

CitizenAudit.org

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

2001

Note: The organization may be able to use a copy of this return to satisfy state reporting requirements.

For calendar year 2001, or tax year beginning JUL 1, 2001, and ending JUN 30, 2002
G Check all that apply: ☐ Initial return ☐ Final return ☐ Amended return ☐ Address change ☐ Name change

Use the IRS label. Otherwise, print or type. See Specific Instructions.

Name of organization: **JOHN WILLIAM POPE FOUNDATION**

Number and street (or P.O. box number if mail is not delivered to street address): **3401 GRESHAM LAKE ROAD**

Room/suite: _____

City or town, state, and ZIP code: **RALEIGH, NC 27615**

A Employer identification number: **58-1691765**

B Telephone number: **(919) 876-6000**

C If exemption application is pending, check here ☐

D 1. Foreign organizations, check here ☐
2. Foreign organizations meeting the 85% test, check here and attach computation ☐

E If private foundation status was terminated under section 507(b)(1)(A), check here ☐

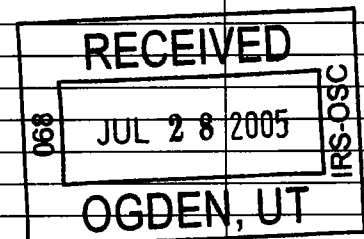
F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

H Check type of organization: ☒ Section 501(c)(3) exempt private foundation
☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation

I Fair market value of all assets at end of year (from Part II, col. (c), line 16): **\$ 17,305,557.** (Part I, column (d) must be on cash basis.)

J Accounting method: ☒ Cash ☐ Accrual
☐ Other (specify) _____

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a).)		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income N/A	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B		1,564.			
2 Distributions from split-interest trusts					
3 Interest on savings and temporary cash investments		287.	287.		STATEMENT 1
4 Dividends and interest from securities		171,977.	171,977.		STATEMENT 2
5a Gross rents					
b (Net rental income or (loss))					
6a Net gain or (loss) from sale of assets not on line 10					
b Gross sales price for all assets on line 6a					
7 Capital gain net income (from Part IV, line 2)			0.		
8 Net short-term capital gain					
9 Income modifications					
10a Gross sales less returns and allowances					
b Less Cost of goods sold					
c Gross profit or (loss)					
11 Other income					
12 Total. Add lines 1 through 11		173,828.	172,264.		
13 Compensation of officers, directors, trustees, etc		0.	0.		0.
14 Other employee salaries and wages					
15 Pension plans, employee benefits					
16a Legal fees					
b Accounting fees STMT 3		6,346.	6,346.		0.
c Other professional fees					
17 Interest					
18 Taxes					
19 Depreciation and depletion					
20 Occupancy					
21 Travel, conferences, and meetings					
22 Printing and publications					
23 Other expenses STMT 4		1,866.	1,866.		0.
24 Total operating and administrative expenses. Add lines 13 through 23		8,212.	8,212.		0.
25 Contributions, gifts, grants paid		2,178,825.			2,178,825.
26 Total expenses and disbursements. Add lines 24 and 25		2,187,037.	8,212.		2,178,825.
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements		<2,013,209.>			
b Net investment income (if negative, enter -0-)			164,052.		
c Adjusted net income (if negative, enter -0-)				N/A	



Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only		
		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing	5,545.	9,617.	9,617.
	2 Savings and temporary cash investments	6,039,852.	4,021,007.	3,979,247.
	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 ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments - U.S. and state government obligations			
	b Investments - corporate stock STMT 5	223,289.	224,853.	13,316,693.
	c Investments - corporate bonds			
Liabilities	11 Investments - land, buildings, and equipment basis ▶			
	Less accumulated depreciation ▶			
	12 Investments - mortgage loans			
	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)	6,268,686.	4,255,477.	17,305,557.
	17 Accounts payable and accrued expenses			
	18 Grants payable			
Net Assets or Fund Balances	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)	0.	0.	
	Organizations that follow SFAS 117, check here ▶ <input type="checkbox"/>			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Organizations that do not follow SFAS 117, check here ▶ <input checked="" type="checkbox"/>			
	27 Capital stock, trust principal, or current funds	0.	0.	
	28 Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
	29 Retained earnings, accumulated income, endowment, or other funds	6,268,686.	4,255,477.	
	30 Total net assets or fund balances	6,268,686.	4,255,477.	
	31 Total liabilities and net assets/fund balances	6,268,686.	4,255,477.	

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 (must agree with end-of-year figure reported on prior year's return)	1	6,268,686.
2 Enter amount from Part I, line 27a	2	<2,013,209.>
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	4,255,477.
5 Decreases not included in line 2 (itemize) ▶	5	0.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	4,255,477.

From 990-PF (2001)

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a			
b NONE			
c			
d			
e			

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a			
b			
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a			
b			
c			
d			
e			

2 Capital gain net income or (net capital loss). { If gain, also enter in Part I, line 7
If (loss), enter -0- in Part I, line 7 }

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

Part V Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income.)

If section 4940(d)(2) applies, leave this part blank.

Was the organization liable for the section 4942 tax on the distributable amount of any year in the base period?

☐ Yes ☒ No

If "Yes," the organization does not qualify under section 4940(e). Do not complete this part.

1 Enter the appropriate amount in each column for each year; see instructions before making any entries.

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2000	1,693,666.	8,090,479.	.2093406
1999	2,089,993.	9,251,852.	.2259000
1998	1,700,000.	11,114,900.	.1529478
1997	1,079,241.	19,319,246.	.0558635
1996	1,025,220.	8,914,944.	.1150002

2 Total of line 1, column (d)

2 .7590521

3 Average distribution ratio for the 5-year base period - divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years

3 .1518104

4 Enter the net value of noncharitable-use assets for 2001 from Part X, line 5

4 7,712,080.

5 Multiply line 4 by line 3

5 1,170,774.

6 Enter 1% of net investment income (1% of Part I, line 27b)

6 1,641.

7 Add lines 5 and 6

7 1,172,415.

8 Enter qualifying distributions from Part XII, line 4

8 2,178,825.

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions.

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see instructions)

1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1. Date of ruling letter: _____ (attach copy of ruling letter if necessary-see instructions)			
b Domestic organizations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b		1	1,641.
c All other domestic organizations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)			
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		2	0.
3 Add lines 1 and 2		3	1,641.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		4	0.
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-		5	1,641.
6 Credits/Payments:			
a 2001 estimated tax payments and 2000 overpayment credited to 2001	6a		
b Exempt foreign organizations - tax withheld at source	6b		
c Tax paid with application for extension of time to file (Form 8868)	6c		
d Backup withholding erroneously withheld	6d		
7 Total credits and payments. Add lines 6a through 6d	7		0.
8 Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> 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		1,641.
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 2002 estimated tax <input type="checkbox"/> Refunded <input type="checkbox"/>	11		

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the organization attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for 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 organization in connection with the activities.		X
1c Did the organization file Form 1120-POL for this year?		X
2 Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the organization. \$ 0. (2) On organization managers. \$ 0.		
e Enter the reimbursement (if any) paid by the organization during the year for political expenditure tax imposed on organization managers. \$ 0.		
2 Has the organization engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.		X
3 Has the organization 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		X
4a Did the organization have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the organization have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV.	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) <u>N/A</u>		
b If the answer is "Yes" to line 7, has the organization furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	X	
9 Is the organization claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2001 or the taxable year beginning in 2001 (see instructions for Part XIV)? If "Yes," complete Part XIV	X	
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses.	X	
11 Did the organization comply with the public inspection requirements for its annual returns and exemption application? Web site address <u>N/A</u>		X
12 The books are in care of <u>JAMES ARTHUR POPE, PRESIDENT</u> Telephone no. <u>(919) 876-6000</u> Located at <u>3401 GRESHAM LAKE ROAD, RALEIGH, NC</u> ZIP+4 <u>27615</u>		
13 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here <input type="checkbox"/> and enter the amount of tax-exempt interest received or accrued during the year		N/A

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

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.

1a During the year did the organization (either directly or indirectly):

- (1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☒ No
- (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No
- (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No
- (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☒ Yes ☐ No
- (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☒ No
- (6) Agree to pay money or property to a government official? (Exception. Check "No" if the organization agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) ☐ Yes ☒ No

b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 19 of the instructions)?Organizations relying on a current notice regarding disaster assistance check here ☐**1b** ☒ X**c** Did the organization engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2001?**1c** ☒ X**2** Taxes on failure to distribute income (section 4942) (does not apply for years the organization was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):**a** At the end of tax year 2001, did the organization have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2001? ☐ Yes ☒ NoIf "Yes," list the years ☐ _____, _____, _____.**b** Are there any years listed in 2a for which the organization 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** **N/A****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 organization hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☒ No**b** If "Yes," did it have excess business holdings in 2001 as a result of (1) any purchase by the organization or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the organization had excess business holdings in 2001.) **N/A****3b** **N/A****4a** Did the organization invest during the year any amount in a manner that would jeopardize its charitable purposes?**4a** ☒ X**b** Did the organization 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 2001?**4b** ☒ X**5a** During the year did the organization pay or incur any amount to:

- (1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☒ No
- (2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☒ No
- (3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☒ No
- (4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? ☐ Yes ☒ No
- (5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☒ No

b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?Organizations relying on a current notice regarding disaster assistance check here ☐**N/A****5b** **N/A****c** If the answer is "Yes" to question 5a(4), does the organization claim exemption from the tax because it maintained expenditure responsibility for the grant? **N/A** ☐ Yes ☐ No

If "Yes," attach the statement required by Regulations section 53.4945-5(d).

6a Did the organization, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? ☐ Yes ☒ No**b** Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract? **N/A** ☐ Yes ☐ No

If you answered "Yes" to 6b, also file Form 8870.

6b ☒ X

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.

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	7,302,124.
b	Average of monthly cash balances	1b	527,399.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	7,829,523.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	7,829,523.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	117,443.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	7,712,080.
6	Minimum investment return. Enter 5% of line 5	6	385,604.

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

1	Minimum investment return from Part X, line 6	1	385,604.
2a	Tax on investment income for 2001 from Part VI, line 5	2a	1,641.
b	Income tax for 2001. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	1,641.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	383,963.
4a	Recoveries of amounts treated as qualifying distributions	4a	0.
b	Income distributions from section 4947(a)(2) trusts	4b	0.
c	Add lines 4a and 4b	4c	0.
5	Add lines 3 and 4c	5	383,963.
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	383,963.

Part XII Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
a	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	1a	2,178,825.
b	Program-related investments - Total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	2,178,825.
5	Organizations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	1,641.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	2,177,184.

Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years.

Part XIII **Undistributed Income** (see instructions)

	(a) Corpus	(b) Years prior to 2000	(c) 2000	(d) 2001
1 Distributable amount for 2001 from Part XI, line 7				383,963.
2 Undistributed income, if any, as of the end of 2000				
a Enter amount for 2000 only			0.	
b Total for prior years 19 __, 19 __, 19 __		0.		
3 Excess distributions carryover, if any, to 2001				
a From 1996	596,051.			
b From 1997	129,417.			
c From 1998	1,182,082.			
d From 1999	1,646,365.			
e From 2000	1,414,686.			
f Total of lines 3a through e	4,968,601.			
4 Qualifying distributions for 2001 from Part XII, line 4: ► \$	2,178,825.			
a Applied to 2000, but not more than line 2a			0.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2001 distributable amount				383,963.
e Remaining amount distributed out of corpus	1,794,862.			
5 Excess distributions carryover applied to 2001 (If an amount appears in column (d), the same amount must be shown in column (a).)	0.			0.
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	6,763,463.			
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 2000. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2001. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2002				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(E) or 4942(g)(3)	0.			
8 Excess distributions carryover from 1996 not applied on line 5 or line 7	596,051.			
9 Excess distributions carryover to 2002. Subtract lines 7 and 8 from line 6a	6,167,412.			
10 Analysis of line 9:				
a Excess from 1997	129,417.			
b Excess from 1998	1,182,082.			
c Excess from 1999	1,646,365.			
d Excess from 2000	1,414,686.			
e Excess from 2001	1,794,862.			

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a <i>Paid during the year</i>				
SEE ATTACHED				
Total			▶ 3a	0.
b <i>Approved for future payment</i>				
NONE				
Total			▶ 3b	0.

Part XVII	Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations
------------------	--

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

[illegible]

- 2a** Is the organization directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? ☐ Yes ☒ No
- b** If "Yes," complete the following schedule.

(a) Name of organization	(b) Type of organization	(c) Description of relationship
	N/A	

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer or fiduciary) is based on all information of which preparer has any knowledge.

Sign Here	By: <u>James O. P. Jr.</u>		Date: <u>7/26/01</u>	Prepared by: <u>Prepared</u>	
	Signature of officer or trustee		Date	Title	
Paid Preparer's Use Only	Preparer's signature: <u>Dave Szyszczak</u>	Date: <u>5/20/01</u>	Check if self-employed: <input type="checkbox"/>	Preparer's SSN or PTIN: <u>390-44-2783</u>	
	Firm's name (or yours if self-employed), address, and ZIP code: <u>GOSPODAREK, CPA, PA</u> <u>4101 LAKE BOONE TRAIL, SUITE 215</u> <u>RALEIGH, NC 27607</u>	EIN: <u>56-2344058</u>		Phone no.: <u></u>	

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

Department of the Treasury
Internal Revenue Service

Schedule of Contributors

Supplementary Information for
line 1 of Form 990, 990-EZ and 990-PF (see instructions)

OMB No 1545-0047

2001

Name of organization

Employer identification number

JOHN WILLIAM POPE FOUNDATION

58-1691765

Organization type (check one):

Filers of:

Section:

Form 990 or 990-EZ

☐ 501(c)() (enter number) organization

☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation

☐ 527 political organization

Form 990-PF

☒ 501(c)(3) exempt private foundation

☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation

☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General rule** or a **Special rule**. (Note: Only a section 501(c)(7), (8), or (10) organization can check box(es) for both the General rule and a Special rule-see instructions.)

General Rule-

- ☐ For organizations filing Form 990, 990-EZ, or 990-PF that received, during the year, \$5,000 or more (in money or property) from any one contributor. (Complete Parts I and II.)

Special Rules-

- ☐ For a section 501(c)(3) organization filing Form 990, or Form 990-EZ, that met the 33 1/3% support test of the regulations under sections 509(a)(1)/170(b)(1)(A)(vi) and received from any one contributor, during the year, a contribution of the greater of \$5,000 or 2% of the amount on line 1 of these forms. (Complete Parts I and II.)
- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990, or Form 990-EZ, that received from any one contributor, during the year, aggregate contributions or bequests of more than \$1,000 for use *exclusively* for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals. (Complete Parts I, II, and III.)
- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990, or Form 990-EZ, that received from any one contributor, during the year, some contributions for use *exclusively* for religious, charitable, etc., purposes, but these contributions did not aggregate to more than \$1,000 (If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Do not complete any of the Parts unless the General rule applies to this organization because it received nonexclusively religious, charitable, etc., contributions of \$5,000 or more during the year.) .. ► \$ _____

Caution: Organizations that are not covered by the General rule and/or the Special rules do not file Schedule B (Form 990, 990-EZ, or 990-PF), but they **must** check the box in the heading of their Form 990, Form 990-EZ, or on line 1 of their Form 990-PF, to certify that they do not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

Schedule B (Form 990, 990-EZ, or 990-PF) (2001)

Name of organization

Employer identification number

JOHN WILLIAM POPE FOUNDATION

58-1691765

Part I Contributors (See Specific Instructions.)

(a) No.	(b) Name, address and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
1	JOHN W. POPE SR 2520 GLENWOOD AVENUE RALEIGH, NC 27608	\$ 1,564.	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II if there is a noncash contribution.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)

Employer identification number

58-1691765

[illegible]

JOHN WILLIAM POPE FOUNDATION

E.I.N. 58-1691765

2001 FORM PF-990

PART XV, LINE 3A, GRANTS CONTRIBUTIONS

<u>Recipient</u>	<u>Relation</u>	<u>Status</u>	<u>Purpose</u>	<u>Amount</u>
Accuracy in Academia		None	Washington, DC 20008	\$1,000.00
American Academy for Liberal Education		None	Washington, DC 20036	\$5,000.00
American Civil Rights Institute		None	Sacramento, CA 95818	\$1,000.00
American Conservative Union Foundation		None	Alexandria, VA 22314	\$5,000.00
American Council of Trustees/Alumni		None	Washington, DC 20036-4524	\$10,000.00
American Friends of IEA		None	Fairfax, VA 22030-6812	\$2,000.00
Americans for Tax Reform Foundation		None	Washington, DC 20036	\$2,500.00
Atlas Economic Research Foundation		None	Fairfax, VA 22030-6812	\$35,000.00
Capital Area Preservation - Mordecai House		None	Raleigh, NC 27611-8072	\$1,000.00
Capitol Research Center		None	Washington, NC 20036-1480	\$5,000.00
Carolina Ballet		None	Raleigh, NC 27604	\$25,000.00
Center For Education Reform		None	Washington, DC 20036	\$5,000.00
Center for Popular Culture		None	Los Angeles, CA 90010	\$10,000.00
Chi Phi Fraternity		None	Lilburn, GA 30047-6866	\$1,000.00
Citizens for a Sound Economy		None	Washington, DC 20036	\$50,000.00
Citizens for a Sound Economy		None	Washington, DC 20036	\$50,000.00
Citizens for a Sound Economy		None	Washington, DC 20036	\$50,000.00
Committee for a Constructive Tomorrow		None	Washington, DC 20035	\$5,000.00
Communities In Schools		None	Raleigh, NC 27604	\$12,000.00
Competitive Enterprise Institute		None	Washington, DC 20036	\$2,500.00
Eagle Forum Education Center		None	Alton, IL 60102	\$2,500.00
Faith Lutheran School		None	Raleigh, NC 27604	\$50,000.00
Frank Porter Graham Child Development Center		None	Chapel Hill, NC 27599	\$1,000.00
Free Congress Foundation		None	Washington, DC 20002	\$5,000.00
Full Gospel Tabernacle		None	Lumberton, NC 28358	\$25,000.00
Institute for Justice		None	Washington, DC 20006	\$25,000.00
Institute for Justice		None	Washington, DC 20006	\$5,000.00
Intercollegiate Studies Institute, Inc.		None	Wilmington, DE 19807-0431	\$2,500.00
Intercollegiate Studies Institute, Inc.		None	Wilmington, DE 19807-0431	\$7,500.00
John Locke Foundation		None	Raleigh, NC 27601	\$22,825.00
John Locke Foundation		None	Raleigh, NC 27601	\$104,000.00
John Locke Foundation		None	Raleigh, NC 27601	\$104,166.66
John Locke Foundation		None	Raleigh, NC 27601	\$104,166.66
John Locke Foundation		None	Raleigh, NC 27601	\$104,166.66
John Locke Foundation		None	Raleigh, NC 27601	\$104,166.66
John Locke Foundation		None	Raleigh, NC 27601	\$104,166.66

JOHN WILLIAM POPE FOUNDATION

E.I.N. 58-1691765

2001 FORM PF-990

PART XV, LINE 3A, GRANTS CONTRIBUTIONS

<u>Recipient</u>	<u>Relation</u>	<u>Status</u>	<u>Purpose</u>	<u>Amount</u>
John Locke Foundation		None	Raleigh, NC 27601	\$104,166.66
John Locke Foundation		None	Raleigh, NC 27601	\$104,166.66
John Locke Foundation		None	Raleigh, NC 27601	\$104,166.66
John Locke Foundation		None	Raleigh, NC 27601	\$104,166.66
John Locke Foundation		None	Raleigh, NC 27601	\$104,166.66
John Locke Foundation		None	Raleigh, NC 27601	\$83,333.33
Kenan Flagler Business School		None	Chapel Hill, NC 27514-9861	\$15,000.00
National Association for Scholars		None	Princeton, NJ 08542-3215	\$5,000.00
National Journalism Center - Education and Research Institute		None	Herndon, VA 20170	\$2,500.00
North Carolina Aviation Museum		None	Asheboro, NC 27204	\$5,000.00
North Carolina Council of Churches		None	Raleigh, NC 27605	\$1,000.00
North Carolina Family Policy Council		None	Raleigh, NC 27619	\$25,000.00
North Carolina Symphony		None	Raleigh, NC 27601	\$25,000.00
North Carolina Theater		None	Raleigh, NC 27601	\$10,000.00
Oak Ranch		None	Broadway, NC 27505	\$5,000.00
Ocooneechee Council Boy Scouts Of America		None	Raleigh, NC 27629-1229	\$10,000.00
Pennsylvania Institute of Technology		None	Media, PA 19063	\$25,000.00
Political Economy Research Institute		None	Charlotte, NC 28262	\$5,000.00
Raleigh Fine Arts Society		None	Raleigh, NC 27605	\$25,000.00
Ravenscroft School		None	Raleigh, NC 27615	\$25,000.00
Social Philosophy & Policy Center		None	Bowling Green State University 225 Troup S Bowling Green, OH 43403	\$1,000.00
The Acton Institute for the Study of Religion & Liberty		None	Grand Rapids, MI 49503	\$1,000.00
The Asheville School		None	Asheville, NC 28806	\$25,000.00
The Asheville School		None	Asheville, NC 28806	\$10,000.00
The Asheville School		None	Asheville, NC 28806	\$10,000.00
The Cato Institute		None	Washington, DC 20001-5431	\$5,000.00
The Cato Institute		None	Washington, DC 20001-5431	\$30,000.00
The Educational Foundation		None	Chapel Hill, NC 27515	\$15,000.00
The Federalist Society		None	Washington, DC 20036	\$5,000.00
The Foundation for Economic Education, Inc.		None	Irvington-on-Hudson, NY 10	\$1,000.00
The Fund for American Studies		None	Washington, DC 20009	\$10,000.00
The Heritage Foundation		None	Washington, DC 20002-4991	\$10,000.00
The Heritage Foundation		None	Washington, DC 20002-4991	\$30,000.00
The Institute for Humane Studies		None	Arlington, VA 22201	\$2,000.00
The Institute for Humane Studies		None	Arlington, VA 22201	\$15,000.00
The Institute for Humane Studies		None	Arlington, VA 22201	\$15,000.00

<u>Recipient</u>	<u>Relation</u>	<u>Status</u>	<u>Purpose</u>	<u>Amount</u>
...

Page 3

FORM 990-PF INTEREST ON SAVINGS AND TEMPORARY CASH INVESTMENTS STATEMENT 1

SOURCE	AMOUNT
VARIOUS	287.
TOTAL TO FORM 990-PF, PART I, LINE 3, COLUMN A	287.

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
VARIOUS	171,977.	0.	171,977.
TOTAL TO FM 990-PF, PART I, LN 4	171,977.	0.	171,977.

FORM 990-PF ACCOUNTING FEES STATEMENT 3

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
PROFESSIONAL FEES	6,346.	6,346.		0.
TO FORM 990-PF, PG 1, LN 16B	6,346.	6,346.		0.

FORM 990-PF OTHER EXPENSES STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
MISCELLANEOUS	1,866.	1,866.		0.
TO FORM 990-PF, PG 1, LN 23	1,866.	1,866.		0.

FORM 990-PF

CORPORATE STOCK

STATEMENT 5

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
CDI CORPORATION	199,874.	11,994,675.
NCNB SHARES	23,415.	562,880.
WALMART SHARES	1,564.	759,138.
TOTAL TO FORM 990-PF, PART II, LINE 10B	224,853.	13,316,693.

6/02

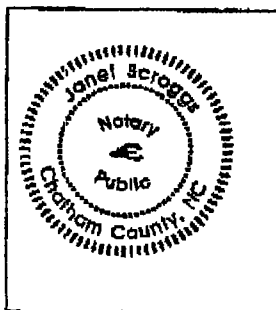
AFFIDAVIT OF PUBLICATIONNORTH CAROLINA.
Wake County.) ss.

PUBLIC NOTICE
The Annual Report of the
Year Ending 2004 of the
JOHN WILLIAM POPE
FOUNDATION, INC. is
available for inspection during
the normal business hours of said
President John Pope, Raleigh,
North Carolina, or any
persons who are authorized to
in the above cited publication
of this notice of availability.
JOHN WILLIAM POPE
FOUNDATION
Raleigh, NC 27615
John A. Pope - President
(919) 871-5555
NAB: July 26, 2005

Before the undersigned, a Notary Public of Chatham County North Carolina, duly commissioned and authorized to administer oaths, affirmations, etc., personally appeared Donna Clayton, who, being duly sworn or affirmed, according to law, doth depose and say that she is Billing Manager-Legal Advertising of The News and Observer a corporation organized and doing business under the Laws of the State of North Carolina, and publishing a newspaper known as The News and Observer, in the City of Raleigh, Wake County and State aforesaid, the said newspaper in which such notice, paper, document, or legal advertisement was published was, at the time of each and every such publication, a newspaper meeting all of the requirements and qualifications of Section 1-597 of the General Statutes of North Carolina and was a qualified newspaper within the meaning of Section 1-597 of the General Statutes of North Carolina, and that as such she makes this affidavit; that she is familiar with the books, files and business of said corporation and by reference to the files of said publication the attached advertisement for JOHN POPE FOUNDATION was inserted in the aforesaid newspaper on dates as follows: 07/20/05

Account Number: 87133040

The above is correctly copied from the books and files of the aforesaid Corporation and publication.



Donna Clayton
Billing Manager-Legal Advertising

Sworn or affirmed to, and subscribed before me, this
21 day of JULY, 2005 AD

In Testimony Whereof, I have hereunto set my hand
and affixed my official seal, the day and year aforesaid.

Janet Scroggs
Notary Public

My commission expires 14th of March 2009.