

For calendar year 2019, or tax year beginning 01-01-2019 , and ending 12-31-2019

Name of foundation ARLINGTON PARTNERS CHARITABLE FOUNDATION INC		A Employer identification number 63-1263667	
Number and street (or P.O. box number if mail is not delivered to street address) 2000 MORRIS AVENUE SUITE 1300		Room/suite	B Telephone number (see instructions) (205) 488-4300
City or town, state or province, country, and ZIP or foreign postal code BIRMINGHAM, AL 35203		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) ▶\$ 1,930,064	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 ☐

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)	415,282			
	2 Check ☐ if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments	3,472	3,472		
	4 Dividends and interest from securities	33,695	33,695		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	21,101			
	b Gross sales price for all assets on line 6a 735,792				
	7 Capital gain net income (from Part IV, line 2)		89,881		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances _____				
Operating and Administrative Expenses	b Less: Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)	307	307		
	12 Total. Add lines 1 through 11	473,857	127,355		
	13 Compensation of officers, directors, trustees, etc.	0	0		0
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)	10,684	5,342		5,342
	c Other professional fees (attach schedule)	11,530	11,530		0
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	5,425	238		0
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	277	0		277
	24 Total operating and administrative expenses. Add lines 13 through 23	27,916	17,110		5,619
	25 Contributions, gifts, grants paid	821,167			821,167
	26 Total expenses and disbursements. Add lines 24 and 25	849,083	17,110		826,786
	27 Subtract line 26 from line 12:				
	a Excess of revenue over expenses and disbursements	-375,226			
	b Net investment income (if negative, enter -0-)		110,245		
c Adjusted net income (if negative, enter -0-)					

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	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash—non-interest-bearing			
	2 Savings and temporary cash investments	1,622,016	597,296	597,296
	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 (attach schedule) ▶ _____ 266 Less: allowance for doubtful accounts ▶ _____ 0	842	266	266
	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)	627,638	1,272,681	1,332,502
	c Investments—corporate bonds (attach schedule)			
	11 Investments—land, buildings, and equipment: basis ▶ _____ Less: accumulated depreciation (attach schedule) ▶ _____			
	12 Investments—mortgage loans			
	13 Investments—other (attach schedule)			
	14 Land, buildings, and equipment: basis ▶ _____ Less: accumulated depreciation (attach schedule) ▶ _____			
15 Other assets (describe ▶ _____)				
16 Total assets (to be completed by all filers—see the instructions. Also, see page 1, item I)	2,250,496	1,870,243	1,930,064	
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	2,250,496	1,870,243	
	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			
	29 Total net assets or fund balances (see instructions)	2,250,496	1,870,243	
30 Total liabilities and net assets/fund balances (see instructions) .	2,250,496	1,870,243		

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	2,250,496
2 Enter amount from Part I, line 27a	2	-375,226
3 Other increases not included in line 2 (itemize) ▶ _____	3	68,780
4 Add lines 1, 2, and 3	4	1,944,050
5 Decreases not included in line 2 (itemize) ▶ _____	5	73,807
6 Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 29 .	6	1,870,243

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., 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.)
1 a ARLINGTON TRUST COMPANY	P	2017-01-01	2019-06-30
b ARLINGTON TRUST COMPANY	D	2019-01-01	2019-06-30
c CAPITAL GAINS DIVIDENDS	P		
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 557,109		543,987	13,122
b 173,347		101,924	71,423
c 5,336			5,336
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col.(h))
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a			13,122
b			71,423
c			5,336
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	89,881
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 does not qualify under section 4940(e). Do not complete this part.

1 Enter the appropriate amount in each column for each year; see 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	588,336	1,505,264	0.390852
2017	525,755	1,520,282	0.345827
2016	594,734	1,233,948	0.481977
2015	730,856	1,539,888	0.474616
2014	322,134	1,357,304	0.237334

2 Total of line 1, column (d)	2	1.930606
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	0.386121
4 Enter the net value of noncharitable-use assets for 2019 from Part X, line 5	4	2,106,095
5 Multiply line 4 by line 3	5	813,208
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	1,102
7 Add lines 5 and 6	7	814,310
8 Enter qualifying distributions from Part XII, line 4	8	826,786

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	1,102
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	1,102
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	1,102
6	Credits/Payments:		
a	2019 estimated tax payments and 2018 overpayment credited to 2019	6a	2,560
b	Exempt foreign organizations—tax withheld at source	6b	
c	Tax paid with application for extension of time to file (Form 8868)	6c	0
d	Backup withholding erroneously withheld	6d	0
7	Total credits and payments. Add lines 6a through 6d.	7	2,560
8	Enter any penalty for underpayment of estimated tax. Check here ☒ if Form 2220 is attached.	8	0
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	1,458
11	Enter the amount of line 10 to be: Credited to 2020 estimated tax ▶ 1,458 Refunded ▶	11	0

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	No
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? (see Instructions for definition). <i>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.</i>	1b	No
c Did the foundation file Form 1120-POL for this year?	1c	No
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. ▶ \$ 0 (2) On foundation managers. ▶ \$ 0		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ \$ 0		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If "Yes," attach a detailed description of the activities.</i>	2	No
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? <i>If "Yes," attach a conformed copy of the changes</i>	3	No
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a	No
b If "Yes," has it filed a tax return on Form 990-T for this year?	4b	
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If "Yes," attach the statement required by General Instruction T.</i>	5	No
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	Yes
7 Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col. (c), and Part XV.</i>	7	Yes
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ AL		
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? <i>If "No," attach explanation .</i>	8b	Yes
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 taxable year beginning in 2019? See the instructions for Part XIV. <i>If "Yes," complete Part XIV</i>	9	No
10 Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses.</i>	10	Yes

Part VII-A Statements Regarding Activities (continued)

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		No
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		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► <u>N/A</u>	13	Yes	
14	The books are in care of ► <u>KENNETH H POLK</u> Telephone no. ► <u>(205) 488-4300</u>			

Located at ► 2000 MORRIS AVENUE SUITE 1300 BIRMINGHAM ALZIP+4 ► 35203

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		
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	Yes	No
	See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes", enter the name of the foreign country ►			

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required**File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.**

		Yes	No
1a	During the year did the foundation (either directly or indirectly):		
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☒ No		
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No		
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No		
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☒ No		
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☒ No		
	(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) ☐ Yes ☒ No		
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions	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	No
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 (lines 6d and 6e, Part XIII) 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.)	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 Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2019.)	3b	
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	No
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	No

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		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?	☐ 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?	☐ Yes ☒ No	6b
	If "Yes" to 6b, file Form 8870.		No
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?	☐ Yes ☒ No	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 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, 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
KENNETH H POLK 2000 MORRIS AVENUE SUITE 1300 BIRMINGHAM, AL 35203	DIRECTOR 1.00	0	0	0
PETER E BARBER 2000 MORRIS AVENUE SUITE 1300 BIRMINGHAM, AL 35203	DIRECTOR 0.50	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
NONE				

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.		0

Part IX-A Summary of Direct Charitable Activities

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

	Expenses
1 FOUNDATION GRANTS TO QUALIFYING 501(C)(3) ORGANIZATIONS TO FURTHER THEIR TAX EXEMPT PURPOSE.	0
2	
3	
4	

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	0
2	
All other program-related investments. See instructions.	
3	
Total. Add lines 1 through 3	0

Part X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see instructions.)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities.	1a	1,500,144
b	Average of monthly cash balances.	1b	638,024
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	2,138,168
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	2,138,168
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	32,073
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	2,106,095
6	Minimum investment return. Enter 5% of line 5.	6	105,305

Part XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ☐ and do not complete this part.)

1	Minimum investment return from Part X, line 6.	1	105,305
2a	Tax on investment income for 2019 from Part VI, line 5.	2a	1,102
b	Income tax for 2019. (This does not include the tax from Part VI.).	2b	
c	Add lines 2a and 2b.	2c	1,102
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	104,203
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	104,203
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	104,203

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	826,786
b	Program-related investments—total from Part IX-B.	1b	0
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes.	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required).	3a	
b	Cash distribution test (attach the required schedule).	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	826,786
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	1,102
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	825,684

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				104,203
2 Undistributed income, if any, as of the end of 2019:				
a Enter amount for 2018 only.			0	
b Total for prior years: 20____, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2019:				
a From 2014.	261,628			
b From 2015.	655,588			
c From 2016.	534,867			
d From 2017.	463,083			
e From 2018.	515,595			
f Total of lines 3a through e.	2,430,761			
4 Qualifying distributions for 2019 from Part XII, line 4: ► \$ 826,786				
a Applied to 2018, but not more than line 2a			0	
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.				104,203
e Remaining amount distributed out of corpus	722,583			
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	3,153,344			
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 instructions.			0	
f Undistributed income for 2019. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2020.				0
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 (see instructions).	261,628			
9 Excess distributions carryover to 2020. Subtract lines 7 and 8 from line 6a.	2,891,716			
10 Analysis of line 9:				
a Excess from 2015.	655,588			
b Excess from 2016.	534,867			
c Excess from 2017.	463,083			
d Excess from 2018.	515,595			
e Excess from 2019.	722,583			

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. ▶

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

2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed

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

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.

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:

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:

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i> See Additional Data Table				
Total			▶ 3a	821,167
b <i>Approved for future payment</i>				
Total			▶ 3b	0

Enter gross amounts unless otherwise indicated.

Enter gross amounts unless otherwise indicated.	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions.)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue:					
a _____					
b _____					
c _____					
d _____					
e _____					
f _____					
g Fees and contracts from government agencies					
2 Membership dues and assessments.					
3 Interest on savings and temporary cash investments			14	3,472	
4 Dividends and interest from securities.			14	33,695	
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.			14	307	
8 Gain or (loss) from sales of assets other than inventory			18	21,101	
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		58,575	0
13 Total. Add line 12, columns (b), (d), and (e). (See worksheet in line 13 instructions to verify calculations.)			13		58,575

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

[illegible]

Part XVII

		Yes	No
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--	--	--

1a(1)		No
1a(2)		No

--	--	--

1b(1)	No
--------------	-----------

1b(2)		No
--------------	--	-----------

1b(3)		No
--------------	--	-----------

1b(4)		No
--------------	--	-----------

1b(5)	No
--------------	-----------

1b(6)		No
--------------	--	-----------

1c		No
-----------	--	-----------

value
ue

[illegible]

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

Sign Here ***** _____ Signature of officer or trustee	2020-06-01 _____ Date	***** _____ Title
--	--	--

May the IRS discuss this return with the preparer shown below

(see instr.) ☒ **Yes** ☐ **No**

Paid Preparer Use Only	GREG P LOGAN		2020-06-01	
	Firm's name ► ARLINGTON ASSOCIATES LLC			Firm's EIN ► 20-1365485
	Firm's address ► 2000 MORRIS AVENUE SUITE 1200 BIRMINGHAM, AL 35203			Phone no. (205) 488-4330

May the IRS discuss this return with the preparer shown below

(see instr.) ☒ **Yes** ☐ **No**

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
2 POLARITIES170 SUTALEE RIDGE WAY WHITE, GA 30184	NONE	PUBLIC CHARITY	GENERAL PURPOSE	1,000
ADVANCING THE MOVEMENT ANOTHER 50 YEARS 2800 MONTESSORI WAY BIRMINGHAM, AL 35209	NONE	EDUCATION	GENERAL PURPOSE	50,000
ALABAMA POSSIBLEPO BOX 55058 BIRMINGHAM, AL 35255	NONE	PUBLIC CHARITY	GENERAL PURPOSE	1,000
Total ▶ 3a				821,167

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
ALABAMA RIVERS ALLIANCE 2014 6TH AVENUE NORTH STE 200 BIRMINGHAM, AL 35203	NONE	PUBLIC CHARITY	GENERAL PURPOSE	5,000
ALABAMA SYMPHONY ORCHESTRA 3621 6TH AVENUE SOUTH BIRMINGHAM, AL 352222407	NONE	PUBLIC CHARITY	GENERAL PURPOSE	11,000
ANOTHER INITIATIVE FOR INDEPENDENT JOURNALISM 147 GLENVIEW DRIVE BIRMINGHAM, AL 35213	NONE	PUBLIC CHARITY	GENERAL PURPOSE	1,000
Total ▶ 3a				821,167

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
ATEAM MINISTRIES 1809 OXMOOR ROAD HOMEWOOD, AL 35209	NONE	RELIGIOUS	GENERAL PURPOSE	600
BEREA COLLEGE AFRICAN AMERICAN OPPORTUNITY CPO 2216 LINCOLN HALL 209 CHESTNUT STREET BEREA, KY 40404	NONE	EDUCATION	GENERAL PURPOSE	25,000
BIRMINGHAM BOTANICAL SOCIETY INC 2612 LANE PARK ROAD BIRMINGHAM, AL 35223	NONE	PUBLIC CHARITY	GENERAL PURPOSE	5,000
Total ▶ 3a				821,167

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
BIRMINGHAM EDUCATION FOUNDATION PO BOX 1476 BIRMINGHAM, AL 35201	NONE	EDUCATION	GENERAL PURPOSE	2,000
BIRMINGHAM MUSEUM OF ART 2000 REV ABRAHAM WOODS JR BLVD BIRMINGHAM, AL 35203	NONE	PUBLIC CHARITY	GENERAL PURPOSE	20,000
BLACK WARRIOR RIVERKEEPER INC 712 37TH STREET SOUTH BIRMINGHAM, AL 35222	NONE	PUBLIC CHARITY	GENERAL PURPOSE	10,000
Total ▶ 3a				821,167

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
BUILD UP GRANT1240 18TH AVE S BIRMINGHAM, AL 35205	NONE	PUBLIC CHARITY	GENERAL PURPOSE	10,000
CHATTANOOGA PREPARATORY SCHOOL PO BOX 3809 CHATTANOOGA, TN 37404	NONE	EDUCATION	GENERAL PURPOSE	5,000
CHILDCARE RESOURCES 244 WEST VALLEY AVE STE 200 BIRMINGHAM, AL 35209	NONE	PUBLIC CHARITY	GENERAL PURPOSE	1,500
Total ▶ 3a				821,167

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
CHURCH AT BROOKHILLS 3145 BROOK HIGHLAND PKWY BIRMINGHAM, AL 35242	NONE	RELIGIOUS	GENERAL PURPOSE	10,000
CHURCH OF THE HIGHLANDS 4700 HIGHLANDS WAY BIRMINGHAM, AL 352103454	NONE	RELIGIOUS	GENERAL PURPOSE	60,663
COMPASSION OUTREACH MINISTRIES 2320 WOODLAND CIRCLE BIRMINGHAM, AL 35242	NONE	RELIGIOUS	GENERAL PURPOSE	500
Total ▶ 3a				821,167

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
CRUPO BOX 628222 ORLANDO, FL 328628222	NONE	RELIGIOUS	GENERAL PURPOSE	1,000
EVANGELICAL CHRISTIAN SCHOOL OF MEMPHIS 7600 MACON ROAD CORDOVA, TN 38018	NONE	EDUCATION	GENERAL PURPOSE	5,000
EYE TO EYE 50 BORAD STREET SUITE 1702 NEW YORK, NY 10004	NONE	PUBLIC CHARITY	GENERAL PURPOSE	3,948
Total ► 3a				821,167

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
FELLOWSHIP OF CHRISTIAN ATHLETES PO BOX 3345 OXFORD, AL 36203	NONE	RELIGIOUS	GENERAL PURPOSE	500
FRESH AIR FAMILY INCPO BOX 321038 BIRMINGHAM, AL 35232	NONE	PUBLIC CHARITY	GENERAL PURPOSE	1,000
FUND FOR THE NEW SCHOOL 4820 NAUTILUS CT N BOULDER, CO 80301	NONE	EDUCATION	GENERAL PURPOSE	1,000
Total ▶ 3a				821,167

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
GASP2320 HIGHLAND AVE S SUITE 270 BIRMINGHAM, AL 35205	NONE	PUBLIC CHARITY	GENERAL PURPOSE	10,000
GRACE HOUSE MINISTRIES INC 4923 FARRELL AVENUE FAIRFIELD, AL 35064	NONE	RELIGIOUS	GENERAL PURPOSE	1,000
GW CARVER2416 DOLLY RIDGE ROAD VESTAVIA HILLS, AL 35243	NONE	PUBLIC CHARITY	GENERAL PURPOSE	500
Total ▶ 3a				821,167

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
HARDING UNIVERSITY FOOTBALL BOX 12281 SEARCY, AR 72149	NONE	PUBLIC CHARITY	GENERAL PURPOSE	12,000
HELPING HANDS MINISTRYPO BOX 337 TALLULAH FALLS, GA 30573	NONE	RELIGIOUS	GENERAL PURPOSE	3,240
HISPANIC INTEREST COALITION OF AL PO BOX 190299 BIRMINGHAM, AL 35219	NONE	PUBLIC CHARITY	GENERAL PURPOSE	10,000
Total ► 3a				821,167

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
HOLY FAMILY CRISTO REY CATHOLIC HIGH SCHOOL 2001 19TH STREET ENSLEY, AL 35218	NONE	EDUCATION	GENERAL PURPOSE	27,750
HOLY ROSARY CATHOLIC CHURCH 7414 GEORGIA ROAD BIRMINGHAM, AL 35212	NONE	RELIGIOUS	GENERAL PURPOSE	6,700
JH RANCH 402 OFFICE PARK DRIVE SUITE 310 BIRMINGHAM, AL 35223	NONE	PUBLIC CHARITY	GENERAL PURPOSE	4,000
Total ▶ 3a				821,167

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
JONES VALLEY TEACHING FARM 701 25TH STREET NORTH BIRMINGHAM, AL 35203	NONE	EDUCATION	GENERAL PURPOSE	50,000
KRASL ART CENTER INC 707 LAKE BOULEVARD ST JOSEPH, MI 49085	NONE	PUBLIC CHARITY	GENERAL PURPOSE	20,000
MAGIC CITY WOODWORKS 976 ALFORD AVENUE BIRMINGHAM, AL 35226	NONE	PUBLIC CHARITY	GENERAL PURPOSE	20,000
Total ▶ 3a				821,167

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
MICHAEL J FOXX FOUNDATION PO BOX 4777 GRAND CENTRAL STATION NEW YORK, NY 10163	NONE	RESEARCH	GENERAL PURPOSE	100
MOUNTAIN BROOK HIGH SCHOOL 3650 BETHUNE DRIVE MOUNTAIN BROOK, AL 35223	NONE	EDUCATION	GENERAL PURPOSE	7,000
MOUNTAIN BROOK SPORTS CORPORATION 2019 3RD AVE N BIRMINGHAM, AL 35209	NONE	PUBLIC CHARITY	GENERAL PURPOSE	5,000
Total ▶ 3a				821,167

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
MWANA VILLAGES US INC 3360 DUNBROOKE DRIVE BIRMINGHAM, AL 35243	NONE	PUBLIC CHARITY	GENERAL PURPOSE	3,500
PEARL MINISTRIES INCPO BOX 610537 BIRMINGHAM, AL 35261	NONE	RELIGIOUS	GENERAL FUND	2,000
PRESBYTERIAN HOME FOR CHILDREN P O DRAWER 577 TALLADEGA, AL 35161	NONE	PUBLIC CHARITY	GENERAL PURPOSE	2,000
Total ▶ 3a				821,167

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
RAZORBACK FOUNDATION INC 1295 S RAZORBACK RD STE A FAYETTEVILLE, AR 72701	NONE	PUBLIC CHARITY	GENERAL PURPOSE	800
RESTORATION ACADEMY INC 4600 CARNEGIE AVENUE FAIRFIELD, AL 35064	NONE	EDUCATION	GENERAL PURPOSE	51,000
RETOUCH INC PO BOX 671104 MARIETTA, GA 30062	NONE	PUBLIC CHARITY	GENERAL PURPOSE	2,000
Total ▶ 3a				821,167

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
SAM FOUNDATIONPO BOX 680003 FT PAYNE, AL 35968	NONE	RESEARCH	GENERAL PURPOSE	2,000
SAMARITAN'S PURSEPO BOX 3000 BOONE, NC 28607	NONE	RELIGIOUS	GENERAL PURPOSE	100,000
SHADES MOUNTAIN BAPTIST CHURCH 2017 COLUMBIANA ROAD VESTAVIA HILLS, AL 35216	NONE	RELIGIOUS	GENERAL PURPOSE	10,000
Total ▶ 3a				821,167

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
SOUTHERN ENVIRONMENTAL LAW CENTER 201 WEST MAIN STREET SUITE 14 CHARLOTTESVILLE, VA 229025065	NONE	PUBLIC CHARITY	GENERAL PURPOSE	25,000
SPIRIT OF AMERICAPO BOX 8915 CHATTANOOGA, TN 37421	NONE	PUBLIC CHARITY	GENERAL PURPOSE	5,000
TEACH FOR AMERICA IN NY 2301 1ST AVENUE NORTH SUITE 105 BIRMINGHAM, AL 35203	NONE	PUBLIC CHARITY	GENERAL PURPOSE	10,000
Total ▶ 3a				821,167

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
UAB ATHLETIC FOUNDATION 701 20TH STREET S SUITE AB 1230 BIRMINGHAM, AL 352829885	NONE	PUBLIC CHARITY	GENERAL PURPOSE	30,000
UAB COMPREHENSIVE CANCER CENTER 1720 2ND AVE SOUTH BIRMINGHAM, AL 352943300	NONE	RESEARCH	GENERAL PURPOSE	20,000
UNITED WAY OF CENTRAL ALABAMA PO BOX 320189 BIRMINGHAM, AL 352320189	NONE	PUBLIC CHARITY	GENERAL PURPOSE	30,000
Total ▶ 3a				821,167

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
UNIVERSITY OF ALABAMA 450 ALSTON HALL BOX 870223 TUSCALOOSA, AL 354870223	NONE	EDUCATION	GENERAL PURPOSE	10,000
URBAN PURPOSE INCPO BOX 660373 BIRMINGHAM, AL 35226	NONE	PUBLIC CHARITY	GENERAL PURPOSE	10,000
VAPOR 12TH MAN PROGRAM 4 BOYS 338 TALLADEGA SPRINGS ROAD SYLACAUGA, AL 35151	NONE	PUBLIC CHARITY	GENERAL PURPOSE	2,736
Total ► 3a				821,167

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
VAPOR SPORTS MINISTRIES 338 TALLADEGA SPRINGS ROAD SYLACAUGA, AL 35151	NONE	RELIGIOUS	GENERAL PURPOSE	10,000
VENTURE FOR AMERICA 307 7TH AVE STE 1201 NEW YORK, NY 10001	NONE	PUBLIC CHARITY	GENERAL PURPOSE	25,000
WBHM650 11TH STREET S BIRMINGHAM, AL 35294	NONE	RELIGIOUS	GENERAL PURPOSE	1,000
Total ▶ 3a				821,167

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
WOODLAWN FOUNDATION 5529 1ST AVENUE SOUTH BIRMINGHAM, AL 35212	NONE	PUBLIC CHARITY	GENERAL PURPOSE	25,000
YALE UNIVERSITYPO BOX 2038 NEW HAVEN, CT 065212038	NONE	EDUCATION	GENERAL PURPOSE	34,880
YMCA OF GREATER MONTGOMERY PO BOX 2336 MONTGOMERY, AL 36102	NONE	PUBLIC CHARITY	GENERAL PURPOSE	250
Total ▶ 3a				821,167

TY 2019 Accounting Fees Schedule

Name: ARLINGTON PARTNERS CHARITABLE
FOUNDATION INC

EIN: 63-1263667

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING FEES	10,684	5,342		5,342

TY 2019 Investments Corporate Stock Schedule

Name: ARLINGTON PARTNERS CHARITABLE
FOUNDATION INC

EIN: 63-1263667

Investments Corporation Stock Schedule

Name of Stock	End of Year Book Value	End of Year Fair Market Value
MARKETABLE SECURITIES	1,272,681	1,332,502

TY 2019 Other Decreases Schedule

Name: ARLINGTON PARTNERS CHARITABLE
FOUNDATION INC

EIN: 63-1263667

Description	Amount
FMV IN EXCESS OF COST- DONATED STOCK CONTRIBUTED IN CURRENT YEAR	73,807

TY 2019 Other Expenses Schedule

Name: ARLINGTON PARTNERS CHARITABLE
FOUNDATION INC

EIN: 63-1263667

Other Expenses Schedule

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INSURANCE	265	0		265
POSTAGE & MAILING	12	0		12

TY 2019 Other Income Schedule

Name: ARLINGTON PARTNERS CHARITABLE
FOUNDATION INC

EIN: 63-1263667

Other Income Schedule

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
ARLINGTON TRUST COMPANY-OTHER INCOME	307	307	307

TY 2019 Other Increases Schedule

Name: ARLINGTON PARTNERS CHARITABLE
FOUNDATION INC

EIN: 63-1263667

Description	Amount
FMV IN EXCESS OF COST- DONATED STOCK SOLD IN CURRENT YEAR	68,780

TY 2019 Other Professional Fees Schedule

Name: ARLINGTON PARTNERS CHARITABLE
FOUNDATION INC

EIN: 63-1263667

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
CUSTODY FEES	6,203	6,203		0
INVESTMENT MANAGEMENT FEES	5,327	5,327		0

**TY 2019 Substantial Contributors
Schedule**

Name: ARLINGTON PARTNERS CHARITABLE
FOUNDATION INC

EIN: 63-1263667

Name	Address
DOUG COLTHARP	2736 ABINGDON ROAD MOUNTAIN BROOK, AL 35213

TY 2019 Taxes Schedule

Name: ARLINGTON PARTNERS CHARITABLE
FOUNDATION INC

EIN: 63-1263667

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOREIGN TAXES	238	238		0
FEDERAL EXCISE TAXES	5,187	0		0

Schedule B (Form 990, 990-EZ, or 990-PF) Department of the Treasury Internal Revenue Service	Schedule of Contributors ▶ Attach to Form 990, 990-EZ, or 990-PF. ▶ Go to <u>www.irs.gov/Form990</u> for the latest information.	OMB No. 1545-0047 2019
	Name of the organization ARLINGTON PARTNERS CHARITABLE FOUNDATION INC	Employer identification number 63-1263667

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 other 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 33¹/₃% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of **(1)** \$5,000 or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I, II, and III.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Don't complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling \$5,000 or more during the year ▶ \$ _____

Caution: An organization that isn't covered by the General Rule and/or the Special Rules doesn't file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2, of its Form 990; or check the box on line H of its Form 990-EZ or on its Form 990PF, 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 ARLINGTON PARTNERS CHARITABLE FOUNDATION INC	Employer identification number 63-1263667
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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
—	See Additional Data Table _____ _____	\$ _____	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contribution.)
—	_____ _____ _____	\$ _____	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contribution.)
—	_____ _____ _____	\$ _____	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contribution.)
—	_____ _____ _____	\$ _____	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contribution.)
—	_____ _____ _____	\$ _____	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contribution.)
—	_____ _____ _____	\$ _____	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contribution.)
—	_____ _____ _____	\$ _____	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contribution.)
—	_____ _____ _____	\$ _____	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contribution.)

Name of organization
ARLINGTON PARTNERS CHARITABLE
FOUNDATION INC

Employer identification number

63-1263667

Part II **Noncash Property**

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
1	VARIOUS SECURITIES	\$ 116,299	2019-02-08
3	2,150 SHS CENTERSTATE BANK STOCK	\$ 54,406	2019-11-20
7	980 SHS DFA US CORE EQUITY 1	\$ 25,137	2019-12-17
-		\$	
-		\$	
-		\$	

63-1263667

Part III Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of *exclusively* religious, charitable, etc., contributions of **\$1,000 or less** for the year. (Enter this information once. See instructions.) ▶ \$ _____
Use duplicate copies of Part III if additional space is needed.

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

Additional Data

Software ID:
Software Version:
EIN: 63-1263667
Name: ARLINGTON PARTNERS CHARITABLE
FOUNDATION INC

Form 990 Schedule B, 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
<u>1</u>	DANIEL AND BROOKE COLEMAN	\$ 116,299	Person ☒
	3536 REDMONT ROAD		Payroll ☐
	BIRMINGHAM, AL 35213		Noncash ☒ (Complete Part II for noncash contribution.)
<u>2</u>	DONALD AND MONA WRIGHT	\$ 40,000	Person ☒
	224 WILSONIA AVENUE		Payroll ☐
	NASHVILLE, TN 37205		Noncash ☐ (Complete Part II for noncash contribution.)
<u>3</u>	DOUGLAS COLTHARP	\$ 54,406	Person ☒
	2736 ABINGDON ROAD		Payroll ☐
	MOUNTAIN BROOK, AL 35243		Noncash ☒ (Complete Part II for noncash contribution.)
<u>4</u>	STEVEN GRIFFIN	\$ 95,000	Person ☒
	2000 MORRIS AVENUE SUITE 1400		Payroll ☐
	BIRMINGHAM, AL 35203		Noncash ☐ (Complete Part II for noncash contribution.)
<u>5</u>	SHEGUN AND MARY OTULANA	\$ 50,000	Person ☒
	808 WINGATE CIRCLE		Payroll ☐
	HOMEWOOD, AL 35209		Noncash ☐ (Complete Part II for noncash contribution.)
<u>6</u>	STEVE AND LEIGH ANN HINES	\$ 33,500	Person ☒
	2640 MONTAUK ROAD		Payroll ☐
	HOOVER, AL 35226		Noncash ☐ (Complete Part II for noncash contribution.)

Form 990 Schedule B, 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
7	MARK AND JENNIFER TARR	\$ 25,137	Person ☒
	4158 APPOMATTOX LANE		Payroll ☐
	MOUNTAIN BROOK, AL 35213		Noncash ☒
			(Complete Part II for noncash contribution.)