign contribution	300,000.00
Tunnel to Towers Foundation	Gold Star Family Home Program	25,000.00
For Youths		
Youth Empowerment Project	Postsecondary Transition Svcs	152,240.00
Mayfield Civic Association Inc.	Playground equipment & security camera	101,459.00
NewFound Families VA	Camp/retreat for sibling foster youth/families	13,594.83
Total Community Organizations		592,293.83
Domestic Violence		
Capital Campaign		
Sexual Abuse/Spouse Abuse Resource Center	Shelter expansion	300,000.00
Hope's Wings Inc.	Shelter expansion	200,000.00
The Mustard Seed Shelter	Shelter expansion	150,000.00
The Family Shelter of Southern OK, Inc.	Shelter expansion	185,000.00
Aid to Individuals		
First Citizens Bank	Insurance pmt for individual	229.00
Domestic Violence Shelter & Services	Client Emergency Fund	10,000.00
Hope Family Services	Client Emergency Fund	5,000.00
Caring Unlimited, Inc.	Client Emergency Fund	5,000.00
Center for Domestic Peace	Client Emergency Fund	5,000.00
Christians as Family Advocates	Client Emergency Fund	5,000.00
Turning Point DV Services	Client Emergency Fund	5,000.00
Newhouse	Client Emergency Fund	10,000.00
Bridges DV Center of Williamson County	Client Emergency Fund	5,000.00
Dom. Abuse & Sexual Assault Intrvntn Svcs	Client Emergency Fund	5,000.00
Schuykill Women in Crisis	Client Emergency Fund	5,000.00
Domestic Violence - Other		
Women in Distress of Broward County	Women's Empowerment Forum	10,000 00
Total Domestic Violence		905,229.00
Educational Organizations		
Children's Center of Transylvania County	Baby Think it Over Babies	7,764.60
Clemson University Call Me Mister	Teacher degree program for minorities	249,400.00
Donors Choose	Donors Choose teacher projects	5,007.40
James Monroe High School	Girls mentoring program operating expenses	6,000.00

Sunshine Lady Foundation, Inc. - Grants 2019

Recipient	Purpose	Grant Amount
James Monroe High School	Girls mentoring program scholarships	4,000 00
Germanna Community College	Dual degree program for underserved students	434,849.89
The Partnership for Academic Excellence	Mentoring underserved students	30,000.00
The Partnership for Academic Excellence	College tour for underserved students	15,000.00
Total Educational Organizations		752,021.89
Health Care/Medical Research		
Mental Health America of Fredericksburg	Signs of Suicide program support	21,210.00
Pen Bay Waldo Healthcare Foundation	Capital Campaign	600,000.00
The Carousel Center	Child victims of physical and sexual abuse	86,758.45
Total Health Care/Medical Research		707,968.45
Housing (Homeless/respite)		
Mary Sunshine House	Residential program for adults with autism disorders	200,000.00
Spectrum Youth & Family Services	Youth winter warming shelter	110,000.00
Thurman Brisben Center	Homless shelter mentoring program	54,000.00
Thurman Brisben Center	Homeless shelter capital needs	120,089.00
House of Possibilities	Program for adults/children with development disabilities	50,000.00
Families First Community Center	Housing for familes with minor children	175,000.00
Total Housing (Homeless/respite)		709,089.00
Humanitarian Grants		
Car/Van Donation		
Lake City Transmission	Payment on behalf of an individual	2,800.00
First Citizens Bank	Payment on behalf of an individual	2,155.00
First Citizens Bank	Payment on behalf of an individual	1,466.24
Credit card-loan debt		
Bank of America	Payment on behalf of an individual	5,000 00
Credit One Bank	Payment on behalf of an individual	1,228.31
Credit One Bank	Payment on behalf of an individual	618.93
First Premier Bank	Payment on behalf of an individual	703.66
First Premier Bank	Payment on behalf of an individual	1,031.50
Capital One	Payment on behalf of an individual	208.60
Capital One	Payment on behalf of an individual	209.00
Lowe's/Synchrony Bank	Payment on behalf of an individual	107.05
Chase	Payment on behalf of an individual	806.24
Comenity-Lane Bryant Retail	Payment on behalf of an individual	69.13
Target Card Services	Payment on behalf of an individual	282.96
Citi	Payment on behalf of an individual	2,231.73
Citi	Payment on behalf of an individual	2,037 67

Sunshine Lady Foundation, Inc. - Grants 2019

Recipient	Purpose	Grant Amount
Paypal Credit Svcs/Syncb	Payment on behalf of an individual	170.76
Discretionary Funds		
Individuals		
UVA Children's Hospital	Client need fund	10,000.00
Project Christmas Cheer	Client need fund	10,000.00
Discretionary Funds - Other		
St. Katharine Drexel Catholic Church	Currituck community outreach Matching grant-emergency fund	10,000.00
St. Katharine Drexel Catholic Church	Currituck community outreach Matching grant-emergency fund	10,000.00
Medical Expense		
Dental expense		
Terence Dental Center	Payment on behalf of an individual	2,625.00
First Citizens Bank	Payment on behalf of an individual	355.00
Medical Expense - Other		
Carolina Ranch	Payment on behalf of an individual	6,543.50
Fisher Mobility	Payment on behalf of an individual	13,567.00
SUWS of the Carolinas	Payment on behalf of an individual	7,780.00
Compass Key, LLC	Payment on behalf of an individual	8,475.00
UT Physicians	Payment on behalf of an individual	1,945.01
CMD Account Management, Inc.	Payment on behalf of an individual	1,364.39
Medical Plus Supplies	Payment on behalf of an individual	370.18
Early Alert Canines	Payment on behalf of an individual	10,000.00
Southwest Residential Care	Payment on behalf of an individual	10,500.00
Watson Clinic - Patient accounts	Payment on behalf of an individual	8,500 00
Rent/mortgage payments		
Chang Real Estate	Payment on behalf of an individual	1,100.00
Daniel Haugh - Landlord	Payment on behalf of an individual	900.00
Jackie Walker	Payment on behalf of an individual	2,000 00
Buildings R Us	Payment on behalf of an individual	3,400.00
DVB Investments	Payment on behalf of an individual	2,135.00
Main Street Baptist Church BenevolentFund	Payment on behalf of an individual	1,500.00
Storage Solutions, Moreno, LLC	Payment on behalf of an individual	494.00
Lewis Management Corp	Payment on behalf of an individual	6,867.03
Lewis Management Corp	Payment on behalf of an individual	35.00
Lewis Management Corp	Payment on behalf of an individual	200.00
Larry Ballantine	Payment on behalf of an individual	3,946.00
First Citizens Bank	Payment on behalf of an individual	2,817.00
Utilities		
Walmart	Payment on behalf of an individual	230.00
First Citizens Bank	Payment on behalf of an individual	374.99
First Citizens Bank	Payment on behalf of an individual	120.00

Sunshine Lady Foundation, Inc. - Grants 2019

Recipient	Purpose	Grant Amount
First Citizens Bank	Payment on behalf of an individual	647.83
Total Humanitarian Grants		159,918.71
Prison Education		
New York Prison Degree Programs		
Vietnam Veterans of America Chapter #205	Supplies for Knitter's Squad at Auburn CC	2,000.00
Genesee Community College	Attica Correctional Facility degree program	62,465.00
Cornell University	Auburn Correctional Facility degree program	100,000 00
Virginia Prison Degree Programs		
Germanna Community College	Spring tuition 12 students Coffeewood Corr. Center	27,018.75
FHEG Germanna Bookstore - Fredericksburg	Books for Spring 2018	1,631.25
Piedmont VA Community College	Spring 2019 Tuition Fluvanna 11 students	9,738.65
Germanna Community College	Summer tuition Coffeewood Corr. Center students	10,807.50
Piedmont VA Community College	Summer 2019 Tuition Fluvanna 17 students	10,377.25
Germanna Community College	Fall tuition Coffeewood Corr. Center 11 students	23,416.25
Other Prison Education/Degree Programs		
Community Partners	Supporting growth of quality higher education	300,000.00
Villanova University	Graterford Correctional degree program	21,157.49
University of Maine/Augusta	Maine State Prison degree program	70,941.50
Saint Louis University Prison Program	Program support (2 years)	100,000.00
Campbell University Inc. (NC)	Sampson Correctional Center degree program	68,000.00
Center for Community Transitions (NC)	Women's Transitional program - 1 student	905.93
Center for Community Transitions	Education fund and capital expenses	80,000.00
Freedom Education Project Puget Sound (WA)	Washington Corrections Center for Women	42,000.00
Life of Mind PA	Prison degree program startup	5,000.00
Prison University Project (CA)	San Quentin State Prison degree program	1,000,000.00
Rhode Island Dept. of Corrections	John J. Moran Medium Security Facility degree program	47,100 00
Southeastern Baptist Theological Seminary (NC)	Nash Correctional Institution degree program	157,000.00
Walla Walla Community College (WA)	WA State Penitentiary & Coyote Ridge CC degree programs	44,691.03
Total Prison Education		2,184,250.60
After Prison Programs		
Louisiana Parole Project	Residential program operations	120,000.00
Louisiana Parole Project	Property aquisition grants	425,000.00
Open Door Recovery Center (ME)	Hancock Cty Jail Treatment Pgm	15,000.00
Hudson Link for Higher Education (NY)	Women's residence renovations	35,000.00
Friends of Guest House (VA)	Women's residence renovations	100,000.00
Total Prison - After prison		695,000.00

Recipient	Purpose	Grant Amount
Scholarships		
Adjunct Scholarship Expense		
Debt Relief		
Cornerstone Ed Loan Services	Loan payments for individual students	2,000.00
US Dept of Ed - Great Lakes	Loan payments for individual students	2,500.00
US Department of Education	Loan payments for individual students	2,500.00
Nelnet/Dept of Education	Loan payments for individual students	1,000.00
The Partnership for Academic Excellence	Loan payments for individual students	19,250.00
The Partnership for Academic Excellence	Loan payments for individual students	5,750.00
US Dept of Ed - Great Lakes	Loan payments for individual students	2,500.00
Rent Aid		
Hamilton Ridge Homes	Rent payments for individual students	2,500.00
Hungarian Scholarships		
The Hungarian American Coalition	Bognar Family Hungarian Scholarship Fund	25,000.00
Post Secondary Scholarships		
Anderson University	Tuition scholarships for individual students	7,500 00
Appalachian State University	Tuition scholarships for individual students	36,900.00
Barton College	Tuition scholarships for individual students	10,000.00
Brevard College	Tuition scholarships for individual students	5,000.00
Bridgewater State University	Tuition scholarships for individual students	2,000.00
Cairn University	Tuition scholarships for individual students	5,000.00
Campbell University	Tuition scholarships for individual students	18,000.00
Carteret Community College	Tuition scholarships for individual students	1,600.00
Cedarville University	Tuition scholarships for individual students	2,500.00
Charleston Southern University	Tuition scholarships for individual students	2,500.00
College at Southeastern	Tuition scholarships for individual students	6,400.00
Covenant College	Tuition scholarships for individual students	5,000.00
Craven Community College	Tuition scholarships for individual students	3,400.00
East Carolina University	Tuition scholarships for individual students	76,300.00
Elon University	Tuition scholarships for individual students	5,000.00
Emerson College	Tuition scholarships for individual students	2,500.00
Emory University	Tuition scholarships for individual students	2,500 00
George Mason University	Tuition scholarships for individual students	5,000.00
George Washington University	Tuition scholarships for individual students	2,500.00
Georgia Southern University	Tuition scholarships for individual students	4,700.00
High Point University	Tuition scholarships for individual students	5,000.00
James Sprunt Community College	Tuition scholarships for individual students	800.00
Lees McRae College	Tuition scholarships for individual students	5,000.00
Lenoir Community College	Tuition scholarships for individual students	1,500.00

Sunshine Lady Foundation, Inc. - Grants 2019

Recipient	Purpose	Grant Amount
Liberty University	Tuition scholarships for individual students	21,000.00
Meredith College	Tuition scholarships for individual students	26,000.00
Methodist University	Tuition scholarships for individual students	12,500.00
Moody Bible Institute	Tuition scholarships for individual students	6,000.00
NC Central University	Tuition scholarships for individual students	7,500.00
NC State University	Tuition scholarships for individual students	112,400.00
Oklahoma Baptist University	Tuition scholarships for individual students	5,000.00
Penn State University	Tuition scholarships for individual students	2,500.00
Regent University	Tuition scholarships for individual students	5,000.00
Sampson Community College	Tuition scholarships for individual students	800.00
Southeastern/Liberty	Tuition scholarships for individual students	2,500.00
The Master's University	Tuition scholarships for individual students	1,200.00
Trevecca Nazarene University	Tuition scholarships for individual students	7,500.00
University of Mary Washington	Tuition scholarships for individual students	7,000.00
University of Mount Olive	Tuition scholarships for individual students	2,500.00
University of NC @ Asheville	Tuition scholarships for individual students	4,400.00
University of NC @ Chapel Hill	Tuition scholarships for individual students	40,000.00
University Of NC @ Charlotte	Tuition scholarships for individual students	33,700 00
University of NC @ Greensboro	Tuition scholarships for individual students	16,200.00
University of NC @ Wilmington	Tuition scholarships for individual students	43,100.00
USAC	Tuition scholarships for individual students	1,200.00
Vance Granville Community College	Tuition scholarships for individual students	2,000 00
Western Carolina University	Tuition scholarships for individual students	6,200.00
Western Michigan University	Tuition scholarships for individual students	5,000.00
Wheaton College	Tuition scholarships for individual students	2,500.00
William Peace University	Tuition scholarships for individual students	5,000.00
Winston Salem State University	Tuition scholarships for individual students	7,500.00
Special Studies		
Longwood University	Tuition scholarships for individual students	3,900.00
The Partnership for Academic Excellence	Tuition scholarships for individual students	2,280.75
URock		
University College at Rockland	Scholarship Pledge	27,000.00
Total Scholarships		698,980.75
Total Grants		**7,504,752.23**

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2019 SUNBEAM GRANT APPLICATION FORM

The Sunshine Lady Foundation mission is to invest in organizations and programs dedicated to providing opportunities for the advancement of education, well being and new life choices for disadvantaged people, with special empathy for the working poor and families in crisis.

DATE SUBMITTED________________

RECIPIENT ORGANIZATION (attach IRS letter of determination of tax exemption)

____

Address ________________________________

____

Phone / email ________________________________

Contact person ________________________________

PROJECT OR FUND NAME

____

DESCRIBE BRIEFLY HOW THE FUNDS WILL BE USED

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(Please include all requested supporting materials with this application)

AMOUNT REQUESTED ________________________________

WHEN WILL FUNDS BE NEEDED ________________________________

SUNBEAM'S NAME ________________________________

Phone / email ________________________________

APPROVED or REJECTED by review committee

AUTHORIZED BY: ________________________________, on ____________