

For calendar year 2020, or tax year beginning 01-01-2020, and ending 12-31-2020

Name of foundation ROBINS JR E CLAIBORNE CHAR AGY		A Employer identification number 32-6140103	
Number and street (or P.O. box number if mail is not delivered to street address) 9878 MAYLAND DRIVE		Room/suite	
City or town, state or province, country, and ZIP or foreign postal code RICHMOND, VA 23233		B Telephone number (see instructions) (804) 935-7223	
G Check all that apply: <div><input type="checkbox"/> Initial return<input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Final return<input type="checkbox"/> Amended return <input checked="" type="checkbox"/> Address change<input type="checkbox"/> Name change</div>		C If exemption application is pending, check here <input type="checkbox"/> D 1. Foreign organizations, check here..... <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation ... <input type="checkbox"/>	
H Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>	
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ▶ \$ 45,413,153		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>	
J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ (Part I, column (d) must be on cash basis.)			

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)				
	2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities . . .	955,495	955,495		
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	600,279			
	b Gross sales price for all assets on line 6a				
	8,956,211				
	7 Capital gain net income (from Part IV, line 2) . . .		600,279		
	8 Net short-term capital gain				
	9 Income modifications				
Operating and Administrative Expenses	10a Gross sales less returns and allowances				
	b Less: Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)	327	327		
	12 Total. Add lines 1 through 11	1,556,101	1,556,101		
	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)	1,400	0		1,400
	c Other professional fees (attach schedule)	140,912	140,912		0
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	22,032	3,003		0
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)				
	24 Total operating and administrative expenses. Add lines 13 through 23	164,344	143,915		1,400
	25 Contributions, gifts, grants paid	1,984,000			1,984,000
	26 Total expenses and disbursements. Add lines 24 and 25	2,148,344	143,915		1,985,400
	27 Subtract line 26 from line 12:				
	a Excess of revenue over expenses and disbursements	-592,243			
	b Net investment income (if negative, enter -0-)		1,412,186		
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	16,187	26,283	26,283
	2 Savings and temporary cash investments	3,783,717	4,317,140	4,317,140
	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) ▶ _____ Less: allowance for doubtful accounts ▶ _____			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments—U.S. and state government obligations (attach schedule)	4,554,510	3,320,359	3,507,189
	b Investments—corporate stock (attach schedule)	17,301,652	16,428,610	28,695,752
	c Investments—corporate bonds (attach schedule)	7,486,175	7,946,125	8,273,435
	11 Investments—land, buildings, and equipment: basis ▶ _____ Less: accumulated depreciation (attach schedule) ▶ _____			
	12 Investments—mortgage loans			
	13 Investments—other (attach schedule)	358,200	588,977	593,354
	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)	33,500,441	32,627,494	45,413,153	
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 ▶ <input type="checkbox"/> and complete lines 24, 25, 29 and 30.			
	24 Net assets without donor restrictions			
	25 Net assets with donor restrictions			
	Foundations that do not follow FASB ASC 958, check here ▶ <input checked="" type="checkbox"/> and complete lines 26 through 30.			
	26 Capital stock, trust principal, or current funds	33,500,441	32,627,494	
	27 Paid-in or capital surplus, or land, bldg., and equipment fund	0	0	
	28 Retained earnings, accumulated income, endowment, or other funds	0	0	
29 Total net assets or fund balances (see instructions)	33,500,441	32,627,494		
30 Total liabilities and net assets/fund balances (see instructions) .	33,500,441	32,627,494		

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	33,500,441
2 Enter amount from Part I, line 27a	2	-592,243
3 Other increases not included in line 2 (itemize) ▶ _____	3	0
4 Add lines 1, 2, and 3	4	32,908,198
5 Decreases not included in line 2 (itemize) ▶ _____	5	280,704
6 Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 29 .	6	32,627,494

2	Capital gain net income or (net capital loss)	<div style="border-left: 1px solid black; border-right: 1px solid black; padding: 0 5px;"> If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 </div>	2	600,279
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	<div style="border-left: 1px solid black; border-right: 1px solid black; padding: 0 5px;"> </div>	3	

1 Reserved									
(a) Reserved		(b) Reserved		(c) Reserved		(d) Reserved			
2 Reserved						2			
3 Reserved.						3			
4 Reserved						4			
5 Reserved						5			
6 Reserved						6			
7 Reserved						7			
8 Reserved ,						8			

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 <input type="checkbox"/> and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary—see instructions)		
b	Reserved.	1	19,629
c	All other domestic foundations enter 1.39% 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	19,629
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	19,629
6	Credits/Payments:		
a	2020 estimated tax payments and 2019 overpayment credited to 2020	6a	8,942
b	Exempt foreign organizations—tax withheld at source	6b	0
c	Tax paid with application for extension of time to file (Form 8868)	6c	0
d	Backup withholding erroneously withheld	6d	0
7	Total credits and payments. Add lines 6a through 6d.	7	8,942
8	Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached.	8	27
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed .	9	10,714
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid .	10	
11	Enter the amount of line 10 to be: Credited to 2021 estimated tax <input type="checkbox"/> Refunded <input type="checkbox"/>	11	

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a	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. <input type="text"/> \$ <u>0</u> (2) On foundation managers. <input type="text"/> \$ <u>0</u>		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. <input type="text"/> \$ <u>0</u>		
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) <input type="text"/> VA		
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 2020 or the taxable year beginning in 2020? 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	No

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>WELLS FARGO BANK NA</u> Telephone no. ▶ <u>(855) 739-2921</u>			

Located at ▶ 100 N MAIN ST FL 6 D4001-065 WINSTON SALEM NC ZIP+4 ▶ 271013818

15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —check here ▶ <input type="checkbox"/>			
	and enter the amount of tax-exempt interest received or accrued during the year ▶ 15			
16	At any time during calendar year 2020, 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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
	(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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 <input type="checkbox"/>	1b	
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 2020?	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 2020, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2020? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b	If "Yes," did it have excess business holdings in 2020 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 2020.)	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 2020?	4b	No

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

5a	During the year did the foundation pay or incur any amount to:		Yes	No
(1)	Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(2)	Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(3)	Provide a grant to an individual for travel, study, or other similar purposes?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(4)	Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions.	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(5)	Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b	If any answer is "Yes" to 5a(1)–(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance? See instructions		5b	
	Organizations relying on a current notice regarding disaster assistance check here.	<input type="checkbox"/>		
c	If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?	<input type="checkbox"/> Yes <input type="checkbox"/> No		
	<i>If "Yes," attach the statement required by Regulations section 53.4945–5(d).</i>			
6a	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	6b	No
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?			
	<i>If "Yes" to 6b, file Form 8870.</i>			
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		7b	
b	If "Yes", did the foundation receive any proceeds or have any net income attributable to the transaction?			
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?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors

1 List all officers, directors, trustees, 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
E CLAIBORNE ROBINS JR 9878 MAYLAND DRIVE RICHMOND, VA 23233	TRUSTEE 5.00	0	0	0
2 Compensation of five highest-paid employees (other than those included on line 1—see instructions). If none, enter "NONE."				
(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
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".

[illegible]

Total number of others receiving over \$50,000 for professional services.	0
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Part IX-A	Summary of Direct Charitable Activities
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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

generations and other phenomena (e.g., convergent synthesis, research paper produced, etc.)	
1	
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	
2	
All other program-related investments. See instructions.	
3	

[illegible]

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	41,135,107
b	Average of monthly cash balances.	1b	7,223
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	41,142,330
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	41,142,330
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	617,135
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	40,525,195
6	Minimum investment return. Enter 5% of line 5.	6	2,026,260

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	2,026,260
2a	Tax on investment income for 2020 from Part VI, line 5.	2a	19,629
b	Income tax for 2020. (This does not include the tax from Part VI.).	2b	
c	Add lines 2a and 2b.	2c	19,629
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	2,006,631
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	2,006,631
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	2,006,631

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	1,985,400
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	1,985,400
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	0
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	1,985,400

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 2019	(c) 2019	(d) 2020
1 Distributable amount for 2020 from Part XI, line 7				2,006,631
2 Undistributed income, if any, as of the end of 2020:				
a Enter amount for 2019 only.			1,983,703	
b Total for prior years: 20____, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2020:				
a From 2015.				
b From 2016.				
c From 2017.				
d From 2018.				
e From 2019.				
f Total of lines 3a through e.	0			
4 Qualifying distributions for 2020 from Part XII, line 4: ► \$ 1,985,400				
a Applied to 2019, but not more than line 2a			1,983,703	
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 2020 distributable amount.				1,697
e Remaining amount distributed out of corpus	0			
5 Excess distributions carryover applied to 2020.	0			0
(If an amount appears in column (d), the same amount must be shown in column (a).)				
6 Enter the net total of each column as indicated below:	0			
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5				
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 2019. Subtract line 4a from line 2a. Taxable amount—see instructions.			0	
f Undistributed income for 2021. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2020.				2,004,934
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 2015 not applied on line 5 or line 7 (see instructions).	0			
9 Excess distributions carryover to 2021. Subtract lines 7 and 8 from line 6a.	0			
10 Analysis of line 9:				
a Excess from 2016.				
b Excess from 2017.				
c Excess from 2018.				
d Excess from 2019.				
e Excess from 2020.				

Part XIV

- 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.)

Inform

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				1,984,000
b <i>Approved for future payment</i>				
Total ▶ 3b				0

Enter gross amounts unless otherwise indicated.

	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	(e) (See instructions.)
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					
4 Dividends and interest from securities. . . .			14	955,495	
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	327	
8 Gain or (loss) from sales of assets other than inventory			18	600,279	
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		1,556,101	0
13 Total. Add line 12, columns (b), (d), and (e). (See worksheet in line 13 instructions to verify calculations.)			13	1,556,101	1,556,101

[illegible]

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

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

[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	Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.		
	*****	2021-08-02	*****
	_____ Signature of officer or trustee	_____ Date	_____ Title

May the IRS discuss this return with the preparer shown below
 (see instr.) ☒ **Yes** ☐ **No**

Paid Preparer Use Only	Print/Type preparer's name	Preparer's Signature	Date	Check if self-employed <input type="checkbox"/>	PTIN
	JACLYN WOOD CPA		2021-08-02		P00743448
	Firm's name ▶ RSM US LLP				Firm's EIN ▶ 42-0714325
	Firm's address ▶ 919 EAST MAIN STREET SUITE 1800 RICHMOND, VA 23219				Phone no. (804) 282-2121

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>				
SAINT BRIDGET SCHOOL 6011 YORK ROAD RICHMOND, VA 23226		PC	TO FURTHER THE EXEMPT PURPOSE OF THE ORGANIZATION	170,000
THE CARMEL SCHOOL 9020 JERICHO ROAD PO BOX 605 RUTHER GLEN, VA 22546		PC	TO FURTHER THE EXEMPT PURPOSE OF THE ORGANIZATION	1,010,000
MAYMONT FOUNDATION 1700 HAMPTON STREET HAMPTON, VA 23220		PC	TO FURTHER THE EXEMPT PURPOSE OF THE ORGANIZATION	100,000
Total ▶ 3a				1,984,000

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>				
VALENTINE RICHMOND HISTORY CENTER 1015 E CLAY STREET RICHMOND, VA 23219		PC	TO FURTHER THE EXEMPT PURPOSE OF THE ORGANIZATION	100,000
NATIONAL D-DAY MEMORIAL FOUNDATION PO BOX 77 BEDFORD, VA 24523		PC	TO FURTHER THE EXEMPT PURPOSE OF THE ORGANIZATION	250,000
ST JOSEPH'S VILLA8000 BROOK RD RICHMOND, VA 23227		PC	TO FURTHER THE EXEMPT PURPOSE OF THE ORGANIZATION	354,000
Total ▶ 3a				1,984,000

TY 2020 Accounting Fees Schedule**Name:** ROBINS JR E CLAIBORNE CHAR AGY**EIN:** 32-6140103

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING FEES	1,400	0		1,400

TY 2020 Investments Corporate Bonds Schedule**Name:** ROBINS JR E CLAIBORNE CHAR AGY**EIN:** 32-6140103**Investments Corporate Bonds Schedule**

Name of Bond	End of Year Book Value	End of Year Fair Market Value
20030NDA6 COMCAST CORP	81,958	82,049
68389XBU8 ORACLE CORP	90,552	93,745
666807BS0 NORTHROP GRUMMAN CORP	92,975	93,094
637432MQ5 NATIONAL RURAL UTIL	70,615	71,593
61747WAL3 MORGAN STANLEY	78,575	77,205
61746BEF9 MORGAN STANLEY	75,524	85,892
594918BJ2 MICROSOFT CORP	66,347	72,666
05531FBG7 BB&T CORPORATION	81,749	83,032
57772KAB7 MAXIM INTEGRATED PRO	72,465	78,956
548661CW5 LOWE'S COMPANIES INC	75,755	77,196
74251VAM4 PRINCIPAL FINANCIAL	74,150	83,619
036752AB9 ANTHEM INC	77,543	86,488
7591EPAP5 REGIONS FINANCIAL CO	79,271	81,360
026874DD6 AMERICAN INTL GROUP	81,967	89,880
77957P402 T ROWE PR SHRT-TRM B	1,126,406	1,137,573
77958B402 T ROWE PRICE INST FL	831,657	801,875
023135AM8 AMAZON.COM INC	83,813	81,844
008117AP8 AETNA INC	84,704	88,150
822582BD3 SHELL INTERNATIONAL	76,964	83,132
87234N765 TCW EMRG MKTS INCM-I	2,200,000	2,344,311

Investments Corporate Bonds Schedule

Name of Bond	End of Year Book Value	End of Year Fair Market Value
882508AW4 TEXAS INSTRUMENTS IN	58,943	62,458
902494AT0 TYSON FOODS INC	80,647	78,647
91159HHN3 US BANCORP	89,341	97,433
00206RHR6 AT&T INC	61,736	65,246
92343VES9 VERIZON COMMUNICATIO	83,126	88,283
931427AH1 WALGREENS BOOTS ALLI	70,770	77,368
963320AW6 WHIRLPOOL CORP	82,982	91,457
524660AW7 LEGGETT & PLATT INC	74,227	77,403
191216CU2 COCA-COLA CO	79,989	82,634
06051GEU9 BANK OF AMERICA CORP	74,086	79,516
200340AS6 COMERICA INC	75,851	80,914
224399AR6 CRANE CO	42,878	43,839
24422EVD8 JOHN DEERE CAPITAL CORP	71,061	76,774
172967KY6 CITIGROUP INC	74,036	83,825
26078JAD2 DOWDUPONT INC	76,021	86,235
26441CAF2 DUKE ENERGY CORP	106,027	101,424
30231GBE1 EXXON MOBIL CORP	82,492	86,839
31641Q755 FIDELITY NEW MRKTS I	81,641	82,874
171239AG1 CHUBB INA HOLDINGS INC	78,954	79,854
46625HJX9 JPMORGAN CHASE & CO	104,147	110,567

Investments Corporate Bonds Schedule

Name of Bond	End of Year Book Value	End of Year Fair Market Value
37045XBM7 GENERAL MOTORS FINL CO	20,276	20,215
001055AM4 AFLAC INC	99,891	111,422
14913R2H9 CATERPILLAR FINL SERVICE	100,264	100,799
110122DQ8 BRISTOL-MYERS SQUIBB CO	74,897	75,370
458140BH2 INTEL CORP	84,381	86,781
459200HU8 IBM CORP	83,078	87,857
12572QAG0 CME GROUP INC	127,785	137,043
126408HD8 CSX CORP	83,702	89,500
38141GVM3 GOLDMAN SACHS GROUP	103,353	110,497
14040HBW4 CAPITAL ONE FINANCIA	84,404	92,192
126650CC2 CVS CAREMARK CORP	32,149	34,509

TY 2020 Investments Corporate Stock Schedule

Name: ROBINS JR E CLAIBORNE CHAR AGY

EIN: 32-6140103

Investments Corporation Stock Schedule

Name of Stock	End of Year Book Value	End of Year Fair Market Value
339128100 JP MORGAN MID CAP VALUE FUND	829,191	1,284,847
464285105 ISHARES GOLD TRUST	728,631	850,206
464287200 ISHARES CORE S & P 500 ETF	2,279,785	6,103,091
464287473 ISHARES RUSSELL MID-CAP VALUE	640,170	729,236
464287481 ISHARES RUSSELL MID-CAP GROWTH	1,413,692	2,687,582
464287614 ISHARES RUSSELL 1000 GROWTH ETF	250,092	531,714
464287804 ISHARES CORE S&P SMALL CAP ETF	356,142	410,977
464287879 ISHARES S&P SMALL-CAP 600 VALUE	344,858	451,108
464287887 ISHARES S&P SMALL-CAP 600 GROWTH	373,945	662,016
589509207 MERGER FUND CLASS INST #301	384,594	428,595
64128R608 NEUBERGER BERMAN LONG/SHORT FUND	181,779	235,038
74925K581 BOSTON PARTNERS LNG/SHRT RESEARCH FUND	888,687	892,002
779547405 T ROWE PRICE EQUITY INCOME FUND	850,410	1,078,253
77954Q403 T ROWE PRICE BLUE CHIP GROWTH FUND	846,000	2,618,161
779572502 T. ROWE PR SMALL-CAP STOCK FUND	149,894	278,693
78463X863 SPDR DJ WILSHIRE INTERNATIONAL REAL ESTATE ETF	281,008	265,766
803431410 JAMES ALPHA GLOBAL REAL ESTATE INVEST.	218,970	207,344
921943858 VANGUARD FTSE DEVELOPED MARKETS ETF	1,208,315	1,349,828
922908553 VANGUARD REAL ESTATE ETF	160,700	294,028
256206103 DODGE & COX INT'L STOCK FUND	518,066	612,457
25264S833 DIAMOND HILL LONG/SHORT FUND	200,000	207,575
411512528 HARBOR CAPITAL APPRECIATION FUND	1,025,713	2,907,780
025083320 AMER CENT SMALL CAP GROWTH	397,746	663,350
00143W859 INV OPP DEVELOP MARKET FUND	680,774	1,144,308
04314H402 ARTISAN INTERNATIONAL FUND	491,786	780,821
04314H600 ARTISAN MID CAP FUND	727,662	1,020,976

TY 2020 Investments Government Obligations Schedule**Name:** ROBINS JR E CLAIBORNE CHAR AGY**EIN:** 32-6140103**US Government Securities - End
of Year Book Value:**

3,320,359

**US Government Securities - End
of Year Fair Market Value:**

3,507,189

**State & Local Government
Securities - End of Year Book
Value:**

0

**State & Local Government
Securities - End of Year Fair
Market Value:**

0

TY 2020 Investments - Other Schedule**Name:** ROBINS JR E CLAIBORNE CHAR AGY**EIN:** 32-6140103**Investments Other Schedule 2**

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
12596JAD5 CNH EQUIPMENT TRUST	AT COST	119,393	121,538
38378CFN2 GOVT NATL MTG ASSN	AT COST	17,806	18,042
3136ACYJ4 FED NATL MTG ASSN	AT COST	127,373	127,469
3137BCA40 FED HOME LN MTG CORP	AT COST	6,565	6,339
02588QAB4 AMERICAN EXPRESS CREDIT ACCOUN	AT COST	101,578	103,180
MI0236783 AMITE COUNTY, MS:	AT COST	1	1
3136ACGS4 FED NATL MTG ASSN	AT COST	96,302	95,363
36192BAY3 GS MORTGAGE SECURITI	AT COST	119,959	121,422

TY 2020 Other Decreases Schedule

Name: ROBINS JR E CLAIBORNE CHAR AGY

EIN: 32-6140103

Description	Amount
BOOK/TAX TIMING DIFFERENCE	280,704

TY 2020 Other Income Schedule

Name: ROBINS JR E CLAIBORNE CHAR AGY

EIN: 32-6140103

Other Income Schedule

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
CLASS ACTION LAWSUIT	327	327	327

TY 2020 Other Professional Fees Schedule**Name:** ROBINS JR E CLAIBORNE CHAR AGY**EIN:** 32-6140103

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
WELLS FARGO - MANAGEMENT FEES	140,912	140,912		0

TY 2020 Taxes Schedule**Name:** ROBINS JR E CLAIBORNE CHAR AGY**EIN:** 32-6140103**Taxes Schedule**

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FEDERAL EXCISE TAX	19,029	0		0
FOREIGN TAX	3,003	3,003		0