

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](http://www.irs.gov/Form990PF) for instructions and the latest information.

OMB No. 1545-0047

2024

Open to Public Inspection

For calendar year 2024 or tax year beginning , and ending

Name of foundation

SCANSOURCE CHARITABLE FOUNDATION

Number and street (or P.O. box number if mail is not delivered to street address)

6 LOGUE CT

City or town, state or province, country, and ZIP or foreign postal code

GREENVILLE SC 29615

A Employer identification number

57-1002959

B Telephone number (see instructions)

864-288-2432

G Check all that apply:

☐ Initial return

☐ Initial return of a former public charity

☐ Final return

☐ Amended return

☐ Address change

☐ Name change

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)

\$ 4,701,991

J Accounting method:

☒ Cash

☐ Accrual

☐ Other (specify)

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

☐

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions).)		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received (attach schedule)	201,145			
	2 Check <input type="checkbox"/> if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities	161,349	161,349		
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	132,175			
	b Gross sales price for all assets on line 6a	575,236			
	7 Capital gain net income (from Part IV, line 2)		132,175		
	8 Net short-term capital gain			0	
	9 Income modifications				
	10a Gross sales less returns and allowances				
Operating and Administrative Expenses	b Less: Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)				
	12 Total. Add lines 1 through 11	494,669	293,524	0	
	13 Compensation of officers, directors, trustees, etc.	0			
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule) STMT 1	5,000	2,500		2,500
	c Other professional fees (attach schedule) STMT 2	54,672	54,672		
	17 Interest				
	18 Taxes (attach schedule) (see instructions) STMT 3	3,533	336		
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (att. sch.) STMT 4	101,114	199		100,915
	24 Total operating and administrative expenses. Add lines 13 through 23	164,319	57,707	0	103,415
	25 Contributions, gifts, grants paid	462,060			462,060
	26 Total expenses and disbursements. Add lines 24 and 25	626,379	57,707	0	565,475
	27 Subtract line 26 from line 12:				
	a Excess of revenue over expenses and disbursements	-131,710			
	b Net investment income (if negative, enter -0-)		235,817		
	c Adjusted net income (if negative, enter -0-)			0	

Part II		Balance Sheets	Attached schedules and amounts in the description column should be for end-of-year amounts only. (See instructions.)		
			Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash — non-interest-bearing	97,718	34,705	34,705
	2	Savings and temporary cash investments	73,549	165,114	165,114
	3	Accounts receivable			
		Less: allowance for doubtful accounts			
	4	Pledges receivable			
		Less: allowance for doubtful accounts			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7	Other notes and loans receivable (att. schedule)			
		Less: allowance for doubtful accounts	0		
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10a	Investments — U.S. and state government obligations (attach schedule) STMT 5	218,440	188,500	188,500
	b	Investments — corporate stock (attach schedule) SEE STMT 6	1,968,144	2,043,702	2,043,702
	c	Investments — corporate bonds (attach schedule) SEE STMT 7	105,927	77,569	77,569
	11	Investments — land, buildings, and equipment: basis			
	Less: accumulated depreciation (attach sch.)				
12	Investments — mortgage loans				
13	Investments — other (attach schedule) SEE STATEMENT 8	2,135,794	2,192,401	2,192,401	
14	Land, buildings, and equipment: basis				
	Less: accumulated depreciation (attach sch.)				
15	Other assets (describe )				
16	Total assets (to be completed by all filers — see the instructions. Also, see page 1, item I)	4,599,572	4,701,991	4,701,991	
Liabilities	17	Accounts payable and accrued expenses			
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe )			
	23	Total liabilities (add lines 17 through 22)	0	0	
Net Assets or Fund Balances	Foundations that follow FASB ASC 958, check here and complete lines 24, 25, 29, and 30				
	24	Net assets without donor restrictions			
	25	Net assets with donor restrictions			
	Foundations that do not follow FASB ASC 958, check here and complete lines 26 through 30				
	26	Capital stock, trust principal, or current funds			
	27	Paid-in or capital surplus, or land, bldg., and equipment fund			
	28	Retained earnings, accumulated income, endowment, or other funds	4,599,572	4,701,991	
	29	Total net assets or fund balances (see instructions)	4,599,572	4,701,991	
	30	Total liabilities and net assets/fund balances (see instructions)	4,599,572	4,701,991	

Part III			Analysis of Changes in Net Assets or Fund Balances	
1	Total net assets or fund balances at beginning of year — Part II, column (a), line 29 (must agree with end-of-year figure reported on prior year's return)	1	4,599,572	
2	Enter amount from Part I, line 27a	2	-131,710	
3	Other increases not included in line 2 (itemize) SEE STATEMENT 9	3	234,129	
4	Add lines 1, 2, and 3	4	4,701,991	
5	Decreases not included in line 2 (itemize)	5		
6	Total net assets or fund balances at end of year (line 4 minus line 5) — Part II, column (b), line 29	6	4,701,991	

Part IV Capital Gains and Losses for Tax on Investment Income

(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.)	(d) Date sold (mo., day, yr.)
1a	PUBLICLY TRADED SECURITIES	P		
b	ML LT CAPITAL GAIN DISTRIB.			
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 556,589		443,061	113,528
b 18,647			18,647
c			
d			
e			

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

(i) FMV 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			113,528
b			18,647
c			
d			
e			

2 Capital gain net income or (net capital loss)	<div>If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7</div>	2	132,175
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). See instructions. If (loss), enter -0- in Part I, line 8		3	113,528

Part V Excise Tax Based on Investment Income (Section 4940(a), 4940(b), or 4948—see instructions)

1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1. Date of ruling or determination letter: (attach copy of letter if necessary — see instructions)	1	3,278
b All other domestic foundations enter 1.39% (0.0139) of line 27b. Exempt foreign organizations, enter 4% (0.04) 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	3,278
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	3,278
6 Credits/Payments:		
a 2024 estimated tax payments and 2023 overpayment credited to 2024	6a	2,800
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	2,800
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	478
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 2025 estimated tax Refunded	11	

Part VI-A Statements Regarding Activities

1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		Yes	No
1a				X
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition			X
	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.			
c	Did the foundation file Form 1120-POL for this year?	1c		X
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. \$ (2) On foundation managers. \$			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. \$			
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.	2		X
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		X
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a		X
b	If "Yes," has it filed a tax return on Form 990-T for this year?	4b	N/A	
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.	5		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?	6	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 XIV	7	X	
8a	Enter the states to which the foundation reports or with which it is registered. See instructions. SEE STATEMENT 10			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	8b	X	
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 2024 or the tax year beginning in 2024? See the instructions for Part XIII. If "Yes," complete Part XIII	9		X
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10		X
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
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address WWW.SCANSOURCE.COM	13	X	
14	The books are in care of TARISSA KNEZEVICH 6 LOGUE COURT		Telephone no. 864-286-4973	
	Located at GREENVILLE SC ZIP+4 29615			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 — check here and enter the amount of tax-exempt interest received or accrued during the year	15		
16	At any time during calendar year 2024, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country		Yes	No
		16		X

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

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

	Yes	No
<b>1a</b> During the year, did the foundation (either directly or indirectly):		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	<b>1a(1)</b>	<b>X</b>
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	<b>1a(2)</b>	<b>X</b>
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	<b>1a(3)</b>	<b>X</b>
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	<b>1a(4)</b>	<b>X</b>
(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)?	<b>1a(5)</b>	<b>X</b>
(6) Agree to pay money or property to a government official? ( <b>Exception.</b> Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)	<b>1a(6)</b>	<b>X</b>
<b>b</b> If any answer is "Yes" to 1a(1)–(6), did <b>any</b> of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions	<b>N/A</b>	<b>1b</b>
<b>c</b> Organizations relying on a current notice regarding disaster assistance, check here <input type="checkbox"/>		
<b>d</b> Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2024?	<b>N/A</b>	<b>1d</b>
<b>2</b> 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)):		
<b>a</b> At the end of tax year 2024, did the foundation have any undistributed income (Part XII, lines 6d and 6e) for tax year(s) beginning before 2024? If "Yes," list the years 20 , 20 , 20 , 20	<b>2a</b>	<b>X</b>
<b>b</b> Are there any years listed in 2a for which the foundation is <b>not</b> 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 <b>all</b> years listed, answer "No" and attach statement — see instructions.)	<b>N/A</b>	<b>2b</b>
<b>c</b> If the provisions of section 4942(a)(2) are being applied to <b>any</b> of the years listed in 2a, list the years here. 20 , 20 , 20 , 20		
<b>3a</b> Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	<b>3a</b>	<b>X</b>
<b>b</b> If "Yes," did it have excess business holdings in 2024 as a result (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Form 4720, Schedule C, to determine if the foundation had excess business holdings in 2024.)	<b>N/A</b>	<b>3b</b>
<b>4a</b> Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	<b>4a</b>	<b>X</b>
<b>b</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 2024?	<b>4b</b>	<b>X</b>

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

5a		During the year, did the foundation pay or incur any amount to:	Yes	No
(1)	Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?			X
(2)	Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?			X
(3)	Provide a grant to an individual for travel, study, or other similar purposes?			X
(4)	Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d) (4)(A)? See instructions			X
(5)	Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?			X
b	If any answer is "Yes" to 5a(1)–(5), did <b>any</b> 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	N/A	5b	
c	Organizations relying on a current notice regarding disaster assistance, check here			
d	If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? If "Yes," attach the statement required by Regulations section 53.4945-5(d).	N/A	5d	
6a	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?		6a	X
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? If "Yes" to 6b, file Form 8870.		6b	X
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?		7a	X
b	If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?	N/A	7b	
8	Is the foundation subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment(s) during the year?		8	X

<b>Part VII</b>	<b>Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors</b>
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**1 List all officers, directors, trustees, and foundation managers and their compensation. See instructions.**

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
SEE STATEMENT 11				

**2 Compensation of five highest-paid employees (other than those included on line 1 — see instructions). If none, enter "NONE."**

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				

<b>Total</b> number of other employees paid over \$50,000	
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Part VII

Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)

3 Five highest-paid independent contractors for professional services. See instructions. If none, enter "NONE."		
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
MERRILL LYNCH PO BOX 11269 COLUMBIA SC 29211	INVEST ADVISORY	54,672
Total number of others receiving over \$50,000 for professional services		0

Part VIII-A Summary of Direct Charitable Activities	
List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1 N/A	
2	
3	
4	

Part VIII-B Summary of Program-Related Investments (see instructions)	
Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.	Amount
1 N/A	
2	
All other program-related investments. See instructions.	
3	
Total. Add lines 1 through 3	

Part IX

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	4,690,279
b	Average of monthly cash balances	1b	225,742
c	Fair market value of all other assets (see instructions)	1c	0
d	Total (add lines 1a, b, and c)	1d	4,916,021
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	4,916,021
4	Cash deemed held for charitable activities. Enter 1.5% (0.015) of line 3 (for greater amount, see instructions)	4	73,740
5	Net value of noncharitable-use assets. Subtract line 4 from line 3	5	4,842,281
6	Minimum investment return. Enter 5% (0.05) of line 5	6	242,114

Part X

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 IX, line 6	1	242,114
2a	Tax on investment income for 2024 from Part V, line 5	2a	3,278
b	Income tax for 2024. (This does not include the tax from Part V.)	2b	
c	Add lines 2a and 2b	2c	3,278
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	238,836
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	238,836
6	Deduction from distributable amount (see instructions)	6	
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XII, line 1	7	238,836

Part XI

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	565,475
b	Program-related investments — total from Part VIII-B	1b	
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 XII, line 4	4	565,475



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

	(a) Corpus	(b) Years prior to 2023	(c) 2023	(d) 2024
1 Distributable amount for 2024 from Part X, line 7				<b>238,836</b>
2 Undistributed income, if any, as of the end of 2024:				
a Enter amount for 2023 only				
b Total for prior years: 20 , 20 , 20				
3 Excess distributions carryover, if any, to 2024:				
a From 2019	<b>238,939</b>			
b From 2020	<b>453,619</b>			
c From 2021	<b>229,366</b>			
d From 2022	<b>139,463</b>			
e From 2023	<b>388,432</b>			
f <b>Total</b> of lines 3a through e	<b>1,449,819</b>			
4 Qualifying distributions for 2024 from Part XI, line 4: \$ <b>565,475</b>				
a Applied to 2023, but not more than line 2a				
b Applied to undistributed income of prior years (Election required — see instructions)				
c Treated as distributions out of corpus (Election required — see instructions)				
d Applied to 2024 distributable amount				<b>238,836</b>
e Remaining amount distributed out of corpus	<b>326,639</b>			
5 Excess distributions carryover applied to 2024 (If an amount appears in column (d), the same amount must be shown in column (a).)				
6 <b>Enter the net total of each column as indicated below:</b>				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	<b>1,776,458</b>			
b Prior years' undistributed income. Subtract line 4b from line 2b				
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				
d Subtract line 6c from line 6b. Taxable amount — see instructions				
e Undistributed income for 2023. Subtract line 4a from line 2a. Taxable amount — see instructions				
f Undistributed income for 2024. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2025				<b>0</b>
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required — see instructions)				
8 Excess distributions carryover from 2019 not applied on line 5 or line 7 (see instructions)	<b>238,939</b>			
9 <b>Excess distributions carryover to 2025.</b> Subtract lines 7 and 8 from line 6a	<b>1,537,519</b>			
10 Analysis of line 9:				
a Excess from 2020	<b>453,619</b>			
b Excess from 2021	<b>229,366</b>			
c Excess from 2022	<b>139,463</b>			
d Excess from 2023	<b>388,432</b>			
e Excess from 2024	<b>326,639</b>			

**Part XIII Private Operating Foundations** (see instructions and Part VI-A, question 9)

<b>1a</b>	If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2024, enter the date of the ruling				
<b>b</b>	Check box to indicate whether the foundation is a private operating foundation described in section <input type="checkbox"/> 4942(j)(3) or <input type="checkbox"/> 4942(j)(5)				
<b>2a</b>	Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part IX for each year listed				<b>(e) Total</b>
	<b>Tax year</b> <b>(a) 2024</b>	<b>(b) 2023</b>	<b>Prior 3 years</b> <b>(c) 2022 (d) 2021</b>		
<b>b</b>	85% (0.85) of line 2a				
<b>c</b>	Qualifying distributions from Part XI, line 4, for each year listed				
<b>d</b>	Amounts included in line 2c not used directly for active conduct of exempt activities				
<b>e</b>	Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c				
<b>3</b>	Complete 3a, b, or c for the alternative test relied upon:				
<b>a</b>	"Assets" alternative test — enter:				
	(1) Value of all assets				
	(2) Value of assets qualifying under section 4942(j)(3)(B)(i)				
<b>b</b>	"Endowment" alternative test — enter 2/3 of minimum investment return shown in Part IX, line 6, for each year listed				
<b>c</b>	"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 XIV Supplementary Information** (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year — see instructions.)

<b>1</b>	<b>Information Regarding Foundation Managers:</b>
<b>a</b>	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>N/A</b>
<b>b</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. <b>N/A</b>
<b>2</b>	<b>Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:</b>
	Check here <input type="checkbox"/> if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc., to individuals or organizations under other conditions, complete items 2a, b, c, and d. See instructions.
<b>a</b>	The name, address, and telephone number or email address of the person to whom applications should be addressed: <b>C/O SCANSOURCE CHARITABLE FDTN 864-286-4973</b> <b>6 LOGUE COURT GREENVILLE, SC 29615</b>
<b>b</b>	The form in which applications should be submitted and information and materials they should include: <b>SEE STATEMENT 12</b>
<b>c</b>	Any submission deadlines: <b>SEE STATEMENT 13</b>
<b>d</b>	Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors: <b>SEE STATEMENT 14</b>

Part XIV

Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment					
Recipient		If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)					
a Paid during the year					
A CHILD'S HAVEN 20 MARTIN DRIVE GREENVILLE SC 29617		N/A	PC PROGRAM AREA:	CHILDREN	6,000
A MOMENT OF MAGIC 390 5TH AVE, 800 NEW YORK NY 10018		N/A	PC PROGRAM AREA:	CHILDREN	4,000
ACCEL 10251 N 35TH AVE PHOENIX AZ 85051		N/A	PC PROGRAM AREA:	EDUCATION	2,000
ANDERSON INTERFAITH MINISTRIES INC PO BOX 1136 ANDERSON SC 29622		N/A	PC PROGRAM AREA:	EDUCATION	5,000
ARIZONA FRIENDS OF FOSTER CHILDREN 360 E CORONADO ROAD PHOENIX AZ 85004		N/A	PC PROGRAM AREA:	CHILDREN	2,000
ARIZONA'S CHILDREN ASSOCIATION 4524 N MARYVALE PKWY PHOENIX AZ 85031		N/A	PC PROGRAM AREA:	CHILDREN	700
ASHER HOUSE 138 B NORTH MAIN STREET ANDERSON SC 29621		N/A	PC PROGRAM AREA:	CHILDREN	2,500
AUGUSTINE LITERACY PROJECT 2435 EAST NORTH STREET GREENVILLE SC 29615		N/A	PC PROGRAM AREA:	EDUCATION	3,000
BELOVED ASHEVILLE 32 OLD CHARLOTTE HWY ASHEVILLE NC 28805		N/A	PC HURRICANE HELENE RELIEF		3,700
BIG BROTHERS BIG SISTERS OF UPSTATE 620 N MAIN ST STE 102 GREENVILLE SC 29601		N/A	PC PROGRAM AREA:	CHILDREN	5,000
Total				3a	462,060
b Approved for future payment					
N/A					
Total				3b	

## Part XV-A

## Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.

Enter gross amounts unless otherwise indicated.		Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions.)
		(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1	Program service revenue:					
a						
b						
c						
d						
e						
f						
g	Fees and contracts from government agencies					
2	Membership dues and assessments					
3	Interest on savings and temporary cash investments					
4	Dividends and interest from securities			14	161,349	
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					
8	Gain or (loss) from sales of assets other than inventory			18	132,175	
9	Net income or (loss) from special events					
10	Gross profit or (loss) from sales of inventory					
11	Other revenue: a					
b						
c						
d						
e						
12	Subtotal. Add columns (b), (d), and (e)		0		293,524	0
13	Total. Add line 12, columns (b), (d), and (e)				13	293,524

(See worksheet in line 13 instructions to verify calculations.)

## Part XV-B

### Relationship of Activities to the Accomplishment of Exempt Purposes

[illegible]

## Part XVI

**Information Regarding Transfers to and Transactions and Relationships With Noncharitable Exempt Organizations**

- 1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?

**a** Transfers from the reporting foundation to a noncharitable exempt organization of:

(1) Cash

**(2) Other assets**

**b Other transactions:**

**(1) Sales of assets to a noncharitable exempt organization**

**(2) Purchases of assets from a noncharitable exempt organization**

**(3) Rental of facilities, equipment, or other assets**

#### (4) Reimbursement arrangements

**(5) Loans or loan guarantees**

**(6) Performance of services or membership or fundraising solicitations**

**c** Sharing of facilities, equipment, mailing lists, other assets, or paid employees

**d** If the answer to any of the above is “Yes,” complete the following schedule. Column **(b)** should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column **(d)** the value of the goods, other assets, or services received.

	Yes	No
1a(1)		X
1a(2)		X
1b(1)		X
1b(2)		X
1b(3)		X
1b(4)		X
1b(5)		X
1b(6)		X
1c		X

[illegible]

**2a** Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) (other than section 501(c)(3)) or in section 527?

☐ Yes ☒ No

**b** If “Yes,” complete the following schedule.

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

**Sign  
Here**

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

May the IRS discuss this return with the preparer shown below?  
See instructions. ☒ Yes

Signature of officer or trustee

Date \_\_\_\_\_

Title

**PRESIDENT**

**Paid**  
**Preparer**  
**Use Only**

Preparer's name

Preparer's signature

Date \_\_\_\_\_

Check ☐ if self-employed

CHRISTOPHER S. CAULEY

CHRISTOPHER S. CAULEY

05/12/25

Firm's name **GREENE FINNEY CAULEY LLP**

PTIN P00534004

Firm's address **908 N MAIN ST  
ANDERSON, SC 29621**

Firm's EIN **52-2212837**

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Phone no **864-225-8713**

Form **990-PF** (2024)

<b>Part XIV</b> <b>Supplementary Information</b> <i>(continued)</i>				
<b>3 Grants and Contributions Paid During the Year or Approved for Future Payment</b>				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
BLUE RIDGE COUNCIL OF BOY SCOUTS 1 PARK PLAZA GREENVILLE SC 29607	N/A	PC PROGRAM AREA:	CHILDREN	2,500
BLUE RIDGE INNOVATION (BRIEF) 220 PERSHING AVENUE CLEMSON SC 29631	N/A	PC PROGRAM AREA:	EDUCATION	2,000
BON SECOURS WELLNESS ARENA 650 N ACADEMY STREET GREENVILLE SC 29601	N/A	PC PROGRAM AREA:	COMMUNITY	10,000
BOOKEM 161 RAINS AVENUE NASHVILLE TN 37203	N/A	PC COMMUNITY	OUTREACH	463
BOYS & GIRLS CLUB OF THE VALLEY 4309 E BELLEVIEW STREET PHOENIX AZ 85008	N/A	PC PROGRAM AREA:	CHILDREN	2,500
CALVARY HOME FOR CHILDREN 110 CALVARY HOME CIRCLE ANDERSON SC 29621	N/A	PC PROGRAM AREA:	CHILDREN	5,000
CAMERONS HOUSE OF HOPE SC 421 GAP CREEK RD MARIETTA SC 29661	N/A	PC PROGRAM AREA:	CHILDREN	2,500
CAMPERDOWN ACADEMY 65 VERDAE COMMONS DRIVE GREENVILLE SC 29607	N/A	PC PROGRAM AREA:	EDUCATION	5,000
CANDICE M CROSBY FOUNDATION 416 SHELLSTONE COURT BOILING SPRINGS SC 29316	N/A	PC PROGRAM AREA:	COMMUNITY	3,000
CHILD CRISIS 817 N COUNTRY CLUB DRIVE MESA AZ 85201	N/A	PC OUTER OFFICE GRANT		3,500
Total			3a	
<b>b</b> <i>Approved for future payment</i>				
N/A				
Total			3b	

Part XIV

Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment					
Recipient		If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)					
a Paid during the year					
CHILDREN'S ATTENTION HOME INC PO BOX 2912 ROCK HILL SC 29732		N/A	PC PROGRAM AREA:	CHILDREN	1,000
CHILDREN'S CANCER PARTNERS 900 S PINE STREET STE F SPARTANBURG SC 29302		N/A	PC PROGRAM AREA:	CHILDREN	5,000
CHILDREN'S RECEIVING HOME 3555 AUBURN BOULEVARD SACRAMENTO CA 95821		N/A	PC OUTER OFFICE GRANT		1,000
CHRISTMAS SHOES 411 SWEETWATER ROAD GREER SC 29650		N/A	PC PROGRAM AREA:	CHILDREN	5,000
CONVERSE UNIVERSITY 580 E MAIN STREET SPARTANBURG SC 29302		N/A	PC VALKYRIE SUPPLY PROJECT		1,000
CORNERSTONES INC 11150 SUNSET HILLS RD RESTON VA 20190		N/A	PC COMMUNITY OUTREACH		500
DANCE COLLABORATIVE PO BOX 5432 GREENVILLE SC 29607		N/A	PC PROGRAM AREA:	COMMUNITY	1,550
EXTENDED HANDS OF GOD SERVANTS 110 MONTANA STREET GREENVILLE SC 29611		N/A	PC PROGRAM AREA:	CHILDREN	3,500
FAMILY SERVICE ASSOCIATION OF BUCKS 4 CORNERSTONE DRIVE LANGHORNE PA 19047		N/A	PC COMMUNITY OUTREACH		500
FEED & SEED CO PO BOX 3005 GREENVILLE SC 29602		N/A	PC PROGRAM AREA:	COMMUNITY	2,000
Total				3a	
b Approved for future payment					
N/A					
Total				3b	

Part XIV

Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment					
Recipient		If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)					
a Paid during the year					
FEEDING THE FOOTHILLS 8284 INDUSTRIAL AVENUE ROSEVILLE CA 95678		N/A	PC OUTER OFFICE GRANT		1,000
FIRST IMPRESSION OF SOUTH CAROLINA 15 GRAND AVENUE GREENVILLE SC 29607		N/A	PC PROGRAM AREA: COMMUNITY		7,500
GIFT OF ADOPTION FUND 1200 SHERMER ROAD STE 111 NORTHBROOK IL 60062		N/A	PC PROGRAM AREA: CHILDREN		5,000
GIRL SCOUTS OF SOUTH CAROLINA 3 INDEPENDENCE POINTE GREENVILLE SC 29615		N/A	PC PROGRAM AREA: CHILDREN		5,000
GIRLS ON THE RUN PO BOX 170773 SPARTANBURG SC 29301		N/A	PC PROGRAM AREA: CHILDREN		3,000
GIRLUP GVL PO BOX 1446 GREENVILLE SC 29602		N/A	PC PROGRAM AREA: COMMUNITY		4,500
GOATLANDIA 2336 OLIVET LANE SANTA ROSA CA 95401		N/A	PC OUTER OFFICE GRANT		1,000
GREENVILLE HEALTH SYSTEMS 701 GROVE ROAD GREENVILLE SC 29605		N/A	PC COMMUNITY OUTREACH		5,000
GREENVILLE SYMPHONY ORCHESTRA 200 S MAIN STREET GREENVILLE SC 29601		N/A	PC PROGRAM AREA: EDUCATION		5,000
GREENVILLE TECH FOUNDATION 556 PERRY AVE STE B110 GREENVILLE SC 29611		N/A	PC PROGRAM AREA: EDUCATION		10,000
Total				3a	
b Approved for future payment					
N/A					
Total				3b	



<b>Part XIV</b> <b>Supplementary Information</b> <i>(continued)</i>					
<b>3 Grants and Contributions Paid During the Year or Approved for Future Payment</b>					
Recipient		If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)					
<b>a</b> <i>Paid during the year</i>					
GREENVILLE THEATRE 444 COLLEGE STREET GREENVILLE SC 29601		N/A	PC PROGRAM AREA: EDUCATION		5,000
GREER RELIEF PO BOX 1303 GREER SC 29652		N/A	PC PROGRAM AREA: COMMUNITY		5,000
HISPANIC ALLIANCE PO BOX 17934 GREENVILLE SC 29606		N/A	PC PROGRAM AREA: EDUCATION		5,000
HOME OF THE INNOCENTS 1100 E MARKET STREET LOUISVILLE KY 40206		N/A	PC PROGRAM AREA: CHILDREN		2,000
HOMES OF HOPE 3 DUNEAN STREET GREENVILLE SC 29611		N/A	PC PROGRAM AREA: COMMUNITY		2,000
INSIDE THE LINES TRAINING 321 NORTH SHAWNEE TERRACE LOUISVILLE KY 40212		N/A	PC PROGRAM AREA: EDUCATION		5,000
JASMINE ROAD INC PO BOX 25452 GREENVILLE SC 29616		N/A	PC PROGRAM AREA: COMMUNITY		5,000
JUDSON COMMUNITY PARTNERSHIP PO BOX 6 GREENVILLE SC 29602		N/A	PC PROGRAM AREA: CHILDREN		5,000
JULIE VALENTINE CENTER 2905 WHITE HORSE ROAD GREENVILLE SC 29611		N/A	PC PROGRAM AREA: COMMUNITY		4,290
JW HOUSE 3850 HOMESTEAD ROAD SANTA CLARA CA 95051		N/A	PC PROGRAM AREA: COMMUNITY		10,000
<b>Total</b>				<b>3a</b>	
<b>b</b> <i>Approved for future payment</i>					
N/A					
<b>Total</b>				<b>3b</b>	

**Part XIV** **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
<b>a</b> Paid during the year				
<b>LIZ'S BIRTHDAY CLOSET</b> 4275 COUNTY LINE RD #20 CHALFONT PA 18914	N/A	PC OUTER OFFICE GRANT		250
<b>LOAVES &amp; FISHES</b> 25 WOODS LAKE RD STE 810 GREENVILLE SC 29607	N/A	PC PROGRAM AREA: COMMUNITY		5,000
<b>MAKE-A-WISH FOUNDATION OF SC INC</b> 225 S PLEASANTBURG DRIVE GREENVILLE SC 29607	N/A	PC PROGRAM AREA: CHILDREN		7,500
<b>MILL VILLAGE MINISTRIES</b> 1186 PENDLETON STREET GREENVILLE SC 29611	N/A	PC PROGRAM AREA: COMMUNITY		105,000
<b>MOUNTAIN STRONG</b> PO BOX 128 BURNSVILLE NC 28714	N/A	PC HURRICANE RELIEF		9,469
<b>NAMI GREENVILLE</b> 130 INDUSTRIAL DRIVE GREENVILLE SC 29607	N/A	PC PROGRAM AREA: CHILDREN		3,000
<b>OPERATION AIR DROP</b> PO BOX 292068 LEWISVILLE TX 75029	N/A	PC HURRICANE HELENE RELIEF		38,026
<b>PHOENIX CHILDREN'S</b> 33109 N 23RD AVE PHOENIX AZ 85085	N/A	PC PROGRAM AREA: CHILDREN		10,000
<b>PICKENS COUNTY YMCA</b> 101 BURNS ROAD EASLEY SC 29640	N/A	PC PROGRAM AREA: CHILDREN		2,500
<b>PLUMSDALE FIRE DEPARTMENT</b> 5064 STUMP ROAD PLUMSTEADVILLE PA 18949	N/A	PC OUTER OFFICE GRANT		250
<b>Total</b>			<b>3a</b>	
<b>b</b> Approved for future payment				
N/A				
<b>Total</b>			<b>3b</b>	

<b>Part XIV</b> <b>Supplementary Information</b> <i>(continued)</i>					
<b>3 Grants and Contributions Paid During the Year or Approved for Future Payment</b>					
Recipient		If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)					
<b>a</b> <i>Paid during the year</i>					
PUBLIC EDUCATION PARTNERS 225 S PLEASANTBURG DRIVE GREENVILLE SC 29607		N/A	PC PROGRAM AREA: EDUCATION	EDUCATION	6,000
REFUGE FOR WOMEN INC PO BOX 99 WILMORE KY 40390		N/A	PC PROGRAM AREA: CHILDREN	CHILDREN	5,000
ROPER MOUNTAIN SCIENCE CENTER 402 ROPER MOUNTAIN ROAD GREENVILLE SC 29615		N/A	PC PROGRAM AREA: EDUCATION	EDUCATION	6,500
SC GOVERNOR'S SCHOOL FOR SCIENCE 1122 LADY STREET COLUMBIA SC 29201		N/A	PC PROGRAM AREA: EDUCATION	EDUCATION	10,000
SC GOVERNOR'S SCHOOL FOR THE ARTS PO BOX 8458 GREENVILLE SC 29604		N/A	PC PROGRAM AREA: EDUCATION	EDUCATION	6,000
SC SCHOOL FOR THE DEAF AND BLIND 355 CEDAR SPRINGS ROAD SPARTANBURG SC 29302		N/A	PC PROGRAM AREA: EDUCATION	EDUCATION	2,500
SLEEP IN HEAVENLY PEACE 1560 ELDRIDGE AVENUE TWIN FALLS ID 83301		N/A	PC PROGRAM AREA: CHILDREN	CHILDREN	4,000
SONOMA FAMILY MEAL 1370 REDWOOD WAY PETALUMA CA 94954		N/A	PC OUTER OFFICE GRANT		1,250
SPECIALIZED ALTERNATIVES FOR 5 CENTURY DRIVE GREENVILLE SC 29607		N/A	PC PROGRAM AREA: CHILDREN	CHILDREN	3,000
STRIDES SYSTEMATIC TUTORING 109 NEW PERRY ROAD GREENVILLE SC 29617		N/A	PC PROGRAM AREA: EDUCATION	EDUCATION	4,000
<b>Total</b>				<b>3a</b>	
<b>b</b> <i>Approved for future payment</i>					
N/A					
<b>Total</b>				<b>3b</b>	

Part XIV

Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
THE FAMILY EFFECT 1400 CLEVELAND STREET GREENVILLE SC 29607	N/A	PC PROGRAM AREA:	CHILDREN	5,800
THE REDWOOD EMPIRE FOODBANK 3990 BRICKWAY BOULEVARD SANTA ROSA CA 95403	N/A	PC OUTER OFFICE GRANT		1,250
TOMORROW'S RAINBOW 1114 PINE LOG FORD RD TRAVELERS REST SC 29690	N/A	PC PROGRAM AREA:	EDUCATION	5,000
TRAVELERS REST UNITED METHODIST 19 SOUTH MAIN STREET TRAVELERS REST SC 29690	N/A	PC PROGRAM AREA:	CHILDREN	5,000
TRI-COUNTY TECHNICAL COLLEGE FOUND. 7900 HIGHWAY 76 PENDLETON SC 29670	N/A	PC PROGRAM AREA:	EDUCATION	2,000
TUCSON JEWISH COMMUNITY CENTER 3800 E RIVER ROAD TUCSON AZ 85718	N/A	PC PROGRAM AREA:	CHILDREN	1,500
UNIVERSITY OF SC 1600 HAMPTON STREET COLUMBIA SC 29208	N/A	PC PROGRAM AREA:	COMMUNITY	2,500
UPCOUNTRY HISTORY MUSEUM 540 BUNCOMBE STREET GREENVILLE SC 29601	N/A	PC PROGRAM AREA:	EDUCATION	1,500
UPSTATE CIRCLE OF FRIENDS 29 RIDGEWAY DRIVE GREENVILLE SC 29605	N/A	PC PROGRAM AREA:	CHILDREN	5,000
WEST GREENVILLE SCHOOL 15 ENDEL STREET GREENVILLE SC 29611	N/A	PC PROGRAM AREA:	EDUCATION	3,562
Total			3a	
b Approved for future payment				
N/A				
Total			3b	

Part XIV

Supplementary Information

(continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment					
Recipient		If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)					
a Paid during the year					
WISH FOR WHEELS		N/A	PC	PROGRAM AREA: CHILDREN	13,000
4600 SOUTH ULSTER STREET					
DENVER CO 80237					
Total				3a	
b Approved for future payment					
N/A					
Total				3b	

57-1002959

**Federal Statements**

FYE: 12/31/2024

**Statement 1 - Form 990-PF, Part I, Line 16b - Accounting Fees**

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
ACCOUNTING FEES	\$ 5,000	\$ 2,500	\$	\$ 2,500
TOTAL	\$ 5,000	\$ 2,500	\$ 0	\$ 2,500

**Statement 2 - Form 990-PF, Part I, Line 16c - Other Professional Fees**

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
INVESTMENT ADVISORY FEES	\$ 54,672	\$ 54,672	\$	\$
TOTAL	\$ 54,672	\$ 54,672	\$ 0	\$ 0

**Statement 3 - Form 990-PF, Part I, Line 18 - Taxes**

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
FOREIGN TAXES PAID	\$ 336	\$ 336	\$	\$
FEDERAL EXCISE TAX	3,197			
TOTAL	\$ 3,533	\$ 336	\$ 0	\$ 0

**Statement 4 - Form 990-PF, Part I, Line 23 - Other Expenses**

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
EXPENSES	\$	\$	\$	\$
COMMUNITY PROJECTS (LOCAL)	85,845			85,845
OUTER OFFICE PROJECTS	5,533			5,533
STATE FILINGS/REGISTRATIONS	3,483			3,483
SOFTWARE	2,983			2,983
BANK SERVICE CHARGES	214	199		15

57-1002959

**Federal Statements**

FYE: 12/31/2024

**Statement 4 - Form 990-PF, Part I, Line 23 - Other Expenses (continued)**

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
DUES & SUBSCRIPTIONS	\$ 180	\$	\$	\$ 180
OFFICE EXPENSES	100			100
POSTAGE	122			122
MEETING EXPENSE	63			63
MISCELLANEOUS EXPENSE	2,591			2,591
TOTAL	\$ 101,114	\$ 199	\$ 0	\$ 100,915

**Statement 5 - Form 990-PF, Part II, Line 10a - US and State Government Investments**

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
ML#204 FIXED INCOME	\$ 218,440	\$ 188,500	MARKET	\$ 188,500
TOTAL	\$ 218,440	\$ 188,500		\$ 188,500

**Statement 6 - Form 990-PF, Part II, Line 10b - Corporate Stock Investments**

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
ML#205 EQUITIES	\$ 1,968,144	\$ 2,043,702	MARKET	\$ 2,043,702
TOTAL	\$ 1,968,144	\$ 2,043,702		\$ 2,043,702

**Statement 7 - Form 990-PF, Part II, Line 10c - Corporate Bond Investments**

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
ML#204 CORPORATE BONDS	\$ 105,927	\$ 77,569	MARKET	\$ 77,569
TOTAL	\$ 105,927	\$ 77,569		\$ 77,569

57-1002959

**Federal Statements**

FYE: 12/31/2024

**Statement 8 - Form 990-PF, Part II, Line 13 - Other Investments**

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
ML #204 MUTUAL FUNDS	\$ 105,651	\$ 90,166	MARKET	\$ 90,166
ML #204 EST ACCRUED INTEREST	2,184	2,180	MARKET	2,180
ML #206 MUTUAL FUNDS	1,530,900	1,606,641	MARKET	1,606,641
ML #206 ALTERNATIVE INVESTMENT	497,059	493,414	MARKET	493,414
TOTAL	<u>\$ 2,135,794</u>	<u>\$ 2,192,401</u>		<u>\$ 2,192,401</u>



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**Federal Statements**

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**Statement 9 - Form 990-PF, Part III, Line 3 - Other Increases**

Description	Amount
NONDIVIDEND DISTRIBUTIONS	\$ 3,479
UNREALIZED GAIN ON INVESTMENTS	230,593
BASIS ADJUSTMENT	57
TOTAL	<u>\$ 234,129</u>

**Statement 10 - Form 990-PF, Part VI-A, Line 8a - States to which the Foundation Reports**Postal  
Code

AK  
AL  
AR  
CA  
CO  
CT  
DE  
FL  
GA  
HI  
IL  
KS  
KY  
MA  
MD  
ME  
MI  
MN  
MO  
MS  
NC  
ND  
NH  
NJ  
NM  
NV  
NY  
OH  
OK  
OR  
PA  
RI  
SC  
TN  
UT  
VA  
WA  
WI  
WV

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**Federal Statements**

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**Statement 11 - Form 990-PF, Part VII, Line 1 - List of Officers, Directors, Trustees, Etc.**

<u>Name and Address</u>	<u>Title</u>	<u>Average Hours</u>	<u>Compensation</u>	<u>Benefits</u>	<u>Expenses</u>
HASSIE DEMUTH 6 LOGUE CT GREENVILLE SC 29615	PRESIDENT	5.00	0	0	0
LIZ DONAHUE 6 LOGUE CT GREENVILLE SC 29615	VICE PRES.	3.00	0	0	0
TARISSA KNEZEVICH 6 LOGUE CT GREENVILLE SC 29615	TREASURER	3.00	0	0	0
JILL ROCKENSTEIN 6 LOGUE CT GREENVILLE SC 29615	SECRETARY	1.00	0	0	0
MEGHAN BLEVINS 6 LOGUE CT GREENVILLE SC 29615	DIRECTOR	0.50	0	0	0
KRIS FRAESSDORF 6 LOGUE CT GREENVILLE SC 29615	DIRECTOR	0.50	0	0	0
ALEXANDRA HARRIS 6 LOGUE CT GREENVILLE SC 29615	DIRECTOR	0.50	0	0	0
TREVOR POPE 6 LOGUE CT GREENVILLE SC 29615	DIRECTOR	0.50	0	0	0
TONY SORBIN 6 LOGUE CT GREENVILLE SC 29615	DIRECTOR	0.50	0	0	0
TIM TOTTEN	DIRECTOR	0.50	0	0	0

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**Federal Statements**

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Public Inspection Copy

**Statement 11 - Form 990-PF, Part VII, Line 1 - List of Officers, Directors, Trustees,  
Etc. (continued)**

<u>Name and Address</u>	<u>Title</u>	<u>Average Hours</u>	<u>Compensation</u>	<u>Benefits</u>	<u>Expenses</u>
6 LOGUE CT GREENVILLE SC 29615					

**Federal Statements****Statement 12 - Form 990-PF, Part XIV, Line 2b - Application Format and Required Contents**

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Description

INFORMATION ON APPLYING FOR GRANTS IS AVAILABLE AT  
SCANSOURCE.COM/EN/ABOUT/SCANSOURCE-CHARITABLE-  
FOUNDATION. APPLICANTS CAN APPLY ONLINE.

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**Statement 13 - Form 990-PF, Part XIV, Line 2c - Submission Deadlines**

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Description

THE GRANT SUBMISSION WINDOW IS OPEN MARCH 1 THROUGH  
SEPTEMBER 30 EACH YEAR.

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**Statement 14 - Form 990-PF, Part XIV, Line 2d - Award Restrictions or Limitations**

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Description

501(C)(3) ORGANIZATIONS CAN REQUEST FUNDING FOR SPECIFIC  
NEEDS. FUNDS SHOULD BE USED TO SUPPORT THE NEED; EVENTS  
TO RAISE FUNDS FOR THE NEED WILL NOT BE CONSIDERED.

Name of the organization	Employer identification number
SCANSOURCE CHARITABLE FOUNDATION	57-1002959
Organization type (check one):	

Filers of:	Section:
Form 990 or 990-EZ	<input type="checkbox"/> 501(c)( ) (enter number) organization
	<input type="checkbox"/> 4947(a)(1) nonexempt charitable trust <b>not</b> treated as a private foundation
	<input type="checkbox"/> 527 political organization
Form 990-PF	<input checked="" type="checkbox"/> 501(c)(3) exempt private foundation
	<input type="checkbox"/> 4947(a)(1) nonexempt charitable trust treated as a private foundation
	<input type="checkbox"/> 501(c)(3) taxable private foundation

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

General Rule

- ☒ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions.

Special Rules

- ☐ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33<sup>1</sup>/<sub>3</sub>% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of **(1)** \$5,000; or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h; or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I (entering "N/A" in column (b) instead of the contributor name and address), II, and III.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Don't complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling \$5,000 or more during the year ..... \$ .....

**Caution:** An organization that isn't covered by the General Rule and/or the Special Rules doesn't file Schedule B (Form 990), but it **must** answer "No" on Part IV, line 2, of its Form 990; or check the box on line H of its Form 990-EZ or on its Form 990-PF, Part I, line 2, to certify that it doesn't meet the filing requirements of Schedule B (Form 990).

Name of organization	Employer identification number
SCANSOURCE CHARITABLE FOUNDATION	57-1002959

Part I Contributors (see instructions). Use duplicate copies of Part I if additional space is needed.

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	SCANSOURCE (EMPLOYEE DONATIONS) 6 LOGUE CT  GREENVILLE SC 29615	\$ 56,494	Person <input type="checkbox"/> Payroll <input checked="" type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
2	SCANSOURCE (COMPANY MATCH) 6 LOGUE CT  GREENVILLE SC 29615	\$ 56,494	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
3	WOMBLE BOND DICKINSON 310 WEST 4TH SREET  WINSTON SALEM NC 27101	\$ 11,120	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
4	WOMBLE BOND DICKINSON (US) LLP 3105 OAK MEADOW DRIVE  SNELLVILLE GA 30078	\$ 10,275	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
5	MIKE BAUR 102 HIGH PLAINS ROAD  SIMPSONVILLE SC 29681	\$ 5,500	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
6	INTERNATIONAL TECHNOLOGIES & SYSTEMS 10721 WALKER STREET  CYPRESS CA 90630	\$ 28,000	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)