Return of Organization Exempt From Income Tax

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations)

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

Go to www.irs.gov/Form990 for instructions and the latest information.

Part I Summary

1 Briefly describe the organization's mission or most significant activities.

See Schedule O provided grants to 501(c)(3) nonprofit organizations and government entities serving the Greater Williamsburg Community provided services and information on the needs of the Greater Williamsburg Community to donor-advisors assisted donor-advisors with philanthropic activities.

2 Check this box if the organization discontinued its operations or disposed of more than 25% of its net assets.

3 Number of voting members of the governing body (Part VI, line 1a).

4 Number of independent voting members of the governing body (Part VI, line 1b).

5 Total number of individuals employed in calendar year 2018 (Part V, line 2a).

6 Total number of volunteers (estimate if necessary).

7a Total unrelated business revenue from Part VIII, column (C), line 12.

7b Net unrelated business taxable income from Form 990-T, line 34.

8 Contributions and grants (Part VIII, line 1h).

9 Program service revenue (Part VIII, line 2g).

10 Investment income (Part VIII, column (A), lines 3, 4, and 7d).

11 Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e).

12 Total revenue—add lines 8 through 11 (must equal Part VIII, column (A), line 12).

13 Grants and similar amounts paid (Part IX, column (A), lines 1-3).

14 Benefits paid to or for members (Part IX, column (A), line 4).

15 Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10).

16 Professional fundraising fees (Part IX, column (A), line 11e).

17 Total fundraising expenses (Part IX, column (D), line 25) $32,186.

18 Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e).

19 Revenue less expenses Subtract line 18 from line 12.

20 Total assets (Part X, line 16).

21 Total liabilities (Part X, line 26).

22 Net assets or fund balances Subtract line 21 from line 20.

Part II Signature Block

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 officer) is based on all information of which preparer has any knowledge.

Signature of officer:

NANCY C SULLIVAN EXECUTIVE DIRECTOR

Type or print name and title:

2019-09-29

Paid Preparer Use Only

Print/Type preparer's name

Preparer's signature

Date

Check if self-employed

PTIN 00052524

Firm's name: BROWN EDWARDS & COMPANY LLP

Firm's EIN: 54-0504606

Firm's address: 701 TOWN CENTER DRIVE

NEWPORT NEWS, VA 23606

Phone no: (757) 873-1033

May the IRS discuss this return with the preparer shown above? (see instructions)
**Part III: Statement of Program Service Accomplishments**

Check if Schedule O contains a response or note to any line in this Part III  

1 Briefly describe the organization’s mission

CONNECTING PEOPLE WHO CARE WITH CAUSES THAT MATTER IN OUR COMMUNITY. FOREVER. THE MISSION IS PURSUED BY HELPING DONORS BUILD PERMANENT, FLEXIBLE ENDOWMENT FUNDS THAT RESPOND TO EMERGING AND CHANGING COMMUNITY NEEDS, PROVIDING EFFECTIVE STEWARDSHIP OF CHARITABLE FUNDS, ADVISING DONORS WITH VARIED INTERESTS TO HELP THEM ACHIEVE THEIR PHILANTHROPIC GOALS, AND SERVING AS A RESOURCE, CATALYST, AND COORDINATOR FOR CHARITABLE ACTIVITIES.

2 Did the organization undertake any significant program services during the year which were not listed on the prior Form 990 or 990-EZ?  

If "Yes," describe these new services on Schedule O  

3 Did the organization cease conducting, or make significant changes in how it conducts, any program services?  

If "Yes," describe these changes on Schedule O  

4 Describe the organization’s program service accomplishments for each of its three largest program services, as measured by expenses.  

Section 501(c)(3) and 501(c)(4) organizations are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported.

<table>
<thead>
<tr>
<th>Code</th>
<th>Expenses $</th>
<th>Including grants of $</th>
<th>Revenue $</th>
</tr>
</thead>
<tbody>
<tr>
<td>4a</td>
<td>636,204</td>
<td>588,914</td>
<td></td>
</tr>
<tr>
<td>4b</td>
<td>109,985</td>
<td>109,985</td>
<td></td>
</tr>
<tr>
<td>4c</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

4d Other program services (Describe in Schedule O)  

(Expenses $ including grants of $ (Revenue $ )

4e Total program service expenses  

746,189
1. Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? If "Yes," complete Schedule A.
2. Is the organization required to complete Schedule B, Schedule of Contributors (see instructions)?
3. Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? If "Yes," complete Schedule C, Part I.
4. Section 501(c)(3) organizations. Did the organization engage in lobbying activities, or have a section 501(h) election in effect during the tax year? If "Yes," complete Schedule C, Part II.
5. Is the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization that receives membership dues, assessments, or similar amounts as defined in Revenue Procedure 98-19? If "Yes," complete Schedule D, Part II.
6. Did the organization maintain any donor-advised funds or any similar funds or accounts for which donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? If "Yes," complete Schedule D, Part III.
7. Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic lands or areas, or historic structures? If "Yes," complete Schedule D, Part IV.
8. Did the organization maintain collections of works of art, historical treasures, or other similar assets? If "Yes," complete Schedule D, Part V.
9. Did the organization report an amount in Part X, line 21 for escrow or custodial account liability, serve as a custodian for amounts not listed in Part X, or provide credit counseling, debt management, credit repair, or debt negotiation services? If "Yes," complete Schedule D, Part VI.
10. Did the organization, directly or through a related organization, hold assets in temporarily restricted endowments, permanent endowments, or quasi-endowments? If "Yes," complete Schedule D, Part V.
11. If the organization's answer to any of the following questions is "Yes," then complete Schedule D, Parts VI, VII, VIII, IX, or X as applicable.
   a. Did the organization report an amount for land, buildings, and equipment in Part X, line 10? If "Yes," complete Schedule D, Part VI.
   b. Did the organization report an amount for investments—other securities in Part X, line 12 that is 5% or more of its total assets reported in Part X, line 16? If "Yes," complete Schedule D, Part VII.
   c. Did the organization report an amount for investments—program related in Part X, line 13 that is 5% or more of its total assets reported in Part X, line 16? If "Yes," complete Schedule D, Part VIII.
   d. Did the organization report an amount for other assets in Part X, line 15 that is 5% or more of its total assets reported in Part X, line 16? If "Yes," complete Schedule D, Part IX.
   e. Did the organization report an amount for other liabilities in Part X, line 25? If "Yes," complete Schedule D, Part X.
   f. Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses the organization's liability for uncertain tax positions under FIN 48 (ASC 740)? If "Yes," complete Schedule D, Part X.
12. Did the organization obtain separate, independent audited financial statements for the tax year? If "Yes," complete Schedule D, Parts XI and XII.
13. Is the organization a school described in section 170(b)(1)(A)(ii)? If "Yes," complete Schedule E.
14. Did the organization maintain an office, employees, or agents outside of the United States?
15. Did the organization have aggregate revenues or expenses of more than $10,000 from grantmaking, fundraising, business, investment, and program service activities outside the United States, or aggregate foreign investments valued at $100,000 or more? If "Yes," complete Schedule F, Parts I and IV.
16. Did the organization report on Part IX, column (A), line 3, more than $5,000 of grants or other assistance to or for any foreign organization? If "Yes," complete Schedule F, Parts II and IV.
17. Did the organization report on Part IX, column (A), line 3, more than $5,000 of aggregate grants or other assistance to or for foreign individuals? If "Yes," complete Schedule F, Parts III and IV.
18. Did the organization report a total of more than $15,000 of expenses for professional fundraising services on Part IX, column (A), lines 6 and 11e? If "Yes," complete Schedule G, Part I (See instructions).
19. Did the organization report more than $15,000 total of fundraising event gross income and contributions on Part VIII, lines 1c and 8a? If "Yes," complete Schedule G, Part II.
20. Did the organization report more than $15,000 of gross income from gaming activities on Part VIII, line 9a? If "Yes," complete Schedule H, Part II.
21. Did the organization operate one or more hospital facilities? If "Yes," complete Schedule H.
22. Did the organization operate one or more hospital facilities? If "Yes," complete Schedule I, Parts I and II.
23. Did the organization report more than $5,000 of grants or other assistance to or for domestic individuals on Part IX, column (A), line 2? If "Yes," complete Schedule I, Parts I and III.
Part IV  Checklist of Required Schedules (continued)

23 Did the organization answer "Yes" to Part VII, Section A, line 3, 4, or 5 about compensation of the organization's current and former officers, directors, trustees, key employees, and highest compensated employees? If "Yes," complete Schedule J ........... 23 Yes No

24a Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than $100,000 as of the last day of the year, that was issued after December 31, 2002? If "Yes," answer lines 24b through 24d and complete Schedule K If "No," go to line 25a .......... 24a Yes No

b Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception? ....... 24b

c Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds? .......... 24c

d Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year? ....... 24d

25a Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations. Did the organization engage in an excess benefit transaction with a disqualified person during the year? If "Yes," complete Schedule L, Part I .......... 25a Yes No

b Is the organization aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? If "Yes," complete Schedule L, Part I .......... 25b Yes No

26 Did the organization report any amount on Part X, line 5, 6, or 22 for receivables from or payables to any current or former officers, directors, trustees, key employees, highest compensated employees, or disqualified persons? If "Yes," complete Schedule L, Part II .......... 26 Yes No

27 Did the organization provide a grant or other assistance to an officer, director, trustee, key employee, substantial contributor or employee thereof, a grant selection committee member, or to a 35% controlled entity or family member of any of these persons? If "Yes," complete Schedule L, Part III .......... 27 Yes No

28 Was the organization a party to a business transaction with one of the following parties (see Schedule L, Part IV instructions for applicable filing thresholds, conditions, and exceptions)

a A current or former officer, director, trustee, or key employee? If "Yes," complete Schedule L, Part IV .......... 28a Yes No

b A family member of a current or former officer, director, trustee, or key employee? If "Yes," complete Schedule L, Part IV .......... 28b Yes No

c An entity of which a current or former officer, director, trustee, or key employee (or a family member thereof) was an officer, director, trustee, or direct or indirect owner? If "Yes," complete Schedule L, Part IV .......... 28c Yes No

29 Did the organization receive more than $25,000 in non-cash contributions? If "Yes," complete Schedule M .. 29 Yes

30 Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? If "Yes," complete Schedule M .......... 30 Yes No

31 Did the organization liquidate, terminate, or dissolve and cease operations? If "Yes," complete Schedule N, Part I .......... 31 Yes No

32 Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets?
If "Yes," complete Schedule N, Part II .......... 32 Yes No

33 Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? If "Yes," complete Schedule R, Part I .......... 33 Yes No

34 Was the organization related to any tax-exempt or taxable entity? If "Yes," complete Schedule R, Part II, III, or IV, and Part V, line 1 .......... 34 Yes No

35a Did the organization have a controlled entity within the meaning of section 512(b)(13)?
If "Yes" to line 35a, did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? If "Yes," complete Schedule R, Part V, line 2 ... 35a Yes No

b If "Yes" to line 35a, did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? If "Yes," complete Schedule R, Part V, line 2 ... 35b Yes No

36 Section 501(c)(3) organizations. Did the organization make any transfers to an exempt non-charitable related organization? If "Yes," complete Schedule R, Part V, line 2 .......... 36 Yes No

37 Did the organization conduct more than 5% of its activities through an entity that is not a related organization and that is treated as a partnership for federal income tax purposes? If "Yes," complete Schedule R, Part VI .......... 37 Yes No

38 Did the organization complete Schedule O and provide explanations in Schedule O for Part VI, lines 11b and 19? Note. All Form 990 filers are required to complete Schedule O .......... 38 Yes

Part V  Statements Regarding Other IRS Filings and Tax Compliance

Check if Schedule O contains a response or note to any line in this Part V ...........  

Yes No

1a Enter the number reported in Box 3 of Form 1096 Enter -0- if not applicable .......... 1a Yes No

b Enter the number of Forms W-2G included in line 1a Enter -0- if not applicable .......... 1b Yes No

c Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners? .......... 1c Yes

Note.
2a Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements, filed for the calendar year ending with or within the year covered by this return.  
2b If at least one is reported on line 2a, did the organization file all required federal employment tax returns?  
2b Yes  
2b No

3a Did the organization have unrelated business gross income of $1,000 or more during the year?  
3a No

3b If "Yes," has it filed a Form 990-T for this year? If "No" to line 3b, provide an explanation in Schedule O

4a At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a financial account in a foreign country (such as a bank account, securities account, or other financial account)?  
4a No

b If "Yes," enter the name of the foreign country

5a Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?  
5a No

b Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?  
5b No

6a Does the organization have annual gross receipts that are normally greater than $100,000, and did the organization solicit any contributions that were not tax deductible as charitable contributions?  
6a No

b If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?  
6b No

7 Organizations that may receive deductible contributions under section 170(c).  
7a Did the organization receive a payment in excess of $75 made partly as a contribution and partly for goods and services provided to the payor?  
7a Yes

b If "Yes," did the organization notify the donor of the value of the goods or services provided?  
7b Yes

7c Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?  
7c No

7d If "Yes," indicate the number of Forms 8282 filed during the year

8 Sponsorizations maintaining donor advised funds.  
8 Did a donor advised fund maintained by the sponsoring organization have excess business holdings at any time during the year?  
8 No

a Did the sponsoring organization make any taxable distributions under section 4966?  
9a No

b Did the sponsoring organization make a distribution to a donor, donor advisor, or related person?  
9b No

10 Section 501(c)(7) organizations. Enter  
a Initiation fees and capital contributions included on Part VIII, line 12  
10a

b Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities  
10b

11 Section 501(c)(12) organizations. Enter  
a Gross income from members or shareholders.  
11a

b Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them)  
11b

12a Section 4947(a)(1) non-exempt charitable trusts. Is the organization filing Form 990 in lieu of Form 1041?  
12a

b If "Yes," enter the amount of tax-exempt interest received or accrued during the year  
12b

13 Section 501(c)(29) qualified nonprofit health insurance issuers.  
a Is the organization licensed to issue qualified health plans in more than one state?  
Note. See the instructions for additional information the organization must report on Schedule O  
13a

b Enter the amount of reserves the organization is required to maintain by the states in which the organization is licensed to issue qualified health plans  
13b

13c Enter the amount of reserves on hand

14a Did the organization receive any payments for indoor tanning services during the tax year?  
14a No

b If "Yes," has it filed a Form 720 to report these payments? If "No," provide an explanation in Schedule O  
14b

15 Is the organization subject to the section 4960 tax on payment(s) of more than $1,000,000 in remuneration or excessive parachute payment(s) during the year? If "Yes," see instructions and file Form 4720, Schedule N.  
15 No

16 Is the organization an educational institution subject to the section 4968 excise tax on net investment income? If "Yes," complete Form 4720, Schedule O.
### Section A. Governing Body and Management

<table>
<thead>
<tr>
<th></th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>1a Enter the number of voting members of the governing body at the end of the tax year</td>
<td></td>
<td>23</td>
</tr>
<tr>
<td>1b If there are material differences in voting rights among members of the governing body, or if the governing body delegated broad authority to an executive committee or similar committee, explain in Schedule O</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2 Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee, or key employee?</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>3 Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors or trustees, or key employees to a management company or other person?</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>4 Did the organization make any significant changes to its governing documents since the prior Form 990 was filed?</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>5 Did the organization become aware during the year of a significant diversion of the organization's assets?</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>6 Did the organization have members or stockholders?</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>7a Did the organization have members, stockholders, or other persons who had the power to elect or appoint one or more members of the governing body?</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>7b Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or persons other than the governing body?</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>8 Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8a The governing body?</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>8b Each committee with authority to act on behalf of the governing body?</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>9 Is there any officer, director, trustee, or key employee listed in Part VII, Section A, who cannot be reached at the organization's mailing address? If &quot;Yes,&quot; provide the names and addresses in Schedule O</td>
<td>No</td>
<td></td>
</tr>
</tbody>
</table>

### Section B. Policies (This Section B requests information about policies not required by the Internal Revenue Code.)

<table>
<thead>
<tr>
<th></th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>10a Did the organization have local chapters, branches, or affiliates?</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>10b If &quot;Yes,&quot; did the organization have written policies and procedures governing the activities of such chapters, affiliates, and branches to ensure their operations are consistent with the organization's exempt purposes?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>11a Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form?</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>11b Describe in Schedule O the process, if any, used by the organization to review this Form 990</td>
<td></td>
<td></td>
</tr>
<tr>
<td>12a Did the organization have a written conflict of interest policy? If &quot;No,&quot; go to line 13</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>12b Were officers, directors, or trustees, and key employees required to disclose annually interests that could give rise to conflicts?</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>12c Did the organization regularly and consistently monitor and enforce compliance with the policy? If &quot;Yes,&quot; describe in Schedule O how this was done</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>13 Did the organization have a written whistleblower policy?</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>14 Did the organization have a written document retention and destruction policy?</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>15 Did the process for determining compensation of the following persons include a review and approval by independent persons, comparability data, and contemporaneous substantiation of the deliberation and decision?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>15a The organization's CEO, Executive Director, or top management official</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>15b Other officers or key employees of the organization</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>16a If &quot;Yes&quot; to line 15a or 15b, describe the process in Schedule O (see instructions)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>16b Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a taxable entity during the year?</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>17 Did the organization follow a written policy or procedure requiring the organization to evaluate its participation in joint venture arrangements under applicable federal tax law, and take steps to safeguard the organization's exempt status with respect to such arrangements?</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Section C. Disclosure

17 List the States with which a copy of this Form 990 is required to be filed

18 Section 6104 requires an organization to make its Form 1023 (or 1024-A if applicable), 990, and 990-T (501(c)(3)s only) available for public inspection. Indicate how you made these available. Check all that apply:
- [ ] Own website
- [ ] Another's website
- [ ] Upon request
- [ ] Other (explain in Schedule O)

19 Describe in Schedule O whether (and if so, how) the organization made its governing documents, conflict of interest policy, and financial statements available to the public during the tax year

20 State the name, address, and telephone number of the person who possesses the organization's books and records

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**ORGANIZATION'S OFFICERS**

1323 JAMESTOWN ROAD NO 103 | WILLIAMSBURG, VA 23185 (757) 259-1660
### Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees

#### (A) Name and Title

<table>
<thead>
<tr>
<th>Name and Title</th>
<th>(B) Average hours per week (list any hours for related organizations below dotted line)</th>
<th>(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)</th>
<th>(D) Reportable compensation from the organization (W-2/1099-MISC)</th>
<th>(E) Reportable compensation from related organizations (W-2/1099-MISC)</th>
<th>(F) Estimated amount of other compensation from the organization and related organizations</th>
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<td>RONALD LOOZIESKI</td>
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<td>KENDALL S KERBY</td>
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<td>WILLIAM L ROBERTS JR</td>
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<tr>
<td>RICK NAHM</td>
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### Part VII  
**Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees (continued)**

<table>
<thead>
<tr>
<th>(A) Name and Title</th>
<th>(B) Average hours per week (list any hours for related organizations below dotted line)</th>
<th>(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)</th>
<th>(D) Reportable compensation from the organization (W-2/1099-MISC)</th>
<th>(E) Reportable compensation from related organizations (W-2/1099-MISC)</th>
<th>(F) Estimated amount of other compensation from the organization and related organizations</th>
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Statement of Revenue

**Contributions, Gifts, Grants and Other Similar Amounts**

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<td>1c Fundraising events</td>
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<td>1e Government grants (contributions)</td>
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<td>1f All other contributions, gifts, grants, and similar amounts not included above</td>
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<td>2f All other program service revenue</td>
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**Program Service Revenue**

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</tr>
</tbody>
</table>

**Other Revenue**

<table>
<thead>
<tr>
<th>Other Revenue</th>
<th>Business Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>6a Gross rents</td>
<td>12,000</td>
</tr>
<tr>
<td>6b Less rental expenses</td>
<td>0</td>
</tr>
<tr>
<td>6c Rental income or (loss)</td>
<td>12,000</td>
</tr>
<tr>
<td><strong>Total, Add lines 6a-6c</strong></td>
<td><strong>Total</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Other Revenue</th>
<th>Business Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>7a Gross amount from sales of assets other than inventory</td>
<td>110,434</td>
</tr>
<tr>
<td>7b Less cost or other basis and sales expenses</td>
<td>131,430</td>
</tr>
<tr>
<td>7c Gain or (loss)</td>
<td>-20,996</td>
</tr>
<tr>
<td><strong>Total, Add lines 7a-7c</strong></td>
<td><strong>Total</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Other Revenue</th>
<th>Business Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>8a Gross income from fundraising events (not including § 26,834 of contributions reported on line 1c)</td>
<td>785</td>
</tr>
<tr>
<td>See Part IV, line 18</td>
<td></td>
</tr>
<tr>
<td>b Less direct expenses</td>
<td>12,075</td>
</tr>
<tr>
<td>c Net income or (loss) from fundraising events</td>
<td>-11,290</td>
</tr>
<tr>
<td><strong>Total, Add lines 8a-8c</strong></td>
<td><strong>Total</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Other Revenue</th>
<th>Business Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>9a Gross income from gaming activities</td>
<td></td>
</tr>
<tr>
<td>See Part IV, line 19</td>
<td></td>
</tr>
<tr>
<td>b Less direct expenses</td>
<td></td>
</tr>
<tr>
<td>c Net income or (loss) from gaming activities</td>
<td></td>
</tr>
<tr>
<td><strong>Total, Add lines 9a-9c</strong></td>
<td><strong>Total</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Other Revenue</th>
<th>Business Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>10a Gross sales of inventory, less returns and allowances</td>
<td></td>
</tr>
<tr>
<td>b Less cost of goods sold</td>
<td></td>
</tr>
<tr>
<td>c Net income or (loss) from sales of inventory</td>
<td></td>
</tr>
<tr>
<td><strong>Total, Add lines 10a-10c</strong></td>
<td><strong>Total</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Miscellaneous Revenue</th>
<th>Business Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>11a MIN FEE INCOME</td>
<td>003,090</td>
</tr>
<tr>
<td>b</td>
<td></td>
</tr>
<tr>
<td>c</td>
<td></td>
</tr>
<tr>
<td>d All other revenue</td>
<td></td>
</tr>
<tr>
<td>e <strong>Total, Add lines 11a-11d</strong></td>
<td><strong>Total</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Miscellaneous Revenue</th>
<th>Business Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>12 <strong>Total revenue. See Instructions</strong></td>
<td><strong>Total</strong></td>
</tr>
</tbody>
</table>

Form 990 (2018)
### Statement of Functional Expenses

Section 501(c)(3) and 501(c)(4) organizations must complete all columns. All other organizations must complete column (A).

Check if Schedule O contains a response or note to any line in this Part IX □

<table>
<thead>
<tr>
<th></th>
<th>(A) Total expenses</th>
<th>(B) Program service expenses</th>
<th>(C) Management and general expenses</th>
<th>(D) Fundraising expenses</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Grants and other assistance to domestic organizations and domestic governments See Part IV, line 21</td>
<td>588,914</td>
<td>588,914</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Grants and other assistance to domestic individuals See Part IV, line 22</td>
<td>109,985</td>
<td>109,985</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Grants and other assistance to foreign organizations, foreign governments, and foreign individuals See Part IV, line 15 and 16</td>
<td>78,273</td>
<td>21,681</td>
<td>42,503</td>
</tr>
<tr>
<td>4</td>
<td>Benefits paid to or for members</td>
<td>58,365</td>
<td>16,167</td>
<td>31,692</td>
</tr>
<tr>
<td>5</td>
<td>Compensation of current officers, directors, trustees, and key employees</td>
<td>890</td>
<td>890</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)</td>
<td>9,722</td>
<td>2,692</td>
<td>5,280</td>
</tr>
<tr>
<td>7</td>
<td>Other salaries and wages</td>
<td>33,081</td>
<td>473</td>
<td>29,825</td>
</tr>
<tr>
<td>8</td>
<td>Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)</td>
<td>11,235</td>
<td>2,500</td>
<td>8,735</td>
</tr>
<tr>
<td>9</td>
<td>Other employee benefits</td>
<td>15,930</td>
<td>3,667</td>
<td>9,363</td>
</tr>
<tr>
<td>10</td>
<td>Payroll taxes</td>
<td>979</td>
<td>979</td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>Fees for services (non-employees)</td>
<td>8,830</td>
<td>110</td>
<td>8,720</td>
</tr>
<tr>
<td></td>
<td>a Management</td>
<td>3,081</td>
<td>473</td>
<td>29,825</td>
</tr>
<tr>
<td></td>
<td>b Legal</td>
<td>11,235</td>
<td>2,500</td>
<td>8,735</td>
</tr>
<tr>
<td></td>
<td>c Accounting</td>
<td>28,216</td>
<td>28,216</td>
<td></td>
</tr>
<tr>
<td></td>
<td>d Lobbying</td>
<td>50,895</td>
<td>50,895</td>
<td></td>
</tr>
<tr>
<td></td>
<td>e Professional fundraising services See Part IV, line 17</td>
<td>1,162</td>
<td>1,162</td>
<td></td>
</tr>
<tr>
<td></td>
<td>f Investment management fees</td>
<td>1,162</td>
<td>1,162</td>
<td></td>
</tr>
<tr>
<td></td>
<td>g Other (If line 11g amount exceeds 10% of line 25, column (A) amount, list line 11g expenses on Schedule O)</td>
<td>1,162</td>
<td>1,162</td>
<td></td>
</tr>
<tr>
<td>12</td>
<td>Advertising and promotion</td>
<td>1,162</td>
<td>1,162</td>
<td></td>
</tr>
<tr>
<td>13</td>
<td>Office expenses</td>
<td>1,162</td>
<td>1,162</td>
<td></td>
</tr>
<tr>
<td>14</td>
<td>Information technology</td>
<td>1,162</td>
<td>1,162</td>
<td></td>
</tr>
<tr>
<td>15</td>
<td>Royalties</td>
<td>1,162</td>
<td>1,162</td>
<td></td>
</tr>
<tr>
<td>16</td>
<td>Occupancy</td>
<td>1,162</td>
<td>1,162</td>
<td></td>
</tr>
<tr>
<td>17</td>
<td>Travel</td>
<td>1,162</td>
<td>1,162</td>
<td></td>
</tr>
<tr>
<td>18</td>
<td>Payments of travel or entertainment expenses for any federal, state, or local public officials</td>
<td>1,162</td>
<td>1,162</td>
<td></td>
</tr>
<tr>
<td>19</td>
<td>Conferences, conventions, and meetings</td>
<td>1,162</td>
<td>1,162</td>
<td></td>
</tr>
<tr>
<td>20</td>
<td>Interest</td>
<td>1,162</td>
<td>1,162</td>
<td></td>
</tr>
<tr>
<td>21</td>
<td>Payments to affiliates</td>
<td>1,162</td>
<td>1,162</td>
<td></td>
</tr>
<tr>
<td>22</td>
<td>Depreciation, depletion, and amortization</td>
<td>1,162</td>
<td>1,162</td>
<td></td>
</tr>
<tr>
<td>23</td>
<td>Insurance</td>
<td>1,162</td>
<td>1,162</td>
<td></td>
</tr>
<tr>
<td>24</td>
<td>Other expenses Itemize expenses not covered above (List miscellaneous expenses in line 24e If line 24e amount exceeds 10% of line 25, column (A) amount, list line 24e expenses on Schedule O)</td>
<td>1,162</td>
<td>1,162</td>
<td></td>
</tr>
<tr>
<td></td>
<td>a DUES AND SUBSCRIPTIONS</td>
<td>1,162</td>
<td>1,162</td>
<td></td>
</tr>
<tr>
<td></td>
<td>b</td>
<td>1,162</td>
<td>1,162</td>
<td></td>
</tr>
<tr>
<td></td>
<td>c</td>
<td>1,162</td>
<td>1,162</td>
<td></td>
</tr>
<tr>
<td></td>
<td>d</td>
<td>1,162</td>
<td>1,162</td>
<td></td>
</tr>
<tr>
<td></td>
<td>e All other expenses</td>
<td>1,162</td>
<td>1,162</td>
<td></td>
</tr>
<tr>
<td>25</td>
<td>Total functional expenses. Add lines 1 through 24e</td>
<td>1,010,114</td>
<td>746,189</td>
<td>231,739</td>
</tr>
<tr>
<td>26</td>
<td>Joint costs. Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation</td>
<td>1,010,114</td>
<td>746,189</td>
<td>231,739</td>
</tr>
</tbody>
</table>

Check here □ if following SOP 98-2 (ASC 958-720)
### Form 990 (2018) Balance Sheet

Check if Schedule O contains a response or note to any line in this Part IX □

<table>
<thead>
<tr>
<th></th>
<th>(A) Beginning of year</th>
<th>(B) End of year</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Cash—non-interest-bearing</td>
<td>360,403</td>
</tr>
<tr>
<td>2</td>
<td>Savings and temporary cash investments</td>
<td>358,274</td>
</tr>
<tr>
<td>3</td>
<td>Pledges and grants receivable, net</td>
<td>3,550,627</td>
</tr>
<tr>
<td>4</td>
<td>Accounts receivable, net</td>
<td>4</td>
</tr>
<tr>
<td>5</td>
<td>Loans and other receivables from current and former officers, directors, trustees, key employees, and highest compensated employees Complete Part II of Schedule L</td>
<td>5</td>
</tr>
<tr>
<td>6</td>
<td>Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), persons described in section 4958(c)(3)(B), and contributing employers and sponsoring organizations of section 501(c)(9) voluntary employees’ beneficiary organizations (see instructions) Complete Part II of Schedule L</td>
<td>6</td>
</tr>
<tr>
<td>7</td>
<td>Notes and loans receivable, net</td>
<td>7</td>
</tr>
<tr>
<td>8</td>
<td>Inventories for sale or use</td>
<td>8</td>
</tr>
<tr>
<td>9</td>
<td>Prepaid expenses and deferred charges</td>
<td>962</td>
</tr>
<tr>
<td>10a</td>
<td>Land, buildings, and equipment cost or other basis Complete Part VI of Schedule D</td>
<td>341,917</td>
</tr>
<tr>
<td>10b</td>
<td>Less accumulated depreciation</td>
<td>68,254</td>
</tr>
<tr>
<td>11</td>
<td>Investments—publicly traded securities</td>
<td>6,330,007</td>
</tr>
<tr>
<td>12</td>
<td>Investments—other securities See Part IV, line 11</td>
<td>12</td>
</tr>
<tr>
<td>13</td>
<td>Investments—program-related See Part IV, line 11</td>
<td>13</td>
</tr>
<tr>
<td>14</td>
<td>Intangible assets</td>
<td>14</td>
</tr>
<tr>
<td>15</td>
<td>Other assets See Part IV, line 11</td>
<td>178,427</td>
</tr>
<tr>
<td>16</td>
<td>Total assets Add lines 1 through 15 (must equal line 34)</td>
<td>11,057,238</td>
</tr>
<tr>
<td>17</td>
<td>Accounts payable and accrued expenses</td>
<td>3,846</td>
</tr>
<tr>
<td>18</td>
<td>Grants payable</td>
<td>18</td>
</tr>
<tr>
<td>19</td>
<td>Deferred revenue</td>
<td>19</td>
</tr>
<tr>
<td>20</td>
<td>Tax-exempt bond liabilities</td>
<td>20</td>
</tr>
<tr>
<td>21</td>
<td>Escrow or custodial account liability Complete Part IV of Schedule D</td>
<td>21</td>
</tr>
<tr>
<td>22</td>
<td>Loans and other payables to current and former officers, directors, trustees, key employees, highest compensated employees, and disqualified persons Complete Part II of Schedule L</td>
<td>22</td>
</tr>
<tr>
<td>23</td>
<td>Secured mortgages and notes payable to unrelated third parties</td>
<td>23</td>
</tr>
<tr>
<td>24</td>
<td>Unsecured notes and loans payable to unrelated third parties</td>
<td>24</td>
</tr>
<tr>
<td>25</td>
<td>Other liabilities (including federal income tax, payables to related third parties, and other liabilities not included on lines 17 - 24) Complete Part X of Schedule D</td>
<td>13,216</td>
</tr>
<tr>
<td>26</td>
<td>Total liabilities Add lines 17 through 25</td>
<td>17,062</td>
</tr>
</tbody>
</table>

Organizations that follow SFAS 117 (ASC 958), check here □ and complete lines 27 through 29, and lines 33 and 34.

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>27</td>
<td>Unrestricted net assets</td>
</tr>
<tr>
<td>28</td>
<td>Temporarily restricted net assets</td>
</tr>
<tr>
<td>29</td>
<td>Permanently restricted net assets</td>
</tr>
</tbody>
</table>

Organizations that do not follow SFAS 117 (ASC 958), check here □ and complete lines 30 through 34.

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>30</td>
<td>Capital stock or trust principal, or current funds</td>
</tr>
<tr>
<td>31</td>
<td>Paid-in or capital surplus, or land, building or equipment fund</td>
</tr>
<tr>
<td>32</td>
<td>Retained earnings, endowment, accumulated income, or other funds</td>
</tr>
<tr>
<td>33</td>
<td>Total net assets or fund balances</td>
</tr>
<tr>
<td>34</td>
<td>Total liabilities and net assets/fund balances</td>
</tr>
</tbody>
</table>
### Part XI  Reconciliation of Net Assets

<table>
<thead>
<tr>
<th></th>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Total revenue (must equal Part VIII, column (A), line 12)</td>
<td>9,642,419</td>
</tr>
<tr>
<td>2</td>
<td>Total expenses (must equal Part IX, column (A), line 25)</td>
<td>1,010,114</td>
</tr>
<tr>
<td>3</td>
<td>Revenue less expenses  Subtract line 2 from line 1</td>
<td>8,632,305</td>
</tr>
<tr>
<td>4</td>
<td>Net assets or fund balances at beginning of year (must equal Part X, line 33, column (A))</td>
<td>11,040,176</td>
</tr>
<tr>
<td>5</td>
<td>Net unrealized gains (losses) on investments</td>
<td>-667,699</td>
</tr>
<tr>
<td>6</td>
<td>Donated services and use of facilities</td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>Investment expenses</td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>Prior period adjustments</td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>Other changes in net assets or fund balances (explain in Schedule O)</td>
<td>0</td>
</tr>
<tr>
<td>10</td>
<td>Net assets or fund balances at end of year  Combine lines 3 through 9 (must equal Part X, line 33, column (B))</td>
<td>19,004,782</td>
</tr>
</tbody>
</table>

### Part XII  Financial Statements and Reporting

<table>
<thead>
<tr>
<th></th>
<th>Description</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Accounting method used to prepare the Form 990</td>
<td>Cash</td>
<td>Accrual</td>
</tr>
<tr>
<td>2a</td>
<td>Were the organization’s financial statements compiled or reviewed by an independent accountant?</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>2b</td>
<td>Were the organization’s financial statements audited by an independent accountant?</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>2c</td>
<td>If &quot;Yes,&quot; to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant?</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>3a</td>
<td>As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Single Audit Act and OMB Circular A-133?</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>3b</td>
<td>If &quot;Yes,&quot; did the organization undergo the required audit or audits? If the organization did not undergo the required audit or audits, explain why in Schedule O and describe any steps taken to undergo such audits</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Form 990 (2018)
Form 990, Part III, Line 4a:
DISTRIBUTED GRANTS TO NONPROFIT ORGANIZATIONS PRIMARILY IN THE GREATER WILLIAMSBURG AREA. COMPETITIVE GRANTS WERE AWARDED IN THE FOLLOWING FOCUS AREAS: ARTS & CULTURE, CHILDREN & YOUNG ADULTS, ENVIRONMENT & CONSERVATION, HEALTH & COMMUNITY WELLNESS, AND SENIOR SERVICES. ADDITIONAL GRANTS WERE AWARDED FOR EDUCATION, HISTORIC PRESERVATION, HUMAN SERVICES, TRANSPORTATION, AMATEUR SPORTS, OVARIAN CANCER, AND OTHER COMMUNITY NEEDS AT THE REQUEST OF DONORS.
Form 990, Part III, Line 4b:
PROVIDED SCHOLARSHIPS FOR 94 STUDENTS WHO HAVE ATTENDED HIGH SCHOOL AT A WILLIAMSBURG-JAMES CITY COUNTY PUBLIC SCHOOL OR ARE ATTENDING A PUBLIC COLLEGE IN THE STATE OF VIRGINIA. CRITERIA FOR SCHOLARSHIPS INCLUDES ACADEMIC ACHIEVEMENT, COMMUNITY SERVICE, CAREER INTEREST AND FINANCIAL NEED.
**SCHEDULE A**  
(For Form 990 or 990-EZ)

**Public Charity Status and Public Support**

Complete if the organization is a section 501(c)(3) organization or a section 4947(a)(1) nonexempt charitable trust.  
Attach to Form 990 or Form 990-EZ.  
Go to www.irs.gov/Form990 for the latest information.

**Name of the organization**

GREATER WILLIAMSBURG COMMUNITY TRUST

**Employer identification number**

54-1927558

### Part I  Reason for Public Charity Status (All organizations must complete this part.) See instructions.

The organization is not a private foundation because it is (For lines 1 through 12, check only one box)

<table>
<thead>
<tr>
<th></th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>A church, convention of churches, or association of churches described in section 170(b)(1)(A)(i).</td>
</tr>
<tr>
<td>2</td>
<td>A school described in section 170(b)(1)(A)(ii). (Attach Schedule E (Form 990 or 990-EZ).)</td>
</tr>
<tr>
<td>3</td>
<td>A hospital or a cooperative hospital service organization described in section 170(b)(1)(A)(iii).</td>
</tr>
<tr>
<td>4</td>
<td>A medical research organization operated in conjunction with a hospital described in section 170(b)(1)(A)(iii). Enter the hospital’s name, city, and state</td>
</tr>
<tr>
<td>5</td>
<td>An organization operated for the benefit of a college or university owned or operated by a governmental unit described in section 170(b)(1)(A)(iv). (Complete Part II.)</td>
</tr>
<tr>
<td>6</td>
<td>A federal, state, or local government or governmental unit described in section 170(b)(1)(A)(v).</td>
</tr>
<tr>
<td>7</td>
<td>An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in section 170(b)(1)(A)(vi). (Complete Part II.)</td>
</tr>
<tr>
<td>8</td>
<td>A community trust described in section 170(b)(1)(A)(vi) (Complete Part II.)</td>
</tr>
<tr>
<td>9</td>
<td>An agricultural research organization described in 170(b)(1)(A)(ix) operated in conjunction with a land-grant college or university or a non-land-grant college of agriculture. See instructions. Enter the name, city, and state of the college or university</td>
</tr>
<tr>
<td>10</td>
<td>An organization that normally receives (1) more than 33 1/3% of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions—subject to certain exceptions, and (2) no more than 33 1/3% of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975. See section 509(a)(2). (Complete Part II.)</td>
</tr>
<tr>
<td>11</td>
<td>An organization organized and operated exclusively to test for public safety. See section 509(a)(4).</td>
</tr>
<tr>
<td>12</td>
<td>An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or more publicly supported organizations described in section 509(a)(1) or section 509(a)(2). See section 509(a)(3). Check the box in lines 12a through 12d that describes the type of supporting organization and complete lines 12e, 12f, and 12g.</td>
</tr>
<tr>
<td>a</td>
<td>Type I. A supporting organization operated, supervised, or controlled by its supported organization(s), typically by giving the supported organization(s) the power to regularly appoint or elect a majority of the directors or trustees of the supporting organization. You must complete Part IV, Sections A and B.</td>
</tr>
<tr>
<td>b</td>
<td>Type II. A supporting organization supervised or controlled in connection with its supported organization(s), by having control or management of the supporting organization vested in the same persons that control or manage the supported organization(s). You must complete Part IV, Sections A and C.</td>
</tr>
<tr>
<td>c</td>
<td>Type III functionally integrated. A supporting organization operated in connection with, and functionally integrated with, its supported organization(s) (see instructions). You must complete Part IV, Sections A, D, and E.</td>
</tr>
<tr>
<td>d</td>
<td>Type III non-functionally integrated. A supporting organization operated in connection with its supported organization(s) that is not functionally integrated. The organization generally must satisfy a distribution requirement and an attentiveness requirement (see instructions). You must complete Part IV, Sections A and D, and Part V.</td>
</tr>
<tr>
<td>e</td>
<td>Check this box if the organization received a written determination from the IRS that it is a Type I, Type II, Type III functionally integrated, or Type III non-functionally integrated supporting organization.</td>
</tr>
<tr>
<td>f</td>
<td>Enter the number of supported organizations.</td>
</tr>
</tbody>
</table>

Provide the following information about the supported organization(s)

<table>
<thead>
<tr>
<th>(i) Name of supported organization</th>
<th>(ii) EIN</th>
<th>(iii) Type of organization (described on lines 1-10 above (see instructions))</th>
<th>(iv) Is the organization listed in your governing document?</th>
<th>(v) Amount of monetary support (see instructions)</th>
<th>(vi) Amount of other support (see instructions)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>Yes</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
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<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Total**

For Paperwork Reduction Act Notice, see the Instructions for Form 990 or 990-EZ.

Cat No 11285F  
Schedule A (Form 990 or 990-EZ) 2018
Part II  Support Schedule for Organizations Described in Sections 170(b)(1)(A)(iv), 170(b)(1)(A)(vi), and 170(b)(1)(A)(ix)  
(Complete only if you checked the box on line 5, 7, 8, or 9 of Part I or if the organization failed to qualify under Part III. If the organization fails to qualify under the tests listed below, please complete Part III.)

### Section A. Public Support

<table>
<thead>
<tr>
<th>Fiscal Year (or fiscal year beginning in)</th>
<th>(a) 2014</th>
<th>(b) 2015</th>
<th>(c) 2016</th>
<th>(d) 2017</th>
<th>(e) 2018</th>
<th>(f) Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Gifts, grants, contributions, and member fees received</td>
<td>1,609,542</td>
<td>620,715</td>
<td>1,004,290</td>
<td>4,961,615</td>
<td>2,538,862</td>
<td>10,735,024</td>
</tr>
<tr>
<td>2 Tax revenues levied for the organization’s benefit and either paid to or expended on its behalf</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3 The value of services or facilities furnished by a governmental unit to the organization without charge</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4 Total</td>
<td>1,609,542</td>
<td>620,715</td>
<td>1,004,290</td>
<td>4,961,615</td>
<td>2,538,862</td>
<td>10,735,024</td>
</tr>
<tr>
<td>5 The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 14, column (f)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6 Public support. Subtract line 5 from line 4</td>
<td>6,332,150</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Section B. Total Support

<table>
<thead>
<tr>
<th>Fiscal Year (or fiscal year beginning in)</th>
<th>(a) 2014</th>
<th>(b) 2015</th>
<th>(c) 2016</th>
<th>(d) 2017</th>
<th>(e) 2018</th>
<th>(f) Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>7 Amounts from line 4</td>
<td>1,609,542</td>
<td>620,715</td>
<td>1,004,290</td>
<td>4,961,615</td>
<td>2,538,862</td>
<td>10,735,024</td>
</tr>
<tr>
<td>8 Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources</td>
<td>182,470</td>
<td>199,513</td>
<td>156,077</td>
<td>216,089</td>
<td>335,592</td>
<td>1,089,741</td>
</tr>
<tr>
<td>9 Net income from unrelated business activities, whether or not the business is regularly carried on</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>10 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI)</td>
<td>251</td>
<td>251</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>11 Total support. Add lines 7 through 10</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>11,625,016</td>
</tr>
<tr>
<td>12 Gross receipts from related activities, etc (see instructions)</td>
<td>12</td>
<td>234,129</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>13 First five years. If the Form 990 is for the organization’s first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and stop here</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Section C. Computation of Public Support Percentage

<table>
<thead>
<tr>
<th>Fiscal Year</th>
<th>(a) 2014</th>
<th>(b) 2015</th>
<th>(c) 2016</th>
<th>(d) 2017</th>
<th>(e) 2018</th>
<th>(f) Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>14 Public support percentage for 2018 (line 6, column (f) divided by line 11, column (f))</td>
<td>53550%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>15 Public support percentage for 2017 Schedule A, Part II, line 14</td>
<td>42990%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

16a 33 1/3% support test—2018. If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization.

16b 33 1/3% support test—2017. If the organization did not check a box on line 13 or 16a, and line 15 is 33 1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization.

17a 10%-facts-and-circumstances test—2018. If the organization did not check a box on line 13, 16a, 16b, and line 14 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and stop here. Explain in Part VI how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization.

17b 10%-facts-and-circumstances test—2017. If the organization did not check a box on line 13, 16a, 16b, 17a, and line 15 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and stop here. Explain in Part VI how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization.

18 Private foundation. If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions.
### Section A. Public Support

#### (Calendar year (or fiscal year beginning in))

<table>
<thead>
<tr>
<th></th>
<th>(a) 2014</th>
<th>(b) 2015</th>
<th>(c) 2016</th>
<th>(d) 2017</th>
<th>(e) 2018</th>
<th>(f) Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Gifts, grants, contributions, and membership fees received (Do not include any &quot;unusual grants&quot;)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Gross receipts from activities that are not an unrelated trade or business under section 513</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Tax revenues levied for the organization's benefit and either paid to or expended on its behalf</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>The value of services or facilities furnished by a governmental unit to the organization without charge</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Total. Add lines 1 through 5</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7a</td>
<td>Amounts included on lines 1, 2, and 3 received from disqualified persons</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7b</td>
<td>Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of $5,000 or 1% of the amount on line 13 for the year</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7c</td>
<td>Add lines 7a and 7b</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>Public support. (Subtract line 7c from line 6)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Section B. Total Support

#### (Calendar year (or fiscal year beginning in))

<table>
<thead>
<tr>
<th></th>
<th>(a) 2014</th>
<th>(b) 2015</th>
<th>(c) 2016</th>
<th>(d) 2017</th>
<th>(e) 2018</th>
<th>(f) Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>9</td>
<td>Amounts from line 6</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>10a</td>
<td>Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>10b</td>
<td>Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>Net income from unrelated business activities not included in line 10b, whether or not the business is regularly carried on</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>12</td>
<td>Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>13</td>
<td>Total support. (Add lines 9, 10c, 11, and 12)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>14</td>
<td>First five years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and stop here</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Section C. Computation of Public Support Percentage

<table>
<thead>
<tr>
<th></th>
<th>15</th>
<th>16</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Public support percentage for 2018 (line 8, column (f) divided by line 13, column (f))</td>
<td>15</td>
</tr>
<tr>
<td></td>
<td>Public support percentage from 2017 Schedule A, Part III, line 15</td>
<td>16</td>
</tr>
</tbody>
</table>

### Section D. Computation of Investment Income Percentage

<table>
<thead>
<tr>
<th></th>
<th>17</th>
<th>18</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Investment income percentage for 2018 (line 10c, column (f) divided by line 13, column (f))</td>
<td>17</td>
</tr>
<tr>
<td></td>
<td>Investment income percentage from 2017 Schedule A, Part III, line 17</td>
<td>18</td>
</tr>
</tbody>
</table>

**33 1/3% support tests—2018.** If the organization did not check the box on line 14, and line 15 is more than 33 1/3%, and line 17 is not more than 33 1/3%, check this box as a publicly supported organization.

**33 1/3% support tests—2017.** If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33 1/3% and line 18 is not more than 33 1/3%, check this box and stop here. The organization qualifies as a publicly supported organization.
### Supporting Organizations

(Complete only if you checked a box on line 12 of Part I. If you checked 12a of Part I, complete Sections A and B. If you checked 12b of Part I, complete Sections A and C. If you checked 12c of Part I, complete Sections A, D, and E. If you checked 12d of Part I, complete Sections A and D, and complete Part V.)

#### Section A. All Supporting Organizations

<table>
<thead>
<tr>
<th>Question</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>Are all of the organization’s supported organizations listed by name in the organization’s governing documents?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>If “No,” describe in Part VI how the supported organizations are designated. If designated by class or purpose, describe the designation. If historic and continuing relationship, explain.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Did the organization have any supported organization that does not have an IRS determination of status under section 509 (a)(1) or (2)? If “Yes,” explain in Part VI how the organization determined that the supported organization was described in section 509(a)(1) or (2)</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Did the organization have a supported organization described in section 501(c)(4), (5), or (6)? If “Yes,” answer (b) and (c) below</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Did the organization confirm that each supported organization qualified under section 501(c)(4), (5), or (6) and satisfied the public support tests under section 509(a)(2)? If “Yes,” describe in Part VI when and how the organization made the determination</td>
<td>3a</td>
<td></td>
</tr>
<tr>
<td>Did the organization ensure that all support to such organizations was used exclusively for section 170(c)(2)(B) purposes? If “Yes,” explain in Part VI what controls the organization put in place to ensure such use</td>
<td>3b</td>
<td></td>
</tr>
<tr>
<td>Was any supported organization not organized in the United States (“foreign supported organization”)? If “Yes” and if you checked 12a or 12b in Part I, answer (b) and (c) below</td>
<td>3c</td>
<td></td>
</tr>
<tr>
<td>Did the organization have ultimate control and discretion in deciding whether to make grants to the foreign supported organization? If “Yes,” describe in Part VI how the organization had such control and discretion despite being controlled or supervised by or in connection with its supported organizations</td>
<td>4a</td>
<td></td>
</tr>
<tr>
<td>Did the organization support any foreign supported organization that does not have an IRS determination under sections 501(c)(3) and 509(a)(1) or (2)? If “Yes,” explain in Part VI what controls the organization used to ensure that all support to the foreign supported organization was used exclusively for section 170(c)(2)(B) purposes</td>
<td>4b</td>
<td></td>
</tr>
<tr>
<td>Did the organization add, substitute, or remove any supported organizations during the tax year? If “Yes,” answer (b) and (c) below (if applicable). Also, provide detail in Part VI, including (i) the names and EIN numbers of the supported organizations added, substituted, or removed, (ii) the reasons for each such action, (iii) the authority under the organization’s governing document authorizing such action, and (iv) how the action was accomplished (such as by amendment to the organizing document)</td>
<td>4c</td>
<td></td>
</tr>
<tr>
<td>Type I or Type II only. Was any added or substituted supported organization part of a class already designated in the organization’s organizing document?</td>
<td>5a</td>
<td></td>
</tr>
<tr>
<td>Substitutions only. Was the substitution the result of an event beyond the organization’s control?</td>
<td>5b</td>
<td></td>
</tr>
<tr>
<td>Did the organization provide support (whether in the form of grants or the provision of services or facilities) to anyone other than (i) its supported organizations, (ii) individuals that are part of the charitable class benefited by one or more of its supported organizations, or (iii) other supporting organizations that also support or benefit one or more of the filing organization’s supported organizations? If “Yes,” provide detail in Part VI.</td>
<td>5c</td>
<td></td>
</tr>
<tr>
<td>Did the organization provide a grant, loan, compensation, or other similar payment to a substantial contributor (defined in section 4958(c)(3)(C)), a family member of a substantial contributor, or a 35% controlled entity with regard to a substantial contributor? If “Yes,” complete Part I of Schedule L (Form 990 or 990-EZ)</td>
<td>6</td>
<td></td>
</tr>
<tr>
<td>Did the organization make a loan to a disqualified person (as defined in section 4958) not described in line 7? If “Yes,” complete Part I of Schedule L (Form 990 or 990-EZ)</td>
<td>7</td>
<td></td>
</tr>
<tr>
<td>Was the organization controlled directly or indirectly at any time during the tax year by one or more disqualified persons as defined in section 4946 (other than foundation managers and organizations described in section 509(a)(1) or (2))? If “Yes,” provide detail in Part VI.</td>
<td>8</td>
<td></td>
</tr>
<tr>
<td>Did one or more disqualified persons (as defined in line 9a) hold a controlling interest in any entity in which the supporting organization had an interest? If “Yes,” provide detail in Part VI.</td>
<td>9a</td>
<td></td>
</tr>
<tr>
<td>Did a disqualified person (as defined in line 9a) have an ownership interest in, or derive any personal benefit from, assets in which the supporting organization also had an interest? If “Yes,” provide detail in Part VI.</td>
<td>9b</td>
<td></td>
</tr>
<tr>
<td>Was the organization subject to the excess business holdings rules of section 4943 because of section 4943(f) (regarding certain Type II supporting organizations, and all Type III non-functionally integrated supporting organizations)? If “Yes,” answer line 10b below</td>
<td>9c</td>
<td></td>
</tr>
<tr>
<td>Did the organization have any excess business holdings in the tax year? (Use Schedule C, Form 4720, to determine whether the organization had excess business holdings)</td>
<td>10a</td>
<td></td>
</tr>
<tr>
<td>Did the organization have any controlling interest in any entity in which the supporting organization had an interest? If “Yes,” provide detail in Part VI.</td>
<td>10b</td>
<td></td>
</tr>
</tbody>
</table>
# Part IV  Supporting Organizations (continued)

## Section B. Type I Supporting Organizations

<table>
<thead>
<tr>
<th>Question</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Did the directors, trustees, or membership of one or more supported organizations have the power to regularly appoint or elect at least a majority of the organization's directors or trustees at all times during the tax year?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. Did the organization operate for the benefit of any supported organization other than the supported organization(s) that operated, supervised, or controlled the supporting organization?</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

## Section C. Type II Supporting Organizations

<table>
<thead>
<tr>
<th>Question</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Were a majority of the organization's directors or trustees during the tax year also a majority of the directors or trustees of each of the organization's supported organization(s)?</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

## Section D. All Type III Supporting Organizations

<table>
<thead>
<tr>
<th>Question</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Did the organization provide to each of its supported organizations, by the last day of the fifth month of the organization's tax year, (i) a written notice describing the type and amount of support provided during the prior tax year, (ii) a copy of the Form 990 that was most recently filed as of the date of notification, and (iii) copies of the organization's governing documents in effect on the date of notification, to the extent not previously provided?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. Were any of the organization's officers, directors, or trustees either (i) appointed or elected by the supported organization(s) or (ii) serving on the governing body of a supported organization?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. By reason of the relationship described in (2), did the organization's supported organizations have a significant voice in the organization's investment policies and in directing the use of the organization's income or assets at all times during the tax year?</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

## Section E. Type III Functionally-Integrated Supporting Organizations

<table>
<thead>
<tr>
<th>Question</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Check the box next to the method that the organization used to satisfy the Integral Part Test during the year (see instructions)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. Did substantially all of the organization's activities during the tax year directly further the exempt purposes of the supported organization(s) to which the organization was responsive?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. Parent of Supported Organizations</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Part V  Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations

1. Check here if the organization satisfied the Integral Part Test as a qualifying trust on Nov 20, 1970 (explain in Part VI)  

#### Section A - Adjusted Net Income

<table>
<thead>
<tr>
<th></th>
<th>(A) Prior Year</th>
<th>(B) Current Year (optional)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Net short-term capital gain</td>
<td>1</td>
</tr>
<tr>
<td>2</td>
<td>Recoveries of prior-year distributions</td>
<td>2</td>
</tr>
<tr>
<td>3</td>
<td>Other gross income (see instructions)</td>
<td>3</td>
</tr>
<tr>
<td>4</td>
<td>Add lines 1 through 3</td>
<td>4</td>
</tr>
<tr>
<td>5</td>
<td>Depreciation and depletion</td>
<td>5</td>
</tr>
<tr>
<td>6</td>
<td>Portion of operating expenses paid or incurred for production or collection of gross income or for management, conservation, or maintenance of property held for production of income (see instructions)</td>
<td>6</td>
</tr>
<tr>
<td>7</td>
<td>Other expenses (see instructions)</td>
<td>7</td>
</tr>
<tr>
<td>8</td>
<td>Adjusted Net Income (subtract lines 5, 6 and 7 from line 4)</td>
<td>8</td>
</tr>
</tbody>
</table>

#### Section B - Minimum Asset Amount

<table>
<thead>
<tr>
<th></th>
<th>(A) Prior Year</th>
<th>(B) Current Year (optional)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Aggregate fair market value of all non-exempt-use assets (see instructions for short tax year or assets held for part of year)</td>
<td>1</td>
</tr>
<tr>
<td>a</td>
<td>Average monthly value of securities</td>
<td>1a</td>
</tr>
<tr>
<td>b</td>
<td>Average monthly cash balances</td>
<td>1b</td>
</tr>
<tr>
<td>c</td>
<td>Fair market value of other non-exempt-use assets</td>
<td>1c</td>
</tr>
<tr>
<td>d</td>
<td>Total (add lines 1a, 1b, and 1c)</td>
<td>1d</td>
</tr>
<tr>
<td>e</td>
<td>Discount claimed for blockage or other factors (explain in detail in Part VI)</td>
<td>2</td>
</tr>
<tr>
<td>2</td>
<td>Acquisition indebtedness applicable to non-exempt use assets</td>
<td>2</td>
</tr>
<tr>
<td>3</td>
<td>Subtract line 2 from line 1d</td>
<td>3</td>
</tr>
<tr>
<td>4</td>
<td>Cash deemed held for exempt use Enter 1-1/2% of line 3 (for greater amount, see instructions)</td>
<td>4</td>
</tr>
<tr>
<td>5</td>
<td>Net value of non-exempt-use assets (subtract line 4 from line 3)</td>
<td>5</td>
</tr>
<tr>
<td>6</td>
<td>Multiply line 5 by 0.035</td>
<td>6</td>
</tr>
<tr>
<td>7</td>
<td>Recoveries of prior-year distributions</td>
<td>7</td>
</tr>
<tr>
<td>8</td>
<td>Minimum Asset Amount (add line 7 to line 6)</td>
<td>8</td>
</tr>
</tbody>
</table>

#### Section C - Distributable Amount

1. Adjusted net income for prior year (from Section A, line 8, Column A)  
2. Enter 85% of line 1  
3. Minimum asset amount for prior year (from Section B, line 8, Column A)  
4. Enter greater of line 2 or line 3  
5. Income tax imposed in prior year  
6. Distributable Amount: Subtract line 5 from line 4, unless subject to emergency temporary reduction (see instructions)  
7. Check here if the current year is the organization's first as a non-functionally-integrated Type III supporting organization (see instructions)
## Part V  Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations (continued)

### Section D - Distributions

<table>
<thead>
<tr>
<th>Current Year</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Amounts paid to supported organizations to accomplish exempt purposes</td>
</tr>
<tr>
<td>2</td>
<td>Amounts paid to perform activity that directly furthers exempt purposes of supported organizations, in excess of income from activity</td>
</tr>
<tr>
<td>3</td>
<td>Administrative expenses paid to accomplish exempt purposes of supported organizations</td>
</tr>
<tr>
<td>4</td>
<td>Amounts paid to acquire exempt-use assets</td>
</tr>
<tr>
<td>5</td>
<td>Qualified set-aside amounts (prior IRS approval required)</td>
</tr>
<tr>
<td>6</td>
<td>Other distributions (describe in Part VI) See instructions</td>
</tr>
<tr>
<td>7</td>
<td>Total annual distributions. Add lines 1 through 6</td>
</tr>
<tr>
<td>8</td>
<td>Distributions to attentive supported organizations to which the organization is responsive (provide details in Part VI) See instructions</td>
</tr>
<tr>
<td>9</td>
<td>Distributable amount for 2018 from Section C, line 6</td>
</tr>
<tr>
<td>10</td>
<td>Line 8 amount divided by Line 9 amount</td>
</tr>
</tbody>
</table>

### Section E - Distribution Allocations (see instructions)

<table>
<thead>
<tr>
<th></th>
<th>(i) Excess Distributions</th>
<th>(ii) Underdistributions Pre-2018</th>
<th>(iii) Distributable Amount for 2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Distributable amount for 2018 from Section C, line 6</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Underdistributions, if any, for years prior to 2018 (reasonable cause required-- explain in Part VI) See instructions</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Excess distributions carryover, if any, to 2018</td>
<td></td>
<td></td>
</tr>
<tr>
<td>a</td>
<td>From 2013.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>b</td>
<td>From 2014.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>c</td>
<td>From 2015.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>d</td>
<td>From 2016.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>e</td>
<td>From 2017.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>f</td>
<td>Total of lines 3a through 3e</td>
<td></td>
<td></td>
</tr>
<tr>
<td>g</td>
<td>Applied to underdistributions of prior years</td>
<td></td>
<td></td>
</tr>
<tr>
<td>h</td>
<td>Applied to 2018 distributable amount</td>
<td></td>
<td></td>
</tr>
<tr>
<td>i</td>
<td>Carryover from 2013 not applied (see instructions)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>j</td>
<td>Remainder Subtract lines 3g, 3h, and 3i from 3f</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Distributions for 2018 from Section D, line 7</td>
<td></td>
<td></td>
</tr>
<tr>
<td>a</td>
<td>Applied to underdistributions of prior years</td>
<td></td>
<td></td>
</tr>
<tr>
<td>b</td>
<td>Applied to 2018 distributable amount</td>
<td></td>
<td></td>
</tr>
<tr>
<td>c</td>
<td>Remainder Subtract lines 4a and 4b from 4</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Remaining underdistributions for years prior to 2018, if any Subtract lines 3g and 4a from line 2 If the amount is greater than zero, explain in Part VI See instructions</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Remaining underdistributions for 2018 Subtract lines 3h and 4b from line 1 If the amount is greater than zero, explain in Part VI See instructions</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>Excess distributions carryover to 2019. Add lines 3j and 4c</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>Breakdown of line 7</td>
<td></td>
<td></td>
</tr>
<tr>
<td>a</td>
<td>Excess from 2014.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>b</td>
<td>Excess from 2015.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>c</td>
<td>Excess from 2016.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>d</td>
<td>Excess from 2017.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>e</td>
<td>Excess from 2018.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
**Facts And Circumstances Test**

**990 Schedule A, Supplemental Information**

<table>
<thead>
<tr>
<th>Return Reference</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>SCHEDULE A, PART VI, LIST OF UNUSUAL GRANTS</td>
<td>DESCRIPTION GIFT FROM ESTATE AMOUNT 6300000 DESCRIPTION GIFT FROM ESTATE AMOUNT 1700000</td>
</tr>
</tbody>
</table>
SCHEDULE D  
(Form 990)  

Supplemental Financial Statements  

Complete if the organization answered "Yes," on Form 990, Part IV, line 6, 7, 8, 9, 10, 11a, 11b, 11c, 11d, 11e, 11f, 12a, or 12b. 

Attach to Form 990. 

Go to www.irs.gov/Form990 for the latest information. 

Name of the organization  
GREATR WILLIAMSBURG COMMUNITY TRUST  

Employer identification number  
54-1927558  

Part I  Organizations Maintaining Donor Advised Funds or Other Similar Funds or Accounts.  
Complete if the organization answered "Yes" on Form 990, Part IV, line 6. 

<table>
<thead>
<tr>
<th></th>
<th>(a) Donor advised funds</th>
<th>(b) Funds and other accounts</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Total number at end of year</td>
<td>37</td>
</tr>
<tr>
<td>2</td>
<td>Aggregate value of contributions to (during year)</td>
<td>292,449</td>
</tr>
<tr>
<td>3</td>
<td>Aggregate value of grants from (during year)</td>
<td>375,990</td>
</tr>
<tr>
<td>4</td>
<td>Aggregate value at end of year</td>
<td>3,796,816</td>
</tr>
</tbody>
</table>

5 Did the organization inform all donors and donor advisors in writing that the assets held in donor advised funds are the organization's property, subject to the organization's exclusive legal control?  
Yes ☐ No ☑  

6 Did the organization inform all grantees, donors, and donor advisors in writing that grant funds can be used only for charitable purposes and not for the benefit of the donor or donor advisor, or for any other purpose conferring impermissible private benefit?  
Yes ☐ No ☑  

Part II  Conservation Easements.  
Complete if the organization answered "Yes" on Form 990, Part IV, line 7. 

1 Purpose(s) of conservation easements held by the organization (check all that apply)  
☐ Preservation of land for public use (e.g., recreation or education)  
☐ Preservation of an historically important land area  
☐ Protection of natural habitat  
☐ Preservation of a certified historic structure  
☐ Preservation of open space  

2 Complete lines 2a through 2d if the organization held a qualified conservation contribution in the form of a conservation easement on the last day of the tax year.  

<table>
<thead>
<tr>
<th></th>
<th>Held at the End of the Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>2a</td>
<td>2b</td>
</tr>
<tr>
<td>2c</td>
<td>2d</td>
</tr>
</tbody>
</table>

3 Number of conservation easements modified, transferred, released, extinguished, or terminated by the organization during the tax year  

4 Number of states where property subject to conservation easement is located  

5 Does the organization have a written policy regarding the periodic monitoring, inspection, handling of violations, and enforcement of the conservation easements it holds?  
Yes ☐ No ☑  

6 Staff and volunteer hours devoted to monitoring, inspecting, handling of violations, and enforcing conservation easements during the year  

7 Amount of expenses incurred in monitoring, inspecting, handling of violations, and enforcing conservation easements during the year  

8 Does each conservation easement reported on line 2(d) above satisfy the requirements of section 170(h)(4)(B)(i) and section 170(h)(4)(B)(ii)?  
Yes ☐ No ☑  

9 In Part III, describe how the organization reports conservation easements in its revenue and expense statement, and balance sheet, and include, if applicable, the text of the footnote to the organization's financial statements that describes the organization's accounting for conservation easements.  

Part III  Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets.  
Complete if the organization answered "Yes" on Form 990, Part IV, line 8.  

1a If the organization elected, as permitted under SFAS 116 (ASC 958), not to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide, in Part XIII, the text of the footnote to its financial statements that describes these items  

1b If the organization elected, as permitted under SFAS 116 (ASC 958), to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide the following amounts relating to these items  

(i) Revenue included on Form 990, Part VIII, line 1  

(ii) Assets included in Form 990, Part X  

2 If the organization received or held works of art, historical treasures, or other similar assets for financial gain, provide the following amounts required to be reported under SFAS 116 (ASC 958) relating to these items  

a Revenue included on Form 990, Part VIII, line 1  

b Assets included in Form 990, Part X  

For Paperwork Reduction Act Notice, see the Instructions for Form 990.  

Cat No 52283D  
Schedule D (Form 990) 2018
### Part III  Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets (continued)

<p>| | | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>3</td>
<td>Using the organization's acquisition, accession, and other records, check any of the following that are a significant use of its collection items (check all that apply)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>a</td>
<td>Public exhibition</td>
<td>d</td>
<td>Loan or exchange programs</td>
</tr>
<tr>
<td>b</td>
<td>Scholarly research</td>
<td>e</td>
<td>Other</td>
</tr>
<tr>
<td>c</td>
<td>Preservation for future generations</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

4. Provide a description of the organization's collections and explain how they further the organization's exempt purpose in Part XIII.

5. During the year, did the organization solicit or receive donations of art, historical treasures or other similar assets to be sold to raise funds rather than to be maintained as part of the organization's collection? □ Yes □ No

### Part IV  Escrow and Custodial Arrangements.

Complete if the organization answered "Yes" on Form 990, Part IV, line 9, or reported an amount on Form 990, Part X, line 21.

<table>
<thead>
<tr>
<th></th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>1a</td>
<td></td>
</tr>
<tr>
<td>b</td>
<td>If &quot;Yes,&quot; explain the arrangement in Part XIII and complete the following table</td>
</tr>
<tr>
<td>c</td>
<td>Beginning balance</td>
</tr>
<tr>
<td>d</td>
<td>Additions during the year</td>
</tr>
<tr>
<td>e</td>
<td>Distributions during the year</td>
</tr>
<tr>
<td>f</td>
<td>Ending balance</td>
</tr>
</tbody>
</table>

2a. Did the organization include an amount on Form 990, Part X, line 21, for escrow or custodial account liability? □ Yes □ No

b. If "Yes," explain the arrangement in Part XIII. Check here if the explanation has been provided in Part XIII. □ Yes □ No

### Part V  Endowment Funds.

Complete if the organization answered "Yes" on Form 990, Part IV, line 10.

<table>
<thead>
<tr>
<th></th>
<th>(a) Current year</th>
<th>(b) Prior year</th>
<th>(c) Two years back</th>
<th>(d) Three years back</th>
<th>(e) Four years back</th>
</tr>
</thead>
<tbody>
<tr>
<td>1a</td>
<td>Beginning of year balance</td>
<td>$8,573,963</td>
<td>$4,501,283</td>
<td>$3,853,887</td>
<td>$4,009,673</td>
</tr>
<tr>
<td>b</td>
<td>Contributions</td>
<td>$8,860,570</td>
<td>$3,732,890</td>
<td>$197,606</td>
<td>$189,840</td>
</tr>
<tr>
<td>c</td>
<td>Net investment earnings, gains, and losses</td>
<td>-$388,282</td>
<td>$708,234</td>
<td>$593,974</td>
<td>-$208,058</td>
</tr>
<tr>
<td>d</td>
<td>Grants or scholarships</td>
<td>$247,433</td>
<td>$343,149</td>
<td>$126,955</td>
<td>$121,014</td>
</tr>
<tr>
<td>e</td>
<td>Other expenditures for facilities and programs</td>
<td>$13,003</td>
<td>$25,295</td>
<td>$17,229</td>
<td>$16,554</td>
</tr>
<tr>
<td>f</td>
<td>Administrative expenses</td>
<td>$16,785,815</td>
<td>$8,573,963</td>
<td>$4,501,283</td>
<td>$3,853,887</td>
</tr>
</tbody>
</table>

2. Provide the estimated percentage of the current year end balance (line 1g, column (a)) held as

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>a</td>
<td>Board designated or quasi-endowment ▶ 31 210 %</td>
</tr>
<tr>
<td>b</td>
<td>Permanent endowment ▶ 11 270 %</td>
</tr>
<tr>
<td>c</td>
<td>Temporarily restricted endowment ▶ 57 520 %</td>
</tr>
</tbody>
</table>

The percentages on lines 2a, 2b, and 2c should equal 100%.

3a. Are there endowment funds not in the possession of the organization that are held and administered for the organization by

<table>
<thead>
<tr>
<th></th>
<th>(i) unrelated organizations</th>
<th>(ii) related organizations</th>
</tr>
</thead>
<tbody>
<tr>
<td>3a(i)</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>3a(ii)</td>
<td>Yes</td>
<td>No</td>
</tr>
</tbody>
</table>

b. If "Yes" on 3a(ii), are the related organizations listed as required on Schedule R? □ Yes □ No

4. Describe in Part XIII the intended uses of the organization's endowment funds

### Part VI  Land, Buildings, and Equipment.

Complete if the organization answered "Yes" on Form 990, Part IV, line 11a. See Form 990, Part X, line 10.

<table>
<thead>
<tr>
<th>Description of property</th>
<th>(a) Cost or other basis (investment)</th>
<th>(b) Cost or other basis (other)</th>
<th>(c) Accumulated depreciation</th>
<th>(d) Book value</th>
</tr>
</thead>
<tbody>
<tr>
<td>1a</td>
<td>Land</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>b</td>
<td>Buildings</td>
<td>$300,000</td>
<td></td>
<td>$32,692</td>
</tr>
<tr>
<td>c</td>
<td>Leasehold improvements</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>d</td>
<td>Equipment</td>
<td>$41,917</td>
<td></td>
<td>$35,562</td>
</tr>
<tr>
<td>e</td>
<td>Other</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Total. Add lines 1a through 1e (Column (d) must equal Form 990, Part X, column (B), line 10(c)) ▶ 273,663
### Part VII Investments—Other Securities

Complete if the organization answered "Yes" on Form 990, Part IV, line 11b.

See Form 990, Part X, line 12.

<table>
<thead>
<tr>
<th>(a) Description of security or category</th>
<th>(b) Book value</th>
<th>(c) Method of valuation Cost or end-of-year market value</th>
</tr>
</thead>
<tbody>
<tr>
<td>(1) Financial derivatives</td>
<td>...</td>
<td>...</td>
</tr>
<tr>
<td>(2) Closely-held equity interests</td>
<td>...</td>
<td>...</td>
</tr>
<tr>
<td>(3) Other</td>
<td>...</td>
<td>...</td>
</tr>
</tbody>
</table>

Total. (Column (b) must equal Form 990, Part X, col (b) line 12.)

### Part VIII Investments—Program Related

Complete if the organization answered 'Yes' on Form 990, Part IV, line 11c. See Form 990, Part X, line 13.

<table>
<thead>
<tr>
<th>(a) Description of investment</th>
<th>(b) Book value</th>
<th>(c) Method of valuation Cost or end-of-year market value</th>
</tr>
</thead>
<tbody>
<tr>
<td>(1)</td>
<td>...</td>
<td>...</td>
</tr>
<tr>
<td>(2)</td>
<td>...</td>
<td>...</td>
</tr>
<tr>
<td>(3)</td>
<td>...</td>
<td>...</td>
</tr>
<tr>
<td>(4)</td>
<td>...</td>
<td>...</td>
</tr>
<tr>
<td>(5)</td>
<td>...</td>
<td>...</td>
</tr>
<tr>
<td>(6)</td>
<td>...</td>
<td>...</td>
</tr>
<tr>
<td>(7)</td>
<td>...</td>
<td>...</td>
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<td>(8)</td>
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<tr>
<td>(9)</td>
<td>...</td>
<td>...</td>
</tr>
</tbody>
</table>

Total. (Column (b) must equal Form 990, Part X, col (b) line 13.)

### Part IX Other Assets

Complete if the organization answered 'Yes' on Form 990, Part IV, line 11d. See Form 990, Part X, line 15.

<table>
<thead>
<tr>
<th>(a) Description</th>
<th>(b) Book value</th>
</tr>
</thead>
<tbody>
<tr>
<td>(1)</td>
<td>...</td>
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<tr>
<td>(2)</td>
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<tr>
<td>(3)</td>
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<td>(4)</td>
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<td>(5)</td>
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<td>(7)</td>
<td>...</td>
</tr>
<tr>
<td>(8)</td>
<td>...</td>
</tr>
<tr>
<td>(9)</td>
<td>...</td>
</tr>
</tbody>
</table>

Total. (Column (b) must equal Form 990, Part X, col (b) line 15.)

### Part X Other Liabilities

Complete if the organization answered "Yes" on Form 990, Part IV, line 11e or 11f. See Form 990, Part X, line 25.

1. (a) Description of liability | (b) Book value |
<table>
<thead>
<tr>
<th></th>
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</tr>
</thead>
<tbody>
<tr>
<td>(1) Federal income taxes</td>
<td>...</td>
</tr>
<tr>
<td>(2)</td>
<td>...</td>
</tr>
<tr>
<td>(3)</td>
<td>...</td>
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<tr>
<td>(8)</td>
<td>...</td>
</tr>
<tr>
<td>(9)</td>
<td>...</td>
</tr>
</tbody>
</table>

Total. (Column (b) must equal Form 990, Part X, col (b) line 25.)

2. Liability for uncertain tax positions. In Part XIII, provide the text of the footnote to the organization’s financial statements that reports the organization’s liability for uncertain tax positions under FIN 48 (ASC 740). Check here if the text of the footnote has been provided in Part XIII.
### Part XI  Reconciliation of Revenue per Audited Financial Statements With Revenue per Return

Complete if the organization answered 'Yes' on Form 990, Part IV, line 12a.

<table>
<thead>
<tr>
<th></th>
<th>Description</th>
<th>Amounts (USD)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Total revenue, gains, and other support per audited financial statements</td>
<td>8,923,825</td>
</tr>
<tr>
<td>2</td>
<td>Amounts included on line 1 but not on Form 990, Part VIII, line 12</td>
<td></td>
</tr>
<tr>
<td></td>
<td>a  Net unrealized gains (losses) on investments</td>
<td>-667,699</td>
</tr>
<tr>
<td></td>
<td>b  Donated services and use of facilities</td>
<td></td>
</tr>
<tr>
<td></td>
<td>c  Recoveries of prior year grants</td>
<td></td>
</tr>
<tr>
<td></td>
<td>d  Other (Describe in Part XIII )</td>
<td></td>
</tr>
<tr>
<td></td>
<td>e  Add lines 2a through 2d</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Subtract line 2e from line 1</td>
<td>-667,699</td>
</tr>
<tr>
<td>4</td>
<td>Amounts included on Form 990, Part VIII, line 12, but not on line 1</td>
<td></td>
</tr>
<tr>
<td></td>
<td>a  Investment expenses not included on Form 990, Part VIII, line 7b</td>
<td>50,895</td>
</tr>
<tr>
<td></td>
<td>b  Other (Describe in Part XIII )</td>
<td></td>
</tr>
<tr>
<td></td>
<td>c  Add lines 4a and 4b</td>
<td>50,895</td>
</tr>
<tr>
<td>5</td>
<td>Total revenue Add lines 3 and 4c. (This must equal Form 990, Part I, line 12)</td>
<td>9,642,419</td>
</tr>
</tbody>
</table>

### Part XII  Reconciliation of Expenses per Audited Financial Statements With Expenses per Return

Complete if the organization answered 'Yes' on Form 990, Part IV, line 12a.

<table>
<thead>
<tr>
<th></th>
<th>Description</th>
<th>Amounts (USD)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Total expenses and losses per audited financial statements</td>
<td>959,219</td>
</tr>
<tr>
<td>2</td>
<td>Amounts included on line 1 but not on Form 990, Part IX, line 25</td>
<td></td>
</tr>
<tr>
<td></td>
<td>a  Donated services and use of facilities</td>
<td></td>
</tr>
<tr>
<td></td>
<td>b  Prior year adjustments</td>
<td></td>
</tr>
<tr>
<td></td>
<td>c  Other losses</td>
<td></td>
</tr>
<tr>
<td></td>
<td>d  Other (Describe in Part XIII )</td>
<td></td>
</tr>
<tr>
<td></td>
<td>e  Add lines 2a through 2d</td>
<td>0</td>
</tr>
<tr>
<td>3</td>
<td>Subtract line 2e from line 1</td>
<td>959,219</td>
</tr>
<tr>
<td>4</td>
<td>Amounts included on Form 990, Part IX, line 25, but not on line 1</td>
<td></td>
</tr>
<tr>
<td></td>
<td>a  Investment expenses not included on Form 990, Part VIII, line 7b</td>
<td>50,895</td>
</tr>
<tr>
<td></td>
<td>b  Other (Describe in Part XIII )</td>
<td></td>
</tr>
<tr>
<td></td>
<td>c  Add lines 4a and 4b</td>
<td>50,895</td>
</tr>
<tr>
<td>5</td>
<td>Total expenses Add lines 3 and 4c. (This must equal Form 990, Part I, line 18)</td>
<td>1,010,114</td>
</tr>
</tbody>
</table>

### Part XIII  Supplemental Information

Provide the descriptions required for Part II, lines 3, 5, and 9, Part III, lines 1a and 4, Part IV, lines 1b and 2b, Part V, line 4, Part X, line 2, Part X, lines 2d and 4b, and Part XII, lines 2d and 4b. Also complete this part to provide any additional information.
<table>
<thead>
<tr>
<th>Return Reference</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
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</tbody>
</table>
**Additional Data**

**Software ID:**

**Software Version:**

**EIN:** 54-1927558  
**Name:** GREATER WILLIAMSBURG COMMUNITY TRUST

---

**Supplemental Information**

<table>
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<tr>
<th>Return Reference</th>
<th>Explanation</th>
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<tbody>
<tr>
<td>PART V, LINE 4</td>
<td>THE ENDOWMENT IS A PERPETUAL FUND WHOSE PURPOSE IS TO PROVIDE FUNDING FOR THE TRUST’S PROGRAM OBJECTIVES AND TO SUSTAIN THE TRUST’S OPERATIONS</td>
</tr>
<tr>
<td>Return Reference</td>
<td>Explanation</td>
</tr>
<tr>
<td>------------------</td>
<td>-------------</td>
</tr>
</tbody>
</table>
Schedule I
(Form 990)

Grants and Other Assistance to Organizations, Governments and Individuals in the United States

Complete if the organization answered "Yes," on Form 990, Part IV, line 21 or 22.
Attach to Form 990.

Go to www.irs.gov/Form990 for the latest information.

Name of the organization
GREATER WILLIAMSBURG COMMUNITY TRUST

Part I  General Information on Grants and Assistance

1. Does the organization maintain records to substantiate the amount of the grants or assistance, the grantees' eligibility for the grants or assistance, and the selection criteria used to award the grants or assistance? [ ] Yes [ ] No

2. Describe in Part IV the organization's procedures for monitoring the use of grant funds in the United States.

Part II  Grants and Other Assistance to Domestic Organizations and Domestic Governments.

Complete if the organization answered "Yes" on Form 990, Part IV, line 21, for any recipient that received more than $5,000. Part II can be duplicated if additional space is needed.

<table>
<thead>
<tr>
<th>(a) Name and address of organization or government</th>
<th>(b) EIN</th>
<th>(c) IRC section (if applicable)</th>
<th>(d) Amount of cash grant</th>
<th>(e) Amount of non-cash assistance</th>
<th>(f) Method of valuation (book, FMV, appraisal, other)</th>
<th>(g) Description of noncash assistance</th>
<th>(h) Purpose of grant or assistance</th>
</tr>
</thead>
<tbody>
<tr>
<td>(1) See Additional Data</td>
<td></td>
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<td>(12)</td>
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</tr>
</tbody>
</table>

2. Enter total number of section 501(c)(3) and government organizations listed in the line 1 table.

3. Enter total number of other organizations listed in the line 1 table.
### Grants and Other Assistance to Domestic Individuals

Complete if the organization answered "Yes" on Form 990, Part IV, line 22

Part III can be duplicated if additional space is needed

<table>
<thead>
<tr>
<th>(a) Type of grant or assistance</th>
<th>(b) Number of recipients</th>
<th>(c) Amount of cash grant</th>
<th>(d) Amount of noncash assistance</th>
<th>(e) Method of valuation (book, FMV, appraisal, other)</th>
<th>(f) Description of noncash assistance</th>
</tr>
</thead>
<tbody>
<tr>
<td>(1) COLLEGE SCHOLARSHIPS</td>
<td>94</td>
<td>109,985</td>
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</tr>
<tr>
<td>(2)</td>
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<td></td>
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</tr>
</tbody>
</table>

### Part IV Supplemental Information

Provide the information required in Part I, line 2; Part III, column (b); and any other additional information.

**Return Reference**

**Explanation**

**PART I, LINE 2**

COMPETITIVE GRANT APPLICATIONS ARE SUBMITTED STATING THE ORGANIZATION'S NEED AND INTENDED USE OF GRANT FUNDS. THESE GRANT APPLICATIONS ARE REVIEWED THOROUGHLY BY THE DISTRIBUTION COMMITTEE AND ULTIMATELY APPROVED BY THE ENTIRE BOARD OF TRUSTEES. COMPETITIVE GRANT RECEPIENTS ARE REQUIRED TO FILE A FOLLOW-UP REPORT ON THE USE OF THE FUNDS. ADDITIONALLY, COMPETITIVE GRANT RECEPIENTS MAY BE ASKED FOR A SITE VISIT OR INTERVIEW FOLLOWING COMPLETION OF THE GRANT. SITE VISIT IS CONDUCTED BY DISTRIBUTION COMMITTEE MEMBERS.
**Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.**

<table>
<thead>
<tr>
<th>(a) Name and address of organization or government</th>
<th>(b) EIN</th>
<th>(c) IRC section if applicable</th>
<th>(d) Amount of cash grant</th>
<th>(e) Amount of non-cash assistance</th>
<th>(f) Method of valuation (book, FMV, appraisal, other)</th>
<th>(g) Description of non-cash assistance</th>
<th>(h) Purpose of grant or assistance</th>
</tr>
</thead>
<tbody>
<tr>
<td>ANGELS OF MERCY INC MEDICAL CLINIC 7151 RICHMOND ROAD SUITE 401 WILLIAMSBURG, VA 23188</td>
<td>54-1901759</td>
<td>501(C)(3)</td>
<td>11,415</td>
<td></td>
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<td>GENERAL SUPPORT</td>
<td></td>
</tr>
<tr>
<td>AVALON A CENTER FOR WOMEN AND CHILDREN PO BOX 6805 WILLIAMSBURG, VA 23188</td>
<td>52-1208945</td>
<td>501(C)(3)</td>
<td>13,801</td>
<td></td>
<td></td>
<td>GENERAL SUPPORT</td>
<td></td>
</tr>
<tr>
<td>(a) Name and address of organization or government</td>
<td>(b) EIN</td>
<td>(c) IRC section</td>
<td>(d) Amount of cash grant</td>
<td>(e) Amount of non-cash assistance</td>
<td>(f) Method of valuation</td>
<td>(g) Description of non-cash assistance</td>
<td>(h) Purpose of grant or assistance</td>
</tr>
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<td>----------------------------------</td>
</tr>
<tr>
<td>COLLEGE OF WILLIAM &amp; MARY FOUNDATION</td>
<td>54-0734117</td>
<td>501(C)(3)</td>
<td>6,000</td>
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<td></td>
<td>GENERAL SUPPORT</td>
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<tr>
<td>PO BOX 1776 WILLIAMSBURG, VA 23187</td>
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<tr>
<td>COLONIAL WILLIAMSBURG FOUNDATION</td>
<td>54-0505888</td>
<td>501(C)(3)</td>
<td>21,700</td>
<td></td>
<td></td>
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<td>GENERAL SUPPORT</td>
</tr>
<tr>
<td>PO BOX 1776 WILLIAMSBURG, VA 23187</td>
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<td></td>
</tr>
<tr>
<td>(a) Name and address of organization or government</td>
<td>(b) EIN</td>
<td>(c) IRC section if applicable</td>
<td>(d) Amount of cash grant</td>
<td>(e) Amount of non-cash assistance</td>
<td>(f) Method of valuation (book, FMV, appraisal, other)</td>
<td>(g) Description of non-cash assistance</td>
<td>(h) Purpose of grant or assistance</td>
</tr>
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</tr>
<tr>
<td>COVENANT CHRISTIAN SCHOOL 113 SPRING BRANCH WILLIAMSBURG, VA 23185</td>
<td>47-3735189</td>
<td>501(C)(3)</td>
<td>13,500</td>
<td></td>
<td></td>
<td></td>
<td>GENERAL SUPPORT</td>
</tr>
<tr>
<td>HOSPICE HOUSE AND SUPPORT CARE OF WILLIAMSBURG 4445 POWHATAN PARKWAY WILLIAMSBURG, VA 23188</td>
<td>52-1289657</td>
<td>501(C)(3)</td>
<td>13,500</td>
<td></td>
<td></td>
<td></td>
<td>GENERAL SUPPORT</td>
</tr>
</tbody>
</table>
Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.

<table>
<thead>
<tr>
<th>(a) Name and address of organization or government</th>
<th>(b) EIN</th>
<th>(c) IRC section if applicable</th>
<th>(d) Amount of cash grant</th>
<th>(e) Amount of non-cash assistance</th>
<th>(f) Method of valuation (book, FMV, appraisal, other)</th>
<th>(g) Description of non-cash assistance</th>
<th>(h) Purpose of grant or assistance</th>
</tr>
</thead>
<tbody>
<tr>
<td>JAMES RIVER ASSOCIATION 4833 OLD MAIN STREET RICHMOND, VA 23231</td>
<td>54-1352365</td>
<td>501(C)(3)</td>
<td>9,700</td>
<td></td>
<td></td>
<td>GENERAL SUPPORT</td>
<td></td>
</tr>
<tr>
<td>OLDE TOWNE MEDICAL AND DENTAL CENTER 5249 OLDE TOWNE RD WILLIAMSBURG, VA 23188</td>
<td>54-1663905</td>
<td>501(C)(3)</td>
<td>9,910</td>
<td></td>
<td></td>
<td>GENERAL SUPPORT</td>
<td></td>
</tr>
<tr>
<td>a) Name and address of organization or government</td>
<td>b) EIN</td>
<td>c) IRC section if applicable</td>
<td>d) Amount of cash grant</td>
<td>e) Amount of non-cash assistance</td>
<td>f) Method of valuation (book, FMV, appraisal, other)</td>
<td>g) Description of non-cash assistance</td>
<td>h) Purpose of grant or assistance</td>
</tr>
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<tr>
<td>PENNSULAR PASTORAL COUNCILING CENTER</td>
<td>54-0930168</td>
<td>501(C)(3)</td>
<td>7,500</td>
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<td>GENERAL SUPPORT</td>
<td></td>
</tr>
<tr>
<td>707 GUM ROCK COURT NEWPORT NEWS, VA 23606</td>
<td></td>
<td></td>
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<td>SAINT BEDE CATHOLIC CHURCH</td>
<td>54-0642331</td>
<td>501(C)(3)</td>
<td>24,671</td>
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<td>3666 IRONBOUND RD WILLIAMSBURG, VA 23188</td>
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<tr>
<td>(a) Name and address of organization or government</td>
<td>(b) EIN</td>
<td>(c) IRC section if applicable</td>
<td>(d) Amount of cash grant</td>
<td>(e) Amount of non-cash assistance</td>
<td>(f) Method of valuation (book, FMV, appraisal, other)</td>
<td>(g) Description of non-cash assistance</td>
<td>(h) Purpose of grant or assistance</td>
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</tr>
<tr>
<td>SOCIETY OF THE ALUMNI COLLEGE OF WILLIAM &amp; MARY PO BOX 2100 WILLIAMSBURG, VA 23187</td>
<td>54-6054289</td>
<td>501(C)(3)</td>
<td>15,000</td>
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<td>GENERAL SUPPORT</td>
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<tr>
<td>THE SALVATION ARMY PO BOX 269 ALEXANDRIA, VA 22313</td>
<td>58-0660607</td>
<td>501(C)(3)</td>
<td>25,171</td>
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<td>GENERAL SUPPORT</td>
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<tr>
<td>(a) Name and address of organization or government</td>
<td>(b) EIN</td>
<td>(c) IRC section</td>
<td>(d) Amount of cash grant</td>
<td>(e) Amount of non-cash assistance</td>
<td>(f) Method of valuation</td>
<td>(g) Description of non-cash assistance</td>
<td>(h) Purpose of grant or assistance</td>
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<td>UNITED JEWISH COMMUNITY OF THE VIRGINIA PENINSULA INC, 2700 SPRING RD, NEWPORT NEWS, VA, 23606</td>
<td>54-0480621</td>
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<tr>
<td>WALSINGHAM ACADEMY, 1100 JAMESTOWN ROAD, WILLIAMSBURG, VA, 23185</td>
<td>54-0592702</td>
<td>501(C)(3)</td>
<td>49,341</td>
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<tr>
<td>(a) Name and address of organization or government</td>
<td>(b) EIN</td>
<td>(c) IRC section if applicable</td>
<td>(d) Amount of cash grant</td>
<td>(e) Amount of non-cash assistance</td>
<td>(f) Method of valuation (book, FMV, appraisal, other)</td>
<td>(g) Description of non-cash assistance</td>
<td>(h) Purpose of grant or assistance</td>
</tr>
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<td>WILLIAMSBURG AREA FAITH IN ACTION</td>
<td>31-1812124</td>
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<td>354 MCLAW CIR 2 WILLIAMSBURG, VA 23185</td>
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<td>BACON STREET YOUTH AND FAMILY SERVICES</td>
<td>54-0891035</td>
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<td>247 MCLAWS CIRCLE WILLIAMSBURG, VA 23185</td>
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<tr>
<td>(a) Name and address of organization or government</td>
<td>(b) EIN</td>
<td>(c) IRC section if applicable</td>
<td>(d) Amount of cash grant</td>
<td>(e) Amount of non-cash assistance</td>
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<td>CHILD DEVELOPMENT RESOURCES</td>
<td>54-0791991</td>
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Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.

<table>
<thead>
<tr>
<th>(a) Name and address of organization or government</th>
<th>(b) EIN</th>
<th>(c) IRC section if applicable</th>
<th>(d) Amount of cash grant</th>
<th>(e) Amount of non-cash assistance</th>
<th>(f) Method of valuation (book, FMV, appraisal, other)</th>
<th>(g) Description of non-cash assistance</th>
<th>(h) Purpose of grant or assistance</th>
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<tr>
<td>GROVE CHRISTIAN OUTREACH CENTER 8800 POCOHONTAS TRAIL WILLIAMSBURG, VA 23185</td>
<td>27-0077733</td>
<td>501(C)(3)</td>
<td>7,000</td>
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<tr>
<td>HABITAT FOR HUMANITY 322 WEST LAMAR ST AMERICUS, GA 317093543</td>
<td>91-1914868</td>
<td>501(C)(3)</td>
<td>7,442</td>
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</table>
### Form 990 Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.

<table>
<thead>
<tr>
<th>(a) Name and address of organization or government</th>
<th>(b) EIN</th>
<th>(c) IRC section if applicable</th>
<th>(d) Amount of cash grant</th>
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<th>(g) Description of non-cash assistance</th>
<th>(h) Purpose of grant or assistance</th>
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<tbody>
<tr>
<td>JAMESTOWN-YORKTOWN FOUNDATION INC PO BOX 3605 WILLIAMSBURG, VA 23187</td>
<td>31-1618642</td>
<td>501(C)(3)</td>
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<td>NETWORK PENINSULA 2 BERNARDINE DRIVE NEWPORT NEWS, VA 23602</td>
<td>26-1250149</td>
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<td>Amount of non-cash assistance</td>
<td>Method of valuation (book, FMV, appraisal, other)</td>
<td>Description of non-cash assistance</td>
<td>Purpose of grant or assistance</td>
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<td>OLD SALEM MUSEUM AND GARDENS TOTAL</td>
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<td>600 S MAIN STREET WINSTONSALEM, NC 27101</td>
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<td>THE ARC OF GREATER GREENSBORO</td>
<td>54-1054921</td>
<td>501(C)(3)</td>
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<td>150-D STRAWBERRY PLAINS ROAD WILLIAMSBURG, VA 23188</td>
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<tr>
<td>Name and address of organization or government</td>
<td>EIN</td>
<td>IRC section</td>
<td>Amount of cash grant</td>
<td>Amount of non-cash assistance</td>
<td>Method of valuation</td>
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<td>Purpose of grant or assistance</td>
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<td>THE WILLIAMSBURG SYMPHONY ORCHESTRA</td>
<td>52-1342360</td>
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<td>TRIANGLE ARTS &amp; CULTURE LEAGUE INC</td>
<td>81-0730851</td>
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<td>PO BOX 1742 WILLIAMSBURG, VA 23187</td>
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<tr>
<td>(a) Name and address of organization or government</td>
<td>(b) EIN</td>
<td>(c) IRC section if applicable</td>
<td>(d) Amount of cash grant</td>
<td>(e) Amount of non-cash assistance</td>
<td>(f) Method of valuation (book, FMV, appraisal, other)</td>
<td>(g) Description of grant or assistance</td>
<td>(h) Purpose of grant or assistance</td>
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<tr>
<td>WILLIAMSBURG-JAMES CITY COUNTY COMMUNITY ACTION AGENCY 312 WALLER MILL ROAD SUITE 405 WILLIAMSBURG, VA 23185</td>
<td>23-7066134</td>
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<td>WJCC SCHOOLS FOUNDATION 117 IRONBOUND ROAD WILLIAMSBURG, VA 23185</td>
<td>47-2579468</td>
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<tr>
<td>(a) Name and address of organization or government</td>
<td>(b) EIN</td>
<td>(c) IRC section if applicable</td>
<td>(d) Amount of cash grant</td>
<td>(e) Amount of non-cash assistance</td>
<td>(f) Method of valuation (book, FMV, appraisal, other)</td>
<td>(g) Description of non-cash assistance</td>
<td>(h) Purpose of grant or assistance</td>
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<td>WORLD PEDIATRIC PROJECT 7201 GLEN FOREST DRIVE SUITE 304 RICHMOND, VA 23226</td>
<td>54-1953305</td>
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<td>35,000</td>
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<tr>
<td>WYCLIFFE SEED COMPANY 220 WESTWAY PLACE SUITE 100 ARLINGTON, TX 76018</td>
<td>33-0838929</td>
<td>501(C)(3)</td>
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### Noncash Contributions

**Part I** Types of Property

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<thead>
<tr>
<th>(a)</th>
<th>(b)</th>
<th>(c)</th>
<th>(d)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Check if applicable</td>
<td>Number of contributions or items contributed</td>
<td>Noncash contribution amounts reported on Form 990, Part VIII, line 1g</td>
<td>Method of determining noncash contribution amounts</td>
</tr>
<tr>
<td>1 Art—Works of art</td>
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<tr>
<td>2 Art—Historical treasures</td>
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<td></td>
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</tr>
<tr>
<td>3 Art—Fractional interests</td>
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</tr>
<tr>
<td>4 Books and publications</td>
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</tr>
<tr>
<td>5 Clothing and household goods</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>6 Cars and other vehicles</td>
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</tr>
<tr>
<td>7 Boats and planes</td>
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<tr>
<td>8 Intellectual property</td>
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<tr>
<td>9 Securities—Publicly traded</td>
<td>X</td>
<td>18</td>
<td>6,206,237 PER STOCK EXCHANGE</td>
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<tr>
<td>10 Securities—Closedly held stock</td>
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<tr>
<td>11 Securities—Partnership, LLC, or trust interests</td>
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<tr>
<td>12 Securities—Miscellaneous</td>
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<tr>
<td>13 Qualified conservation contribution—Historic structures</td>
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</tr>
<tr>
<td>14 Qualified conservation contribution—Other</td>
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</tr>
<tr>
<td>15 Real estate—Residential</td>
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</tr>
<tr>
<td>16 Real estate—Commercial</td>
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<tr>
<td>17 Real estate—Other</td>
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<tr>
<td>18 Collectibles</td>
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<tr>
<td>19 Food inventory</td>
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<tr>
<td>20 Drugs and medical supplies</td>
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<tr>
<td>21 Taxidermy</td>
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<tr>
<td>22 Historical artifacts</td>
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<tr>
<td>23 Scientific specimens</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>24 Archeological artifacts</td>
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<tr>
<td>25 Other ▶ (X) VARIOUS</td>
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<tr>
<td>26 Other ▶ ( )</td>
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<tr>
<td>27 Other ▶ ( )</td>
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<td></td>
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</tr>
<tr>
<td>28 Other ▶ ( )</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>29 Number of Forms 8283 received by the organization during the tax year for contributions for which the organization completed Form 8283, Part IV, Donor Acknowledgement</td>
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</table>

<table>
<thead>
<tr>
<th>30a</th>
<th>30b</th>
<th>Yes</th>
<th>No</th>
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<tbody>
<tr>
<td>During the year, did the organization receive by contribution any property reported in Part I, lines 1 through 28, that it must hold for at least three years from the date of the initial contribution, and which is not required to be used for exempt purposes for the entire holding period?</td>
<td>If &quot;Yes,&quot; describe the arrangement in Part II</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>31</td>
<td>Does the organization have a gift acceptance policy that requires the review of any nonstandard contributions?</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>32a</td>
<td>Does the organization hire or use third parties or related organizations to solicit, process, or sell noncash contributions?</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>33</td>
<td>If the organization did not report an amount in column (c) for a type of property for which column (a) is checked, describe in Part II</td>
<td></td>
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</tr>
</tbody>
</table>
Supplemental Information.

Provide the information required by Part I, lines 30b, 32b, and 33, and whether the organization is reporting in Part I, column (b), the number of contributions, the number of items received, or a combination of both. Also complete this part for any additional information.

<table>
<thead>
<tr>
<th>Return Reference</th>
<th>Explanation</th>
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<tr>
<td>PART I, LINE 33</td>
<td>THE TRUST RECEIVED VARIOUS OTHER IN-KIND DONATIONS FOR WHICH REVENUE WAS NOT RECORDED AS THE CRITERIA FOR RECOGNITION UNDER APPLICABLE ACCOUNTING STANDARDS WAS NOT MET. THE TOTAL ESTIMATED VALUE OF SUCH OTHER IN-KIND DONATIONS WAS $8,535</td>
</tr>
</tbody>
</table>
**Schedule O (Form 990 or 990-EZ)**

**Supplemental Information to Form 990 or 990-EZ**

Complete to provide information for responses to specific questions on Form 990 or 990-EZ or to provide any additional information.

- Attach to Form 990 or 990-EZ.
- Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for the latest information.

**990 Schedule O, Supplemental Information**

<table>
<thead>
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<th>Return Reference</th>
<th>Explanation</th>
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<tr>
<td>FORM 990, PART VI, SECTION B, LINE 11B</td>
<td>A DRAFT COPY OF THE ORGANIZATION’S FORM 990 IS REVIEWED BY THE AUDIT COMMITTEE (WHICH INCLUDES SEVERAL FINANCIAL EXPERTS) AND THE TRUSTEE AND GOVERNANCE COMMITTEE AT SCHEDULED COMMITTEE MEETINGS. THESE COMMITTEES ASK QUESTIONS AND PROVIDE REVISIONS TO THE FORM 990 IF APPROVED BY THE AUDIT AND TRUSTEE AND GOVERNANCE COMMITTEES, A RECOMMENDATION IS MADE BY THESE COMMITTEES FOR THE BOARD TO REVIEW THE FORM 990 AND APPROVE ULTIMATELY, THE FULL BOARD WILL APPROVE THE FORM 990 AND THE FORM 990 IS FILED</td>
</tr>
<tr>
<td>Return Reference</td>
<td>Explanation</td>
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<td>------------------</td>
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</tr>
<tr>
<td>FORM 990, PART VI, SECTION B, LINE 12C</td>
<td>THE ORGANIZATION’S BOARD REVIEWS THE CONFLICT OF INTEREST POLICY, PROVIDE QUESTIONNAIRES FOR OR THE BOARD MEMBERS TO REPORT CONFLICTS OF INTEREST, AND REPORT ON ANY FINDINGS OF CONFLICTS OF INTERESTS</td>
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<td>Explanation</td>
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<tr>
<td>FORM 990, PART VI, SECTION B, LINE 15</td>
<td>THE ORGANIZATION'S BOARD OF TRUSTEES REVIEWS AND APPROVES THE COMPENSATION OF THE EXECUTIVE DIRECTOR</td>
</tr>
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<td>Explanation</td>
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<tr>
<td>FORM 990, PART VI, SECTION C, LINE 19</td>
<td>THE ORGANIZATION’S GOVERNING DOCUMENTS, CONFLICT OF INTEREST POLICY, AND FINANCIAL STATEMENTS ARE MADE AVAILABLE TO THE PUBLIC FOR REVIEW UPON REQUEST</td>
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<tr>
<td>Return Reference</td>
<td>Explanation</td>
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<tr>
<td>FORM 990, PART XI, LINE 2C</td>
<td>FORM 990, FORM 990, PART XI, LINE 2C THERE WERE NO CHANGES TO THE AUDIT COMMITTEE'S PROCEDURES REGARDING THE OVERSIGHT OF THE AUDIT AND SELECTION OF THE INDEPENDENT AUDITORS</td>
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</table>