294	9	1.2	70(2.	209	,
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Form **990-PF**

Return of Private Foundation
or Section 4947(a)(1) Trust Treated as Private Foundation
enter social security numbers on the form as it may be made

			ent of the Treasury levenue Service	'			social security numbers on rs.gov/Form990PF for instr				()		J
	_		endar year 2019	or tay year		******	13.90471 011110001 1 101 11131	, and e		Tinudon.	ОВ	en to Public In	spection
	Na	ıme	of foundation	•	EMORIAL U	NI:	TRUST FBO	, and c	inding.	A Employer identification	numbe	er	
			WESLEYA	_						61-6188401	ı		
			and street (or PO BOX 948		mail is not delivered to s	street a	ddress)		Room/suite	B Telephone number 270-689-98			
		City or town, state or province, country, and ZIP or foreign post OWENSBORO, KY 42302					ostal code			C If exemption application is pending, check here			▶ □
		G Check all that apply. Initial return Final return Address change				Amended return Name change			D 1. Foreign organizations, check here 2. Foreign organizations meeting the 85% test, check here and attach computation			▶□	
	_											>	
0:	} <u> </u>	H Check type of organization: X Section 501(c)(3) e Section 4947(a)(1) nonexempt charitable trust				empt private foundation Other taxable private foundation			E If private foundation status was terminated under section 507(b)(1)(A), check here			! ►□	
04					her (specify)			F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here			tion		
	_	► \$				colun	nn (d), must be on cash bas	ıs.)					
	P:	<u>art</u>	The total of am	ounts in colui	d Expenses mns (b), (c), and (d) may r ls in column (a))	not	(a) Revenue and expenses per books		vestment ome	(c) Adjusted net income	for	d) Disbursem charitable pur (cash basis of	poses
		1			ts, etc., received					N/A			
		3	Interest on caven	if the foundations gs and tempos s	n is not required to attach Sch rary	В					<u> </u>		
		4	Dividends and	interest fro	om securities		61,118.	6	1,118.		STA	ATEMEN	T 1
		5	a Gross rents										
			b Net rental income	e or (loss) _			4.4.4.5				<u> </u>		
	9		. Gross sales orice		assets not on line 10		14,447.		r		<u> </u>		
	Š	ᅵ	D assets on line 6a		1,977,110	<u>. </u>		1	4,447.	RECEIVED			
	á	7		-				<u>_</u>			l S		
		g			III				 	MAY 2 0 2020	8		
Best in a Outon		10	Gross sales less						13	WAI 2 U 2020	S		
. 9			b Loss Cost of god	blos abo						OCDEN	# 🕮		
کے کے			c Gross profit o	r (loss)						OGDEN, UT		-	
<i>ॅ</i> .8		11	Other income				4,124.		4,124.		STA	TEMEN	TT 2
333		12	Total. Add lin	es 1 throug	h 11	-	79,689.		9,689.		ļ		· · · · · · ·
_		13	•		ctors, trustees, etc		19,997.	1	9,997.		ļ		0.
Alis		14			-						-		
7	, ,	15	•	, employee		2	250.		250		-		
7	T V	םו ופ	a Legal fees b Accounting fe	ac	STMT STMT		1,200.		250. 1,200.				0.
7 2020	\$	Y	c Other professi		51111	_	1,2001		2,200.				
9			Interest								1		
	į	17 18 19 20			STMT	5	2,091.		488.				0.
	į	19	Depreciation a	ınd depletio	n								
		20											
	202	21	-		-						ļ		
		 22				_							
	<u> </u>	23			STMT	0	6.		6.		-		0.
	\geq	22 23 24	Total operation expenses. Ad	_			23,544.	2	1,941.				0.
	\geq	25	-		-		109,767.		-,,,,,,			109,	767.
	0		Total expense		•				·· -· ·-· -·		<u> </u>	,	
į	Ш	<u> </u>	Add lines 24 a				133,311.	2	1,941.			109,	767.
	SCANNED NOV 1 2 2020	27	Subtract line 2	26 from line			-53,622.						
5	Ę				ses and disbursements if negative, enter -0-)		-33,022.	5	7,748.		-		
(ん ろ		C Adjusted net i						.,,,,,,,,	N/A			

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

Form **990-PF** (2019)

61-6188401 Page 2

Form 990-PF (3019)

	ari	Balance Sheets Attached schedules and amounts in the description	Beginning of year	End of	End of year		
드	art	column should be for end-of-year amounts only	(a) Book Value	(b) Book Value	(c) Fair Market Value		
	1	Cash - non-interest-bearing					
	2	Savings and temporary cash investments	57,057.	20,907.	20,907.		
	3	Accounts receivable					
	İ	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					
10	8	Inventories for sale or use					
Assets	9	Prepaid expenses and deferred charges	· · · · · · · · · · · · · · · · · · ·				
As		Investments - U.S. and state government obligations					
		Investments - corporate stock STMT 7	1,030,975.	1.275.926.	1.424.585.		
	!	Investments - corporate bonds STMT 8	1,083,201.	1,275,926.	1,424,585. 849,367.		
		Investments - land, buildings, and equipment basis					
	l ''	Less accumulated depreciation	· · · · · · · · · · · · · · · · · · ·				
	12	Investments - mortgage loans					
	13	Investments - other					
	14	Land, buildings, and equipment: basis					
	'	Less accumulated depreciation					
	15	Other assets (describe					
		Total assets (to be completed by all filers - see the					
	"	instructions. Also, see page 1, item I)	2,171,233.	2,117,611.	2,294,859.		
_	17	Accounts payable and accrued expenses			1		
	18	Grants payable			· · · · · · · · · · · · · · · · · · ·		
	19	Deferred revenue					
Liabilities	20	Loans from officers, directors, trustees, and other disqualified persons					
Ē	21	Mortgages and other notes payable					
Ę		Other liabilities (describe)					
	23	Total liabilities (add lines 17 through 22)	0.	0.			
		Foundations that follow FASB ASC 958, check here		·			
s		and complete lines 24, 25, 29, and 30.					
alances	24	Net assets without donor restrictions					
aga	25	Net assets with donor restrictions	·		<u> </u>		
d B		Foundations that do not follow FASB ASC 958, check here 🕨 🗓					
5		and complete lines 26 through 30.					
<u></u>	26	Capital stock, trust principal, or current funds	2,171,233.	2,117,611.			
ets	27	Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.			
SS	28	Retained earnings, accumulated income, endowment, or other funds	0.	0.			
Net Assets or Fund B	29	Total net assets or fund balances	2,171,233.	2,117,611.			
Z							
_	30	Total liabilities and net assets/fund balances	2,171,233.	2,117,611.			
P	art	Analysis of Changes in Net Assets or Fund Ba	lances				
_	Total	net assets or fund balances at beginning of year - Part II, column (a), line 2	20	<u> </u>			
		t agree with end-of-year figure reported on prior year's return)		,	2,171,233.		
	•	ramount from Part I, line 27a		2	-53,622.		
		r increases not included in line 2 (itemize)		3	0.		
		lines 1, 2, and 3		4	2,117,611.		
		eases not included in line 2 (itemize)		5	0.		
6	Total	net assets or fund balances at end of year (line 4 minus line 5) - Part II, co	lumn (b), line 29	6	2,117,611.		

KY WESLEYAN

(PartilV	Capital Gains a	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			acquired ay, yr.)	(d) Date sold (mo , day, yr.)	
1a BB&7							P				
	EPENDENCE BA		ATTACHED		_		P				
	ITAL GAINS I	DIVIDENDS			-						
<u>d</u>											—
е		/f) Depresention	allowed (a) Co	ot as other basis				(h) C	our or (loop)		_
(e) Gross sales price (f) Depreciation allowed (or allowable) (g) Cost or other basis plus expense of sale									ain or (loss) s (f) minus ((g))	
<u>a</u>	1,302,274.			1,307,94	_					-5,667	
<u>b</u>	672,536. 2,300.			654,72	 					17,814 2,300	•
d	2,300.			-						2,300	•
e					\rightarrow		-				—
	te only for assets showin	g gain in column (h) ai	nd owned by the foundation	n on 12/31/69.			(1)	Gains (C	ol. (h) gain	minus	_
•	/IV as of 12/31/69	(j) Adjusted b	asıs (k) E	xcess of col. (I)				(k), but r	k), but not less than -0-) or Losses (from col. (h))		
a					+		···-	-		-5,667	_
b										17,814	÷
c										2,300	•
đ											
е											_
2 Capital g	ain net income or (net ca		ain, also enter in Part I, lind oss), enter -0- in Part I, lin		}	2				14,447	•
3 Net short	t-term capital gain or (los	s) as defined in section	ns 1222(5) and (6).		`						
•	lso enter in Part I, line 8,	column (c).	,		\downarrow						
If (loss),	enter -0- in Part I, line 8	nder Section 40	40(e) for Reduced	Tay on Not	J Invo	3 stm	ent Inco	me	N/A		
If section 49 Was the foul	140(d)(2) applies, leave th indation liable for the sect foundation doesn't qualify	is part blank. ion 4942 tax on the dis y under section 4940(e	the section 4940(a) tax or stributable amount of any y). Do not complete this par ear; see the instructions be	ear in the base perit.	ıod?					Yes X N	0
1 Littor tile	(a)	den column for each y	(b)	Tore making any cr	(c)			T		(d) oution ratio	—
Calendar	Base periód years year (or tax year beginnin	a in) Adjusted	qualifying distributions	Net value of no		ıtable-ı	use assets		Distrib (col. (b) div	ution ratio ided by col. (c))	
	2018		112,105.				0,797.		(.05048	0
	2017		106,345.				6,536.			.04650	9
	2016		122,917.	<u></u>			9,835.			.05463	
	2015		121,736.				1,647.			.05154	
	2014		116,812.	l	_2	, 46	5,280.	+		.04738	3
2 Total of I	line 1, column (d)							2		.25055	3
3 Average	distribution ratio for the 5	5-year base period - div	ride the total on line 2 by 5	.0, or by the numbe	er of y	ears					_
the found	dation has been in existen	ice if less than 5 years						3		.05011	<u>1</u>
4 Enter the	net value of noncharitable	le-use assets for 2019	from Part X, line 5					4		2,190,449	•
5 Multiply	line 4 by line 3							_5		109,766	•
6 Enter 1%	of net investment incom	e (1% of Part I, line 27	b)					6_		577	_
7 Add lines	5 5 and 6		•					7		110,343	•
	alifying distributions from							8		109,767	•
	s equal to or greater than Part VI instructions.	line 7, check the box i	n Part VI, line 1b, and com	plete that part usin	g a 1%	6 tax ra	ate.		· · · · · · · · · · · · · · · · · · ·		

16 Exempt departming foundations described in section 4940(a)(2), chock hare ▶ □ and enter *100* on time 1. Date of ruling or determination letter: (attach copy of letter if necessary see instructions) b Diametalic foundations that meet the section 4940(a) requirements in Part V, check here ▶ □ and enter *150* of Part I, line 270. All other domestic foundations enter 2% of line 270. 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 40. 3 Add lines 1 and 2. 4 A 0. 5 Tax based on investment alicence. Subtract line 4 from line 3. If zero or less, enter -0. 5 Tax based on investment alicence. Subtract line 4 from line 3. If zero or less, enter -0. 6 Credistry-layments. 5 Tax based on investment and 2018 overpayment credited to 2019 8 1 1, 280. 6 E 0. 6 Credistry-layments and 2018 overpayment credited to 2019 8 1, 280. 8 Expert foreign organizations - tax withheld at source 6 E 0. 6 E 0. 7 1, 280. 8 Expert foreign organizations - tax withheld as source 7 1, 280. 8 Expert foreign organizations - tax withheld as source 8 Expert foreign organizations - tax withheld as source 1 Tax pack with agripations for extension of time to life (Form 8888) 8 Expert foreign organizations - tax withheld as source 1 Tax pack with agripations for extension of time to life (Form 8888) 8 Expert foreign organizations - tax withheld as source 1 Tax pack with agripations for extension of time to life (Form 8888) 8 Expert foreign organizations - tax withheld as source 1 Tax pack with agripations for extension of the life (Form 8888) 1 Section with a section of the life (Form 8888) 1 Section with a section of the life (Form 8888) 1 Section with life (Form 88888) 1 Section with life (Form 88888) 1 Section with life (Form 888888) 1 Section with life (Form 88		990-PF (2019) KY WESLEYAN 61 - 0 rt VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - 9	6188401 see instru		Page 4	
Date of ralling or determination letter:	1a				,	
b Domestic foundations that meet the section 4947(a) requirements in Part V, check here		I I	i			
of Part I, line 27b • All other domestic foundations enter 2% of line 27b, Exempt foreign organizations, enter 4% of Part I, line 12, col. (b) 2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-) 3 Add fines 1 and 2 5 Subtitle 4 (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-) 5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0- 5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0- 5 Tax based on investment and 2018 overpayment credited to 2019 5 Exempt foreign organizations - tax withheld at source 6 Ba 0. 6 Dempt foreign organizations - tax withheld at source 7 Total credits and payments. Add tines 6 at through 6d 8 Exiter any penalty for underpayment of estimated tax Check here I if Form 2220 is attached 9 Tax due. If the found thin 10 to 10 to Extended to 2019 10 Verpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid 10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid 10 Verpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid 10 Verpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid 10 Verpayment. If line 7 is more than the total or lines 5 and 8, enter the amount overpaid 10 Verpayment. If line 7 is more than the total or lines 5 and 8, enter the amount overpaid 10 Verpayment. If line 7 is more than the total or lines 5 and 8, enter the amount overpaid 10 Verpayment. If line 7 is more than the total or lines 5 and 8, enter the amount overpaid 11 Verpayment. If line 7 is more than the total or lines 5 and 8, enter the amount overpaid 12 Lines the amount of line 10 to De Credited to 2002 destinated tax by 119 - Refunded by 11 O. Part VII-A Statements Regarding Activities 14 During the tax var, did the foundation at amount overpaid to the lines 5 and 8, enter the amount	b			1.1	55.	
e. All other domestic foundations enter? 2% of line 27b, Exempt Triespin graphical properties 4% of Part I, line 12, cot. (b) 2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-) 3 Add lines 1 and 2 4 Subtitle 4 (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-) 5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0- 5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0- 5 Cerdist/Payments, 6 2 1019 estimated tax payments and 2018 overpayment credited to 2019 6 2 109 terminated tax payments and 2018 overpayment credited to 2019 6 2 100 trace and payments, and the state of the 16 fe/Form 8688) 6 2 0. 6 2 0. 6 2 0. 7 1, 280. 8 6 0. 8 6 0. 8 6 0. 9 Tax date. If the total of lines 5 and 8 is more than line 7, enter amount oved 8 6 0. 9 Tax date. If the total of lines 5 and 8 is more than line 7, enter amount oved 9 10 0 119. 11 Enter the amount of line 10 to be Cinedited to 2020 estimated tax. 10 1 119. Refunded 11 0. 11 Enter the amount of line 10 to be Cinedited to 2020 estimated tax. 10 10 of the star payment tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign? 10 10 of the foundation. A state is a state of the activities of the activities of the foundation of the 200 during the year (either directly or indivectly) for political purposes? See the instructions for the definition life from 1129-90. For the year? 11 Ferrite the remotersement (if any) paid by the foundation of underviews and copies of any materials published or distributed by the foundation on monection with the activities of the activities of the activities of the activities of the foundation of the activities of the activities of the foundation of the activities of					1	
2 Tax under section 511 (domestic section 4947(s)(1) trusts and taxable foundations only; others, enter -0-) 3 3 1,155. 4 Add lines 1 and 2 5 Subtitle A (income) tax (domestic section 4947(s)(1) trusts and taxable foundations only; others, enter -0-) 5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0- 5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0- 5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0- 5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0- 5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0- 5 Tax due, if the grant of the subtract income is a subtract line 4 from line 3. If zero or less, enter -0- 5 Tax due, if the grant income is a subtract line 4 from line 3. If zero or less, enter -0- 6 B 0. 0. 6 D. 0	C	· · · · · · · · · · · · · · · · · · ·			Ī	
3 Add tiers 1 and 2 4 Subtitle A (incomes) tax (domestic section 4947(s)(1) trusts and taxable foundations only; others, enter -0-) 5 Tax based on investment incomes. Subtract line 4 from line 3. If zero or less, enter -0- 6 Credist/Payments. 5 1, 1, 1, 1, 1, 1, 1, 1, 1, 1, 1, 1, 1,					0.	
4 Subtile A (nocme) tax (domestic section 497(a)(1) trusts and taxable foundations only; others, enter -0-) 5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0- 6 Cedits/Payments. 2 2019 estimated tax payments and 2018 overpayment credited to 2019 Exempt foreign organizations - tax withheld at source 6 Day organizations - tax withheld at source 6 Day organizations - tax withheld at source 6 Day organizations - tax withheld at source 7 Tax paid with application for extension of time to life (Form 8868) 6 Day organizations - tax withheld at source 7 Total credits and payments. Add lines 6s through 8d 8 Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached 9 Tax due. If the total or lines 5 and 8 is more than line 7, enter amount owed 9 Tax due. If the total or lines 5 and 8 is more than line 7, enter amount owed 9 Tax due. If the total or lines 5 and 8 is more than line 7, enter amount owed 10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid 11 Day Refunded ► 11 0. Part VIII-A Statements Regarding Activities 12 During the tax year, did the foundation attempt to influence any national, state, or local legislation or did typarcipate or intervene in any political campaign? 10 During the tax year, did the foundation attempt to influence any national, state, or local legislation or did typarcipate or intervene in any political campaign? 10 During the tax year, did the foundation attempt to influence any national, state, or local legislation or did typarcipate or intervene in any political campaign? 10 During the tax year, did the foundation and the foundation managers in any activities of the activities and copies of any materials published or distributed by the foundation or the activities and copies of any materials published or distributed or the calculation and published or the activities and copies of any materials published or distributed or the calculation and published or the activities. 10 Did				1.1		
5 Tax based on Investment income. Subtract line 4 from line 3. If zero or less, enter -0- 6 Credits/Payments. 2 2019 estimated tax payments and 2018 overpayment credited to 2019 b Exempt foreign organizations - tax withheld at source 1 Tax pad with application for extension of time to the (Form 8868) 6 Ba	4	 				
6 Credits/Payments, a 2019 estimated tx payments and 2018 overpayment credited to 2019 be xempt foreign organizations - tax withheld at source c Tax pad with application for extension of time to file (Form 8868) be 0. Total credits and payments. Add lines 6a through 6d Enter any penalty for underpayment of estimated tax. Check here if Form 2220 is attached Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed To overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid To overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid To overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid To overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid To overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid To overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid To overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid To overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid To overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid To overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid To overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid To overpayment if line 10 is lines 10	5			1.1	55.	
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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 4a Did the foundation have unrelated business gross income of \$1,000 or more during the year? b If "Yes," has it filed a tax return on Form 990-T for this year? Why A State a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T 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? 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 KY b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation 9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2019 or the tax year beginning in 2019? See the instructions for Part XIV. If "Yes," complete Part XIV 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	Has the foundation engaged in any activities that have not previously been reported to the IRS?	2		<u>X</u>	
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	10					
10111 444 : 120131	10	one way persons account account account contributors during the tax year? If the attach a schedule listing their names and addresses		0-PF (

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	DELMAS CLARDY MEMORIAL UNITRUST FBO			
	1990-PF (2019) KY WESLEYAN 61-61	<u>.88401</u>		Page 5
Pa	art 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		Х
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Х	
	Website address ► N/A			
14	The books are in care of ► INDEPENDENCE BANK Telephone no. ► 270 -	689-9	861	
		42302		
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - check here			$\overline{\Box}$
	and enter the amount of tax-exempt interest received or accrued during the year	N	I/A	_
16	At any time during calendar year 2019, did the foundation have an interest in or a signature or other authority over a bank,		Yes	No
	securities, or other financial account in a foreign country?	16		Х
	See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the	-	†	
	foreign country	•		
Pa	art 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	1
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	,		
•	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from)	•		
	a disqualified person?	_		
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? Yes X N	I	l	
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? Yes X N	l l	ŀ	
	(5) Transfer any income or assets to a disqualified person (or make any of either available	٠]		
	for the benefit or use of a disqualified person)?	_		
	(6) Agree to pay money or property to a government official? (Exception, Check "No"	٠		
	If the foundation agreed to make a grant to or to employ the official for a period after			
		_		
		•		1
D	of 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/F	. 	├ ─	
			\vdash	
_		_		1
С	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected	<u> </u>	 	
	before the first day of the tax year beginning in 2019?	1c	 -	Α,
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation			1
	defined in section 4942(j)(3) or 4942(j)(5)):			
а	At the end of tax year 2019, did the foundation have any undistributed income (Part XIII, lines			1
	6d and 6e) for tax year(s) beginning before 2019?	٥		
	If "Yes," list the years \(\bigsim_ \),,,,,			
b				1
	valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach	ļ 		لـــــا
	statement - see instructions.) N/P	2b	ļ	<u> </u>
	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			1
-	during the year?	,	1	
h	of "Yes," did it have excess business holdings in 2019 as a result of (1) any purchase by the foundation or disqualified persons after	-	1	
	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		1	
	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		
Aa	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		X
	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that	74	\vdash	 -
U	had not been removed from jeopardy before the first day of the tax year beginning in 2019?	4b	·	X
	nac not been removed from jeopardy before the first day of the tax year beginning in 2013.	40		_ 43

DELMAS CLARDY MEMORIAL UNITRUST FBO Form 990-PF (2019) KY WESLEYAN 61-6188401 Page 6 Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required (continued) Yes No 5a During the year, did the foundation pay or incur any amount to. (1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? Yes X No (2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, Yes X No any voter registration drive? Yes X No (3) Provide a grant to an individual for travel, study, or other similar purposes? (4) Provide a grant to an organization other than a charitable, etc., organization described in section Yes X No 4945(d)(4)(A)? See instructions (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 X 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 N/A expenditure responsibility for the grant? 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 Yes X No a personal benefit contract? X b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? 6b If "Yes" to 6b, file Form 8870. Yes X No 7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? 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 Yes X No excess parachute payment(s) during the year? 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. (d) Contributions to employee benefit plans and deferred compensation (b) Title, and average hours per week devoted (c) Compensation (e) Expense (If not paid, enter -0-) ccount, other (a) Name and address to position allowances BRANCH BANKING AND TRUST CO TRUSTEE 100 W 3RD ST OWENSBORO, ΚY 42303 1.00 3,491 0 0. INDEPENDENCE BANK TRUSTEE PO BOX 948 OWENSBORO, KY 42302-0948 16,506 0. 0. 1.00 2 Compensation of five highest-paid employees (other than those included on line 1), If none, enter "NONE." (d) Contributions to employee benefit plans and deferred compensation (b) Title, and average (e) Expense account, other (a) Name and address of each employee paid more than \$50,000 (c) Compensation hours per week devoted to position allowances NONE

> ► 0 Form **990-PF** (2019)

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

Form 990-PF (2019) KY WESLEYAN		188401 Page 7
Part VIII Information About Officers, Directors, Trustees, Foundat Paid Employees, and Contractors (continued)	ion Managers, Highly	
3 Five highest-paid independent contractors for professional services. If none, enter	"NONE."	
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
	_	
	-	
		
	-	
Total number of others receiving over \$50,000 for professional services		▶ 0
Part IX-A Summary of Direct Charitable Activities		
List the foundation's four largest direct charitable activities during the tax year. Include relevant statist number of organizations and other beneficiaries served, conferences convened, research papers produ		Expenses
1 N/A	ceu, etc.	
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 li	nes 1 and 2.	Amount
1 N/A		
2		
All other program-related investments. See instructions.		
3		
Total. Add lines 1 through 3	b	0.

0 . Form **990-PF** (2019)

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Page 8

ĮP.	art∤X■ Minimum Investment Return (All domestic foundations must complete this part. Foreign four	ndations	s, see instructions)
1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes.		" .
а		1a	1,995,302.
b	Average of monthly cash balances	1b	1,995,302. 228,504.
С	Fair market value of all other assets	10	
d	Total (add lines 1a, b, and c)	1d	2,223,806.
е	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	2,223,806.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	33,357.
5	Net value of noncharitable-use assets Subtract line 4 from line 3. Enter here and on Part V, line 4	5	2,190,449.
6	Minimum investment return. Enter 5% of line 5	6	109,522.
ĮP.	artiXI■ Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations ar foreign organizations, check here and do not complete this part.)	d certair	1
1	Minimum investment return from Part X, line 6	I 1 T	109,522.
2a			107,322
b	Income tax for 2019. (This does not include the tax from Part VI.)		
C	Add lines 2a and 2b	2c	1,155.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	108,367.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	108,367.
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	108,367.
_	art∤XII] Qualifying Distributions (see instructions)		
1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
а	Expenses, contributions, gifts, etc total from Part I, column (d), line 26	1a	109,767.
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:		
а	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	109,767.
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	109,767.
	Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation of 4940(e) reduction of tax in those years.	ualifies	for the section

Form **990-PF** (2019)

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,				108,367.
2 Undistributed income, if any, as of the end of 2019		-		
a Enter amount for 2018 only			109,767.	
b Total for prior years:		0.		
Excess distributions carryover, if any, to 2019.	- ,,	0.		
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 $4^{\cdot} \triangleright \$$ 109,767.				
a Applied to 2018, but not more than line 2a			109,767.	
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				0.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2019 (if an amount appears in column (d), the same amount must be shown in column (a))	0.			0.
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	0.			
b Prior years' undistributed income. Subtract				-
line 4b from line 2b		0.		
c Enter the amount of prior years'			*	
undistributed income for which a notice of deficiency has been issued, or on which				
the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b Taxable				· · · · · · · · · · · · · · · · · · ·
amount - see instructions		0.		
e Undistributed income for 2018. Subtract line	•			
4a from line 2a, Taxable amount - see instr.			0.	
f Undistributed income for 2019. Subtract				
lines 4d and 5 from line 1. This amount must				
be distributed in 2020				108,367.
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.			1
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				

Form 990-PF (2019) KY WESLEYAN 61-6188401 Page 10 Part XIV Private Operating Foundations (see instructions and Part VII-A, question 9) N/A 1 a If the foundation has received a ruling or determination Jetter that it is a private operating foundation, and the ruling is effective for 2019, enter the date of the ruling b Check box to indicate whether the foundation is a private operating foundation described in section 4942(i)(3) or 4942(1)(5 2 a Enter the lesser of the adjusted net Tax year Prior 3 years (a) 2019 (b) 2018 (c) 2017 (d) 2016 (e) Total income from Part I or the minimum investment return from Part X for each year listed b 85% of line 2a c Qualifying distributions from Part XII, line 4, for each year listed d Amounts included in line 2c not used directly for active conduct of exempt activities e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c Complete 3a, b, or c for the alternative test relied upon: a "Assets" alternative test - enter: (1) Value of all assets (2) Value of assets qualifying under section 4942(j)(3)(B)(i) b "Endowment" alternative test - enter 2/3 of minimum investment return shown in Part X, line 6, for each year listed c "Support" alternative test - enter (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)(HI) (3) Largest amount of support from an exempt organization (4) Gross investment income Supplementary Information (Complete this part only if the foundation had \$5,000 or more in assets Part XV at any time during the year-see instructions.) 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).) 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 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs: Check here 🕨 🗓 if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc., to individuals or organizations under other conditions, complete items 2a, b, c, and d, a The name, address, and telephone number or email address of the person to whom applications should be addressed; b The form in which applications should be submitted and information and materials they should include: c Any submission deadlines: d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors:

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Part XV Supplementary Information		<u> </u>	·	
3 Grants and Contributions Paid During the Ye Recipient	ar or Approved for Future I	Payment	<u> </u>	
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	or substantial contributor	recipion		 -
·				
ADDITIONAL MEGI DATA COLLEGE			TO DROWERS	·
KENTUCKY WESLEYAN COLLEGE 3000 FREDERICA ST		EXEMPT	TO PROVIDE SCHOLARSHIPS	
OWENSBORO, KY 42301				109,767
		-		
				<u> </u>
	,			
	,			•
,	,			
			<u> </u>	
•	·			
•		1		
1				
Total			▶ 3a	109,767
b Approved for future payment			·	
NONE				
NONE				
		i .	,	
		1		
	,			
Total	L	<u> </u>	▶ 3b	0

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er gross amounts unless otherwise indicated.	Unrelated	business income		by section 512, 513, or 514	(e)
	(a) Business	(b) Amount	(C) Exclu- sion	(d) Amount	Related or exemp
Program service revenue:	code		code	Amount	Turiction income
·	_		+ +		
<u> </u>	1 1				
<u> </u>	_			<u>.</u> .	
		 			
	_				
Fees and contracts from government agencies					
Membership dues and assessments	-				
nterest on savings and temporary cash					
nvestments			1.4	<u> </u>	
Dividends and interest from securities			14	61,118.	
et rental income or (loss) from real estate:				· - ·- · · · ·	
Debt-financed property	+				
Not debt-financed property					
let rental income or (loss) from personal					
property	-		1 1	4 1 2 4	
Other investment income	<u> </u>		14	4,124.	
Gain or (loss) from sales of assets other			1.0	14 447	
han inventory			18	14,447.	
let income or (loss) from special events					
Gross profit or (loss) from sales of inventory	-				
Other revenue:					
·	_				
					·
<u> </u>	_				
.	_			70 600	
		1.1	.	79,689.	
Subtotal. Add columns (b), (d), and (e)					
Total. Add line 12, columns (b), (d), and (e)				13	79,68
otal. Add line 12, columns (b), (d), and (e) worksheet in line 13 instructions to verify calculations.					79,6
otal. Add line 12, columns (b), (d), and (e) worksheet in line 13 instructions to verify calculations.					79,6
otal. Add line 12, columns (b), (d), and (e) worksheet in line 13 instructions to verify calculations. ITT XVI-B Relationship of Activities e No. Explain below how each activity for which in	to the Accom	nplishment of E	xempt Pu	ırposes	
otal. Add line 12, columns (b), (d), and (e) worksheet in line 13 instructions to verify calculations. IRT XVI-B Relationship of Activities e No. Explain below how each activity for which in	to the Accom	nplishment of E	xempt Pu	ırposes	
otal. Add line 12, columns (b), (d), and (e) worksheet in line 13 instructions to verify calculations. ITT XVI-B Relationship of Activities e No. Explain below how each activity for which in	to the Accom	nplishment of E	xempt Pu	ırposes	
otal. Add line 12, columns (b), (d), and (e) worksheet in line 13 instructions to verify calculations. ITT XVI-B Relationship of Activities e No. Explain below how each activity for which in	to the Accom	nplishment of E	xempt Pu	ırposes	
otal. Add line 12, columns (b), (d), and (e) worksheet in line 13 instructions to verify calculations. IT XVI-B Relationship of Activities e No. Explain below how each activity for which in	to the Accom	nplishment of E	xempt Pu	ırposes	
otal. Add line 12, columns (b), (d), and (e) worksheet in line 13 instructions to verify calculations. IT XVI-B Relationship of Activities e No. Explain below how each activity for which in	to the Accom	nplishment of E	xempt Pu	ırposes	
otal. Add line 12, columns (b), (d), and (e) worksheet in line 13 instructions to verify calculations. IT XVI-B Relationship of Activities e No. Explain below how each activity for which in	to the Accom	nplishment of E	xempt Pu	ırposes	
otal. Add line 12, columns (b), (d), and (e) worksheet in line 13 instructions to verify calculations. ITT XVI-B Relationship of Activities e No. Explain below how each activity for which in	to the Accom	nplishment of E	xempt Pu	ırposes	
otal. Add line 12, columns (b), (d), and (e) worksheet in line 13 instructions to verify calculations. IT XVI-B Relationship of Activities e No. Explain below how each activity for which in	to the Accom	nplishment of E	xempt Pu	ırposes	
otal. Add line 12, columns (b), (d), and (e) worksheet in line 13 instructions to verify calculations. ITT XVI-B Relationship of Activities e No. Explain below how each activity for which in	to the Accom	nplishment of E	xempt Pu	ırposes	
otal. Add line 12, columns (b), (d), and (e) worksheet in line 13 instructions to verify calculations. ITT XVI-B Relationship of Activities e No. Explain below how each activity for which in	to the Accom	nplishment of E	xempt Pu	ırposes	
otal. Add line 12, columns (b), (d), and (e) worksheet in line 13 instructions to verify calculations. THE XVI-B Relationship of Activities e No. Explain below how each activity for which in	to the Accom	nplishment of E	xempt Pu	ırposes	
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otal. Add line 12, columns (b), (d), and (e) worksheet in line 13 instructions to verify calculations. art XVI-B Relationship of Activities e No. Explain below how each activity for which in	to the Accom	nplishment of E	xempt Pu	ırposes	
otal. Add line 12, columns (b), (d), and (e) worksheet in line 13 instructions to verify calculations. art XVI-B Relationship of Activities e No. Explain below how each activity for which in	to the Accom	nplishment of E	xempt Pu	ırposes	
otal. Add line 12, columns (b), (d), and (e) worksheet in line 13 instructions to verify calculations. THE XVI-B Relationship of Activities e No. Explain below how each activity for which in	to the Accom	nplishment of E	xempt Pu	ırposes	

Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c)

Yes No

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[Part:XVII] Information Regarding Transfers to and Transactions and Relationships With Noncharitable **Exempt Organizations**

	(other that	an section 501(c)(3) organi	izations) or in section 527, relati	ng to political organizations?				
а	Transfers	s from the reporting founda	ition to a noncharitable exempt o	organization of:				
	(1) Cash	h					1a(1)	X
	(2) Othe	er assets					1a(2)	X
b	Other tra	nsactions;						
	(1) Sale:	s of assets to a noncharitab	ble exempt organization				1b(1)	X
	(2) Purc	chases of assets from a non	ncharitable exempt organization				1b(2)	X
	(3) Rent	tal of facilities, equipment, o	or other assets				1b(3)	X
	(4) Rein	nbursement arrangements					1b(4)	X
	(5) Loar	ns or loan guarantees					1b(5)	X
	(6) Perfe	ormance of services or mer	mbership or fundraising solicitat	tions			1b(6)	Х
C	Sharing o	of facilities, equipment, mai	iling lists, other assets, or paid e	mployees			10	Х
d	If the ans	swer to any of the above is '	"Yes," complete the following sc	hedule. Column (b) should alv	vays show the fair m	narket value of the goods, ot	her assets,	
	or service	es given by the reporting fo	oundation. If the foundation rece	ived less than fair market value	e in any transaction	or sharing arrangement, sho	w in	
	column ((d) the value of the goods, o	other assets, or services received	d				
a) Li	ne no	(b) Amount involved	(c) Name of noncharital	ole exempt organization	(d) Description	of transfers, transactions, and sh	aring arrangeme	nts
			N/A					
-								
			_	•				
2 a	Is the fou	indation directly or indirect	ly affiliated with, or related to, or	ne or more tax-exempt organiz	ations described	· · · · · · · · · · · · · · · · · · ·		
			n 501(c)(3)) or in section 527?				Yes X	. No
		complete the following sche						
		(a) Name of orga		(b) Type of organization	((c) Description of relationsh	ρ	
		N/A						
	Unde	r penalties of perjury, I declare th	hat I have examined this return, including	ng accompanying schedules and sta	itements, and to the bes	st of my knowledge May	the IRS discuss t	this
Siç	ın and p	perer, it is true correct, and com	plete Declaration of preparer (other in	an taxpayer) is based on all informati	ion of which preparer ha	return show	with the prepar n below? See in	er
He	re 🕨	Bu: KuDer	Hayden	3-11-20	Most.	Officer IX		No
	Sig	nature of officer or trustee		Date	Title			
		Print/Type preparer's nar	me Preparer's	signature	Date	Check If PTIN		
		JOSHUA D. N	MEYER,	- 0 -	.	self- employed		
Pa	id	CPA		2/35	5/8/20	P01	229485	
Pre	eparer		LHAR WHITEHEAD	, PLLC		Firm's EIN ► 27-26		
Us	e Only	1						
		Firm's address ► 10	0 WEST THIRD ST	TREET, SUITE 2	200			
			ENSBORO, KY 42:			Phone no. 270-92	6-2922	
				· - · · · - · · · · · · · · · · · · · ·			m 990-PF	(2019)

FORM 990-PF	DIVIDENDS	AND INTE	EREST	FROM SEC	URITIES S	STATEMENT 1
SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS		(A) REVENUE PER BOOKS	(B) NET INVEST- S MENT INCOME	
BB&T	9,170.		1.	9,169		
INDEPENDENCE BANK	54,248.		299.	51,949		_
TO PART I, LINE 4	63,418.	2,3	300.	61,118	61,118.	
FORM 990-PF		OTHER	INCO	ME	S	STATEMENT 2
DESCRIPTION		·		(A) VENUE BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
BB&T INDEPENDENCE BANK		_		72. 4,052.	72. 4,052.	
TOTAL TO FORM 990-F	F, PART I,	LINE 11 =		4,124.	4,124.	
FORM 990-PF		LEGA	L FE	ES		STATEMENT 3
DESCRIPTION		(A) EXPENSES PER BOOKS	NE	(B) T INVEST- NT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
LEGAL FEES		250	- -	250	•	0.
TO FM 990-PF, PG 1,	LN 16A	250). = =	250	•	0.
	···········					
FORM 990-PF		ACCOUNTING FEES		STATEMENT 4		
DESCRIPTION		(A) EXPENSES PER BOOKS	NE ME	(B) T INVEST- NT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING FEES	·	1,200		1,200.	· ·	0.
TO FORM 990-PF, PG	1, LN 16B.	1,200	<u> </u>	1,200.	•	0.
					=	

FORM 990-PF	TAX	ES	STATEMENT 5	
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FEDERAL TAXES FOREIGN TAXES	1,603. 488.	0.		0.
TO FORM 990-PF, PG 1, LN 18	2,091.	488.		0.
FORM 990-PF	OTHER EXPENSES		STATEMENT 6	
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
DESCRIPTION INVESTMENT FEES	EXPENSES	NET INVEST-	ADJUSTED	CHARITABLE

FORM 990-PF	CORPORATE STOCK		STATEMENT 7
DESCRIPTION		BOOK VALUE	FAIR MARKET VALUE
INDEPENDENCE BANK		1,275,926.	1,424,585.
TOTAL TO FORM 990-PF, PART II,	LINE 10B	1,275,926.	1,424,585.
FORM 990-PF	CORPORATE BONDS		STATEMENT 8
DESCRIPTION		BOOK VALUE	FAIR MARKET VALUE
INDEPENDENCE BANK		820,778.	849,367.
TOTAL TO FORM 990-PF, PART II,	LINE 10C	820,778.	849,367.