SCANNED JUL 1 0 2019

Form 990-PF Department of the Treasury Internal Revenue Service

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

Do not enter social security numbers on this form as it may be made public.
Go to www.irs.gov/Form990PF for instructions and the latest information.

OMB No 1545-0052

For calendar year 2018 or tax year beginning		, and ending		
Name of foundation			A Employer identification	n number
THE PAUL AND MARGARET PORT	rer			
CHARITABLE FOUNDATION			59-1750571	
Number and street (or P O box number if mail is not delivered to street	•	Room/suite	B Telephone number	
NC1-028-26-09 150 N COLLEC		<u> </u>	980-387-58	346
CHART Office NC 28255	postal code		C If exemption application is p	pending, check here
CHARLOTTE, NC 28255			<u> </u>	
G Check all that apply: Initial return		rmer public charity	D 1. Foreign organization	s, check here
Final return	Amended return		Foreign organizations me check here and attach co	eeting the 85% test,
Address change	Name change exempt private foundation		1	
H Check type of organization: X Section 501(c)(3) e Section 4947(a)(1) nonexempt charitable trust	Other taxable private founda	U	E If private foundation sta	
	ting method: X Cash	Accrual	under section 507(b)(1	
	Other (specify)	Accidal	F If the foundation is in a	
\$ 6,254,765. (Part I, colu		s.)	under section 507(b)(1	χω, check here
Part Analysis of Revenue and Expenses	Ť T		(a) Advicted not	(d) Disbursements
(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	for charitable purposes (cash basis only)
			N/A	(cash basis only)
1 Contributions, gifts, grants, etc., received 2 Check X if the foundation is not required to attach Sch. B			11/A	-
Interest on savings and temporary	560.	560.	 	STATEMENT 1
3 cash investments	163,785.	163,785.		STATEMENT 2
4 Dividends and interest from securities	103,703.	103,703.		DIVIEWENI 7
5a Gross rents			F	DEC
b Net rental income or (loss)	155,310.	•	 	KECEIVE
6a Net gain or (loss) from sale of assets not on line 10 b Gross sales price for all 1,525,080.	133,310.		 	77
assets on line 6a	<u> </u>	155,310.	18	MAY(2 8 2000
7 Capital gain net income (from Part IV, line 2)	—	133,310.	<u> </u> "	119
8 Net short-term capital gain		-	1 '	0.5
9 Income modifications Gross sales less returns				OGDEN TH
10a and allowances		<u> </u>	j '	, 01
b Less Cost of goods sold	+			
c Gross profit or (loss)	46,804.	20.		STATEMENT 3
11 Other income	366,459.	319,675.		DIWITHTINI 2
12 Total. Add lines 1 through 11	366,439.	319,673.		0.
13 Compensation of officers, directors, trustees, etc	0.	<u> </u>	<u> </u>	<u> </u>
14 Other employee salaries and wages				
15 Pension plans, employee benefits				
16a Legal fees b Accounting fees STMT 4	23,100.	0.	-	23,100
b Accounting fees STMT 4				
c Other professional fees STMT 5	62,733.	47,050.		15,683
	13,106.	4,006.		0.
18 Taxes STMT 6	13,100.	4,000.	-	ļ
19 Depreciation and depletion				
20 Occupancy	12,351.	6,176.		6,176
21 Travel, conferences, and meetings	14,351.	0,1/0.		0,1/6
22 Printing and publications	1 272	2 600		1 520
23 Other expenses STMT 7	4,373.	2,600.		1,530
24 Total operating and administrative	115 (6)	E0 020		16 400
expenses. Add lines 13 through 23	115,663.	59,832.		46,489 202,600
25 Contributions, girts, grants paid	202,600.	<u> </u>		202,600
26 Total expenses and disbursements.	212 252	E0 000		040 000
Add lines 24 and 25	318,263.	59,832.	<u> </u>	249,089
27 Subtract line 26 from line 12:	1	•		
a Excess of revenue over expenses and disbursements	48,196.			
b Net investment income (if negative, enter -0-)		259,843.		
C Adjusted net income (if negative, enter -0-)	1		N/A	1

823501 12-11-18 LHA For Paperwork Reduction Act Notice, see instructions.

Form **990-PF** (2018)

Form 99Q-PF (2018) CHARITABLE FOUNDATION 59-1750571 Beginning of year Part II Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only End of year (a) Book Value (b) Book Value (c) Fair Market Value 1 Cash - non-interest-bearing 399,333. 232,519. 232,520. 2 Savings and temporary cash investments 3 Accounts receivable ► Less allowance for doubtful accounts 4 Pledges receivable ▶ Less: allowance for doubtful accounts 5 Grants receivable 6 Receivables due from officers, directors, trustees, and other disqualified persons 7 Other notes and loans receivable Less allowance for doubtful accounts I 8 Inventories for sale or use 9 Prepaid expenses and deferred charges 10a Investments - U.S. and state government obligations STMT 9 5,356,599. 5,566,975. 5,666,846. b investments - corporate stock c Investments - corporate bonds 11 Investments - land, buildings, and equipment basis Less accumulated depreciation 12 Investments - mortgage loans STMT 10 108,339. 109,770. 355,399. 13 Investments - other 14 Land, buildings, and equipment; basis Less accumulated depreciation 15 Other assets (describe ▶ 16 Total assets (to be completed by all filers - see the 5,864,271. 5,909,264. 6,254,765. instructions. Also, see page 1, item 1) 17 Accounts payable and accrued expenses 18 Grants payable 19 Deferred revenue 20 Loans from officers, directors, trustees, and other disqualified persons 21 Mortgages and other notes payable 22 Other liabilities (describe 23 Total liabilities (add lines 17 through 22) Foundations that follow SFAS 117, check here and complete lines 24 through 26, and lines 30 and 31. 24 Unrestricted 25 Temporarily restricted 26 Permanently restricted **Vet Assets or Fund ▶** 🗓 Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. 27 Capital stock, trust principal, or current funds 28 Paid-in or capital surplus, or land, bldg., and equipment fund 0. Ō. 5,864,271. 5,909,264. 29 Retained earnings, accumulated income, endowment, or other funds 5,864,271. 5,909,264. 30 Total net assets or fund balances 5,909,264 5,864,271. 31 Total liabilities and net assets/fund balances Part III Analysis of Changes in Net Assets or Fund Balances 1 Total net assets or fund balances at beginning of year - Part II, column (a), line 30 5,864,271. (must agree with end-of-year figure reported on prior year's return) 2 Enter amount from Part I, line 27a 3 Other increases not included in line 2 (itemize) 0. 5,912,467. Add lines 1, 2, and 3 SEE STATEMENT 8 3,203. 5 Decreases not included in line 2 (itemize) 5,909,264. 6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30

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THE PAUL AND MARGARET PORTER CHARITABLE FOUNDATION

Form 990,PF (2018)

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(a) List and describe the kind(s) of property sold (for example, real estate, 2-story brick warehouse, or common stock, 200 shs. MLC Co.) (b) How acquired P - Purchase D - Donation (c) Date acquired (mo , day, yr.) (mo , day, yr.) (c) d (e) Gross sales price (f) Depreciation allowed (g) Cost or other basis (or allowable) (g) Cost or other basis (le) plus (f) minus (q))	
b SEE ATTACHED STATEMENT c d e (e) Gross sales price (f) Depreciation allowed (g) Cost or other basis (h) Gain or (loss)	
c d e (e) Gross sales price (f) Depreciation allowed (g) Cost or other basis (h) Gain or (loss)	
e (e) Gross sales price (f) Depreciation allowed (g) Cost or other basis (h) Gain or (loss)	
e (e) Gross sales price (f) Depreciation allowed (g) Cost or other basis (h) Gain or (loss)	
(e) Gross sales price (f) Depreciation allowed (g) Cost or other basis (h) Gain or (loss)	
(4) Annua (4)	
a	
b	
С	
d	
	,310.
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69. (I) Gains (Col. (h) gain minus	
(i) FMV as of 12/31/69 (j) Adjusted basis as of 12/31/69 (k) Excess of col. (i) col. (k), but not less than -0-) or Losses (from col. (h))	
a	
b	
С	
d	
e 155	,310.
	,310.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6):	
If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8 N/A	
If (loss), enter -0- in Part I, line 8 Part V Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income	
(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income.)	
If section 4940(d)(2) applies, leave this part blank.	
	X No
If "Yes," the foundation doesn't qualify under section 4940(e). Do not complete this part.	
1 Enter the appropriate amount in each column for each year, see the instructions before making any entries.	
(a) Base period years (b) (c) Distribution ratio	
Calendar year (or tax year beginning in) Adjusted qualifying distributions Net value of noncharitable-use assets (col. (b) divided by col.	
2017 272,765. 6,607,6470	1280
	38685
	33390
	16479
2013 52,287. 968,4530	3990
2 Total of line 1, column (d)	L3824
3 Average distribution ratio for the 5-year base period - divide the total on line 2 by 5.0, or by the number of years	
	12765
I I	227.
4 Enter the net value of noncharitable-use assets for 2018 from Part X, line 5	
4 Enter the net value of noncharitable-use assets for 2018 from Part X, line 5	
5 Multiply line 4 by line 3 5 293	934.
5 Multiply line 4 by line 3 5 293	934.
5 Multiply line 4 by line 3 6 Enter 1% of net investment income (1% of Part I, line 27b) 6 293	934.
5 Multiply line 4 by line 3 6 Enter 1% of net investment income (1% of Part I, line 27b) 6 293	934.
5 Multiply line 4 by line 3 5 293 6 Enter 1% of net investment income (1% of Part I, line 27b) 6 2 7 Add lines 5 and 6 7 296	934. 598. 532.

Form 990+PF (2018) CHARITABLE FOUNDATION 59-1750571 Part VI | Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see instructions 1a Exempt operating foundations described in section 4940(d)(2), check here and enter "N/A" on line 1. (attach copy of letter if necessary-see instructions) Date of ruling or determination letter: $5,\overline{197}$ b Domestic foundations that meet the section 4940(e) requirements in Part V, check here
and enter 1% 1 of Part I, line 27b c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations, enter 4% of Part I, line 12, col. (b). 2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-) 2 3 4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only, others, enter -0-) 4 5,197 5 Tax based on investment income Subtract line 4 from line 3. If zero or less, enter -0-6 Credits/Payments: 3.883 a 2018 estimated tax payments and 2017 overpayment credited to 2018 Ō. 6b b Exempt foreign organizations - tax withheld at source 0 c Tax paid with application for extension of time to file (Form 8868) σ. d Backup withholding erroneously withheld 3.883 7 7 Total credits and payments. Add lines 6a through 6d 8 Enter any penalty for underpayment of estimated tax. Check here X if Form 2220 is attached 8 9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed 9 10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid 10 11 Enter the amount of line 10 to be. Credited to 2019 estimated tax Part VII-A | Statements Regarding Activities Yes No 1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in Х any political campaign? 1a 1b X b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities. $\overline{\mathbf{x}}$ 1c c Did the foundation file Form 1120-POL for this year? d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: 0 • (2) On foundation managers. ▶ \$ (1) On the foundation. > \$ e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers > \$ X 2 2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities. 3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes 3 4a Did the foundation have unrelated business gross income of \$1,000 or more during the year? 4a X 4b X b If "Yes," has it filed a tax return on Form 990-T for this year? X 5 5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T 6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either; By language in the governing instrument, or By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law X 6 remain in the governing instrument? X 7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV 8a Enter the states to which the foundation reports or with which it is registered. See instructions. NC b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) $\overline{\mathbf{x}}$ 8b of each state as required by General Instruction G? If "No," attach explanation 9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2018 or the tax year beginning in 2018? See the instructions for Part XIV. If "Yes," complete Part XIV 10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses Form **990-PF** (2018)

THE PAUL AND MARGARET PORTER Form 990 PF (2018) CHARITABLE FOUNDATION Part VII-A Statements Regarding Activities (continued)

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· · · · · · · · · · · · · · · · · · ·		Yes	No
11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of			
section 512(b)(13)? If "Yes," attach schedule. See instructions	-11		X
12 Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges?			
If "Yes," attach statement, See instructions	12		X X
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Х	 ^* -
Website address ► PORTERFOUNDATION • ORG	10	21	<u> </u>
14 The books are in care of ► ROBERT R. FOX Telephone no. ►980-68	3 - 9	815	
Located at ►NC1-028-26-09 150 N COLLEGE ST, CHARLOTTE, NC ZIP+4 ►28		043	
15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - check here	233	$\overline{}$	т
and enter the amount of tax-exempt interest received or accrued during the year	N	/A	
16 At any time during calendar year 2018, did the foundation have an interest in or a signature or other authority over a bank,		Yes	No
securities, or other financial account in a foreign country?	16	103	X
See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the	-10	-	
foreign country	ŀ		
Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required	1		<u> </u>
File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.	•	Yes	Nο
1a During the year, did the foundation (either directly or indirectly):		103	
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?			
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from)	l		}
a disqualified person?	ľ		Ì
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?			
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? X Yes No			
(5) Transfer any income or assets to a disqualified person (or make any of either available			
for the benefit or use of a disqualified person)?			
(6) Agree to pay money or property to a government official? (Exception. Check "No"	i		
if the foundation agreed to make a grant to or to employ the official for a period after	1		
termination of government service, if terminating within 90 days.)			
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations			l
section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions			X
Organizations relying on a current notice regarding disaster assistance, check here	-10		
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected	ľ		
before the first day of the tax year beginning in 2018?	1c		$\overline{\mathbf{x}}$
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation	-~		 -
defined in section 4942(j)(3) or 4942(j)(5)):			ļ
a At the end of tax year 2018, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning		,, ,	[]
before 2018?			
If "Yes," list the years			
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect			
valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach			
statement - see instructions.) N/A	2b		
c if the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.			,
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time		'	,
during the year?			
b If "Yes," did it have excess business holdings in 2018 as a result of (1) any purchase by the foundation or disqualified persons after			
May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose	ĺ		
of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C,			
Form 4720, to determine if the foundation had excess business holdings in 2018.)	3b		$\overline{\mathbf{x}}$
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that		-+	
had not been removed from jeopardy before the first day of the tax year beginning in 2018?	4b		$\overline{\mathbf{x}}$
	n 990	DE	

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CHARITABLE FOUNDATION

Part VII-B Statements Regarding Activities for Which	Form 4/20 May Be i	Required (contin	ued)		
5à During the year, did the foundation pay or incur any amount to:				Yes	No
(1) Carry on propaganda, or otherwise attempt to influence legislation (section	n 4945(e))?	Y	es 🗶 No 🛭		
(2) Influence the outcome of any specific public election (see section 4955);	or to carry on, directly or indire	ectly,			1 1
any voter registration drive?			es 🗓 No 🥇		
(3) Provide a grant to an individual for travel, study, or other similar purposes	3?	Y	es 🗶 No 📗		
(4) Provide a grant to an organization other than a charitable, etc., organization	on described in section			,	1 1
4945(d)(4)(A)? See instructions		Y	es 🗶 No		
(5) Provide for any purpose other than religious, charitable, scientific, literary	, or educational purposes, or f		['.	- 1	
the prevention of cruelty to children or animals?		Y	es 🗶 No	:	1. 1
b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify un	der the exceptions described i	ın Regulations	1_		
section 53.4945 or in a current notice regarding disaster assistance? See instr	uctions			5b	X
Organizations relying on a current notice regarding disaster assistance, check	here		▶□ [
c If the answer is "Yes" to question 5a(4), does the foundation claim exemption f	rom the tax because it mainta	ined			
expenditure responsibility for the grant?		Y	es 🔲 No 📗		
If "Yes," attach the statement required by Regulations section 53.4945-5(d).		-		1 1	
6a Did the foundation, during the year, receive any funds, directly or indirectly, to				-	
a personal benefit contract?	Y	es 🗶 No 📙			
b Did the foundation, during the year, pay premiums, directly or indirectly, on a p		Ľ	6b	X	
If "Yes" to 6b, file Form 8870.					
7a At any time during the tax year, was the foundation a party to a prohibited tax s	Y	es 🗶 No		<u> </u> . †	
b If "Yes," did the foundation receive any proceeds or have any net income attrib		N/A	7b		
8 Is the foundation subject to the section 4960 tax on payment(s) of more than 5				1	
excess parachute payment(s) during the year?			es X No		
Part VIII Information About Officers, Directors, Trust	ees, Foundation Ma	nagers, Highl	У	-	
Paid Employees, and Contractors					
1 List all officers, directors, trustees, and foundation managers and t		(c) Compensation	(d)	1 () 5	
(a) Name and address	(b) Title, and average hours per week devoted	(If not paid.	(d) Contributions to employee benefit plans and deferred	(e) Exp account	, other
	to position	`enter'-0-)'	compensation	allowa	inces
ELLEN PORTER WARLICK	PRESIDENT				
401 S. TRYON STREET, SUITE 3000	1				^
CHARLOTTE, NC 28202	1.00	0.	0.		0.
PATRICIA PORTER TAYLOR	VICE PRESIDEN	ĮT.			
401 S. TRYON STREET, SUITE 3000		_			^
CHARLOTTE, NC 28202	1.00	0.	0.		0.
SCOTT PORTER	TREASURER				
401 S. TRYON STREET, SUITE 3000					_
CHARLOTTE, NC 28202	1.00	0.	0.		<u>0.</u>
J WILLIAM PORTER	SECRETARY				
401 S. TRYON STREET, SUITE 3000					_
CHARLOTTE, NC 28202	1.00	0.	0.	<u> </u>	0.
2 Compensation of five highest-paid employees (other than those inc		enter "NONE."	(d) Contributions to	Γ , , , , , , , , , , ,	
(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	employee benefit plans and deferred	(e) Exp	, other
	devoted to position	, ,	compensation	allowa	nces
NONE					
				ļ	
					
	1	I			
	1	i		1	
	1 1 1 1 1 1				
Fotal number of other employees paid over \$50,000					

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Part VIII Information About Officers, Directors, Trustees, Found Paid Employees, and Contractors (continued)	ation Managers, Highly	
3 Five highest-paid independent contractors for professional services. If none, enter	er "NONE."	
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
US TRUST - 150 N COLLEGE ST STE 2800,		_
CHARLOTTE, NC 28255	INVESTMENT/ADVISOR	Y 62,732.
	7	
	7	
-	\neg	
		
	7	
Total number of others receiving over \$50,000 for professional services	_	▶ 0
Part IX-A Summary of Direct Charitable Activities		
List the foundation's four largest direct charitable activities during the tax year. Include relevant statis	stical information such as the	
number of organizations and other beneficiaries served, conferences convened, research papers pro		Expenses
1 N/A		
· · · · · · · · · · · · · · · · · · ·		
2		
3		
	,, ,	
4		
Part IX-B Summary of Program-Related Investments		
Describe the two largest program-related investments made by the foundation during the tax year on	lines 1 and 2.	Amount
1 N/A		
2		
All other program-related investments. See instructions.		
3		
Total. Add lines 1 through 3	>	0.

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P	art X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations	ndations,	see instructions)
1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	6,185,721.
b	Average of monthly cash balances	1b	392,044.
C	Fair market value of all other assets	1c	400,130.
đ	Total (add lines 1a, b, and c)	1d	6,977,895
е	Reduction claimed for blockage or other factors reported on lines 1a and		
	1c (attach detailed explanation) 1e 0.		
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	6,977,895.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	104,668
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4.	5	6,873,227
6	Minimum investment return. Enter 5% of line 5	6	343,661
P.	art XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations a foreign organizations, check here and do not complete this part.)	nd certain	
1	Minimum investment return from Part X, line 6	1	343,661
2a			
b	Tax on investment income for 2018 from Part VI, line 5 Income tax for 2018 (This does not include the tax from Part VI.) 2a 5, 197. 2b 9, 482.		
C	Add lines 2a and 2b	2c	14,679.
3	Distributable amount before adjustments Subtract line 2c from line 1	3	328,982.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	328,982.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	328,982.
P.	art XII] Qualifying Distributions (see instructions)	11	
1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes		240 000
	Expenses, contributions, gifts, etc total from Part I, column (d), line 26	1a	249,089. 0.
	Program-related investments - total from Part IX-B	1b	<u> </u>
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the.		
	Suitability test (prior IRS approval required)	3a	
	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8; and Part XIII, line 4	4	249,089.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment	1 1	•
	income. Enter 1% of Part I, line 27b	5	0.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	249,089.
	Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation 4940(e) reduction of tax in those years.	qualifies for	the section

Form **990-PF** (2018)

b Excess from 2015 c Excess from 2016 d Excess from 2017 e Excess from 2018

	ND MARGARET P FOUNDATION	ORTER	59-	1750571 Page 9
Part XIII Undistributed Income (s	see instructions)			
	(a)	(b)	(c)	(d)
	Corpus	Years prior to 2017	2017	2018
1 Distributable amount for 2018 from Part XI, line 7				328,982.
2 Undistributed income, if any, as of the end of 2018				1
a Enter amount for 2017 only			198,891.	
b Total for prior years				
•		0.		
3 Excess distributions carryover, if any, to 2018.				
a From 2013		i		
b From 2014				
c From 2015				
d From 2016				
e From 2017				4
f Total of lines 3a through e	0.	1.		i
4 Qualifying distributions for 2018 from				1
Part XII, line 4: ▶\$ 249,089.				
a Applied to 2017, but not more than line 2a			198,891.	
b Applied to undistributed income of prior	···			
years (Election required - see instructions)		0.		:
c Treated as distributions out of corpus				í
(Election required - see instructions)	0.			
d Applied to 2018 distributable amount				50,198.
e Remaining amount distributed out of corpus	0.			1
5 Excess distributions carryover applied to 2018	0.			0.
(If an amount appears in column (d), the same amount must be shown in column (a))				
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	0.			
b Prior years' undistributed income. Subtract				
line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously				
assessed		0.		
d Subtract line 6c from line 6b. Taxable		0.		1
amount - see instructions e Undistributed income for 2017. Subtract line		-		1
4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2018, Subtract				
lines 4d and 5 from line 1. This amount must				
be distributed in 2019				278,784.
7 Amounts treated as distributions out of		- -		270,7040
corpus to satisfy requirements imposed by				į
section 170(b)(1)(F) or 4942(g)(3) (Election				ĺ
	0.			1
may be required - see instructions)				
8 Excess distributions carryover from 2013 not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2019.				
Subtract lines 7 and 8 from line 6a	0.			
10 Analysis of line 9.				
a Excess from 2014				

THE PAUL AND MARGARET PORTER CHARITABLE FOUNDATION Form 990₂PF (2018) 59-1750571 Part XIV. Private Operating Foundations (see instructions and Part VII-A, question 9) N/A 1 a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2018, enter the date of the ruling **b** Check box to indicate whether the foundation is a private operating foundation described in section 4942(1)(3) or 4942(1)(5) Prior 3 years Tax year 2 a Enter the lesser of the adjusted net (é) Total (a) 2018 (b) 2017 (c) 2016 (d) 2015 income from Part I or the minimum investment return from Part X for each year listed **b** 85% of line 2a c Qualifying distributions from Part XII, line 4 for each year listed d Amounts included in line 2c not used directly for active conduct of exempt activities e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c Complete 3a, b, or c for the alternative test relied upon. a "Assets" alternative test - enter: (1) Value of all assets (2) Value of assets qualifying under section 4942(j)(3)(B)(i) b "Endowment" alternative test - enter 2/3 of minimum investment return shown in Part X, line 6 for each year c "Support" alternative test - enter: (1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties) (2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(III) (3) Largest amount of support from an exempt organization (4) Gross investment income Part XV | Supplementary Information (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year-see instructions.) Information Regarding Foundation Managers: a List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000). (See section 507(d)(2).) b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest. NONE Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs: Check here Light if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc., to individuals or organizations under other conditions, complete items 2a, b, c, and d. a The name, address, and telephone number or email address of the person to whom applications should be addressed. SEE STATEMENT 11 b The form in which applications should be submitted and information and materials they should include: c Any submission deadlines:

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

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Part XV | Supplementary Information (continued) Grants and Contributions Paid During the Year or Approved for Future Payment If recipient is an individual, show any relationship to any foundation manager or substantial contributor Recipient Foundation Purpose of grant or status of recipient Amount contribution Name and address (home or business) a Paid during the year SOUTH MOUNTAIN CHRISTIAN YOUTH CAMP, SCHOLARSHIPS FOR INC. CAMPERS 1129 SOUTH MOUNTAIN ROAD BOSTIC, NC 28018 2,100. FREEDOM SCHOOL PARTNERS OPERATIONS 1030 AROSA AVENUE CHARLOTTE, NC 28203 2,500. HOWARD COUNTY PUBLIC SCHOOL SYSTEM gov HIGH SCHOOL FAMILY 6101 OLD DOBBIN RD FUND COLUMBIA, MD 21045 2,500. THE LEARNING COLLABORATIVE OPERATIONS 3241 SAM DRENAN RD CHARLOTTE, NC 28205-7621 2,500. CLEVELAND COUNTY POTATO PROJECT INC. BUILD A COOLED STORAGE 1175 WYKE ROAD FACILITY 4,000. SHELBY, NC 28150-4258 SEE CONTINUATION SHEET(S) 202,600. Total **▶** 3a **b** Approved for future payment NONE **▶** 3b 0. Total

·Part XVI-A	Analysis of Income-Producir	ng Activities

•	•				
Enter gross amounts unless otherwise indicated.	Unrelated bu (a) Business	(b)	Excluded I	(d)	(e) Related or exempt
1 Program service revenue;	code	Amount	code	Amount	function income
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments		· · · -			
3 Interest on savings and temporary cash					
investments			14	560.	
4 Dividends and interest from securities			14	163,785.	
5 Net rental income or (loss) from real estate:					
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal		•			
property					
7 Other investment income	721110	46,784.	14	20.	
8 Gain or (loss) from sales of assets other	7-2-2				
than inventory			14	155,310.	
9 Net income or (loss) from special events	l				
10 Gross profit or (loss) from sales of inventory					
11 Other revenue:					
a	- 		 		
D	·		 		
<u> </u>			 	· · · · · · · · · · · · · · · · · · ·	
o	-		\vdash		* *
e	·	16 701		210 675	0
12 Subtotal. Add columns (b), (d), and (e)		46,784.		319,675.	0.
13 Total Add line 12, columns (b), (d), and (e)				13	366,459.
(See worksheet in line 13 instructions to verify calculations.)					•
Part XVI-B Relationship of Activities	to the Accom	plishment of Ex	empt P	urposes	
Line No Explain below how each activity for which inc			contributed	I importantly to the accomp	olishment of
the foundation's exempt purposes (other than	n by providing funds t	for such purposes).			
`					
				-	
	•				
	-				
······					
					
I					

Firm's address ► 227 WEST TRADE ST, SUI CHARLOTTE, NC 28202

Form 99	<u>0-PF (201</u> 8) CHAR I	TABLE FOUN	DATIC	ON	59-	-1750571	Page 13
Part	XVII Information R Exempt Organ		fers to a	and Transactions ar	nd Relationships With No	ncharitable	
1 Dic	the organization directly or ind		the follows	no with any other organization	n described in section 501(c)	Y	es No
	her than section 501(c)(3) orga						1
	insfers from the reporting found			•			
	Cash		onompt o	. 94		1a(1)	_ <u>x</u> _
	Other assets					1a(2)	X
	ner transactions:					1(2/	 -
	Sales of assets to a noncharita	ahle exempt organizatio	n			1b(1)	_ <u></u>
٠, ,	Purchases of assets from a no					1b(1)	$\frac{1}{X}$
٠,	Rental of facilities, equipment,	, ,	amzation			1b(2)	$\frac{1}{x}$
٠,	Reimbursement arrangements					1b(4)	- X
• •	Loans or loan guarantees	,				1b(5)	$\frac{1}{X}$
	Performance of services or mi	emhershin or fundraisin	n solicitatii	nne		1b(6)	$\frac{1}{X}$
	aring of facilities, equipment, ma	·	-			10(0)	X
				-	ays show the fair market value of the		
					e in any transaction or sharing arrang		٠,
	umn (d) the value of the goods,				, in any transaction or origining arrang		
(a)Line n				le exempt organization	(d) Description of transfers, transact	ions, and sharing arran	gements
•	1	 	N/A		,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,		
		-			· · · · · · · · · · · · · · · · · · ·		
-					<u> </u>		
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	1			* "			
	1			· · · · · · · · · · · · · · · · · · ·			
	· † · · · · ·						
	1						
				-			
2a Ist	he foundation directly or indirec	tly affiliated with, or rela	ated to, one	e or more tax-exempt organiza	ations described		
ın s	ection 501(c) (other than section	on 501(c)(3)) or in secti	on 527?			Yes	X No
b If"	es," complete the following sch	edule.					
	(a) Name of org	ganization		(b) Type of organization	(c) Description of r	elationship	
	N/A						
							
	-			<u> </u>			
	Under penalties of pelicy, I depart and belief, it is true correct, and co	that I have examined this re	eturn, includii arer (other tha	ng accompanying schedules and s an taxpaver) is based on all informa	tatements, and to the best of my knowledge ition of which preparer has any knowledge	iviay the indust	cuss this
Sign		Mn/ C	/	1 6/12/19	No.	return with the pr shown below? S	reparer ee instr
Here		<u> </u>	W_				
	Signature/of/officer/or/trustee			Date			
	Pro Type preparer's na	ame P	reparer's s	signature			
De!-J			B.	ula O			
Paid	PAULA P. T			un G			
Prepa		ERWALKER L	LP				
Use (ווזע y ווזע						

Part IV Capital Gains and Los	sses for Tax on Investment Income				
	describe the kind(s) of property solution discusses describe the kind(s) of property solutions are the kind(s) of property solutions.		(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a US TRUST #7403	1		P		
b US TRUST #7403			P		
c US TRUST #7403			P		
d US TRUST #7403			P		
e US TRUST #7403		•	P		· · · · · · · · · · · · · · · · · · ·
	STIN BEACH HOTEL	· -	P		
q CAPITAL GAINS					-
h	-				
1					
1	· · · · · · · · · · · · · · · · · · ·				
k					
					-
m					
n					
0					
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale		Gain or (loss) lus (f) minus (g)	
a 1,686.		1,760.			-74.
b 475,426.		491,524.			-16,098.
c 385,494.		354,487.			31,007.
d 56,024.		59,278.			-3,254.
e 563,836.		462,331.			101,505.
f		390.			-390.
g 42,614.					42,614.
h					
1					
l					
k					
1					
m					
<u>n</u>					
0					
Complete only for assets showin	g gain in column (h) and owned by t		(I) Los	ses (from col. (h)) if col. (h) gain over	aal (k)
(i) F.M V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (ı) over col. (յ), ıf any		ot less than "-0-")	. ,,
a					-74.
b					-16,098.
С					31,007.
đ				<u> </u>	-3,254.
e					101,505.
<u>f</u>					-390.
<u>g</u>			. —		42,614.
h					
<u> </u>					
<u> </u>					
<u>k</u>					
m					
n					
0					
2 Capital gain net income or (net cap	pital loss) { If gain, also enter If (loss), enter "-0-	ın Part I, line 7 " ın Part I, line 7 }	2		155,310.
3 Net short-term capital gain or (los		, i			_
If gain, also enter in Part I, line 8, of If (loss), enter "-0-" in Part I, line 8	column (c).	}	3	N/A	

Supplementary Information Grants and Contributions Paid During the Year (Continuation) If recipient is an individual, Recipient Foundation Purpose of grant or show any relationship to **Amount** any foundation manager status of contribution Name and address (home or business) or substantial contributor recipient CENTRAL UNITED METHODIST CHURCH РC OPERATIONS 200 E MARION ST SHELBY, NC 28150 5,000. CLEVELAND COUNTY ABUSE PREVENTION Ьc FINAL COSTS OF COUNCIL, INC. CONSTRUCTION AND MOVING COSTS FOR THE PO BOX 2589 AGENCY SHELBY, NC 28151-2589 5,000. FEEDING KIDS OF CLEVELAND COUNTY DOUBLE THE NUMBER OF ÞС 105 ANNIES CIRCLE STUDENTS AND THEIR SHELBY, NC 25182 FAMILIES SERVED OVER THE SCHOOL BREAKS 5,000. LOAVES & FISHES FOOD PANTRY ÞС OPERATIONS 2050 LAMBS ROAD CHARLOTTESVILLE, VA 22901 5,000. TEACH FOR AMERICA ÞС EDUCATION 5855 EXECUTIVE CENTER DR STE 200 CHARLOTTE, NC 28212 5,000. THE SALVATION ARMY EMERGENCY FINANCIAL ÞС 501 ARCHDALE DRIVE ASSISTANCE FOR NEEDY CHARLOTTE, NC 28217-4237 INDIVIDUALS OR FAMILIES 5,000. CHILDREN'S HOME OF CLEVELAND COUNTY. ÞС FQUIPMENT AND SUPPLY INC. PURCHASES 425 C CHERRYVILLE ROAD SHELBY, NC 28150 7,500. FIRST UNITED METHODIST CHURCH OF РC THE EVERGREEN PROJECF CHARLOTTESVILLE 101 JEFFERSON STREET CHARLOTTESVILLE, VA 22902 7,500. CLEVELAND COUNTY SCHOOLS EDUCATIONAL РC ACADEMIC AWARDS FOUNDATION, INC. PROGRAM 400 WEST MARION STREET SHELBY, NC 28150 10,000. CROSSROADS RESCUE MISSION ÞС MEDICAL, VISION, PO BOX 2090 DENTAL AND SHELBY, NC 28151-2090 TRANSPORTATION COSTS 10,000. Total from continuation sheets 189,000.

Part XV, **Supplementary Information** Grants and Contributions Paid During the Year (Continuation) If recipient is an individual, Recipient Foundation Purpose of grant or show any relationship to Amount status of any foundation manager contribution Name and address (home or business) or substantial contributor recipient THE FIRST TEE OF THE POOTHILLS ÞС PHYSICAL EDUCATION 3005 LONGWOOD DRIVE SHELBY, NC 28152 10,000. UNITED METHODIST COMMITTEE ON RELIEF РC OPERATIONS 458 PONCE DE LEON AVE. NE ATLANTA, GA 30308 10,000. CLEVELAND COUNTY RESCUE MISSION OPERATIONS ÞС PO BOX 1272 15,000. SHELBY, NC 28151 SPREAD THE HEALTH INC. Þс NURSE MIDWIFE AT THE 2310 CHANCELLOR ROAD NAMUMU ORPHANAGE N CHESTERFIELD, VA 23235-2714 CENTER CLINIC 18,000. BOYS AND GIRLS CLUB OF CLEVELAND ÞС SUMMER PROGRAM AT THE COUNTY INC. TEEN CENTER PO BOX 2001 SHELBY, NC 28151-2001 20,000. CLEVELAND/RUTHERFORD KIDNEY ENLARGE PACILITY TO РC ACCOMODATE ALL ASSOCIATION 1017 N. WASHINGTON ST SERVICES IN A MORE SHELBY, NC 28150-3818 EFFICIENT AND EFFECTIVE MANNER 20,000. LIFE ENRICHMENT CENTER OF CLEVELAND ÞС SCHOLARSHIP FUNDS TO COUNTY INC. ASSIST ECONOMICALLY 110 LIFE ENRICHMENT BLVD. DISADVANTAGED FAMILIES SHELBY, NC 28150-3689 ACCESS ADULT DAY CARE FEES 20,000. YELLOW DOOR FOUNDATION, INC. OPERATIONS ÞС 3039 GILBERT STATION RD. BARBOURSVILLE, VA 22923 6,000. LYNC8 PROJECT CORP ÞС OPERATIONS PO BOX 2091 DANVILLE, KY 40423 5,000. Total from continuation sheets

									
FORM 990-PF INTERI	EST ON SAVING	S AND I	EMPOR	ARY CASI	IIN	VESTMENTS	SI	PATEMENT	1
SOURCE			(A) VENUE BOOK			(B) VESTMENT COME	N	(C) ADJUSTED NET INCOME	Ξ
FROM K-1 SANDESTIN HOTEL, LTD.	BEACH		5(60.		560.			
TOTAL TO PART I, L	INE 3		5 (60.		560.			
FORM 990-PF	DIVIDENDS	AND INT	EREST	FROM SI	ECUR	ITIES	SI	TATEMENT	2
SOURCE	GROSS AMOUNT	CAPIT GAIN DIVIDE	rs	(A) REVENU PER BOO		(B) NET INVES MENT INCO		(C) ADJUSTE NET INCO	
MERRILL LYNCH A/C#74031 MERRILL LYNCH	56,882.	1,	259.	55,6					
A/C#74032 MERRILL LYNCH A/C#74033	68,262. 77,948.	41,	0. 355.	68,2 36,5					
MERRILL LYNCH A/C#74034	3,307.		0.	3,3	307.	3,30	7.		
TO PART I, LINE 4	206,399.	42,	614.	163,7	85.	163,78	5.		
FORM 990-PF		OTHER	INCO	ME			SI	CATEMENT	3
DESCRIPTION			REV	(A) JENUE BOOKS		(B) ET INVEST- ENT INCOME		(C) ADJUSTEI NET INCOM	
FROM K-1 - BELMONT FROM K-1 - ALBEMARI FROM K-1 - SANDESTI	E ROAD	£L		19 19 46,784	. •	19 1 0	•		
TOTAL TO FORM 990-E	PF, PART I, L	INE 11		46,804	 	20	 • -		
					_ =		_ =		

FORM 990-PF	ACCOUNTING FEES		STATEMENT 4	
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING FEES	23,100.	0.		23,100.
TO FORM 990-PF, PG 1, LN 16B	23,100.	0.		23,100.
FORM 990-PF (OTHER PROFES	SIONAL FEES	S	TATEMENT 5
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
INVESTMENT FEES 728-74031 INVESTMENT FEES 728-74032 INVESTMENT FEES 728-74033 INVESTMENT FEES 728-74034 ADVISORY FEES	8,090. 16,538. 10,255. 12,167. 15,683.	16,538. 10,255.		0. 0. 0. 0. 15,683.
TO FORM 990-PF, PG 1, LN 16C	62,733.	47,050.		15,683.
FORM 990-PF	TAXES		STATEMENT 6	
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITĀBLE PURPOSES
INCOME TAX FOREIGN TAXES 728-74032 FOREIGN TAXES 728-74033	9,100. 2,961. 1,045.	0. 2,961. 1,045.		0. 0. 0.
TO FORM 990-PF, PG 1, LN 18	13,106.	4,006.		0.

• • •

FORM 990-PF	OTHER E	XPENSES		STATEMENT 7		
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME				
SANDPIPER RUN 3G PARTNERHIP WEBSITE EXPENSE FROM K-1 - SANDESTIN	2,600. 1,530. 243.		•	0. 1,530. 0.		
TO FORM 990-PF, PG 1, LN 23	4,373.	2,600	•	1,530.		
FORM 990-PF OTHER DECREASE	ES IN NET AS	SETS OR FUND	BALANCES	STATEMENT 8		
DESCRIPTION	•			AMOUNT		
INVESTMENTS - CORPORATE STOCK	3,203.					
TOTAL TO FORM 990-PF, PART II	I, LINE 5			3,203.		
FORM 990-PF	CORPORAT	E STOCK		STATEMENT 9		
DESCRIPTION		В	OOK VALUE	FAIR MARKET VALUE		
ML 728-74031 ML 728-74032 ML 728-74033	ć		1,563,365. 2,303,073. 1,700,537.	1,495,343. 2,511,767. 1,659,736.		
TOTAL TO FORM 990-PF, PART II	, LINE 10B		5,566,975.	5,666,846.		
FORM 990-PF	OTHER INV	ESTMENTS		STATEMENT 10		
DESCRIPTION		LUATION ETHOD B	OOK VALUE	FAIR MARKET VALUE		
ALBEMARLE ROAD LLC BELMONT #1 I-85 PALMETTO CLUB PROPERTIES LP SANDESTIN BEACH HOTEL LTD	(COST COST COST COST COST	5,406. 52,872. 18,932. 15,240. 17,320.	8,820. 96,469. 28,733. 0. 221,377.		
TOTAL TO FORM 990-PF, PART II			109,770.	355,399.		

FORM 990-PF

GRANT APPLICATION SUBMISSION INFORMATION PART XV, LINES 2A THROUGH 2D

STATEMENT

11

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

ROBERT R. FOX NC1-028-26-09 150 N COLLEGE STREET CHARLOTTE, NC 28255

TELEPHONE NUMBER

980-683-9845

EMAIL ADDRESS

ROBERT.R.FOX@USTRUST.COM

FORM AND CONTENT OF APPLICATIONS

APPLICANTS MUST COMPLETE AN ONLINE APPLICATION. IN ADDITION, APPLICANTS MUST SUBMIT BY E-MAIL THE FOLLOWING MATERIALS: A COVER LETTER OUTLINING THE REQUEST FOR SUPPORT, SIGNED BY THE ORGANIZATION'S LEADERSHIP, THE OPERATING BUDGET FOR THE CURRENT FISCAL YEAR, INCLUDING SOURCES OF SUPPORT, A LIST OF DIRECTORS OR TRUSTEES AND THEIR AFFILIATIONS, A BRIEF BIOGRAPHY OF THE EXECUTIVE DIRECTOR, A COPY OF THE IRS 501(C)(3) DETERMINATION LETTER

ANY SUBMISSION DEADLINES

OCTOBER 1ST OF EACH YEAR

RESTRICTIONS AND LIMITATIONS ON AWARDS

ORGANIZATIONS THAT APPLY FOR FUNDING FROM THE PORTER FOUNDATION MUST BE CLASSIFIED AS PUBLIC CHARITIES AND TAX EXEMPT UNDER SECTION 501(C)(3) OF THE INTERNAL REVENUE CODE OF 1986. THE PORTER FOUNDATION WILL PRIORITIZE SUPPORT FOR EFFORTS THAT PROVIDE K-12 EDUCATION, SOCIAL SERVICES AND MEDICAL AND PALLIATIVE CARE. PROGRAMS OR PROJECTS OF PARTICULAR INTEREST ARE THOSE FOCUSED ON IMPROVING THE QUALITY OF EDUCATION, MEETING BASIC HUMANITARIAN NEEDS, AND ENSURING COMPASSIONATE CARE FOR THE ELDERLY.